

Managing New Business Prospects

CurrentTrack® enables you to carefully manage new business opportunities as they enter and move through your agency. In this training document, you'll learn how to track Tasks pertaining to an RFP (Request for Proposal), to record time and expenses incurred along the way and, ideally, to recover said costs once you've brought the Client on board.

First, create a Client named "New Business," via the Agency Administration menu (Figure 1).

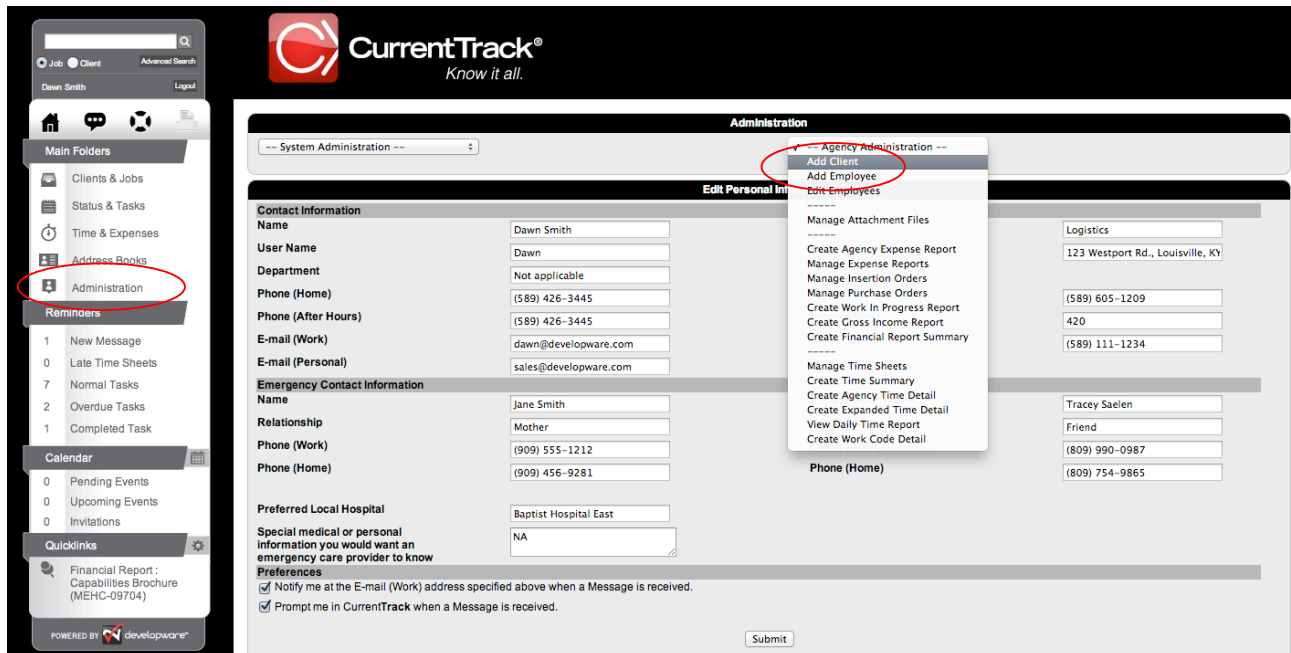


Figure 1

Upon receiving an RFP, or learning of a prospective Client, open a job within the New Business folder (Figures 2-3).

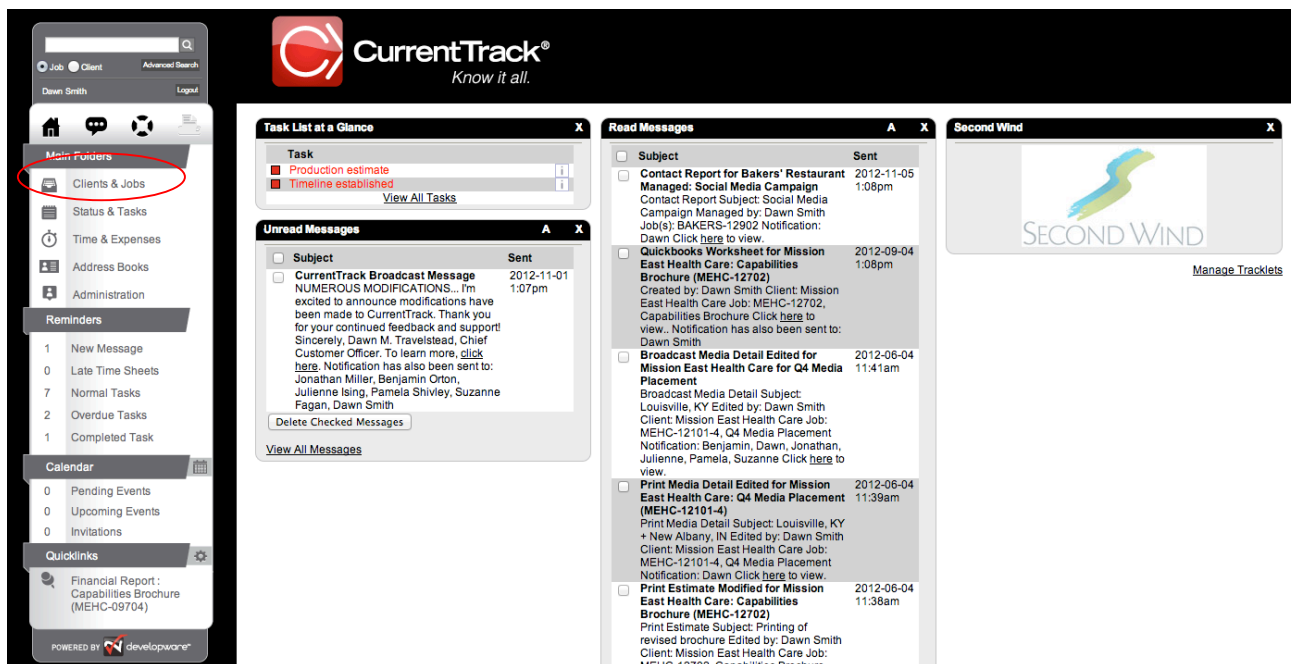


Figure 2

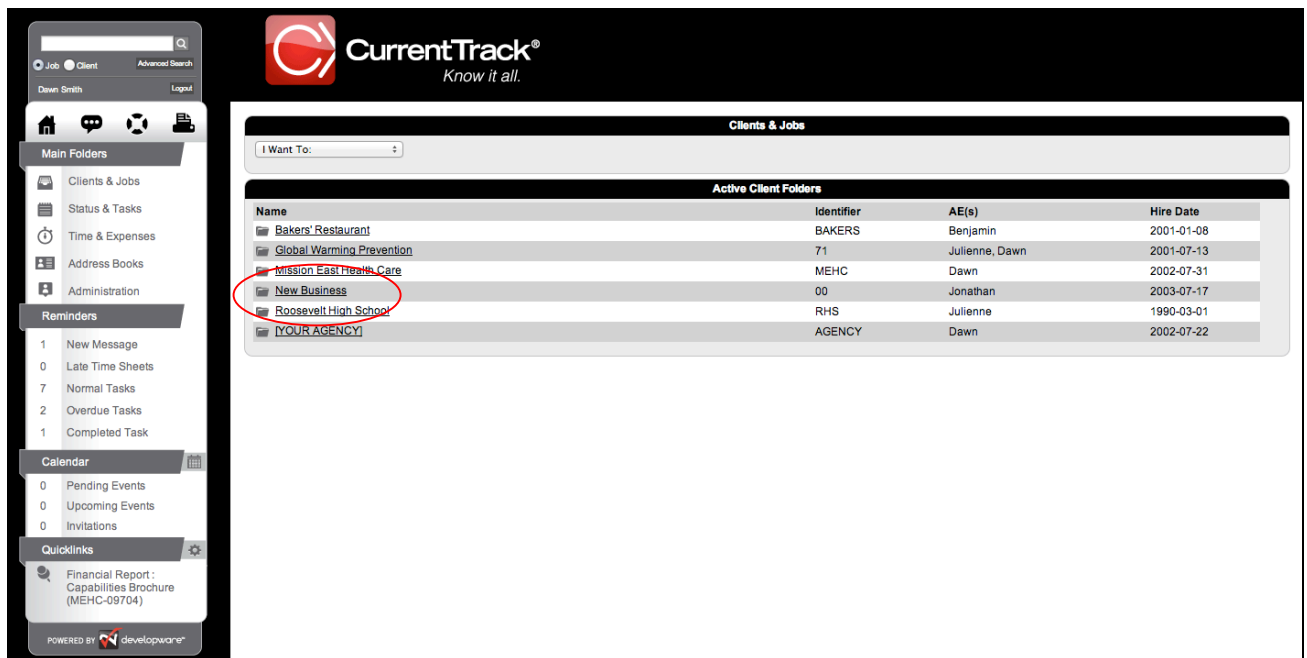


Figure 3

Next, add Tasks to the job's Workback Schedule (e.g. "Call Jim" or "RFP due")(Figure 4); prepare a Production Estimate (if applicable). All active Tasks, because they bear a Status of Working, will appear on the Assigned Task List of the Responsible Employee(s)(Figure 5).

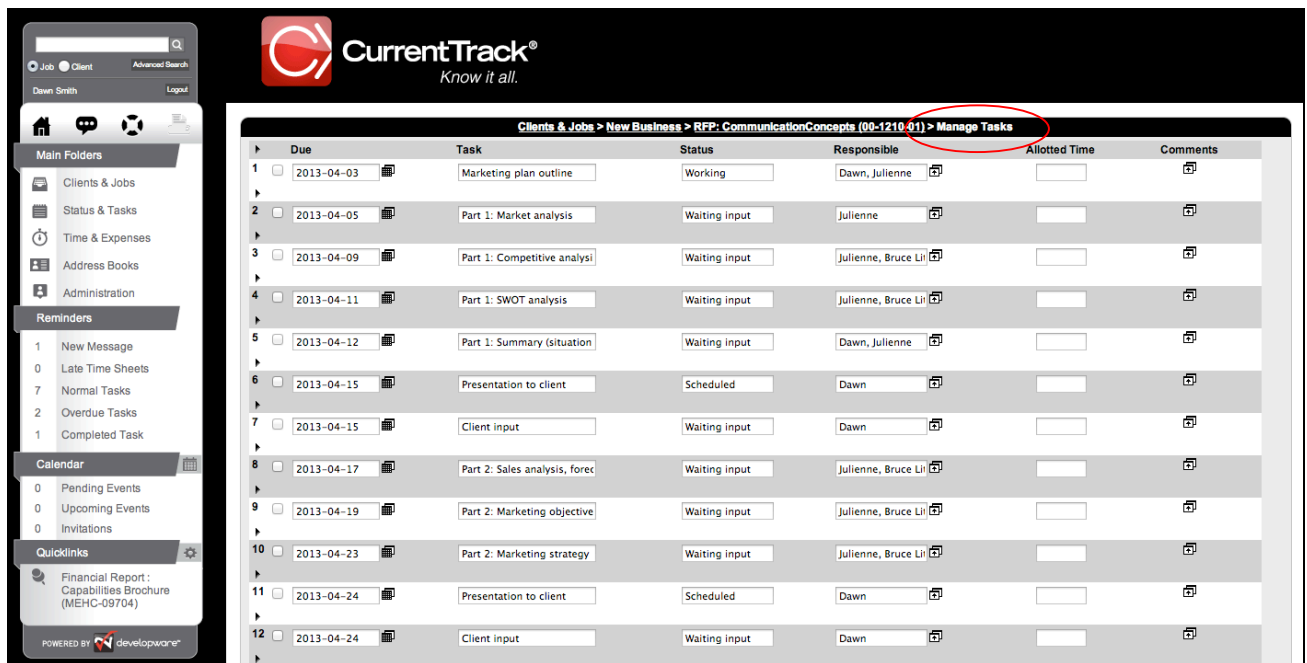


Figure 4

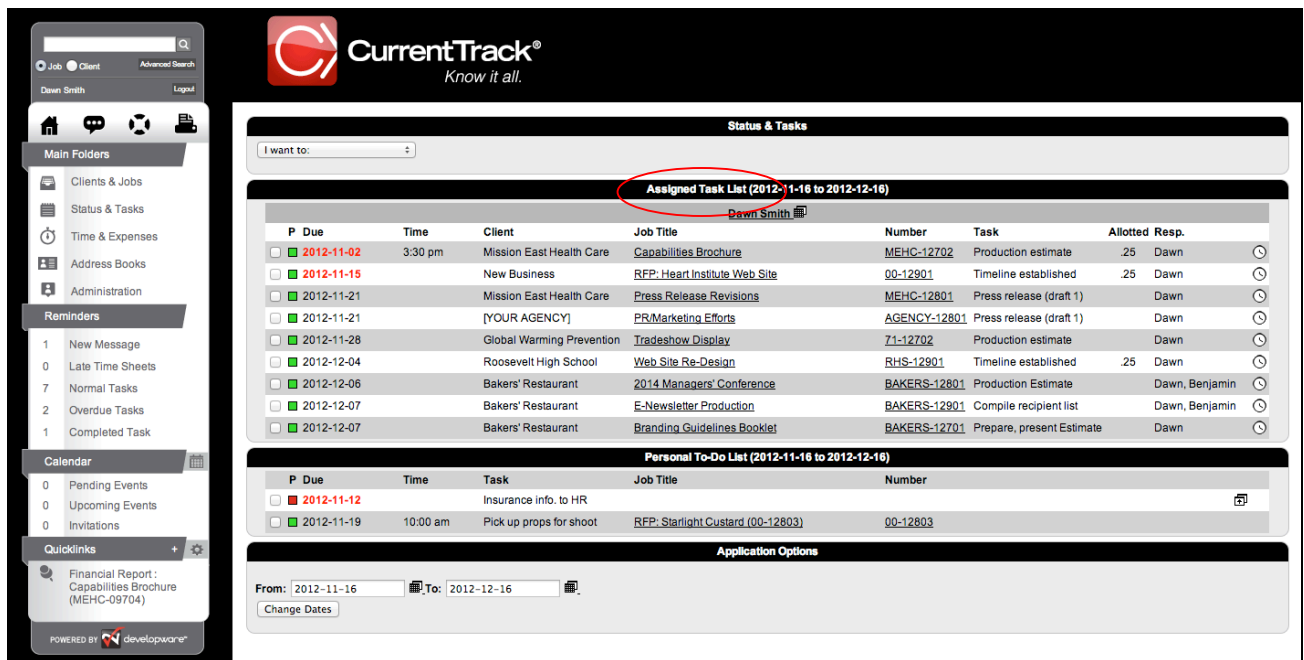


Figure 5

After making a phone call, preparing a proposal, etc., file a Progress Report under the job; cc: internal team members (if applicable)(Figure 6).

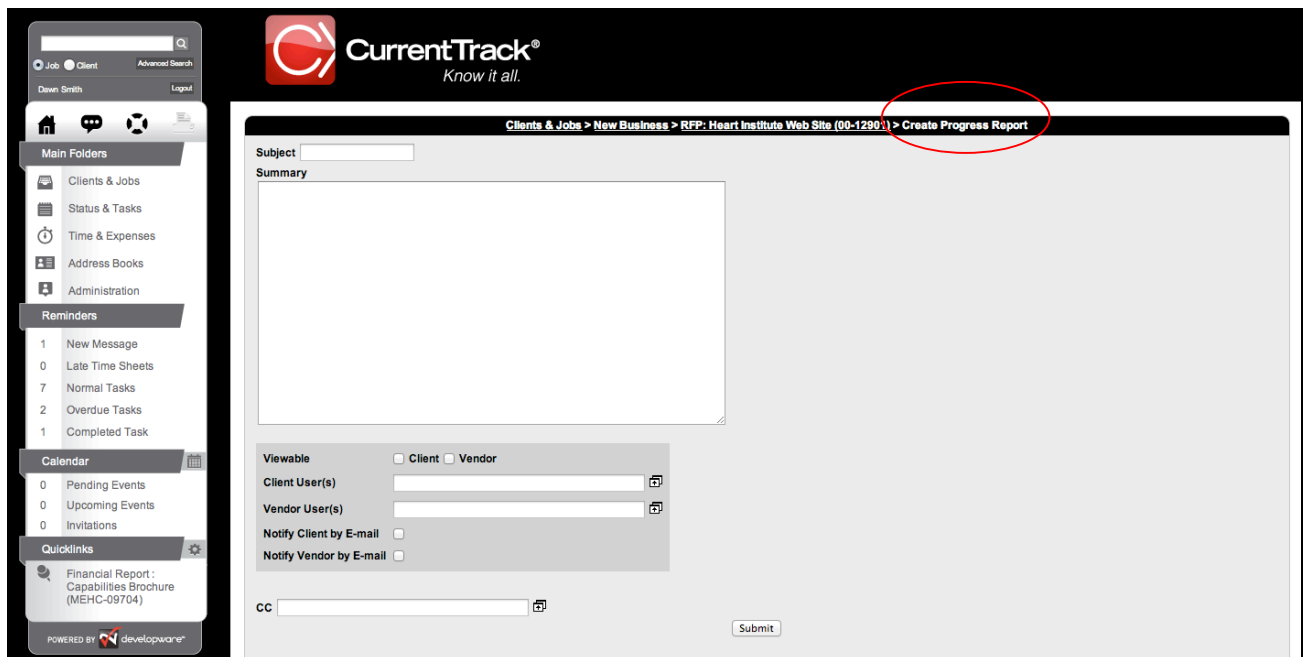


Figure 6

Upon becoming agency of record, create a Client Folder, via Agency Administration (Figure 1); open a new Job Number. Move the contents of the New Business job over to the new Number (Figure 7). All project history (i.e. phone calls, Progress Reports, etc.) will then be available for reference. After moving the job over to the new Number, be sure to delete the New Business job folder (Figure 7).

Job

Client

Advanced Search

Dawn Smith

Logout

Home

Messages

Calendar

Address Books

Administration

Main Folders

Clients & Jobs

Status & Tasks

Time & Expenses

Address Books

Administration

Reminders

1 New Message

0 Late Time Sheets

7 Normal Tasks

2 Overdue Tasks

1 Completed Task

Calendar

0 Pending Events

0 Upcoming Events

0 Invitations

Quicklinks

Financial Report : Capabilities Brochure (MEHC-09704)

POWERED BY

developware

CurrentTrack

Know it all.

Clients & Jobs > New Business > RFP: Heart Institute Web Site (00-12901) > Edit Job

Job Status

Active

Job Jacket Location

Number Change?

☒ None
☐ Just Media Type
☐ Whole Job Number

Job Type

9 - Web / Internet

Media Type

0 - Not Media

Target Job Complete Date

2013-01-15

Change Template?

No Template Change

Template Date Type

Start Date

Template Date

2012-11-16

Include Weekends

☐

Title

RFP: Heart Institute Web Site

Description

Budget

1000.00

Non-billable?

☐

Requestor(s)

Jonathan Radford

(re)CC?

☐

Submit

Application Options

No Command

Move Entire Job to

Delete Entire Job

Move or Delete this job, all data and files associated with this job will also be moved or deleted respectively.

Figure 7

