CKearney
Consulting LLC

Cosential Optimization Workshop

Marketing

CKearney ConsultingLLC

We are excited to have you join our workshop diving into Cosential to discover tips, best practices and ways to optimize how marketing uses the system. In this training, we will discuss the full power of Cosential's marketing features from proposal automation to data management. We will identify areas of the system to automate and optimize marketing operations including a detailed review of your processes.

Learning Objectives

- Workflows. Maximize the use of workflows for efficient communication and automation.
- Data Management. Learn how to maintain and protect your data integrity with maintenance and audit reports.
- Dashboards. Build a customized home page dashboard to impact your work flow and increase efficiency.
- Best Practices. Obtain best practices and valuable tips to improve your Cosential experience.
- New Features. Review the good, the bad and the ok of all the new features, which ones to invest in using and how to best capitalize on them.
- BD. Briefly discuss the opportunity grid and review the mobile apps.
- Excel Templates. Review our custom spreadsheets to produce a printable calendar and workload projection charts.

Agenda

- Why & Who. Define and document why you have Cosential, who should be using, who's responsible for what tasks and championing its success.
- Process Map. Outline your marketing processes and client experience.
- Data Mapping. Start with the end in mind to determine the data you need and how it should be collected.
- Reports. Discover the power of maintenance and audit reports. Review or calendar and gantt chart templates.
- CFO & Mobile. Brief overview of CFO and the Card Reader mobile app.
- Dashboards. Review optimal widget layouts and formatting.
- New Features. Discuss the good, the bad and the truth about all new features.
- Automation. Maximize workflows for efficient communication and automation.
- Hands-On. Log into Cosential to review records, call logs, tasks and forms.
- Objectives. Identify the top three items to implement upon returning to the office.
- Q&A. Clarify any questions and discuss any lingering or unanswered items.

Define and Document Your Why

What features closed the deal on your firm purchasing Cosential?

1.
2.
3.
4.
5.
6.

What did you buy Cosential to do? What was the desired end result?

1.
2.
3.

Who

Which department, role or specific person is ultimately responsible for Cosential? ______________________________

At the leadership level, who is the Cosential champion? ______________________________

To have the most successful CRM you will need at least one champion in an influential role backing your efforts to move initiatives forward. If you do not have a champion, do not worry. Here are some places to look for some:

- Power Users
- Tech Savvy
- Office Influencers

Who else can you recruit to be champions supporting the success of Cosential?

____

____

Once you have the champion, how do you plan to utilize them?

1.
2.
3.
4.

Key Performance Indicators (KPI's)

- Overall Firm Hit Rate
- Hit Rate by total number of proposals submitted to total number of proposals won (my least favorite but it's better than nothing)
- Hit Rate by total dollar value of proposals (proposed fee) submitted to the total dollar value of projects won
- Hit Rate by total number of proposals shortlisted to the total number of projects won
- Hit Rate by individual business development manager or seller/doer
- Hit Rate by office, service and/or market
- Hit Rate by contract type
- Percentage of go verses no-go
- Number of submitted a month (including the "quick" fee proposals)
- Number of impressions until prospect engages
- Monthly number of touches/impressions with prospects (you need to define what a touch/impression is - an email, call, lunch, meeting, etc.)
- Number of content pieces written (blog, social media post, content for the website, an article, interview for an email campaign, award submittal, etc.)

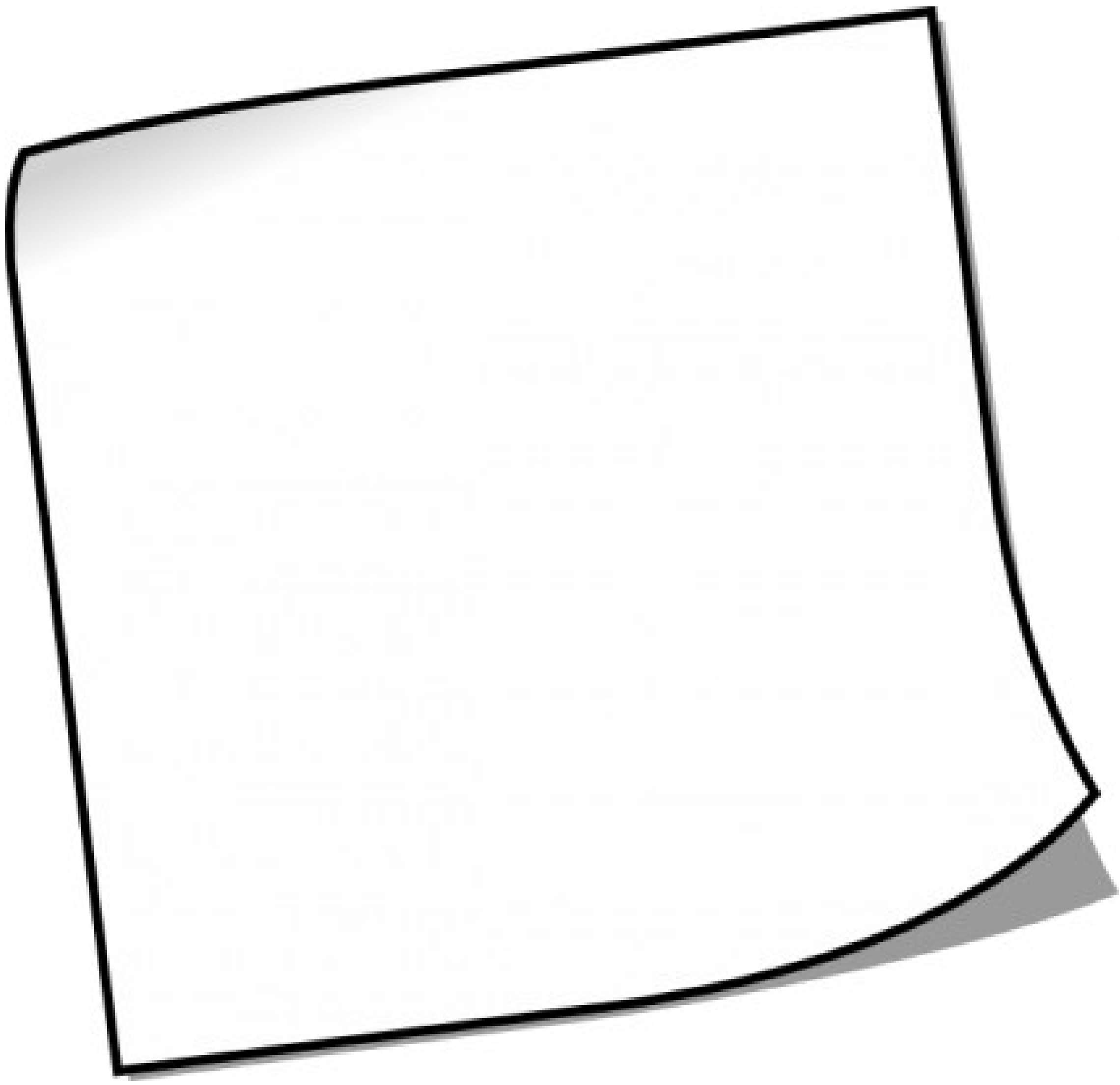
Firms are not tracking these in a one-time silo but rather looking at them month over month to see if there are any trends or patterns emerging. According to PSMJ, the industry average hit rates have varied from mid-30% to low 40% over the years. The 2015 SMPS Foundation report shows the industry hit rate is 42.07% with architecture firms averaging 41.39% and engineering firms at 44.21%.

Brainstorming Your Specific KPI's

- Which examples spoke to you?
- Did any other KPIs come to mind?
- Assign a frequency to each KPI be it weekly, monthly, quarterly or annually.
- Appoint each KPI to a role in the firm, not a person but a role.
- Finally, set a goal for each KPI.

Process Map

Outline marketing's communication and engagement with clients.

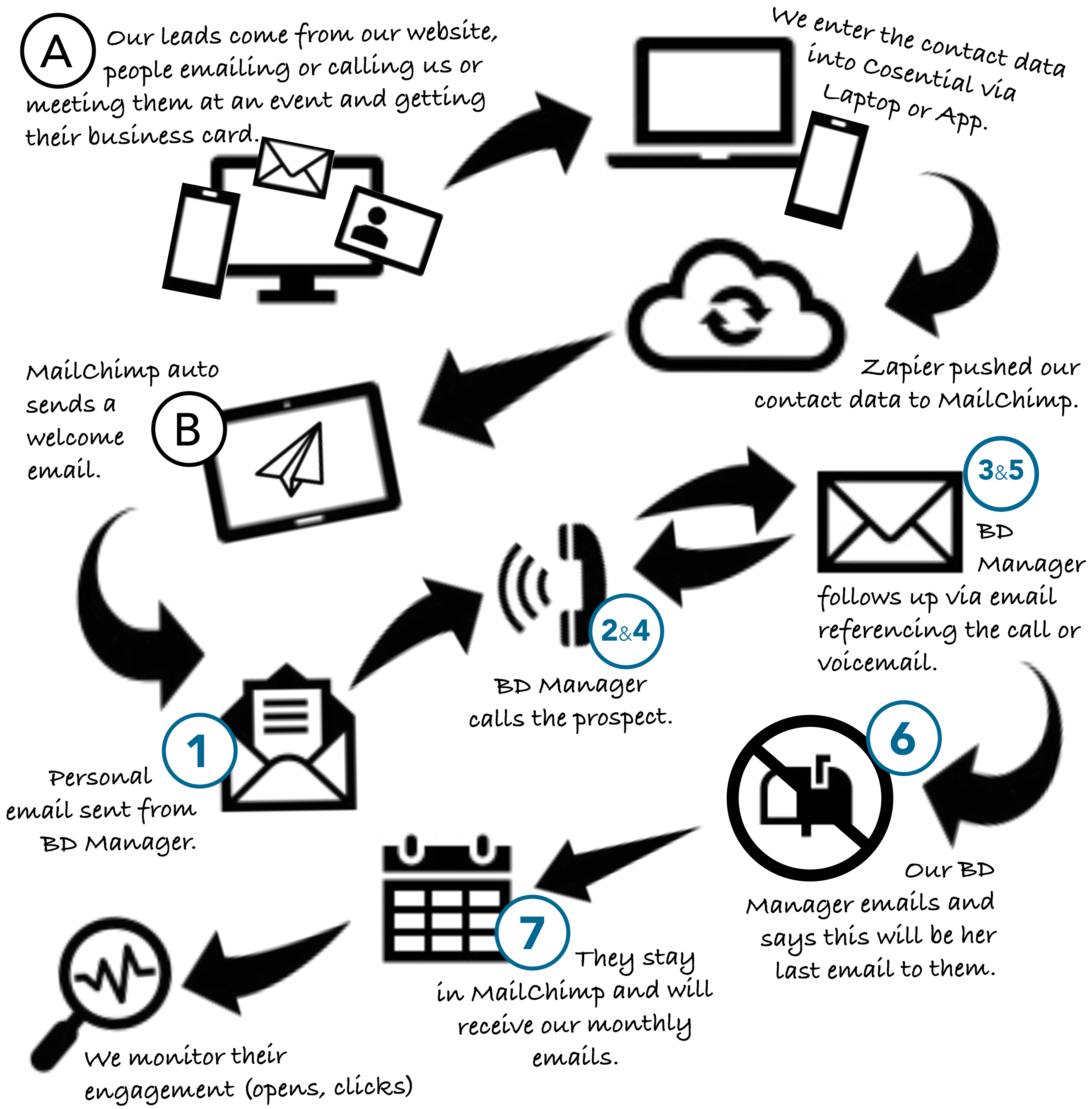


"He who fails to plan is planning to fail."

~ Winston Churchill

Process Map

Here is our prospective client experience. Statistics show after seven impressions or points of contact with the prospect response drops significantly and no longer warrants your time, effort or resources.



Grow Your Process Map

Continue to build on your mapping:

- Add how leadership, business development, marketing and operations or technical staff factor in and impact the client journey.
- Consider how data is gathered.
- Who should get the information once it's collected? How?
- Who's responsible for entering the data?
- Where is the data stored? Is it consistently being saved by all users?
- Are there notifications that could be created?
- What can be automated?

Review your maps quarterly so you can:

- Report and celebrate what's working successfully.
- Measure the ROI on your efforts.
- Tweak things that need to change.
- Ensure all automations are working as planned.
- Confirm they still align with your company and department objectives.
- With fresh eyes and advanced technology search for ways to improve.

"If you can't fly then run,
if you can't run then walk,
if you can't walk then crawl,
but whatever you do
you have to keep moving forward.."

~ Martin Luther King Jr.

Data Mapping

Start with the end in mind to determine the data you need and how it should be collected. Here are some prompts to help you begin at the end.

- What report, statistic or metric do you spend time manually creating, calculating or building?
- Is there a repetitive task you do that could be automated or replaced with a report, graph or clear process?
- Could you create a report, process, automation or notification that could reduce frustration, eliminate double work, increase profitability or simply solve a problem for your firm?

Pick one and let's walk backwards to the data we need.

1. Identify the end goal you want to accomplish.
2. What data needs to be exported on the final product, solution or automation?
3. Where is that data housed?
4. Do you have access to it? If not, can you get access?
5. Now that you know where the data should be and you can get to it, determine if it's there. Are the data fields you need populated?
6. If they aren't, how can you gather the data?
7. Once you have the data where it needs to be, how will you produce this report, workflow or notification?
8. Map out the answers in a visual format, regardless of how sketchy or rough.

Don't just take my word for it. Maud Purcell, MSW, LCSW, CEAP is a skilled and seasoned Psychotherapist whose research supports the importance of writing.

> "The act of writing accesses your left brain, which is analytical and rational. While your left brain is occupied, your right brain is free to create, intuit and feel. In sum, writing removes mental blocks and allows you to use all of your brainpower to better understand yourself, others and the world around you."

Data Mapping Example

1. Identify the end goal you want to accomplish.
   - Eradicate double entering our contact information!

2. What data needs to be exported on the final product, solution or automation?
   - Let's keep it simple - First Name, Last Name, Title, Company Name, Email

3. Where is that data housed?
   - We enter this data into Cosential.

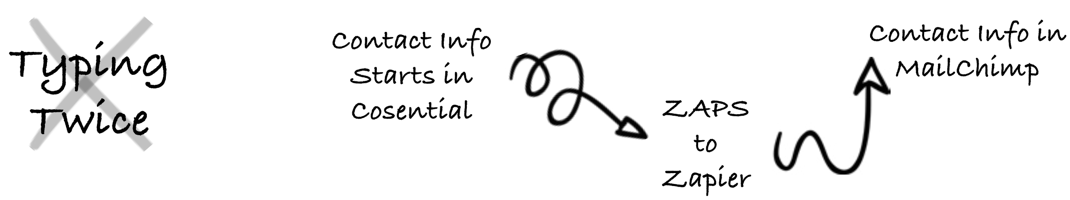
4. Do you have access to it? If not, can you get access?
   - Yes we have active credentials and the ability to retrieve the data.

5. Now that you know where the data should be and you can get to it, determine if it's there. Are the data fields you need populated?
   - After running a report, I learn of the 2,000 contacts in our system 500 are missing emails. Another 1,200 do not have titles, however, every record has a first, last and company name.

6. If they aren't, how can you gather the data?
   - We create an information campaign among the employees to gather the emails needed. We determine titles are not necessary at this time.

7. Once you have the data where it needs to be, how will you produce this report, workflow or notification?
   - Zapier is a service that allows end users to integrate web applications. If we connect our Cosential and MailChimp accounts to Zapier, we can create a ZAP to push contact information from Cosential to MailChimp.

8. Map out the answers in a visual format, regardless of how sketchy or rough.



Your Data Mapping

1. Identify the end goal you want to accomplish.
   -
2. What data needs to be exported on the final product, solution or automation?
   -
3. Where is that data housed?
   -
4. Do you have access to it? If not, can you get access?
   -
5. Now that you know where the data should be and you can get to it, determine if it's there. Are the data fields you need populated?
   -
6. If they aren't, how can you gather the data?
   -
7. Once you have the data where it needs to be, how will you produce this report, workflow or notification?
   -
8. Map out the answers in a visual format, regardless of how sketchy or rough.

Reports

Discover the power to maintain and protect your data integrity with maintenance and audit reports. These reports are simple but powerful when ran regularly. Basically you are looking for missing data and verifying the data that is there. For example, if you do any email marketing you should have a report pulling on contact records with no email address. If you need a list of in progress projects, create a report querying records without a status populated or without a percent complete depending on how you have your data.

Audits are similar in that you look at each fields locating those that are empty, not to populate the data but rather clean house and turn the unused fields off. For example, create a report pulling fax numbers and if empty turn it off.

Title	Time	Type
Maintenance Report :: All projects with no Staff Team	00:01	Projects
Maintenance Report :: All projects with no Completion Date	00:00	Projects
Maintenance Report :: All projects with no Cost	00:00	Projects
Maintenance Report :: All projects with no Architect	00:00	Projects
Maintenance Report :: All projects with no Size	00:00	Projects
Maintenance Report :: All projects with no Contract Type	00:02	Projects
Maintenance Report :: All projects with no Delivery Method	00:00	Projects
Maintenance Report :: All projects with no Firm Org	00:01	Projects
Maintenance Rpt:: Employee IDs	00:01	Personnel
Maintenance Rpt:: Personnel with no Image	00:01	Personnel
Maintenance Rpt:: Companies without Company Type	00:01	Company
Maintenance Rpt:: Contacts without Addresses	00:07	Contact
Maintenance Rpt:: Contacts with No Owner	00:17	Contact
Maintenance Rpt:: Opps with No Firm Org Market Sector	00:10	Opportunity
Maintenance Report :: Contracted with $0 - Open Opps	00:02	Opportunity

What maintenance reports would help increase your firm's data integrity?

1.
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Reports

Calendar. Although Cosential has not yet included a calendar feature in the system, we have you covered with a formatted Excel spreadsheet to produce a printable calendar with all the information you need. Go to our website to download the file: ckearneyconsulting.com/cosentialoptimization.

Gantt Charts. If you would like to have a workload projection gantt chart for all your active and open pursuits, click above link.

The New Cosential for Outlook (CFO)

Cosential is focused on developing CFO, which means new features are constantly being added. To enable CFO, contact your Customer Success Manager. Only Full and CRM users on the current pricing can access CFO (read-only users will get a "No Access" message.)

Review and follow the release notes in the Support Center > General Users > Cosential for Outlook & Ethnos > Cosential for Outlook (CFO) Release Notes. There is a guided tour in the help section of the CFO panel.

Mobile

Cosential CRM is the original app and the Card Reader app is where Cosential is focusing all their mobile development. In the future we will likely see the original app discontinued and all features in the Card Reader app likely renamed Cosential 2.0, or something to that affect.

Accuracy. If you experience inaccurate data change your Scan Quality to High.

Data Issues. If records begin to error, take too long to load, won't load at all or have missing data, select Re-Sync from Settings and download the records.

Re-Install. If the app is glitching or crashing, delete it from your phone and re-install it to clear the issues.

Dashboards

Review optimal widget layouts and formatting.

- Least amount of clicks and typing
- Custom per user or user group to be the most efficient for them
- Quick reference of data
- Don't put similar widgets on the same tab
- Using the Web Browser widget to display a report

Home Page (1st Tab on Dashboard)

- General information
- Shortcut bar locked at the top
- Recently viewed widget
- My Reports
- My Call Logs
- My Tasks

General Business Stats (2nd Tab)

- 2019 Gross Profit Goal vs Actual
- 2019 Sales Goal Gauge
- Open Opps Grid
- Pipeline
- Hit Rate

Segmented Stats (3rd Tab)

- Texas Gross Profit Goal vs Actual
- Texas Sales Goal Gauge
- Texas Open Opps Grid
- Texas Pipeline

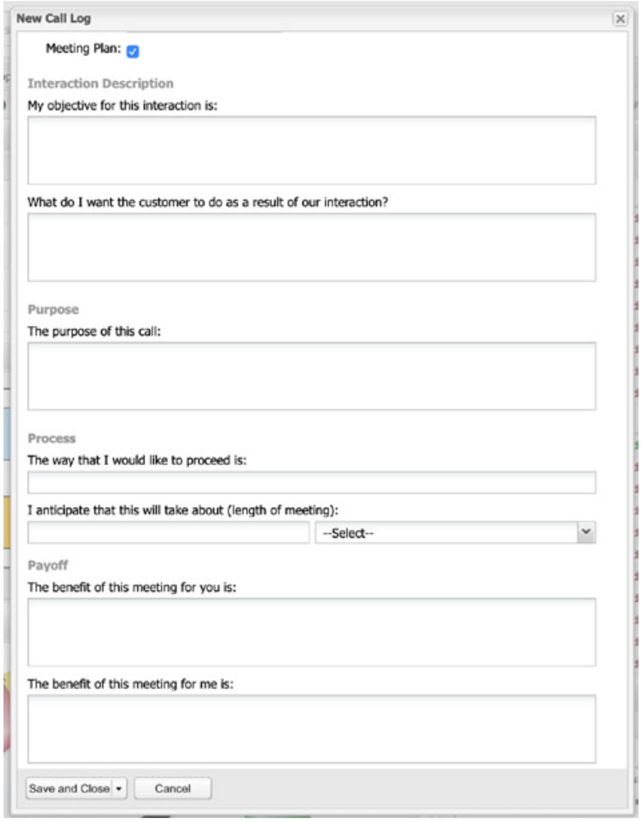
New Features

Product Updates. I suggest following the product update posts in the Support Center to receive notifications of all future changes. Support Center > Product Updates > See All Articles > Click Follow in the upper-right corner.

Products Module. Designed as a basic estimating tool to incorporate cost items within a submittal or cost letter produced through the Publisher Module.

Properties Module. Capture details about a specific location encompassing multiple projects. Properties can be associated to multiple Company, Contact, Personnel, Lead, Opportunity and Project records. Example: If you have several contracts with multiple clients and/or owners at an airport or retail development, you could create a property record.

Account Plan. Used to capture key strategic information about a Company. Most of the data is added/edited in the Account Plan, but some data is pulled from other areas of Cosential. This feature is found on the top right of a Company record once it's installed in your account. The plan now has a 'Printable Summary' button to downloads a PDF of the Account Plan.

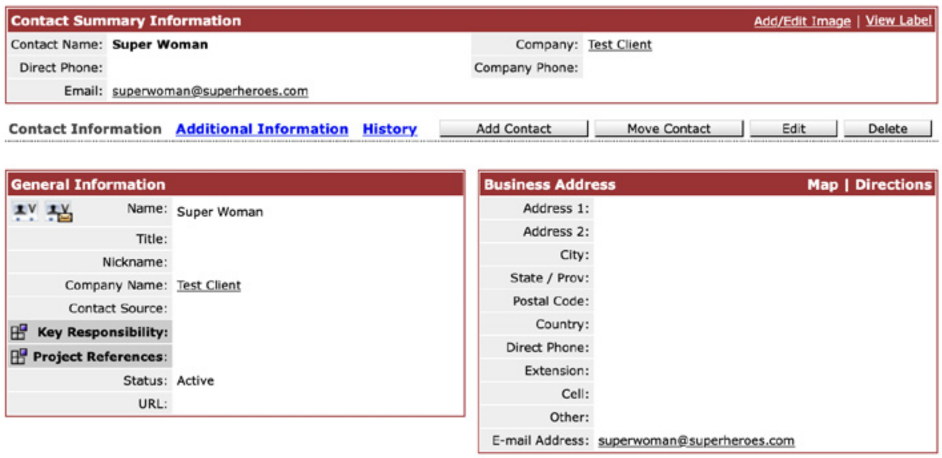


Opportunity Plan. The Opportunity Plan allows you to strategically plan how to win a specific Project. It has a section for strategy, objectives, a SWOT analysis and account relationship information. Note this is <u>not</u> printer-friendly.

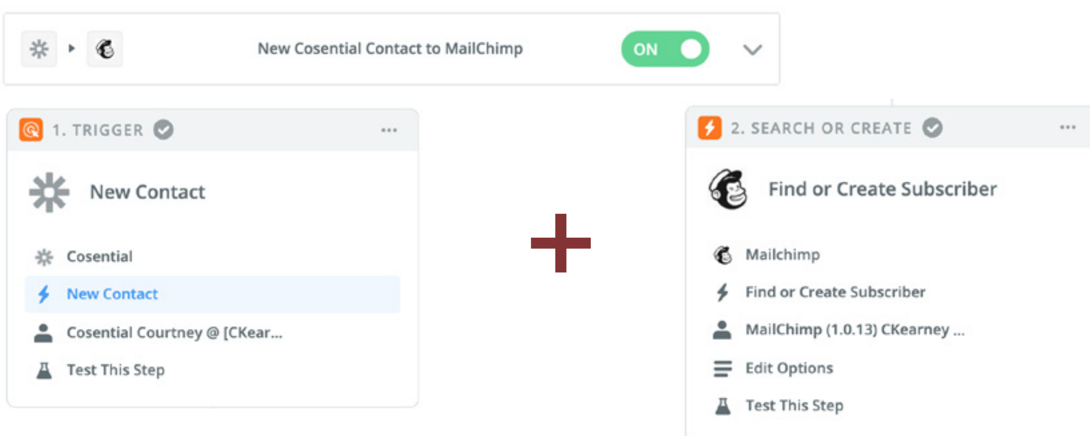
Meeting Plan. When installed the meeting plan checkbox appears at the bottom of new call logs. Once checked a list of dialogue boxes with prompts and questions loads. The downside is that there is not print-friendly option or view.

Automation

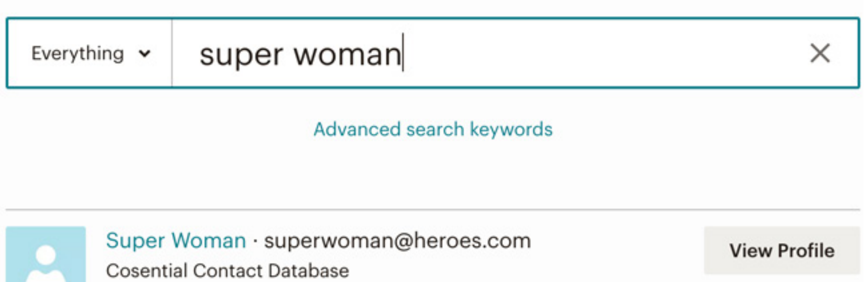
Enter the data in Cosential.



Zapier ZAPS the data to MailChimp.



The contact data is now in MailChimp.



Automation

Maximize the use of workflows for efficiency, communication and automation.
Popular workflows:

- Date triggers on license registrations for the firm and staff to be notified x number of days prior to expiring.
- Notification to accounting when a pursuit is won.
- Notify certain team members when a new lead, opportunity, project or client has been created.
- Project alerts or reminders based on dates, status and/or description.
- Notifications when a certain event, call log or task activity occurs.
- Automate the go/no go form.
  - » Build the form.
  - » Create a workflow to trigger when the score is over a set number.
  - » When the score is above that number an email notification goes to a group of key decision makers.
- Automated project report with a set list of fields at project milestones.
  - » At 25% complete send basic data (dates, dollars, scope, team) to be reviewed and confirmed.
  - » At 50% send additional information (partnering team information, award narratives about innovative technology.)
  - » At 75% send all information to be reviewed and completed .
  - » At 100% complete the project lead signs off on all data.
- If you have client account managers or champions, set a trigger to notify them if anything changes with their client's records.

Here are some additional automation examples to consider:

- Financial Data Connector (FDC)
- Tracking events or contacts in other platforms and/or medias and pushing/ pulling the information to Cosential through API integrations.
- Using third party automation tools like Zapier to send data, Slacks, emails and more based on a set of triggers.

Hands-On

- Account Plan Printable Summary but not on Opportunity Plan
- Project Records
- Add Fields to Project Summary
- Forms
- Opportunity Grid
- Remove Firm Org values from dropdown menu
- Workflows
- Set Action Links
- Headline Summary Reports
- Use Call Logs and Opps to track marketing initiatives
- Use Go/No Go Form in Opps for other purposes
- Tracking which proposal the project was used in on the Publications Tab
- Using the Project Summary: Details as the project close-out forms
- Report of all projects used in a specific proposal
- Completion reports using Publisher
- Personnel and project URLs are not unique so only have one record open at a time
- Contact Manager landing page

Call Logs vs. Tasks

Tasks. Future items that need to be completed.
Call Logs. Records of things that have already occurred.

Objectives

Identify the top three items you want to implement or initiate upon returning to the office. Be specific, denote how you will measure your progress, create milestones and assign an attainable deadline.

1. Objective One. Describe the objective and be specific.

____

____

How will you measure progress? ________________________________

Milestone 1 ______________________________ Due ____________

Milestone 2 ______________________________ Due ____________

2. Objective Two. Describe the objective and be specific.

____

____

How will you measure progress? ________________________________

Milestone 1 ______________________________ Due ____________

Milestone 2 ______________________________ Due ____________

3. Objective Three. Describe the objective and be specific.

____

____

How will you measure progress? ________________________________

Milestone 1 ______________________________ Due ____________

Milestone 2 ______________________________ Due ____________

Thank You

- We appreciate you spending your valuable time investing in your CRM.
- The return on your investment will increase ten fold if you take the objectives from today's workshop back to the office and spend time to implement them.
- Please check out the resources provided to you on our website at ckearneyconsulting.com/cosentialoptimization. There you can:
  - Download the presentation slides and this workbook.
  - Access the Calendar and Gantt Chart documents.
  - Schedule a discovery call to see which of our services best fits your firm's needs.
  - Book a private training session to bring Courtney out to your office.
  - Register for the CRM Users Group call the 2nd Thursday of the month.
  - Register for our Marketing Calls held the 1st Wednesday of the month.
- CKearney Consulting is here for you in any and all ways possible. We want to give you the lifestyle you want, free from the stress of managing social media or a CRM system.

> *"It is a true value to know that someone is on top of our CRM data that we can reach out to at any given moment. CKC was able to fulfill our needs so we no longer have to worry about filling a vacant position and where we would have to train someone from the ground up. They are proactive on bringing information to our attention that needs to be addressed if there is an issue with our system or data."*
>
> ***Jessica Shipley | The Beck Group***