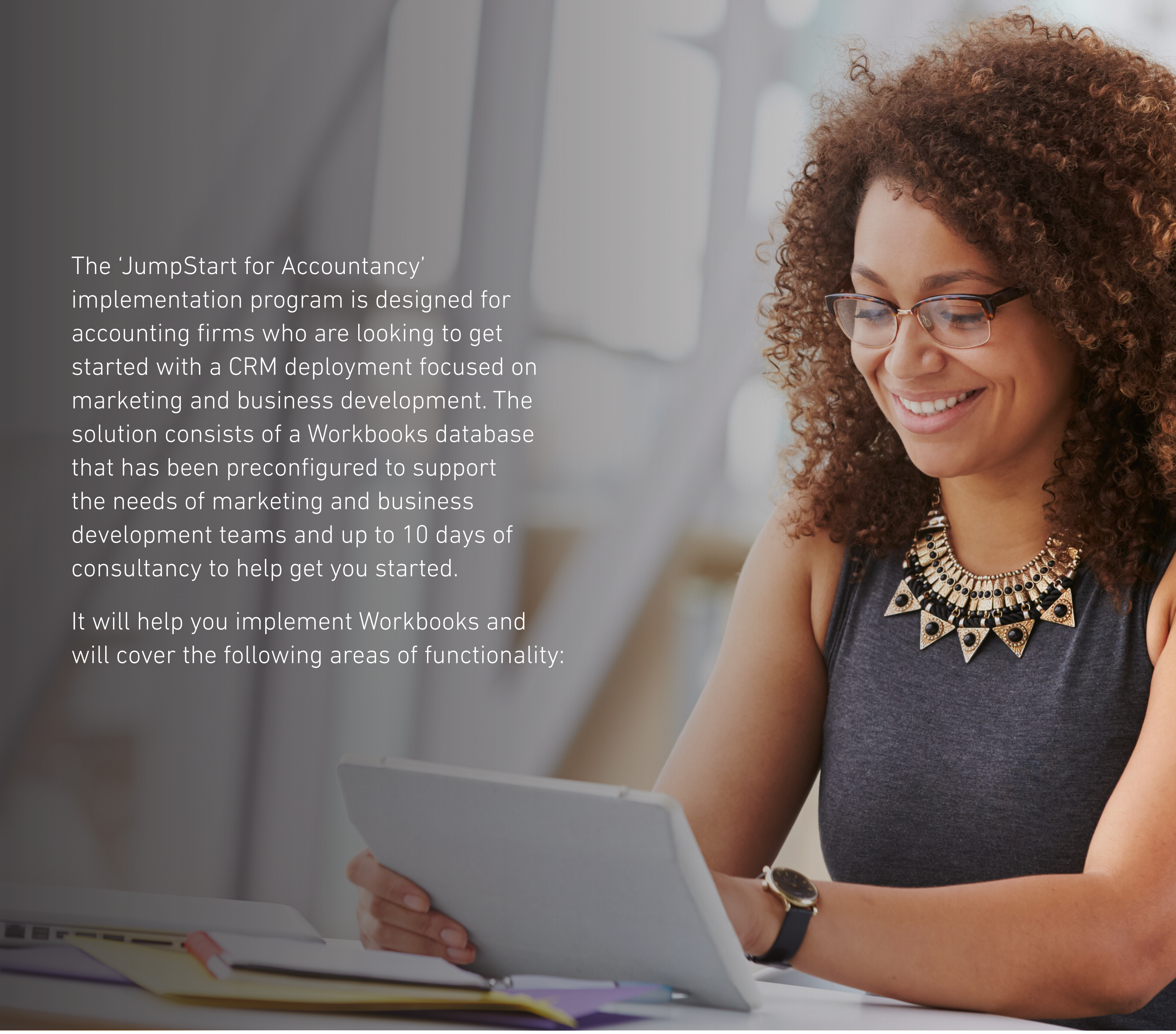
Workbooks.com

JumpStart for ACCOUNTING

Contents

For further advice and guidance please contact Workbooks at **success-usa@workbooks.com** or call +1 860-438-6647.



The 'JumpStart for Accountancy' implementation program is designed for accounting firms who are looking to get started with a CRM deployment focused on marketing and business development. The solution consists of a Workbooks database that has been preconfigured to support the needs of marketing and business development teams and up to 10 days of consultancy to help get you started.

It will help you implement Workbooks and will cover the following areas of functionality:

CONTACT MANAGEMENT

This is a centralized database where you can store information about the organizations and people you do (or plan to do) business with. You can record notes, activity records (such as meetings, tasks and phone calls) and emails against all record types.

Organizations and People records can be flagged as Suspects/Prospects, Clients, and Professional Contacts. In addition, these records include basic profiling fields including Job Role, Annual Revenue, Number of Employees, and Industry/Sector.

The scope of the project includes the option to add up to three additional fields on each record to store additional profiling information. Profiling information can then be used in reports to segment Clients and Prospects.

Integration with Microsoft Outlook (for Windows) or directly to Microsoft Exchange (including hosted Exchange and Office 365) is supported. This will enable you to push emails from Outlook/Exchange to Workbooks and store the emails against the relevant records in CRM. This plug-in also enables tasks, meetings and contacts to be synchronized between CRM and Outlook/Exchange.

CAMPAIGN & LEAD MANAGEMENT

Manage leads generated by your marketing teams and those captured directly from your website. As part of the implementation process, we will train the marketing team to import leads into Workbooks from 'off-line' marketing activities such as events.

The Workbooks database comes pre-configured with a Marketing Dashboard and a set of marketing reports designed to allow you to measure lead flow and ensure leads are followed-up correctly.

Reports include:

- New leads created by month, by campaign
- Open leads with no follow-up activity
- Leads converted into opportunities
- Opportunity pipeline by campaign
- Closed won opportunities by campaign

BUSINESS DEVELOPMENT & PIPELINE REPORTING

Your Workbooks database is pre-configured with a record to manage opportunities, including all the reports you need to track your pipeline and produce a forecast.

It enables you to record the details of the deals your business development team are working on, including:

- Close date, opportunity stage and percentage probability
- Services to be sold, including standard pricing if appropriate
- Organizations and people related to the opportunity
- Overall opportunity value and gross margin

All open Opportunity records should have an Activity record, describing the next step in the process with an appropriate due date. This combination of Opportunity and Activity records is what drives the process to ensure all deals are being proactively followed-up.

The pre-built database includes a Dashboard to provide an overview for each business development executive on their activities and pipeline. The Dashboard includes the following reports:

- My opportunities and activities, sorted by due date (action report)
- My achievement against target
- My pipeline, by stage, by month or quarter
- My opportunities with no next step (exception report)
- My leads with no next step (exception report)

The following management Dashboards are also included:

- **Business Development Dashboard**: A collection of reports that provide visibility of performance and pipeline by team member including:
  - Performance (closed won opportunities) by month or quarter, against target, by business development executive
  - Pipeline by business development executive by stage, by month or quarter
  - Opportunities with overdue or no activities (exception report)
  - Conversion rate by business development executive for the year
- **Adoption Dashboard**: Reports designed to ensure users are using the CRM solution appropriately, including:
  - Activities created by week/month
  - Opportunities created by week/month
  - Sales leads created by week/month
  - Emails sent by week/month
- **Pipeline Analysis Dashboard**: Reports designed to provide insight into movement within the pipeline, including:
  - New opportunities to Stage 0
  - New opportunities to Stage 1 (pipeline)
  - Pipeline by deal size (small, medium, large)
  - Opportunities lost this month
  - Opportunities qualified-out this month
  - Lost and qualified-out opportunities summarized by lost/qualified-out category

IMPLEMENTATION *approach*

Our ‘JumpStart for Accounting’ implementation approach is designed to get your firm using the platform within 6 weeks. The implementation begins with a 1 day workshop to ‘walk-through’ sales and marketing best practice.

This is followed by 2 days to setup the CCH Central integration, a day to build an HTML template/Preference Centre, a day to configure an event, and 3 days to train the business development and digital marketing teams.

This timeframe provides adequate preparation for preparing Suspects/Prospects, Clients, and Professional Contacts to be imported into the Workbooks system.

A typical timetable will be as follows:

Day	Activity	Description
Day 1	Best Practice Workshop	Typically held at your premises, this workshop is designed to kick-off the implementation process, agree roles and responsibilities, and schedule the project's key milestones. Thereafter we will walk-through sales and marketing best practice with the core project team and agree any minor configuration changes to the Workbooks system – e.g. picklist values, custom fields and so on.
Days 2 & 3	CCH Central Data Integration	As CCH Central is 'on-premise' software installed locally on your firm's own servers, a further day on-site is required to setup the integration with Workbooks. This includes a review of the fields to be extracted and synchronized and the initial extraction of the data. Once your data team has populated the import templates provided by Workbooks it can be shared with your Implementation Consultant to perform the import (off-site, on day 3).
Days 4 & 5	Marketing Automation	Workbooks will use these days to build a single HTML template (from either an existing email marketing tool or a completely new design), a Preference Center that allows your target audience and prospects to subscribe to the content they are most interested in, and the configuration of a free or paid event to use as the basis for training your event management team.
Days 6 to 8	End User Training & Go-Live	Workbooks will deliver a day's training specifically for the business development team and a further day scheduled later to follow-up and present the key reports and dashboards to the Partners. Furthermore, a day's training will also be arranged for the marketing and events team.
Day 9	Assignment/ WIP Data	This is an optional day to setup the automated import of Assignment/ WIP Data from CCH Central into Workbooks via an SFTP Server. Client billings can be displayed in the CRM graphically to easily identify your most profitable clients and what each Partner is writing-off.

Please note: The final day of consultancy will be used to manage the project schedule and implement any changes to the configuration as discussed at the Best Practice Workshop.

PROJECT
scope & cost

PROJECT SCOPE

The scope of the implementation as defined in this document is for the following record types:

- Organization records
- People records (connected as employees to organizations)
- A simple product/services book
- Opportunity records + line items
- Campaign/event records

All other record types are excluded from the scope but may be included if the customer purchases additional consultancy days.

The customer is responsible for populating the Excel templates Workbooks provides with the necessary data for import. Customers should take care to ensure the templates are correctly populated and fields validated.

PROGRAM COSTS

The total cost for the 'JumpStart for Accounting' program is $12,600 (or $14,000 if Assignment/WIP Data is included) + VAT + Expenses.

Expenses will be charged in line with our standard policy, set out in our **terms of service**.