

# Back To Basics:

## Shortcuts to Success Using Vision CRM

*Presented by:*



# Agenda

## Agenda

1. Resources
2. WebEx Instructions
3. Presentation: Back to Basics
4. Questions

Keep your business  
on *course*.

Full Sail Partners



# ***Resources from Full Sail Partners:***

## **Whitepapers & Publications**

- **Client Feedback – Don't Wait 'Till It's Too Late!**  
<http://bit.ly/1sElgYg>
- **Why Are CRMs So Important?**  
<http://bit.ly/1CW6L9n>

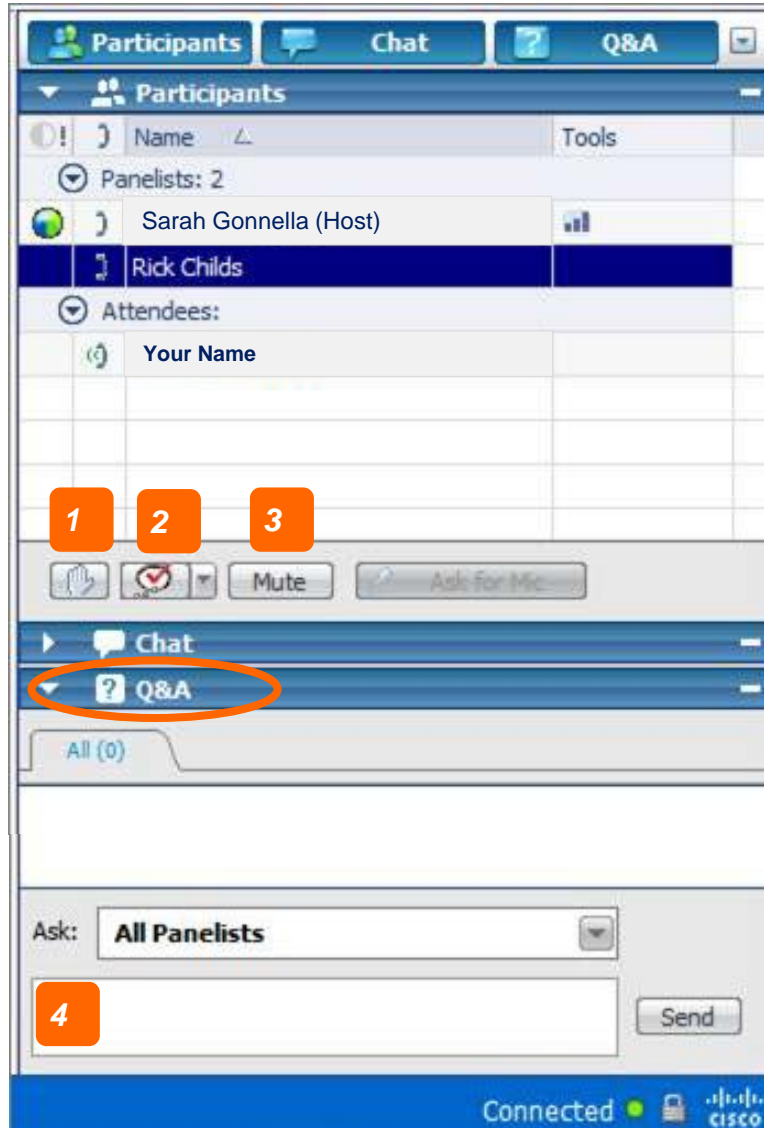
## **Events, Webinars and Resources**

- **Full Sail Partners Online Events:**  
<http://bit.ly/URI1K0>
- **Managing a CRM System and Beyond:**  
<http://bit.ly/1p1EhVB>
- **Growing Smarter | Core Growth Strategies & Metrics for PS Firms:**  
<http://bit.ly/16JePLy>

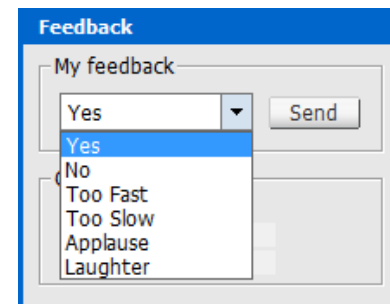
***Join The Full Sail Partners' User Group Space on Kona:  
Search for 'Full Sail Partners User Group' on Kona***



# WebEx Instructions



1. **Raise Hand** (be sure to click again to remove raised hand or feedback information)
2. **Feedback Tool** (use for yes/no questions or to provide the speaker feedback).



3. **Mute** (mute yourself when you need to talk to someone in your office or put the line on hold)
4. **Q&A** (Type in the Q&A dialogue box [Not Chat] to ask a question. Be sure to choose All Panelist)



# Back To Basics:

## Shortcuts to Success Using Vision CRM

*Presented by:*



Kevin Hebblethwaite, FSMPS, CPSM  
Senior Consultant



DRIVE THRU

Guest: KEVIN

Vehicle Id: Tan Seclan

Tour Member: Cynthia

Register: 52 Transaction Number: 4197

---

1 CFA Bisc

+No Cdmt

1 Hsh Brn

1 Coffee SM

+FrVan Crm



A large group of cats of various breeds and colors are gathered in a yard. In the background, there are several small wooden houses and trees. The word "CHAOS" is written in large, red, serif capital letters across the center of the image. The cats are in various poses, some standing, some walking, and some sitting, creating a sense of a busy, unorganized scene.

CHAOS



*clarity*



**ACCESS**

**COLLECT**

**MANAGE**

**CYCLE**





*Google*

# Access – Smart Client

Dear Vision User,

<https://something.hardtoremember.com/visionclient/>

Love,

*Your IT Department*

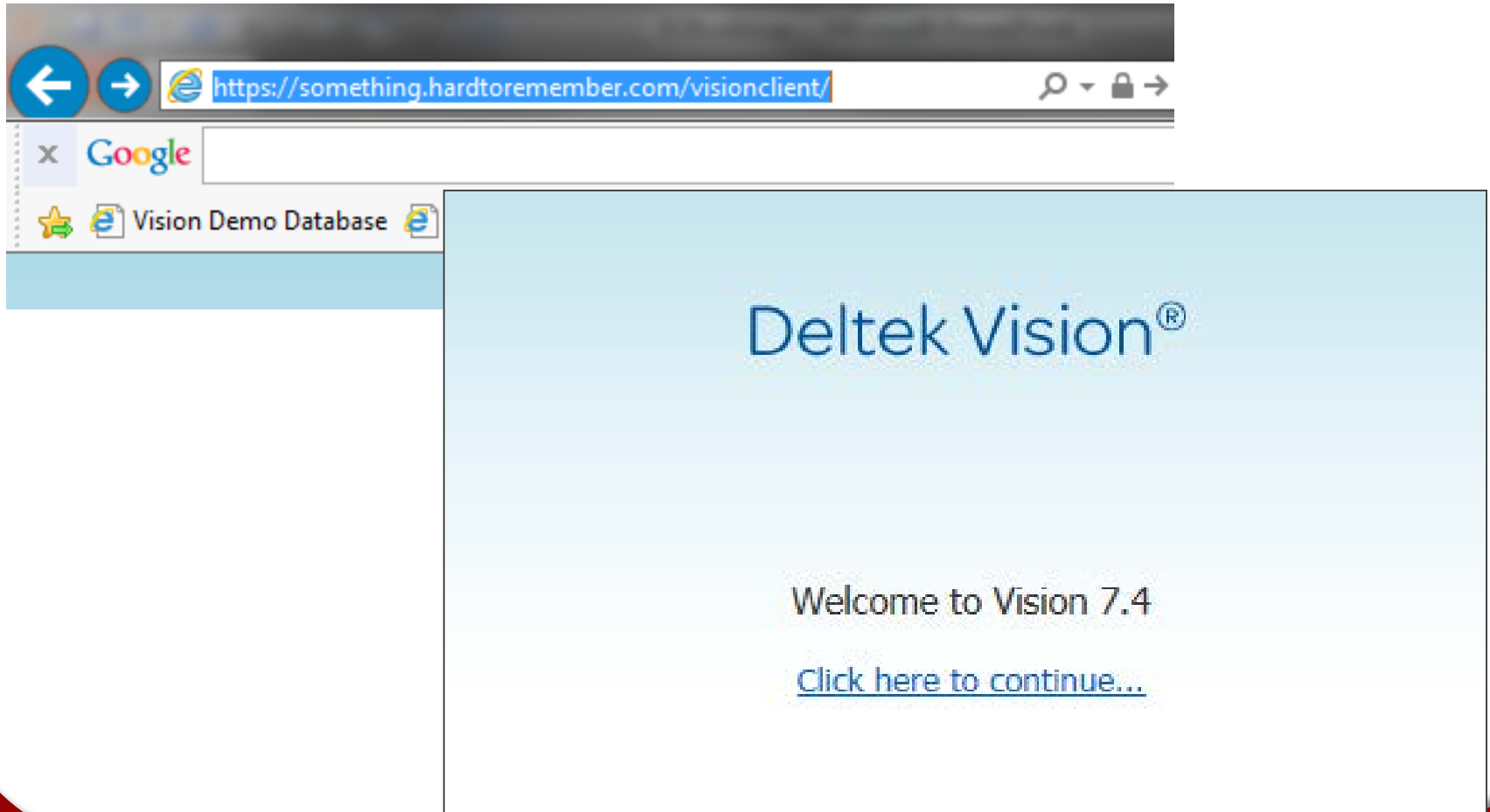


# Access – Smart Client

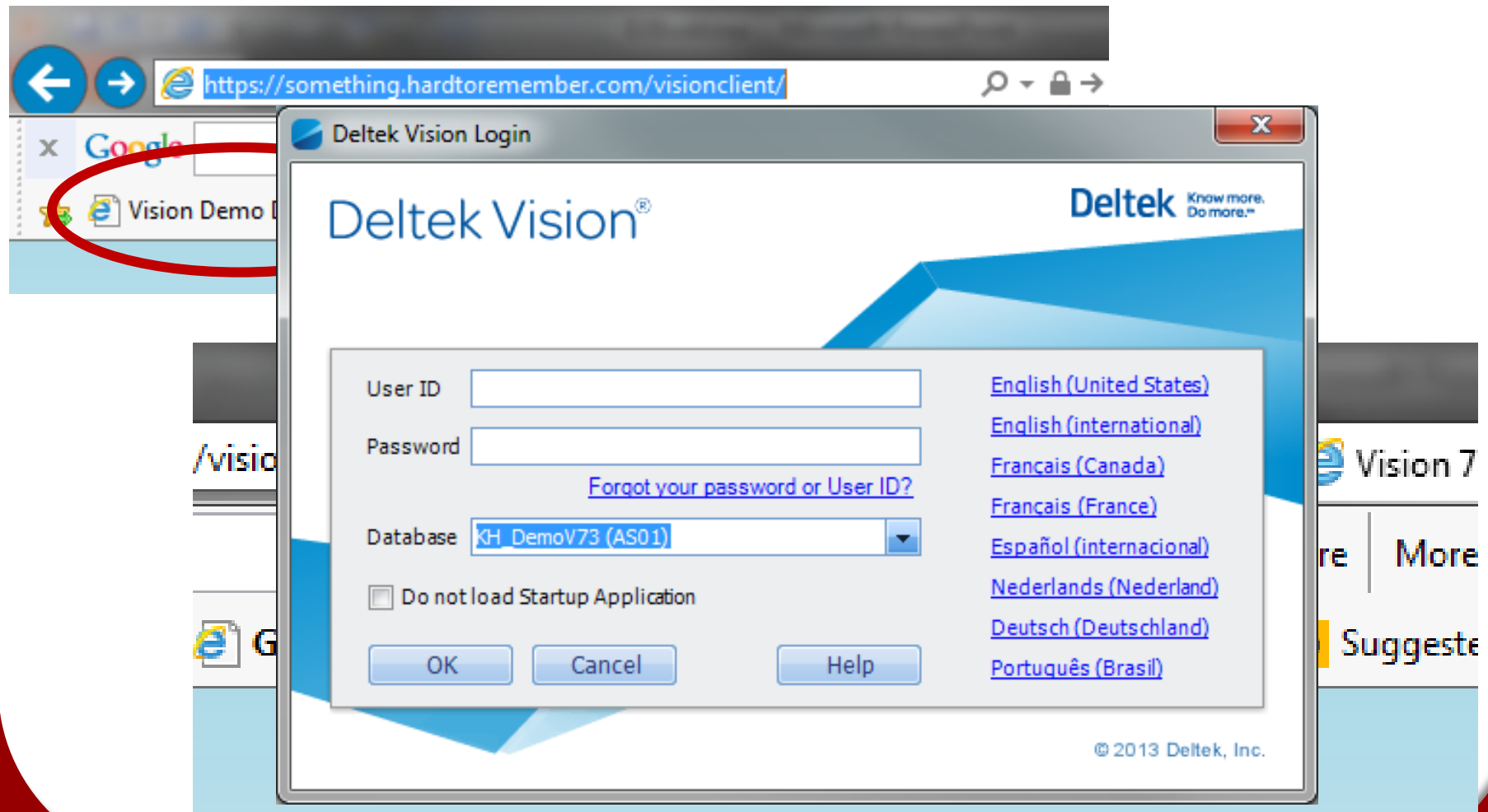
- Bookmarks
- Shortcuts
- Office Desktop Integration Utility (MODI)



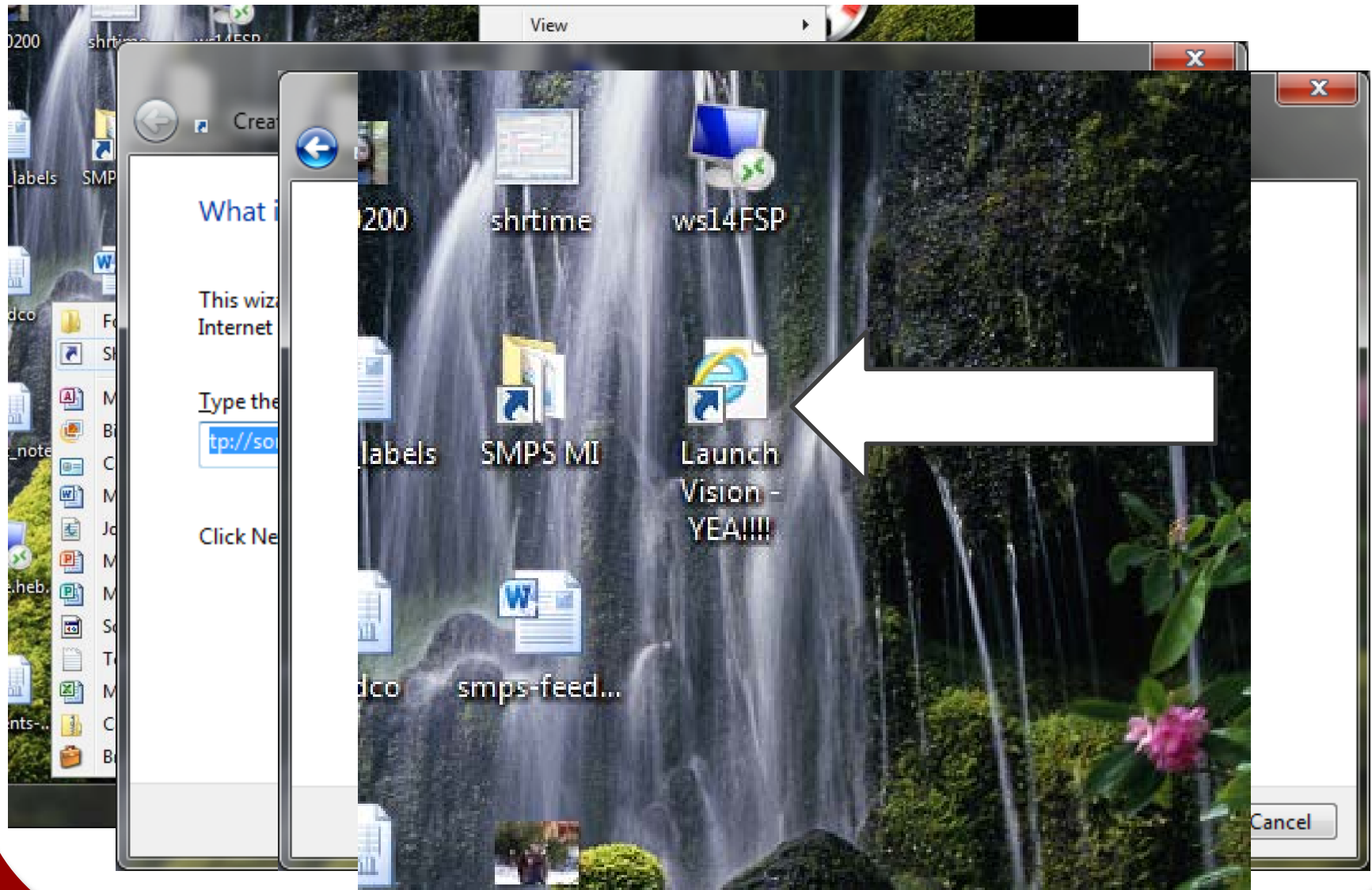
# Access – Smart Client



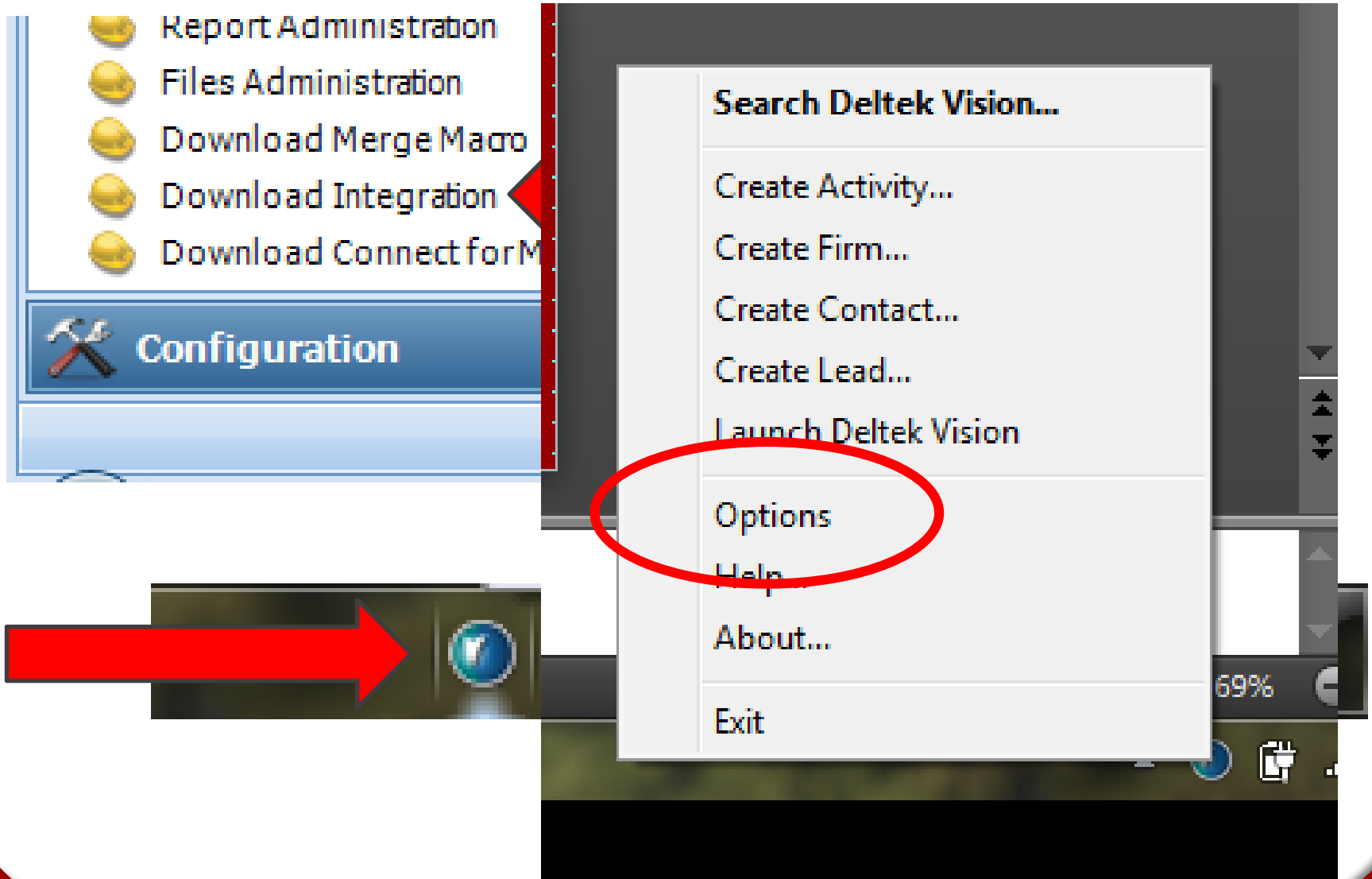
# Access – Smart Client



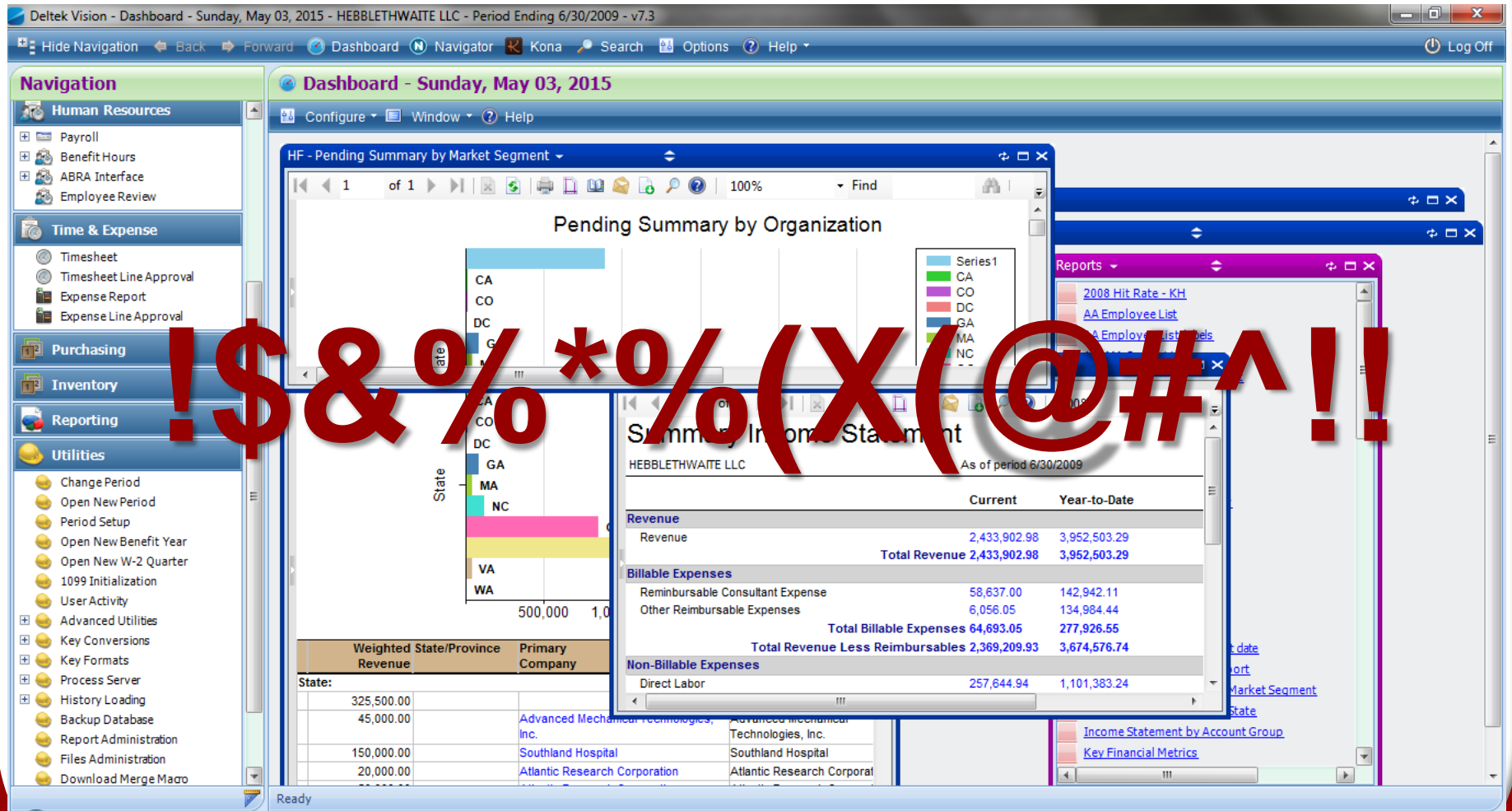
# Access – Smart Client



# Access – MODI







# SECURITY



# Security Suggestions

**Roles**

Save New Delete Role Print List View Help

**CRMADM**

General Record Access Accounting Planning Access Rights Navigator

Role: CRMADM

☐ Access to all menu items Enable All Disable All

<input checked="" type="checkbox"/>		Info Center
<input checked="" type="checkbox"/>		Calendar/Activities
<input checked="" type="checkbox"/>		Proposals
<input type="checkbox"/>		Planning
<input type="checkbox"/>		Billing
<input type="checkbox"/>		Transaction Center
<input type="checkbox"/>		Accounting
<input type="checkbox"/>		Human Resources
<input type="checkbox"/>		Time & Expense
<input type="checkbox"/>		Purchasing
<input type="checkbox"/>		Inventory
<input type="checkbox"/>		Reporting
<input checked="" type="checkbox"/>		Utilities
<input checked="" type="checkbox"/>		Configuration

**Type of Role**

- ☒ Administrator
- ☐ Accounting
- ☒ CRM

**Favorites Organizing**

Save For All Roles

**Process Queues**

Allow priority 0 (or higher)

**Organization Record Access**

All Organizations

**Search Options**

- ☐ All Access to SQL where Clause
- ☒ Enable Searching Across Info Centers

**Email Template Organizing**

Save Personal Only



# Security Suggestions

**Roles**

Save New Delete Role Print List View Help

**CRMADM**

General Record Access Accounting Planning Access Rights Navigator

Role CRMADM

☐ Full access to all menu items Enable All Disable All

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Info Center
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Calendar/Activities
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Proposals
<input type="checkbox"/>	<input type="checkbox"/>	Planning
<input type="checkbox"/>	<input type="checkbox"/>	Billing
<input type="checkbox"/>	<input type="checkbox"/>	Transaction Center
<input type="checkbox"/>	<input type="checkbox"/>	Accounting
<input type="checkbox"/>	<input type="checkbox"/>	Human Resources
<input type="checkbox"/>	<input type="checkbox"/>	Time & Expense
<input type="checkbox"/>	<input type="checkbox"/>	Purchasing
<input type="checkbox"/>	<input type="checkbox"/>	Inventory
<input type="checkbox"/>	<input type="checkbox"/>	Reporting
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Utilities
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Configuration

Type of Role

- ☒ Administrator
- ☐ Accounting
- ☒ CRM

Favorites Organizing

Save For All Roles

Process Queues

Allow priority 0 (or higher)

Organization Record Access

All Organizations

Search Options

- ☐ Allow Access to SQL Where Clause
- ☒ Enable Searching Across Info Centers

Email Template Organizing

Save Personal Only



# Security Suggestions

The screenshot shows the 'Roles' configuration window in CRMADM. The 'Lookups' tab is selected, and the 'Functional Area' is set to 'Lookups'. The 'Full access to all lookups' checkbox is checked. The 'Lookup Type' is set to 'Project Lookup'. The 'Available Fields' list on the left includes: #1 Construction Type, #2 Construction Type, Activity Notes, Activity Start Date, Activity Subject, Activity Type, Actual Completion Date, Addendum #, Address Line 1, Address Line 2, Address Line 3, Alt. Bid Subtotal, Approved for use in processing, and Award. A red arrow points from the 'Add->' button to the 'Fields for this Lookup' list on the right.

**Roles**

Save New Delete Role Print List View Help

**CRMADM**

General Record Access Accounting Planning Access Rights Navigator

Functional Area: Lookups ☒ Full access to all lookups

Lookup Type: Project Lookup

**Available Fields**

- #1 Construction Type
- #2 Construction Type
- Activity Notes
- Activity Start Date
- Activity Subject
- Activity Type
- Actual Completion Date
- Addendum #
- Address Line 1
- Address Line 2
- Address Line 3
- Alt. Bid Subtotal
- Approved for use in processing
- Award

**Fields for this Lookup**

Add->

Ready





COLLECT



**Projects**

**Experiences**

**People**

**Challenges**



# Where's the data right now?

The image shows a Microsoft Excel spreadsheet with a large image of business cards overlaid on it. The spreadsheet has columns M through AC and rows 1 through 27. The image of business cards shows various contact information, including 'ECOM Engineering, Inc.', 'T/E/S ENGINEERING', and 'JACOBSEYE.COM'. The Excel interface includes a formula bar and a taskbar at the bottom with icons for 'YWSNuture - Final Basic', 'Opportunities', and 'Outbox'.

	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	Formula Bar	AC
1	US	james.carter@cnet	www.che	918-384-7853	918-232-2	918-384-7	N					Gaming	Y	Y	N	N	N
2	US	janie.dillard@choctaw	www.cho	800-788-2	580-920-0160	Ext. 11	580-920-0	N		Trade/Cor	500 Acre	II	Gaming	Y	Y	N	N
3	US																
4	US																
5	US																
6	US																
7	US																
8	US																
9	US																
10	US																
11	US																
12	US																
13	US																
14	US																
15	US																
16	US																
17	US																
18	US																
19	US																
20	US																
21	US																
22	US																
23	US																
24	US																
25	US																
26	US																
27	US																

YWSNuture - Final Basic

Ready

Opportunities

Outbox

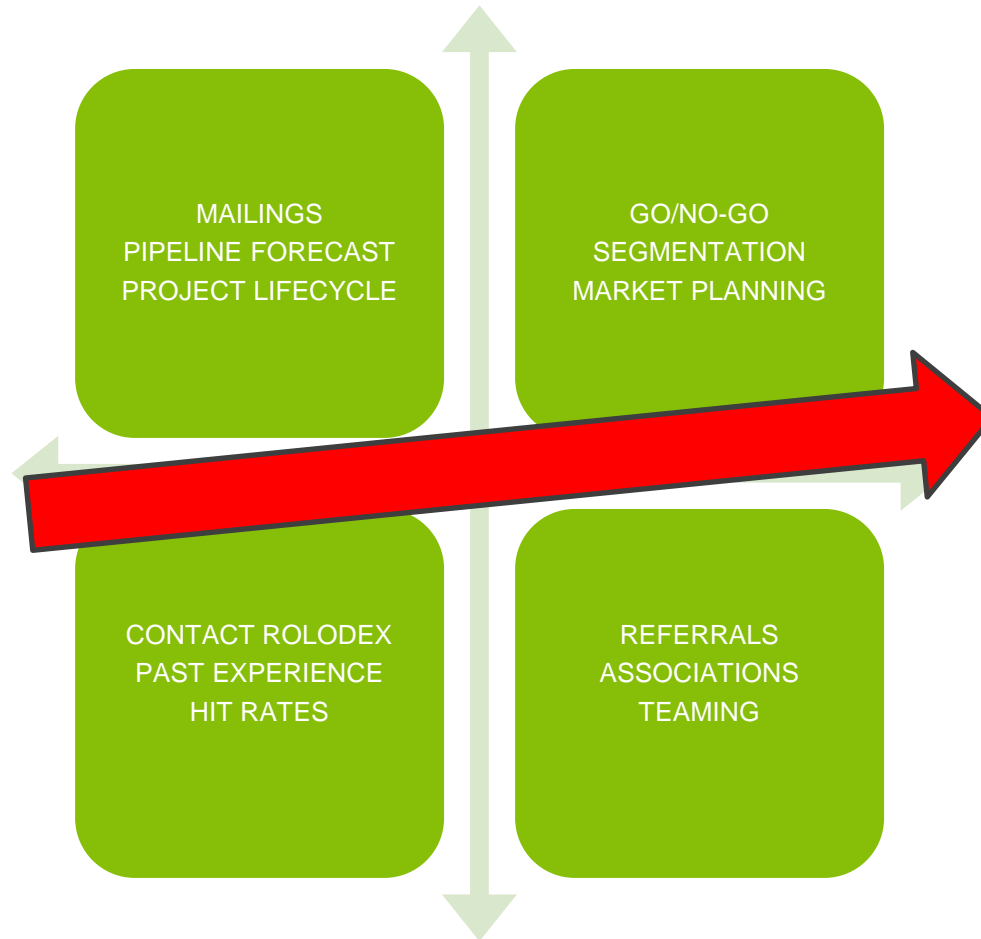




PROCESS

STANDARD

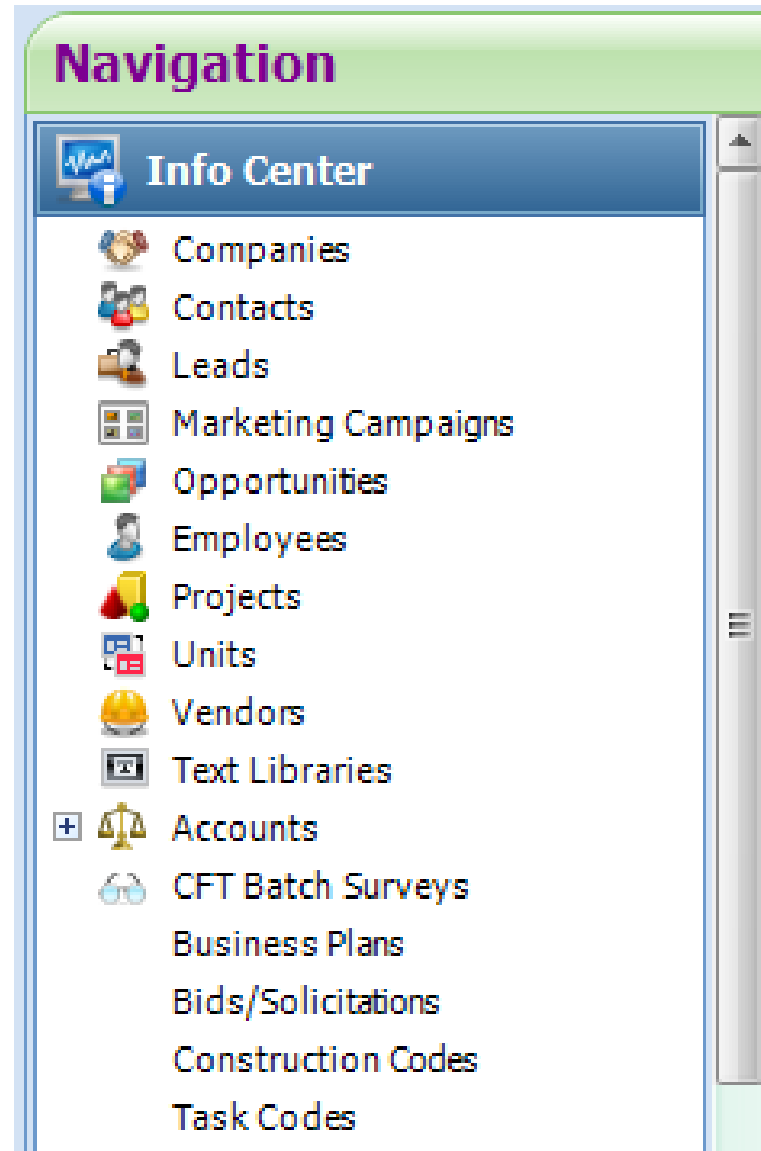
CUSTOM



FACTUAL

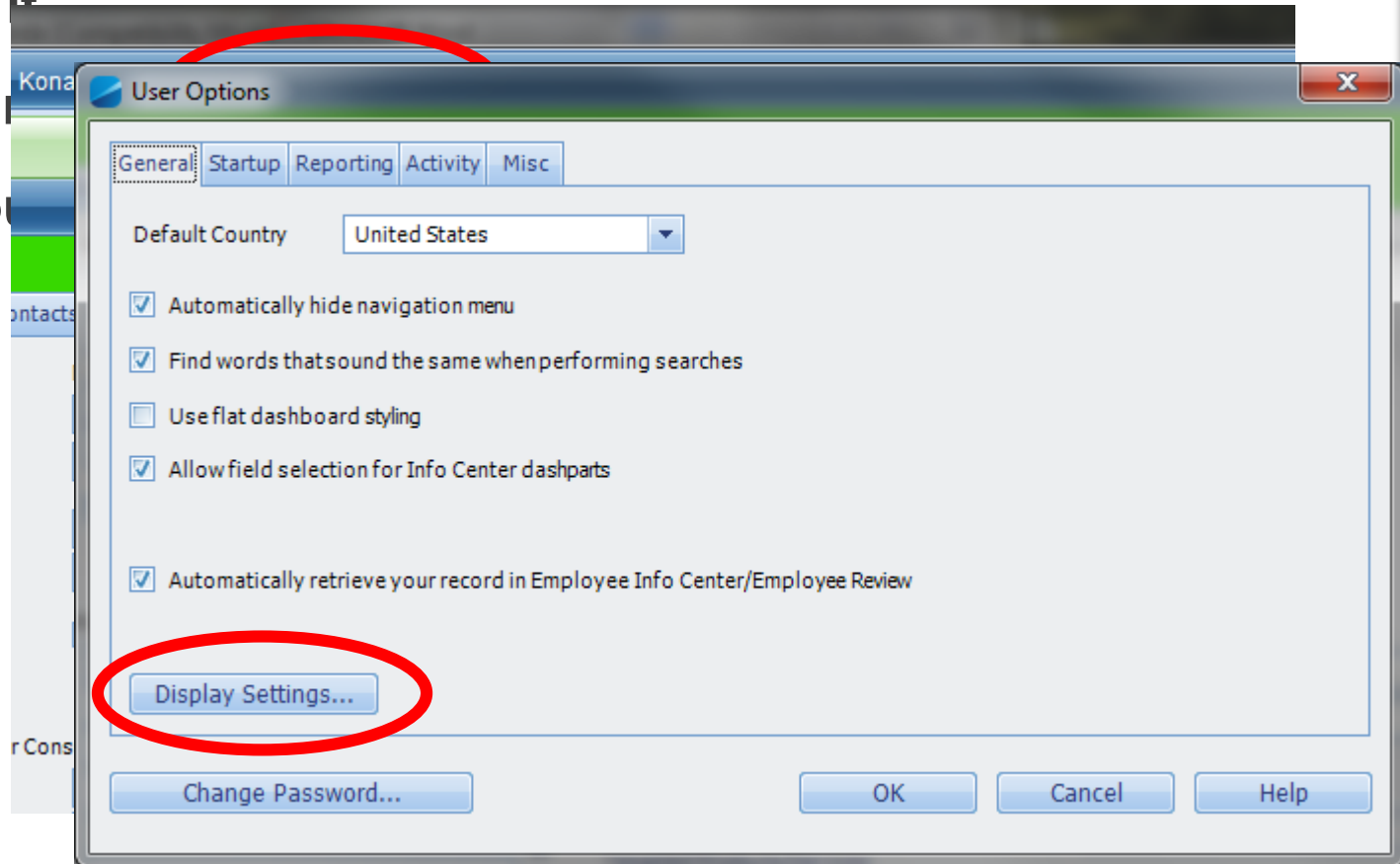


# Collecting Information



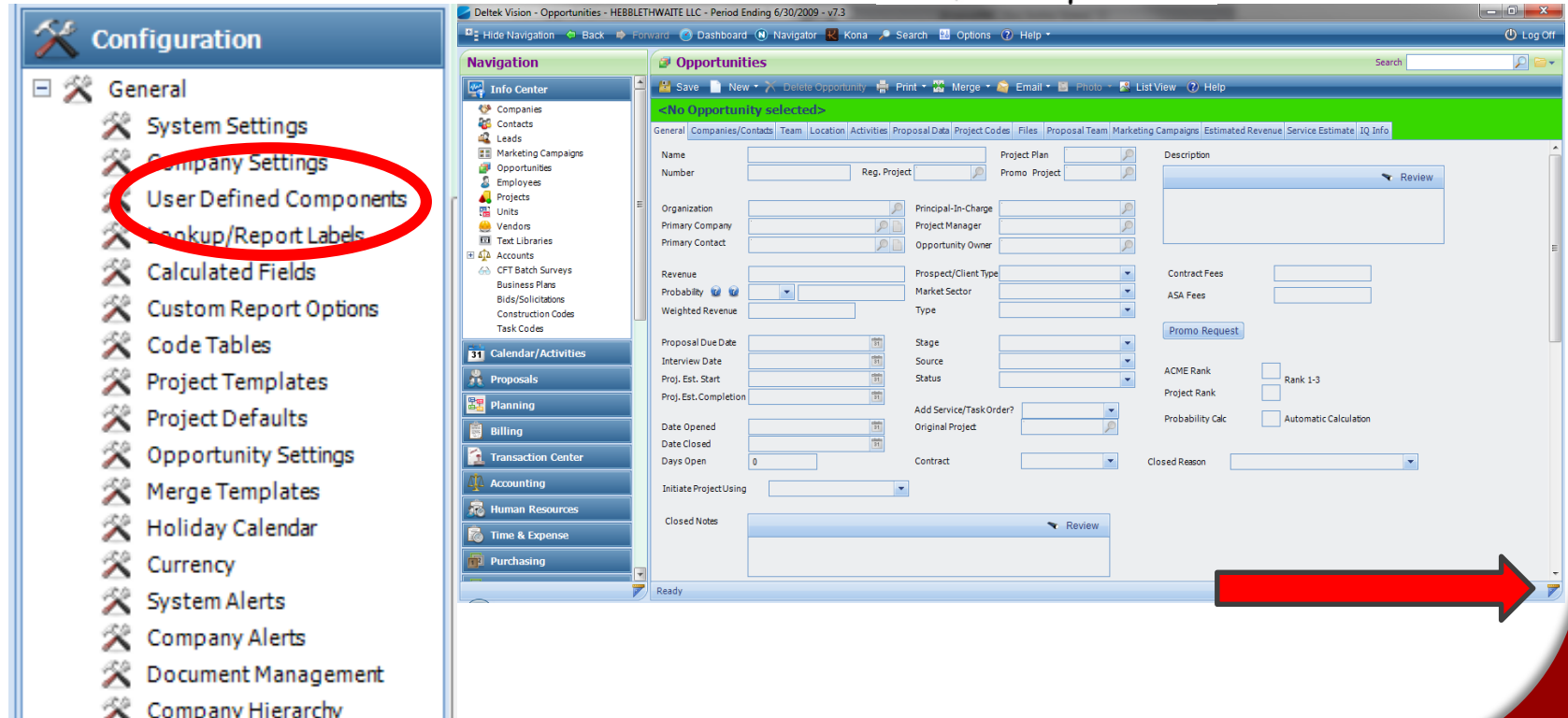
# Collecting Information

1. Decide what's important.
2. Decide what's REALLY IMPORTANT – and require it
3. Stick to your guns
4. Embrace your power



# Collecting Information

1. Think about the information first.
2. Setup the Field(s) and/or Tab(s).
3. Arrange the layout.



# Collecting Information

Opportunities - Designer

General Companies/Contacts Team Location Activities Proposal Data Project Codes Files Proposal Team Marketing Campaigns Estimated Revenue Service Estimate IQ Info

Name  Project Plan  Description Kona Space

Number  Reg. Project  Promo Project

Organization  Principal-In-Charge

Primary Company  Project Manager

Primary Contact  Opportunity Owner

Revenue  Prospect/Client Type

Probability  Market Sector

Weighted Revenue  Type

Proposal Due Date  Stage

Interview Date  Source

Proj. Est. Start  Status

Proj. Est. Completion

Add Service/Task Order?

Date Opened  Original Project

Date Closed

Days Open  Contract

Initiate Project Using

Closed Notes  Edit

Contract Fees

ASA Fees

Promo Request

ACME Rank

Project Rank

Probability Calc

Closed Reason

Properties

<Multiple Selections>

Misc

Hidden

Position

Left

Top

Task Initiation

Insert Copy Delete

OK Cancel

## Screen Designer



# Collecting Information

## Custom Fields – On Screen vs. Search

Potential Services

<input type="checkbox"/> Research	<input type="checkbox"/> Master Planning
<input type="checkbox"/> Brand Exploration	<input type="checkbox"/> Procurement
<input type="checkbox"/> Global Teaming	<input type="checkbox"/> Construction Consulting
<input type="checkbox"/> Visioning	<input type="checkbox"/> Operations Consulting
<input type="checkbox"/> Interior Design	<input type="checkbox"/> Companion Financing
<input type="checkbox"/> Architecture	

Nurtures

Display Type: **Advanced** Search Searches:  Organize

Search Criteria

	Search Type	Search Field	Operator	Search List
▶	Nurture	Services-Architecture	Checked	
	Nurture	Services-Architecture	st	

Services-Architecture

Services-Brand Exploration

Services-Companion Financing

Services-Construction Consulting

Services-Global Teaming

Services-Interior Design

Services-Master Planning

Services-Operations Consulting

Services-Procurement

Services-Research

☐ Display Search Text

☐ Active Only

Total Rows

Clear Select Select All Close Help



# Collecting Information

**Opportunities** Search

Save New Delete Opportunity Print Merge Email Photo **Detail View** Help

Opportunities Select Fields

Date Opened	Name	Contract	ASA Fees	Contract Fees	Revenue	Probabili	Weighted Revenue	Proj. Est. S
10/13/2008	A/E Project for Primary Care Addition,	Original	50,000.00		2,000,001.00	90	1,800,000.90	8/4/2010
9/9/2008	Abington Elementary School	Original		250,000.00	250,000.00	50	125,000.00	
7/14/2008	Adelphi Research Lab				500,000.00	60	300,000.00	4/1/2009
1/1/2009	Anderson Clinic Expansion	Additional Services		52,000.00	52,000.00	90	47,700.00	12/1/2014
4/4/2008	Balboa International Office and Comme				79,000.00	100	79,000.00	1/9/2010
11/19/2008	Burlington Research Park	Change Order		35,000.00	35,000.00	50	17,500.00	1/1/2015
7/4/2008	Carlton Industries Plant Expansion				5,000,000.00	0	0.00	1/23/2010
6/12/2008	Gilbert Elementary School				2,600,000.00	100	2,600,000.00	2/13/2010
10/1/2008	Hilton Head VA Clinic Expansion and A	Change Order	7,500.00		7,500.00	100	8,500.00	11/16/2010
10/1/2009	Indefinite Delivery Contract for Various	Letter of Agreement			3,200,000.00	60	1,920,000.00	1/1/2011
8/8/2008	Indore Corporate Facility				1,200,000.00	100	1,200,000.00	9/30/2009
9/5/2008	Moscone Public School 45				1,500,000.00	100	1,500,000.00	3/1/2010
8/4/2014	SDC Test for VA Forms	Original		45,000.00	45,000.00	20	10,000.00	
12/18/2013	Thalle Construction Projects				500,000.00	0	0.00	

Ready

List View







MANAGE



# Managing Information

The screenshot displays the Deltek Vision software interface. The title bar reads "Deltek Vision - Companies - HEBBLETHWAITE LLC - Period Ending 6/30/2009 - v7.3". The top menu bar includes "Hide Navigation", "Back", "Forward", "Dashboard", "Navigator", "Kona", "Search", "Options", and "Help". A red circle highlights the "Search" button in the top right corner. The left sidebar contains a "Navigation" pane with a tree view of modules: Info Center, Companies, Contacts, Leads, Marketing Campaigns, Opportunities, Employees, Projects, Units, Vendors, Text Libraries, Accounts, CFT Batch Surveys, Business Plans, Bids/Solicitations, Construction Codes, Task Codes, Calendar/Activities, Proposals, Planning, Billing, Transaction Center, Accounting, and Human Resources. The main content area is titled "Companies" and shows a search bar with the text "Search". Below the search bar, there are tabs for "General", "Contacts", "Associations", "Activities", "Opportunities", "Projects", "Additional Info", and "Files". The "General" tab is active, displaying a form for company information. The form includes fields for Number, Name, Client, Parent, Type, Status, Relationship, Client Ranking, Addresses, Description, Address 1, Address 2, Address 3, Address 4, City, State/Province, Zip/Postcode, Country, Phone, Fax, Web Site, and Notes. There are also buttons for "Add Address" and "Delete Address". At the bottom, there is a "Client Classification" section with a table showing "Date", "Previous Classification", and "Current Classification".

## Info Center Search



# Managing Information

1. Choose Standard or Advanced
2. Say your search OUT LOUD – does it make sense to you?
3. Use the “**Search**” button to preview Vision’s answer.
4. Not convinced? Repeat steps 1-3.

The screenshot shows a 'Company Lookup' window with a search interface. The 'Display Type' is set to 'Standard'. The 'Search By' dropdown is set to 'Company Name'. The 'Search Text' field is empty. The 'Searches' field is empty. The 'Organize' button is visible. The search results are displayed in a table with columns: City, State/Province, and Zip/Postcode. The table contains 56 rows of data, including entries for Atlanta, New York, Los Angeles, Alexandria, Boston, Sacramento, Calvert, Sandwich, Baltimore, and Boston.

City	State/Province	Zip/Postcode
Atlanta	GA	30339
New York	NY	25410
Los Angeles	CA	90012
Alexandria	VA	24578
Atlanta	GA	30302
Boston	MA	02215
Sacramento	CA	94273-0001
Sacramento	CA	98103
Calvert	MD	22049-3232
Sandwich	MA	01520
Baltimore	MD	21201
Boston	MA	02118

Active Only Total Rows 56

Clear Select Select All Close Help



# Managing Information

The screenshot displays the 'Company Lookup' dialog box with the 'Search List' tab selected. A red circle highlights the 'Search' button. The 'Search Criteria' section shows a search for 'Project' in the 'Project Type' field, with the operator 'In List' and the search list 'Aviation; Environmental; Medical'. The 'Display Search Text' checkbox is checked. The results table lists companies with their names, numbers, cities, states/provinces, and zip/postcodes.

**Search Criteria**

Search Type	Search Field	Operator	Search List	Con
Project	Project Type	In List	Aviation; Environmental; Medical	AND

☒ Display Search Text

Name	Number	City	State/Province	Zip/Postcode
Advanced Mechanical Technologies, Inc.		Atlanta	GA	30339
Anderson & Associates, LLC	00ANDERSON	New York	NY	25410
Atlantic Research Corporation	0000000192	Alexandria	VA	24578
BioMed Technologies LTD	0000003425	Boston	MA	02215
California Department of Transportation	00000CADOT	Sacramento	CA	94273-0001
City of Cambridge	0CAMBRIDGE	Cambridge	MA	02139

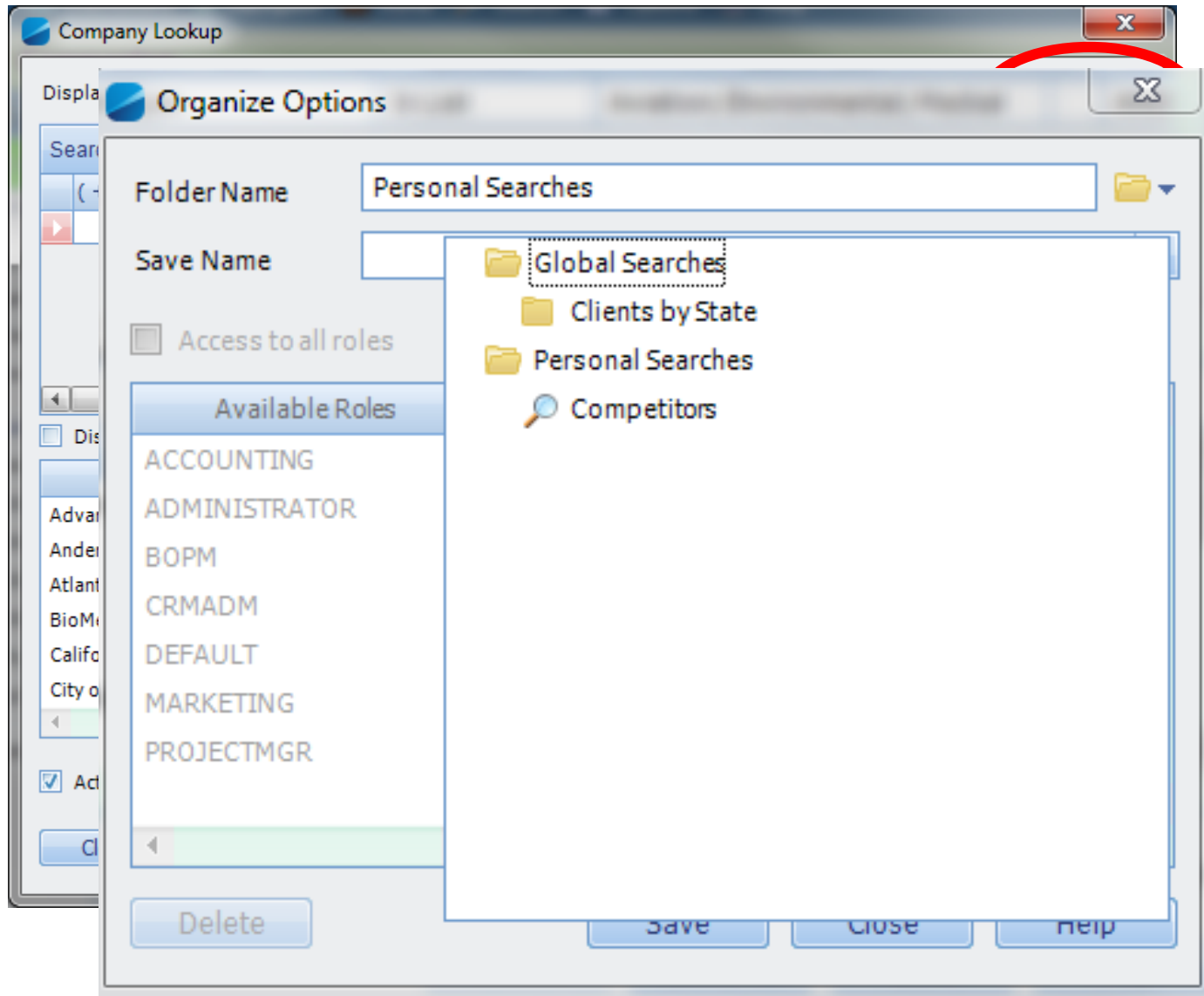
☒ Active Only

Total Rows 19

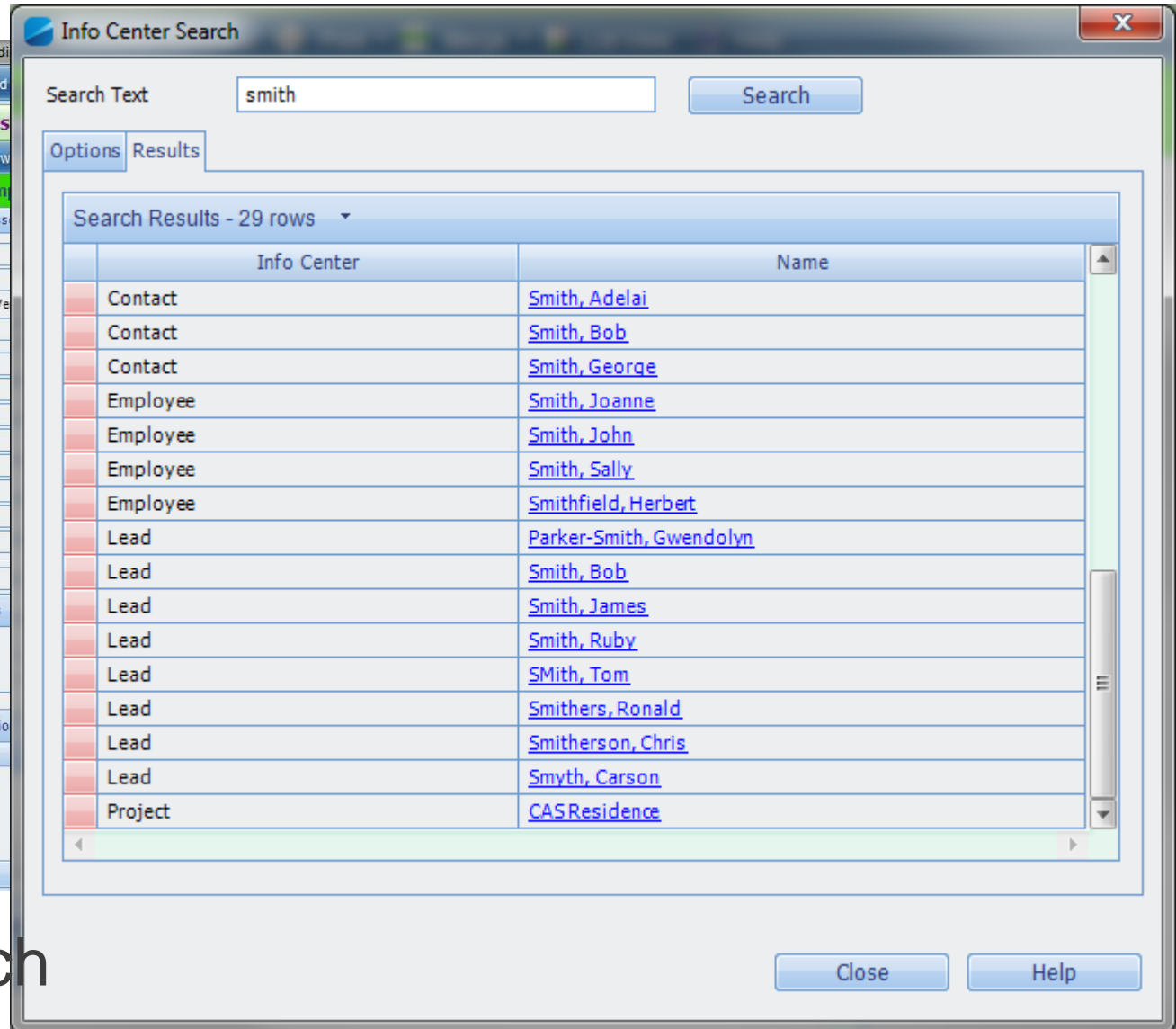
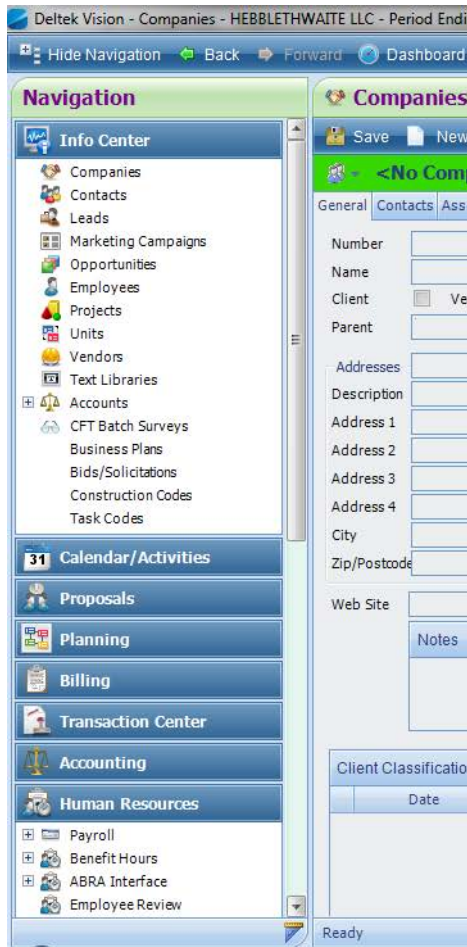
Buttons: Clear, Select, Select All, Close, Help



# Managing Information



# Managing Information



Master Search




# Managing Information - Associations

- Contacts → Employees
- Clients → Employees
- Contacts → Contacts
- Clients → Clients



# Managing Information - Associations

 **Contacts**

Save New Delete Contact Print Merge Email List View Help

**Janet Anderson**

General Activities Opportunities Projects Associations Personal Information Marketing Campaigns Files Details

Associations

	Name	Relationship	Relationship Description
--	------	--------------	--------------------------

Employees

Employee	Name	Relationship	Relationship Description
00201	<a href="#">Anderson, Steve</a>	Former Direct Report	
00001	<a href="#">Apple, William</a>	Client Manager	

Client Manager

Former Direct Report

Former Supervisor

Contact Manger

Former Employee (of this Company)

Ready



# Managing Information - Associations

The screenshot displays a CRM application window titled 'Contacts' with a sub-window 'Contact Lookup'. The 'Contact Lookup' window has a 'Display Type' dropdown set to 'Advanced' and a 'Search' button. Below the search bar is a table for 'Search Criteria' with columns: Search Type, Search Field, Operator, Search List, and Con. A red circle highlights the row where Search Type is 'Contact', Search Field is 'Association Relationship', Operator is 'In List', and Search List is 'Referred To'. Below the search criteria table is a checkbox for 'Display Search Text'. At the bottom of the dialog is a table with columns 'Full Contact Name', 'Title', and 'Type'. It contains two rows of data. At the very bottom of the dialog are buttons for 'Clear', 'Select', 'Select All', 'Close', and 'Help', along with a status bar showing 'Active Only' and 'Total Rows 2'.

Search Type	Search Field	Operator	Search List	Con
Contact	Association Relationship	In List	Referred To	AND

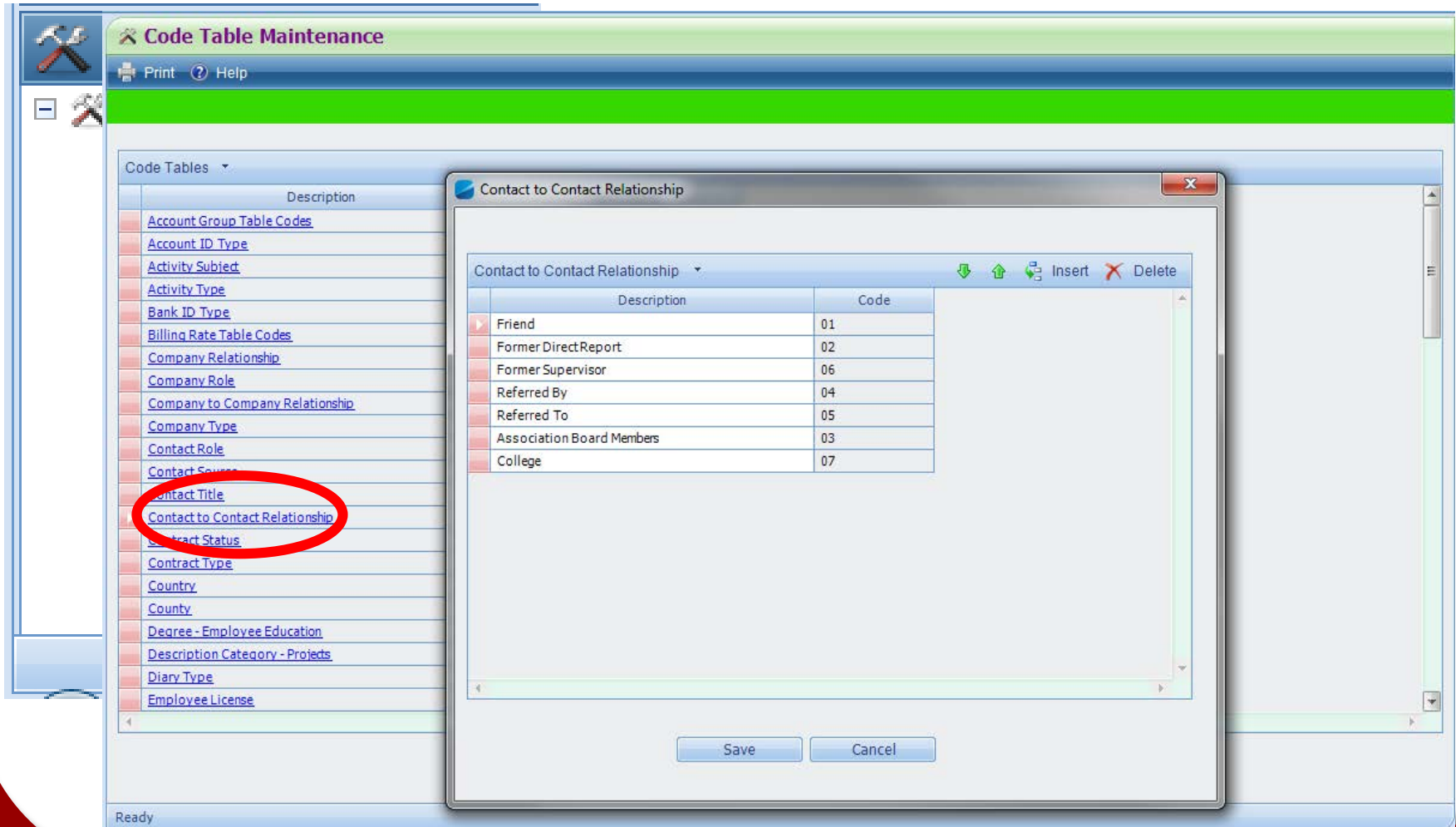
  

Full Contact Name	Title	Type
DeRosa, George M.	Director of Ma	C
Taylor, Wesley A.	Project Manag	C

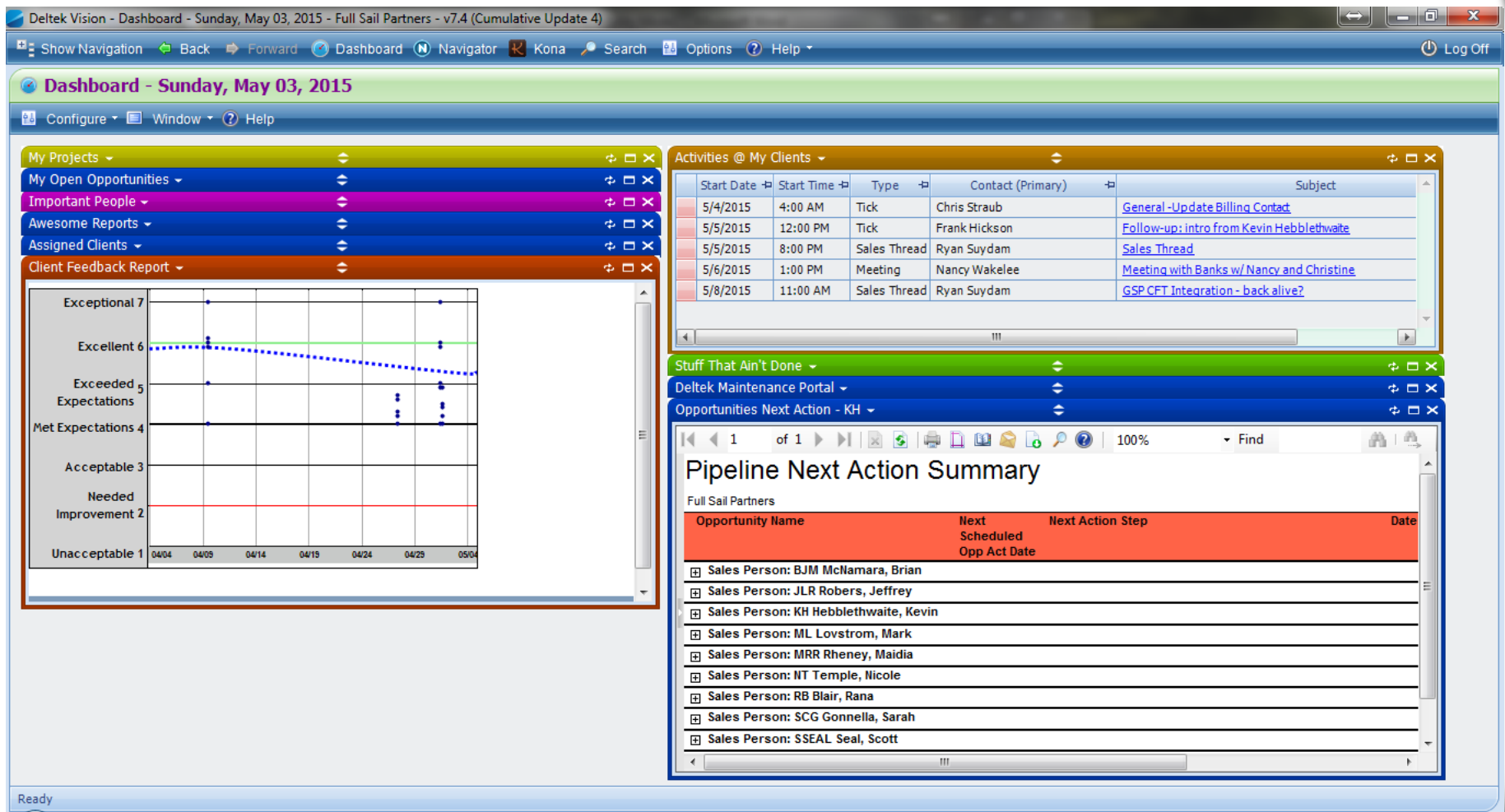




# ***The Code Tables***



# Managing Information - Dashboards



# Managing Information - Dashboards

- Provides information with no hunting/pecking
- Provides ACCESS to routine information minimizing clicks
- Helps each Vision user FOCUS



# Managing Information - Dashboards

## Basic Lists of Stuff

Projects, Opportunities, Contacts, Clients, Activities, etc.



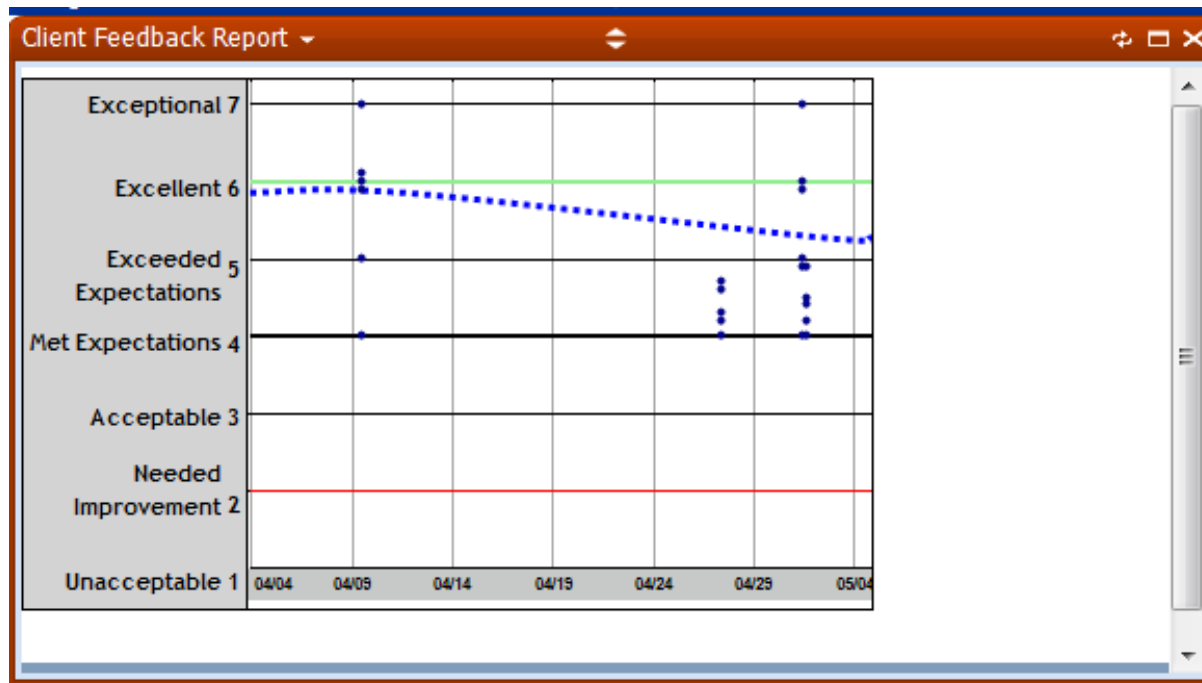
The screenshot shows a window titled 'My Projects' with a green header bar. Below the header is a table with the following columns: Project ID, Project Name, Primary Company, Phase, and Phase Name. The table contains 10 rows of project data. The first row is highlighted with a red background. The table has a scrollbar on the right side.

Project	Project Name	Primary Company	Phase	Phase Name
199900	<a href="#">Indore Corporate Office Building</a>	<a href="#">Atlantic Research Corporation</a>		
200000	<a href="#">Ipswich Public Library</a>	<a href="#">Town of Marblehead</a>		
199902	<a href="#">Liberty Wastewater Treatment Plant</a>	<a href="#">City of Charlotte</a>		
002020	<a href="#">Martinville Children's Hospital</a>	<a href="#">Atlantic Research Corporation</a>		
199509	<a href="#">North River Environment Test Laborat</a>	<a href="#">North Shore Alliance Group</a>		
200009	<a href="#">Overhead Variance</a>			
000000	<a href="#">PDQ Building</a>	<a href="#">Town of Sedona</a>		
000PDQ	<a href="#">PDQ Building</a>	<a href="#">Town of Sedona</a>		
0PIEDM	<a href="#">Piedmont Town Center</a>			
000201	<a href="#">Reedy River Trunk</a>	<a href="#">Western Carolina Regional Sewer Au</a>		



# Managing Information - Dashboards

## Quick Glance: Web-based Resource



# Managing Information - Dashboards

## Easy Access: Important Reports

**Awesome Reports**

- [Consulting - PastDue Actions](#)
- [InSight Targets](#)
- [Kevin's AR](#)
- [Kevin's Collections](#)
- [Kevin's Vouchers](#)

**Opportunities Next Action - KH**

Pipeline Next Action Summary

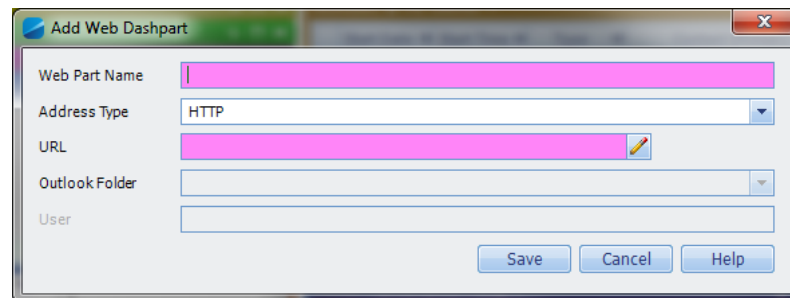
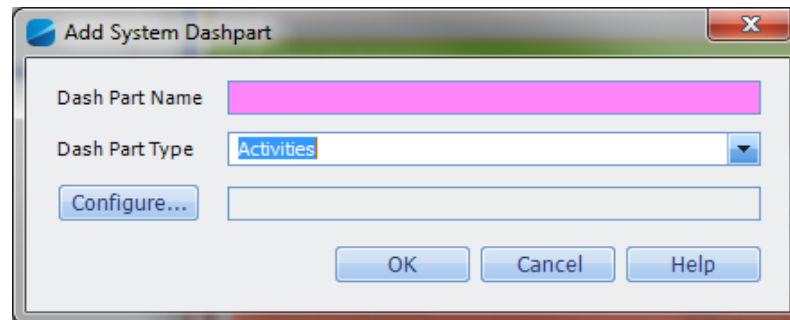
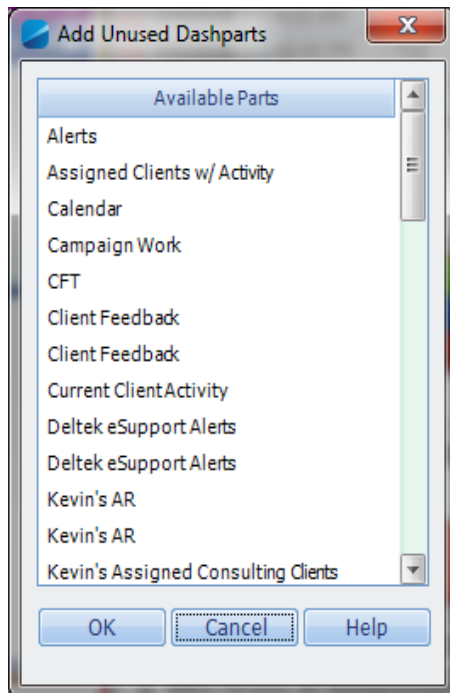
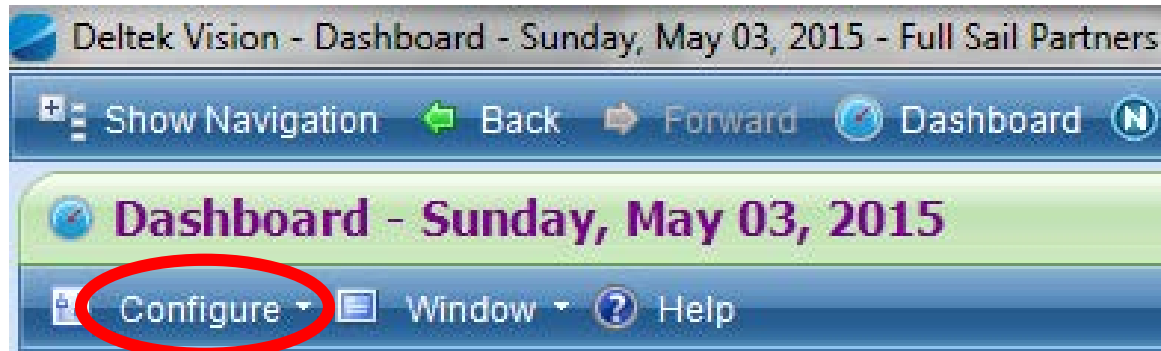
Full Sail Partners

Opportunity Name	Next Scheduled Opp Act Date	Next Action Step	Date
+ Sales Person: BJM McNamara, Brian			
+ Sales Person: JLR Robers, Jeffrey			
+ Sales Person: KH Hebblethwaite, Kevin			
+ Sales Person: ML Lovstrom, Mark			
+ Sales Person: MRR Rheney, Maidia			
+ Sales Person: NT Temple, Nicole			
+ Sales Person: RB Blair, Rana			
+ Sales Person: SCG Gonnella, Sarah			
+ Sales Person: SSEAL Seal, Scott			

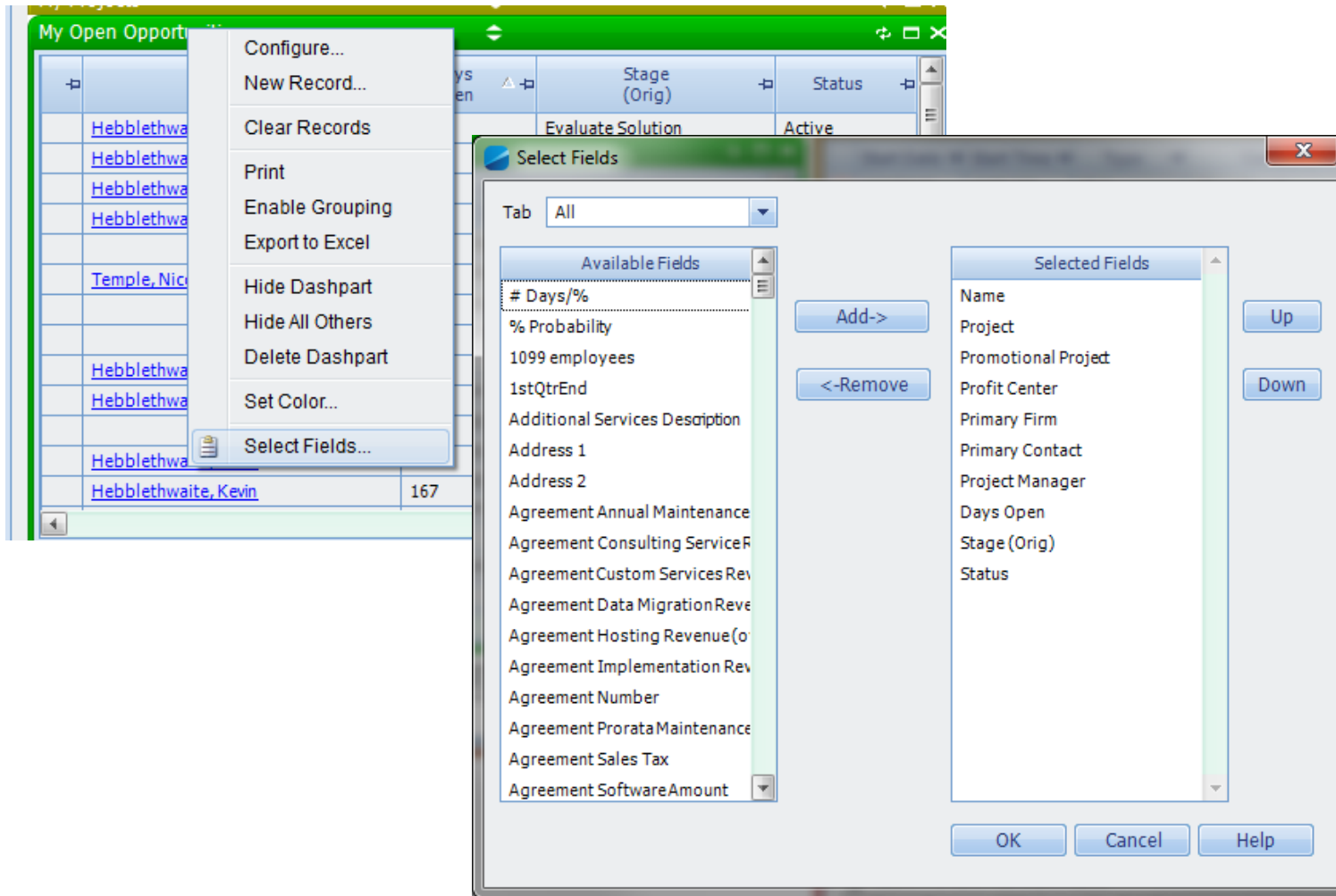




# Managing Information - Dashboards



# Managing Information - Dashboards





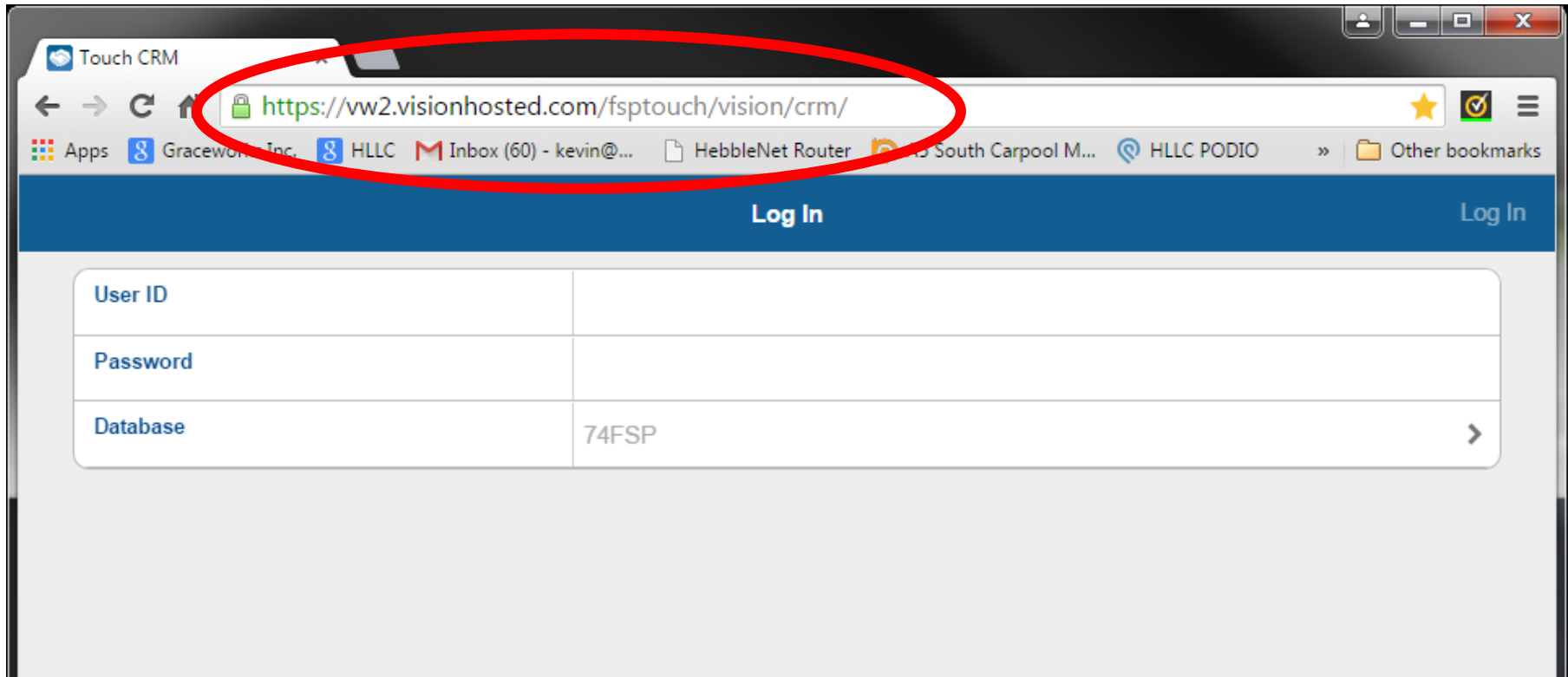
# Managing Information – Mobile!

<https://something.hardtoremember.com/visionclient/>

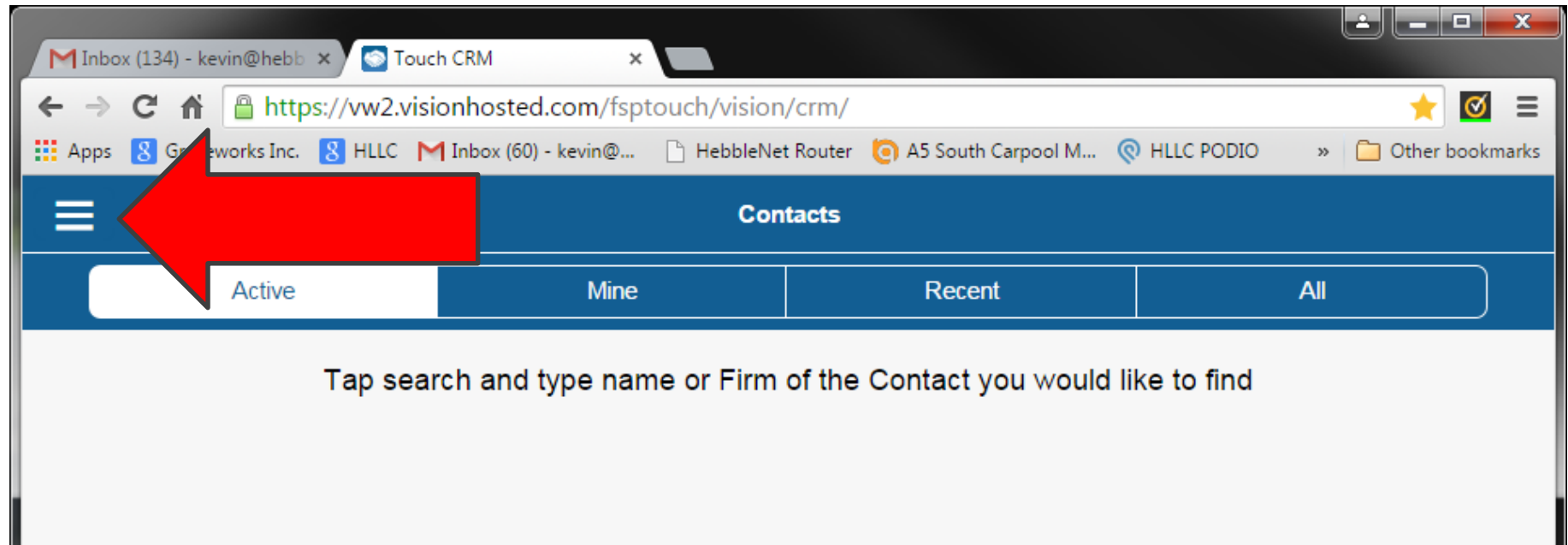
</visiontouch/vision/crm>



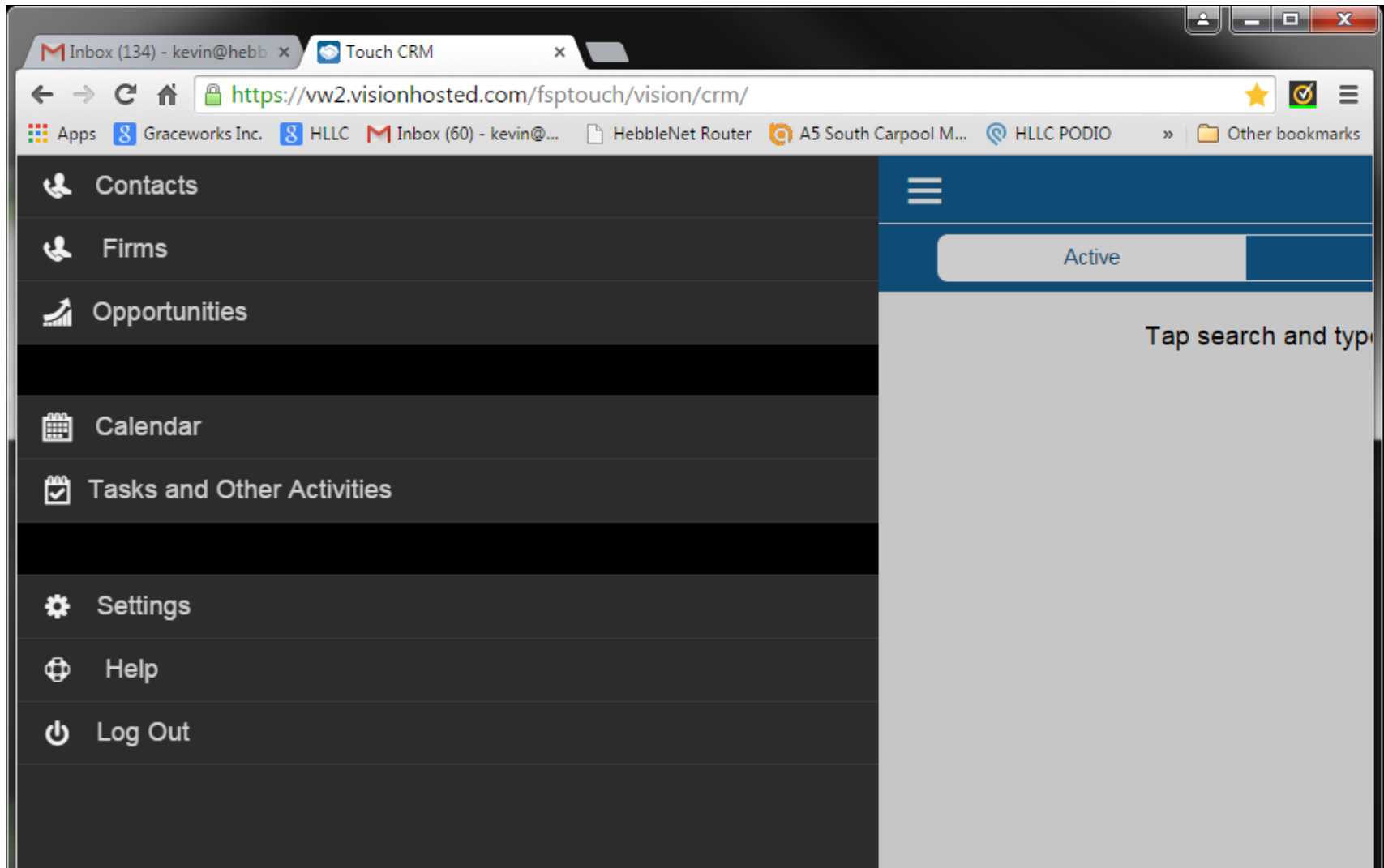
# Managing Information – Mobile!



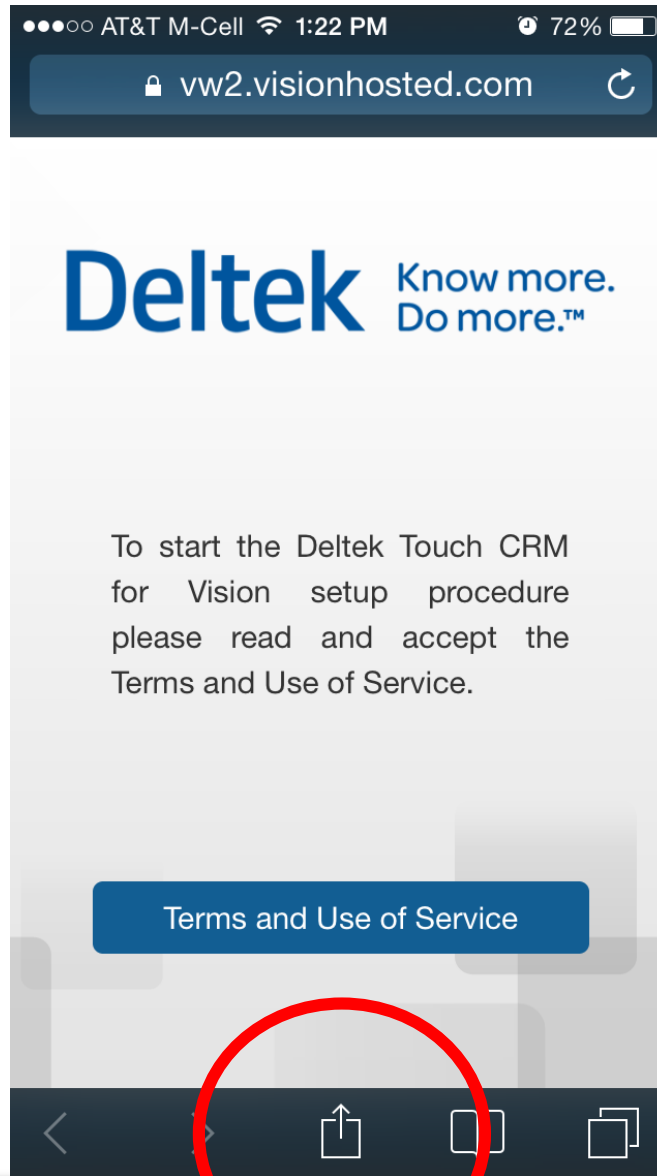
# Managing Information – Mobile!



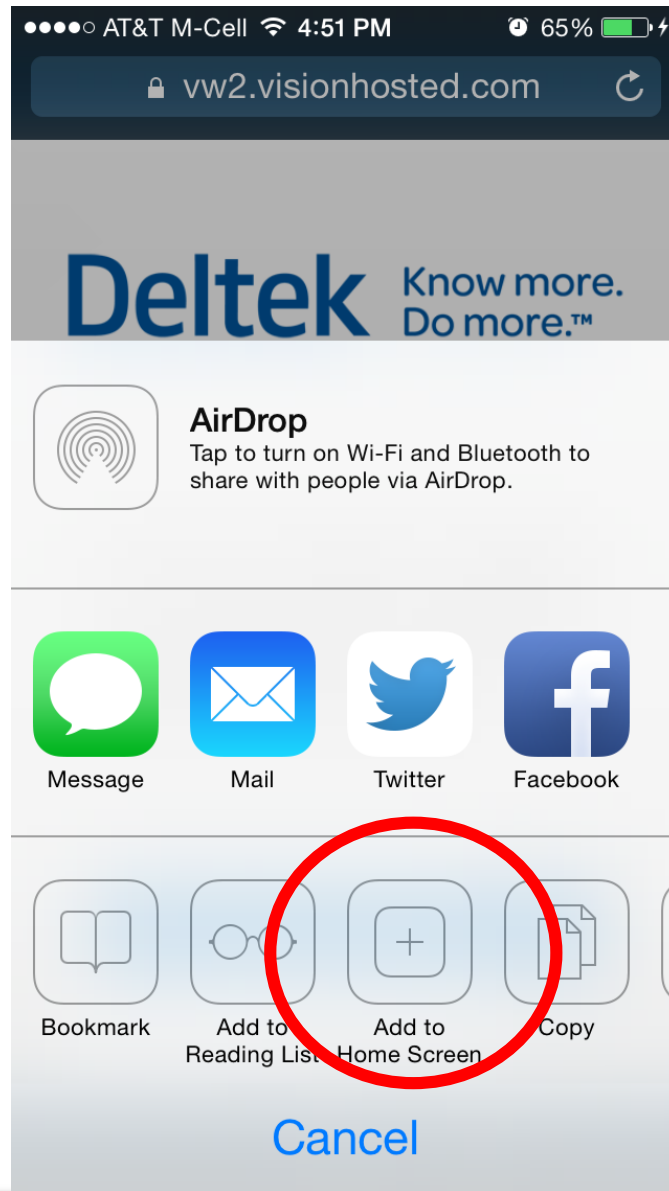
# Managing Information – Mobile!



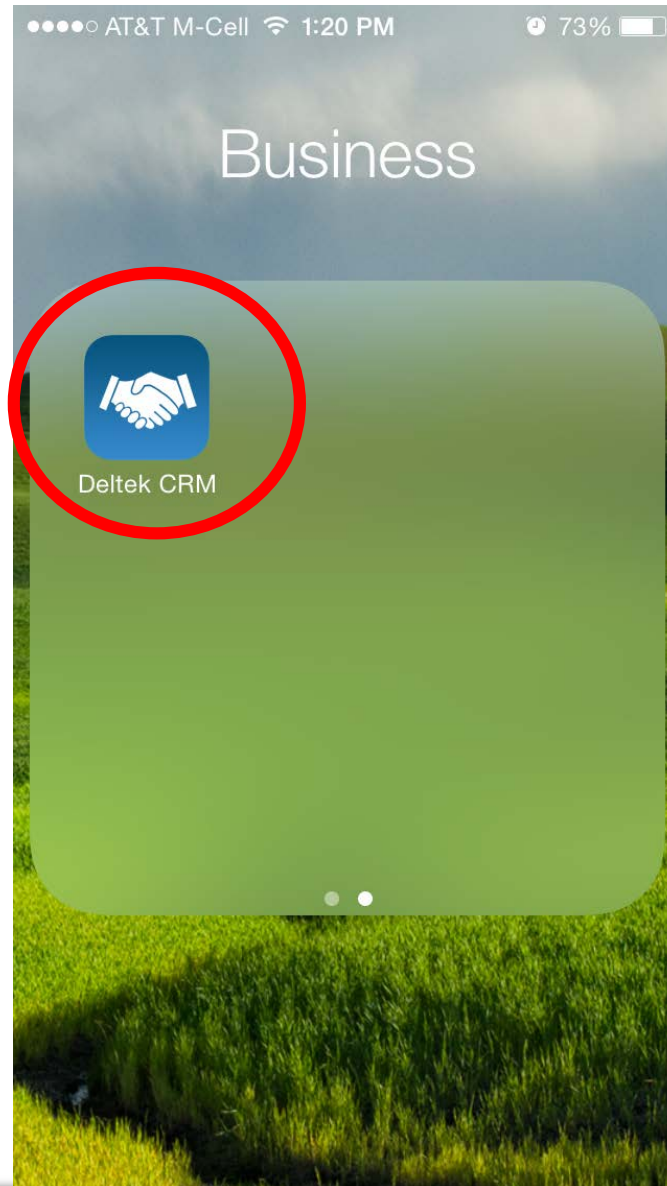
# Managing Information – Mobile!



# Managing Information – Mobile!



# Managing Information – Mobile!



# Managing Information – Mobile!

●●●○ AT&T M-Cell 1:23 PM 72%

vw2.visionhosted.com

Log In Log In

User ID	Khebblethwaite
Password	●●●●●●●●
Database	74FSP

< >





# Managing Information – Mobile!

AT&T M-Cell 1:23 PM 72%

vw2.visionhosted.com

Skip PIN Setup

Enter a four-digit PIN code to allow fast and easy access in the future:

Note: PIN protection is optional and can be skipped.

1	2	3
4	5	6
7	8	9
	0	⌫

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# Managing Information – Mobile!

●●●● AT&T M-Cell 6:08 PM 98%


Back Details

Details Misc.

Dylan S. Zimmerman  
Chief Executive Officer at Anderson & Associates, LLC  
Status : Active

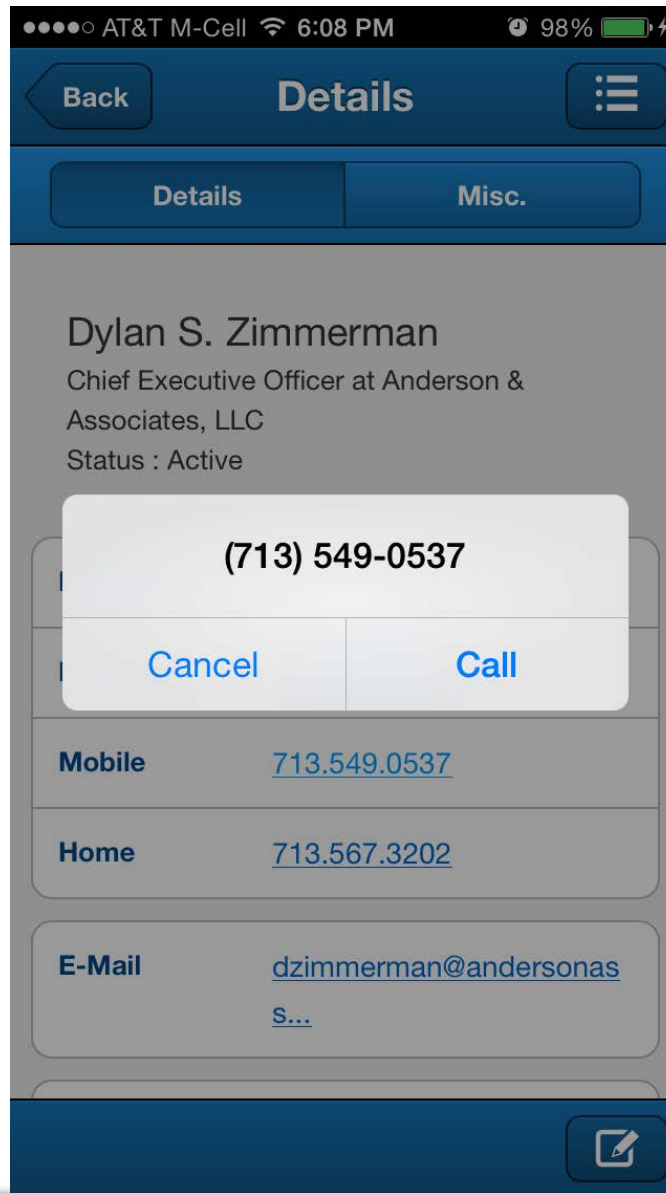
Bus. Phone	<a href="tel:713.920.7000">713.920.7000</a>
Bus. Fax	<a href="tel:713.920.7001">713.920.7001</a>
Mobile	<a href="tel:713.549.0537">713.549.0537</a>
Home	<a href="tel:713.567.3202">713.567.3202</a>

E-Mail [dzimmerman@andersonas.com](mailto:dzimmerman@andersonas.com)  
[S...](#)





# Managing Information – Mobile!



# Managing Information – Mobile!

**Do NOT expect Mobile to:**

- Be primary data entry tool
- Display everything Vision Smart Client does
- Work without a connection



# Managing Information – Mobile!

**DO expect Mobile to:**



# CYCLE



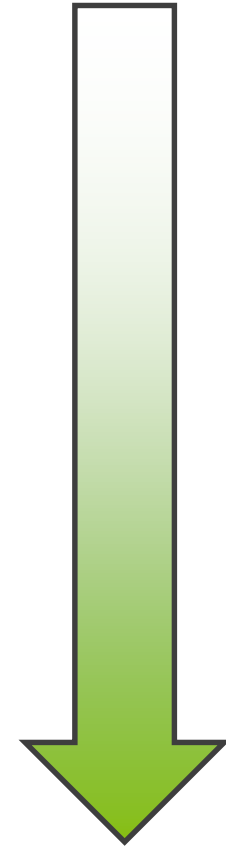
# ***The Napkin***



# Cycling Information

1. Get to know people
2. Intrigue them with your awesomeness
3. Get invited to present a solution
4. Sign the contract
5. Deliver awesomeness
6. Make money
7. Mostly repeat steps 3-6
8. Occasionally repeat steps 1-2

**DATA!!!**





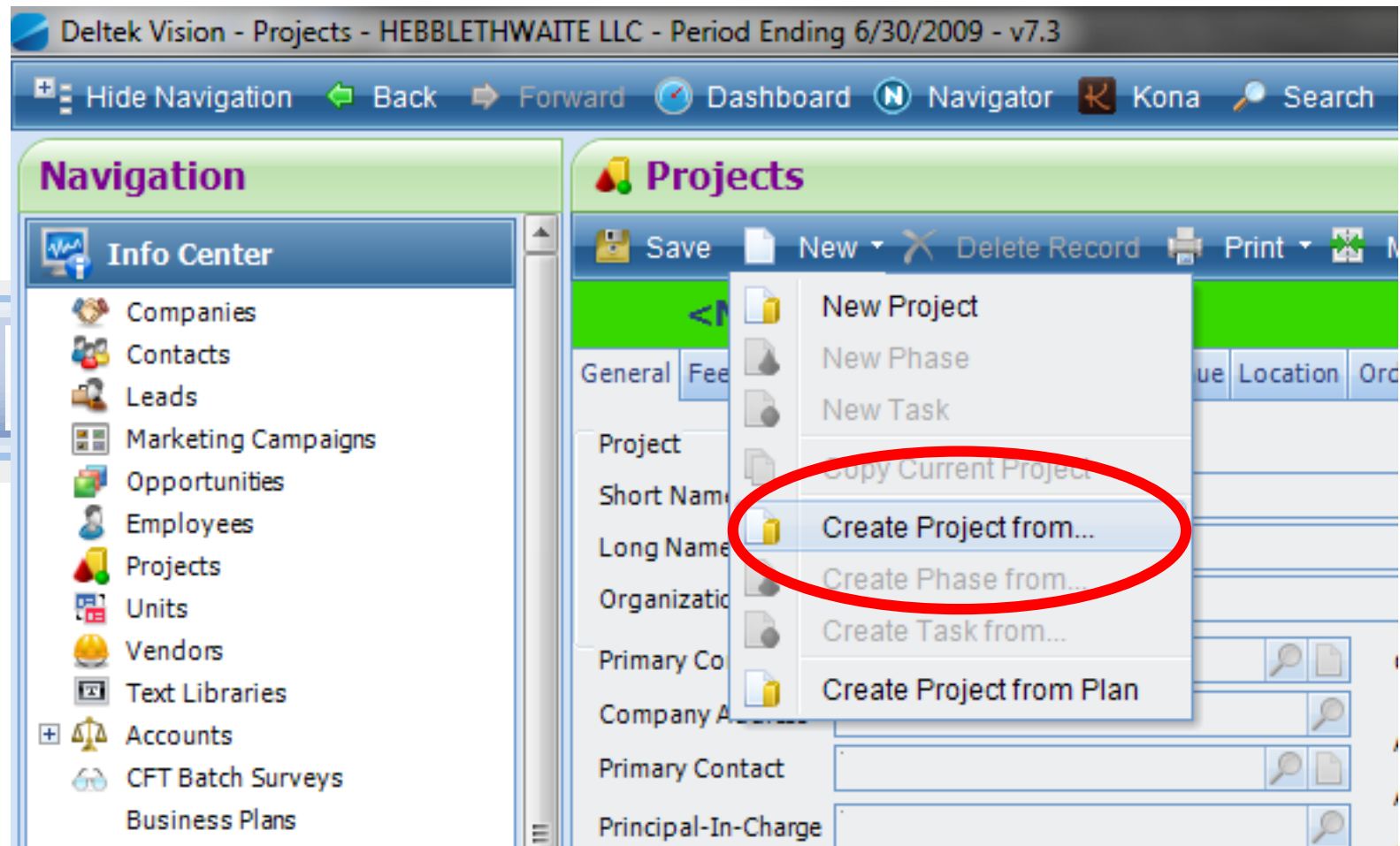
# **Cycling Information**

**1. Vision's Built-in Data Flow**

**2. Creating your own Workflow**



# Cycling Information



# Cycling Information

## The following Opportunity Info Center tabs and fields...

### **General Tab**

Opportunity Name

Opportunity Number

Primary Client

Primary Client Address

Organization

Description

Type

Estimated Start Date

Estimated Completion Date

### **Team Tab**

### **Client/Contact Tab**

### **Location Tab**

### **Project Codes Tab**

### **Custom Fields and Tabs**

## Map to these tabs and fields in the new Project Info Center record...

### **General Tab**

Project Short Name

Project Long Name

Project Number — unless the number is changed during the posting process

Primary Client — **General Tab**

Billing Client — **Accounting Tab**

Client Address

Organization

Project Description — with category Opportunity Description

Project Type

Start Date — **Dates and Costs Tab**

Estimated Completion Date — **Dates and Costs Tab**

**Team Tab** — with the same roles and role descriptions for Employees and Vendors

**Client/Contact Tab** — with all related information

**Location Tab** — all fields

**Project Codes Tab** — all fields

**Custom Fields and Tabs** — will carry over as long as the same custom fields and tabs exist in the Project Info Center



# ***Workflows***

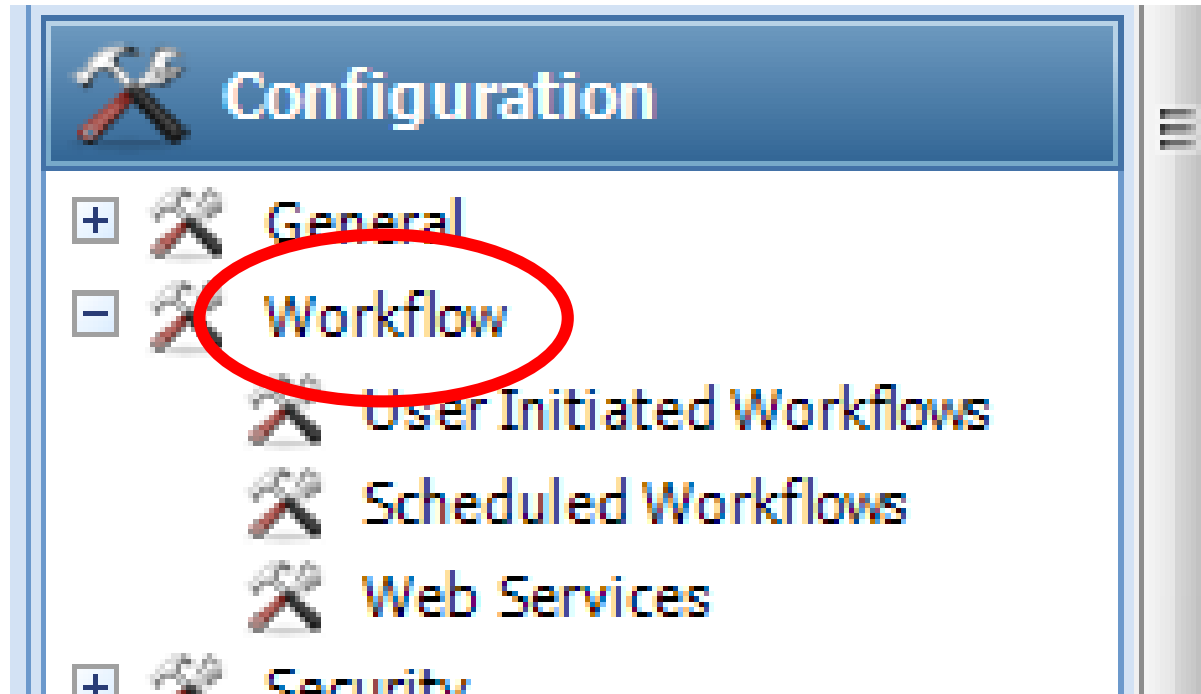


# Cycling Information

THIS	THAT
An Opportunity is “sold”	Marked with today’s date, record marked “Inactive”
Client has first project	Client classified as “Existing”
Go/No-Go Scoring	Calculate and track with the record
Client’s project is closed out	Schedule a follow-up meeting three months later



# Cycling Information





**ACCESS**

**COLLECT**

**MANAGE**

**CYCLE**







# Questions?



***Want to learn more:***

***Webcast:*** Managing a CRM System and Beyond: <http://bit.ly/1p1EhVB>

***Need a CRM Consultant?***

Email: [info@fullsailpartners.com](mailto:info@fullsailpartners.com)

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A feedback survey will be sent using the Client Feedback Tool.



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