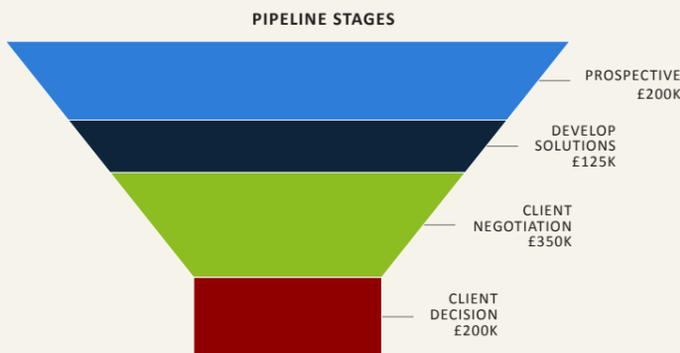




THE AGENCY WORKS

synergist®

SYNERGIST – YOUR NEW BUSINESS TOOL



POWERFUL AND EASY

Synergist makes tracking opportunities simple, helping your new business team focus on converting them into live work. Having opportunities within Synergist along with the rest of your company's key data gives a far more robust and powerful solution than spreadsheets, whilst ensuring it's easy to keep up to date.

Reports include | Forecasts based on expected, weighted or gross profit values | New or lost business from prospects | Repeat or new business from existing clients | Pipeline reporting.

Flexible reporting possibilities can be easily extracted by organisation, team, handler or even by market sector or source.

FEATURES



- Create your own ratings e.g. Hot / Cold or Red / Amber / Green
- Track won and lost opportunities
- Track the source of the opportunity e.g. referral or web enquiry
- Report on monthly forecasted figures reported via the data viewer
- Deadened opportunities can be reported on with the reason they were lost e.g. lost to price or competitor
- Opportunities can be created for existing clients or prospects

USAGE



- MDs
- New Business Team members
- Account Directors

PRIMARY BENEFITS



- Data feeds into one live system, accessible in or out of the office
- Natural progression from Prospect to Client status
- Avoids duplicate data
- Customisable fields for rating, contacts, market sector etc.

IMPACT ON COMPANY



- Having the team's live forecast of pipeline business on hand each day is an enormously powerful tool to help make informed decisions on staffing levels, investment, pitching and promotional activity
- Focuses everyone's mind that they can take some responsibility for new business either from prospects or existing clients

SPINOFF BENEFITS



- Enables targets to be reported against
- Valuable data is retained when prospects are promoted to clients
- Capacity forecasting on new business
- Tracking pitch costs

KEY WORDS

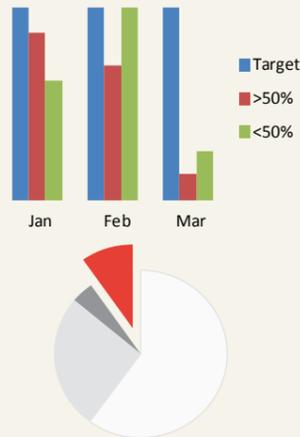


- Forecasting
- Budgets
- Tracking won or lost opportunities
- Revenues
- Targeting

CLEVER STUFF



- Track new business and the activity that leads to it — cold calls, emailshots, conversations, meetings, pitches
- Track opportunity forecasts against targets. See at a glance which projections have a +50% chance of fruition
- Pivot the reporting by client, market sector or team or by account handler, source or rating



BIG PICTURE



Synergist is recognised as the leader in managing time, jobs, projects, purchases, invoicing and so on. So it's easy to overlook the fact that it's a New Business tool as well.

Managing the level of business coming into the agency is key to ensuring that the cost and profit requirements are being met. Without a robust process and reporting, an agency will never have a clear indication of its real position.

Implementation and consultation by

synergist®

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