

Client Relationship Management

Users Guide



Client Relationship Management

Client relationship management tools allow you to track communications and activities associated with current and future clients. Use this information to understand the business you have already obtained and what you have in the pipeline. Use the CRM tools to track the sales of products and services to existing clients or new ones.

- Company profiles store identifying information about your clients and prospects that can be used for analysis.
- The activity summary provides an interactive tool for tracking current status and all activities.
- Enter and track the value of the business you are working toward using opportunities which are automatically converted to contracts when you win the business.
- Contracts store agreed upon rates, fees, reporting schedules and other details.
- Scheduled activities such as calls, to-dos and meetings can be added to the calendar by client or project so that you can track your activities. Scheduled activities are accounted for in overall workload calculations. Time can be recorded with a single click.
- Analyze the results through a series of reports and dashboards designed to measure opportunities, investment and status.
- The Documents feature provides a central location for the storage of any documents related to the client or new business prospect at many different levels including client, division, product, contract, report, and value added. All uploaded documents may be flagged as private to maintain confidentiality where necessary.
- Advantage sends you reminders when contract renewal dates are approaching and when required reporting is due.
- Quickly access and update the main components of the CRM details from a central application under Desktop

Security

User Security – User settings contains a new CRM User option that allows you to control what a user can do within Client maintenance. CRM User restricts a user and only allows entry of new business clients. All clients can be seen by the user but only CRM-related information may be seen for the new business clients.

Building blocks for managing clients and new business prospects

Setup in Maintenance/Client

Set up various tables used to manage clients and prospects under the Maintenance/Client menu. These details are entered onto client and prospect records to aid in marketing and reporting on the type of business you are getting or losing.

1. Affiliations – clubs or organizations your clients or prospects can be a part of.
2. Competition – your competitors on any given client or prospect.
3. Industry – the industries in which your clients or prospects operate.
4. Source – lead sources.

5. Specialty – client and prospect specialties.
6. Rating – create your own rating system to help analyze the quality of the prospect, include lost and sold dates for reporting purposes.

Set up Maintenance/General

1. Region – area of the country where your client or prospect operates or distributes.
 - This is a multi-purpose field which is used in various modules, so it is located in General Maintenance.
2. Cycle/Frequency - used in Contracts/Report section to define frequency of preparing reports required as part of a contract.

Client Maintenance

There are three levels available; client, division and product which are all available within a single client maintenance application. These levels account for your client's different organizational levels. If your client does not have multiple organizational levels or uses only two of the three levels, just repeat the client code and information across all three. If upselling an existing client, you may want to add a new division or product to an existing client record.

Note that Client Maintenance (and related components) is available in both Advantage and Webvantage so that account executives and directors can stay within Webvantage and manage all client activities.

Use the copy feature to quickly and easily create clients, divisions, or products. Client maintenance includes the following (*not available to CRM users).

1. Client list and filters
 - New business indicator – check for new business clients (CRM users cannot change this flag)
 - Main address
 - Billing address
 - Billing settings for both production and media*
 - Required fields settings*
 - Websites
 - Contacts
 - Documents – upload related documents.
2. Division list and filters
 - Main address
 - Product list and filters
 - Contacts
 - Documents – upload related documents
3. Product list and filters
 - Main address and office designation
 - Billing settings for both production and media (all types)*
 - Account executives

- Contacts
- Company profile
- Activity summary
- Contracts and opportunities
- Documents – upload related documents

Client Relationship Management

Use the CRM tools to track communications and activities associated with current and future clients. This section focuses on new business, but many of the tools mentioned can be used to update and track information on existing clients and/or can be used to upsell to existing clients within an existing client record.

Set up New Business Client (Prospect) in Client Maintenance

1. Add Client/Division/Product and flag client as New Business
 - Because new business prospects reside in client maintenance, jobs can be opened for general new business time or for tracking time and expenses against spec jobs. These jobs can be marked non-billable or billable, depending on your agreement with the prospect.
 - We recommend creating each new business prospect as a client (not a product under a master new business client) so that it may be converted to a client and history can be maintained.
2. Assign Account Executives to the Product
3. Once the client is established, use the CRM features to record information and monitor activity.
4. If a new business client (prospect) becomes a client, uncheck the new business flag, and take other actions to update the record. If you lose the new business client to a competitor, update activities accordingly and mark the record inactive.

Company Profile

1. Record important information about the client or prospect:
 - Industry
 - Specialty
 - Region
 - Revenue
 - Number of employees
 - Affiliations
2. Note if a case study has been done
3. Note if this client may be used as a reference
4. Add any additional notes about the company

Activity Summary

1. Track all information related to the events that have taken place from the moment you learned about this possible new business opportunity including:
 - Lead Date
 - Source
 - Last Activity Date
 - Last Contact Date
 - Sold Date
 - Lost Date
 - Probability of turning this opportunity into a new contract
 - Rating – how soon do you plan to close
 - Current provider
 - Competition for the business
2. Activities
 - View a list of activities you've entered in the Calendar in Webvantage related to the client including Calls, Meetings and To Do lists with all details.
 - Add your own diary entries for any additional events you wish to track and update the Subject and/or body of the diary entries at any time.

Scheduled Calendar Activities

In addition to the diary entries, three types of calendar activities including Call, Meeting and To Do may be set up using the Webvantage Calendar. A summary of these activities will also be displayed in the Activity Summary pane along with the diary entries in client maintenance at the product level. This feature, along with diary entries, allows you to create and maintain a clear, chronological chain of events for the client or new business opportunity as well as reminders for scheduled events. The calendar activities include the following information:

1. General
 - Activity Type
 - Subject
 - Activity Dates
 - Activity Times
 - Priority
 - Reminders
2. Employee
 - Employees participating in the scheduled activity who will receive an e-mail related to the specific activity.
3. Details
 - Specific details and any hard copy documents related to the scheduled activity including agendas, spreadsheets, timelines, briefs, etc.

Contract/Opportunity

The contract/opportunity record is used to enter information on the value of either an opportunity (based on a new business prospect and potential contract) or a solidified client contract. The record is considered an opportunity when the client is marked as 'new business.' When the record is marked as 'client', the record becomes a contract record which can be modified to reflect the specifics of the agreed upon rates and other details needed to ensure you meet the contract requirements.

Opportunities – The main purpose is to store enough information about the potential opportunity to create pipeline reports and include potential business in forecasts.

Contracts – The main purpose is to store agreed upon rates and other details about the contract (including copies of signed contracts) with enough information to ensure the contract obligations are met.

One or more contract/opportunity records can be entered. Only active records are counted on reports. The contract/opportunity record includes the following:

1. General Information

- Type (contract/opportunity) – If a client is marked 'new business', the type is opportunity (by default) and cannot be changed.
- Start date / end date – This is important because it allows you to measure the value for a specific period of time. It also indicates the expiration date (based on the end date).

2. Rates / Terms

- Type – Check boxes indicate whether the value will include fees or projects done on an hourly basis (or both).
 - A blended hourly billing rate is stored here for estimating project totals.
- Values – Enter values using one or more of the following categories based on the expected opportunity or the solidified contract.
 - Fees/retainer total (can be updated based on fee break out)
 - Fee incentive/bonus total
 - Fee royalty total
 - Project/hourly total (can be updated based on hours x blended rate)
 - Media commission total
 - Production commission total
 - **Total contract value (calculated)**
 - Fee schedule – Optionally enter fee totals by service fee type. Enter hours and if a blended rate is supplied, a total value is calculated automatically. Refresh the fee/retainer amount based on details entered here.
- Comments – Enter comments for terms that can be referenced when using related areas of the system.
 - Billing rate comments
 - Billing terms
 - Estimating terms

3. Internal Contacts – List internal contacts here. These are individuals that may be alerted when certain events occur or need to occur. Includes employee code and alert indicator.
4. Reports – This section is designed to store a list (unlimited) of reports that your client requires as part of the contract, when solidified. You may also use this list to store your own reporting requirements, if they are specific to a client or contract.
 - Report description.
 - Frequency – Indicates how often the report must be created.
 - Last completed date – Enter the last time the report was created. This field is not updated automatically because this may not be a system-generated report. The date is used to track the last time the requirement was met and only you know when that has occurred.
 - Next start date – Enter the next date to start preparing the required report. This date will be updated automatically after entering the last completed date based on the frequency but can be overridden to allow for additional time.
 - Notification options - A service will send an alert/email to contacts based on these settings for each report:
 - Notify internal contacts – Determines if this group will be notified or not.
 - Notify a specific employee – Determines an individual employee to notify.
 - Alert X days prior – Determines how many days prior to the next start date of the report that the alert will be sent, when indicated (leave blank for none).
 - Send alert days prior – Determines if the alert is to be sent based on the next start date and days prior.
 - Send alert upon completion – Determines if the alert is to be sent based on the last completed date.
 - Document – Upload a document for each report row. If multiple documents exist, upload in a zip or other file that can hold multiple files.
5. Value Added – This section provides a place to store information on value added results that were not captured through a job or media order.
 - Short description
 - Comment
 - Amount
 - Documents – Upload a document for each value added row. If multiple documents exist, upload in a zip or other file that can hold multiple files.
6. Documents – Upload documents related to the opportunity/contract in general.

CRM Central

Once the CRM set up is complete, the CRM Central desktop application is where you'll track and update information and details associated with contracts and activities for both new business and existing customers. When accessed from the Desktop menu, CRM Central displays a list of all of the CRM activities by Client, Division and Product along with the following options.

1. Export – generates a summarized list of all CRM activities with the following information
 - a. Client Code
 - b. Client Name
 - c. Division Code
 - d. Division Name
 - e. Product Code
 - f. Product Name
 - g. Office Code
 - h. Office Name
 - i. Account Executive Code
 - j. Account Executive Name
 - k. New Business indicator
 - l. Is Active indicator
 - m. Last Activity Date
 - n. Last Activity Type
 - o. Last Activity Subject
 - p. Last Contact Date
2. Print – select from the three reports outlined below
 - a. Client Contract and Opportunity Detail
 - b. CRM Detailed Information
3. Show Codes – displays only the codes for Client, Division, Product, Office and Account Executive
4. Show Descriptions – displays only the descriptions for Client, Division, Product, Office and Account Executive.
5. Show Both – displays both the code and descriptions for Client, Division, Product, Office and Account Executive.
6. Client – select this option to update all client information for both existing and new business prospects.
7. Division – select this option to update all division information for both existing and new business prospects.
8. Product – select this option to update all product information for both existing and new business prospects including:
 - a. Company Profile
 - b. Activity Summary
 - c. Contracts/Opportunities
9. Client Contacts – select this option to quickly view, add or modify contacts associated with specific client, division and products.
10. Diary – select this option to quickly add a diary entry without accessing the Activity Summary tab. All diary entries will be displayed on the Activity Summary Tab.
11. Activity – select this option to quickly create a calendar activity including Call, To Do, Meeting, Holiday or Appointment.

Reports

CRM Opportunity Detail (Dataset)

Lists opportunities for clients or new business prospects based on opportunity records. Lists only records marked as opportunity for all types of client/products.

Criteria

1. Includes active products and active opportunity records only.
2. Opportunity End Date Cut Off: Includes records with an end date that is greater than the date entered.

Fields

- Client Code
- Client Name
- Division Code
- Division Name
- Product Code
- Product Name
- Default AE Code
- Default AE Name
- New Business (Y/N)
- Last Activity Date
- Last Contact Date
- Sold Date
- Lost Date
- Probability
- Rating
- Code (the user defined code)
- Description (the user defined description)
- Start Date
- End Date
- Blended Billing Rate
- Fee/Retainer
- Fee Hours (total from table, not by type)
- Fee Incentive Bonus
- Fee Royalty
- Project/Hourly Total
- Project Hours
- Media Commission
- Production Commission
- Total Contract Value
- Monthly Value (total divided by number of months in the contract)
- Monthly Hours (total divided by number of months in the contract)

CRM Opportunity to Investment (Dataset)

Lists opportunities summarized for clients or new business prospects. Summarizes all opportunities for the CDP and compares to actual investment (non-billable time and charges) to date.

Criteria

- Includes active products and active opportunity records only.
- Opportunity End Date Cut Off: Includes records with an end date that is greater than the date entered.

Fields

- Client Code
- Client Name
- Division Code
- Division Name
- Product Code
- Product Name
- Default AE Code
- Default AE Name
- New Business (Y/N)
- Last Activity Date
- Last Contact Date
- Probability
- Rating
- Fee/Retainer (total for all)
- Fee Hours (total from table, not by type)
- Fee Incentive Bonus (total for all)
- Fee Royalty (total for all)
- Project/Hourly Total (total for all)
- Project Hours
- Media Commission (total for all)
- Production Commission (total for all)
- Total Value (total for all active contracts)
- Monthly Value (total divided by number of months in the contract)
- Total Investment (dollar value of non-billable time and vendor charges posted to the CDP, all jobs, regardless of the date range). This will be at the billable rate.
 - EMP TIME DTL table, time marked as Non Billable but not marked as Fee Time. We'll need to use the billable rate (Line Total – Resale Taxes).
 - AP PRODUCTION table, charges marked non billable. (Extended Net plus Non Resale Tax)
- Recoup Months (number of months to recoup investment based on monthly contract value)

Example:

Total Opportunity value is 2,000,000.00.

Monthly Value is 166,666.66. Add up monthly value for all Opportunities.

Total investment to date is 208,000.00 in time and other charges. Recoup Months is 1.24.

CRM Prospects (Dataset)

Lists new business clients (prospects) and related activity summary data and total opportunities recorded. Includes all records marked active and inactive.

Criteria

- None – use filters

Fields

- Client Code
- Client Name
- Division Code
- Division Name
- Product Code
- Product Name
- Default AE Code
- Default AE Name
- Industry
- Specialty
- Region
- Revenue
- # of Employees
- Case Study Done
- Use as Reference
- Notes
- Lead Date
- Source
- Last Activity Date
- Last Activity Type
- Last Activity Employee (name)
- Last Activity Subject
- Last Activity Body
- Last Contact Date
- Probability
- Rating
- Current Provider
- Total Opportunity Value (all active opportunity records totaled)

Client Contracts (Dataset)

Lists contracts and related details.

Criteria

- Includes active contract records only for all client records regardless of new business flag.
- Contract End Date Cut Off: Includes contracts with an end date that is greater than the date entered.

Fields

- Client Code
- Client Name
- Division Code
- Division Name
- Product Code
- Product Name
- Default AE Code
- Default AE Name
- New Business (Y/N)
- Code (the user defined code)
- Description (the user defined description)
- Contract Start Date
- Contract End Date
- Blended Billing Rate
- Fee/Retainer
- Fee Hours (total from table, not by type)
- Fee Incentive Bonus
- Fee Royalty
- Project/Hourly Total
- Project Hours
- Media Commission
- Production Commission
- Total Contract Value
- Monthly Contract Value (total divided by number of months in the contract)
- Monthly Contract Hours (total divided by number of months in the contract)
- Reporting Requirements? Y/N (if any rows exist in the report table)
- Value Added? Y/N (if any rows exist in the report table).
- Value Added Amount

Services

Advantage services run in the background for the purpose of sending proactive alerts based on the following:

Contracts:

- Contract expiration date approaching. You set the number of days prior to the contract end date that the alert should be sent. Alert is sent to the internal contacts list within the contract.
- Contract Reports (requirements)
 - Start Report – Alert is sent to contacts indicated in the report record using the days prior indicated (within 24 hours).
 - Report Complete – Alert is sent after the report last completed date has been updated (within 24 hours).