CRM Launch

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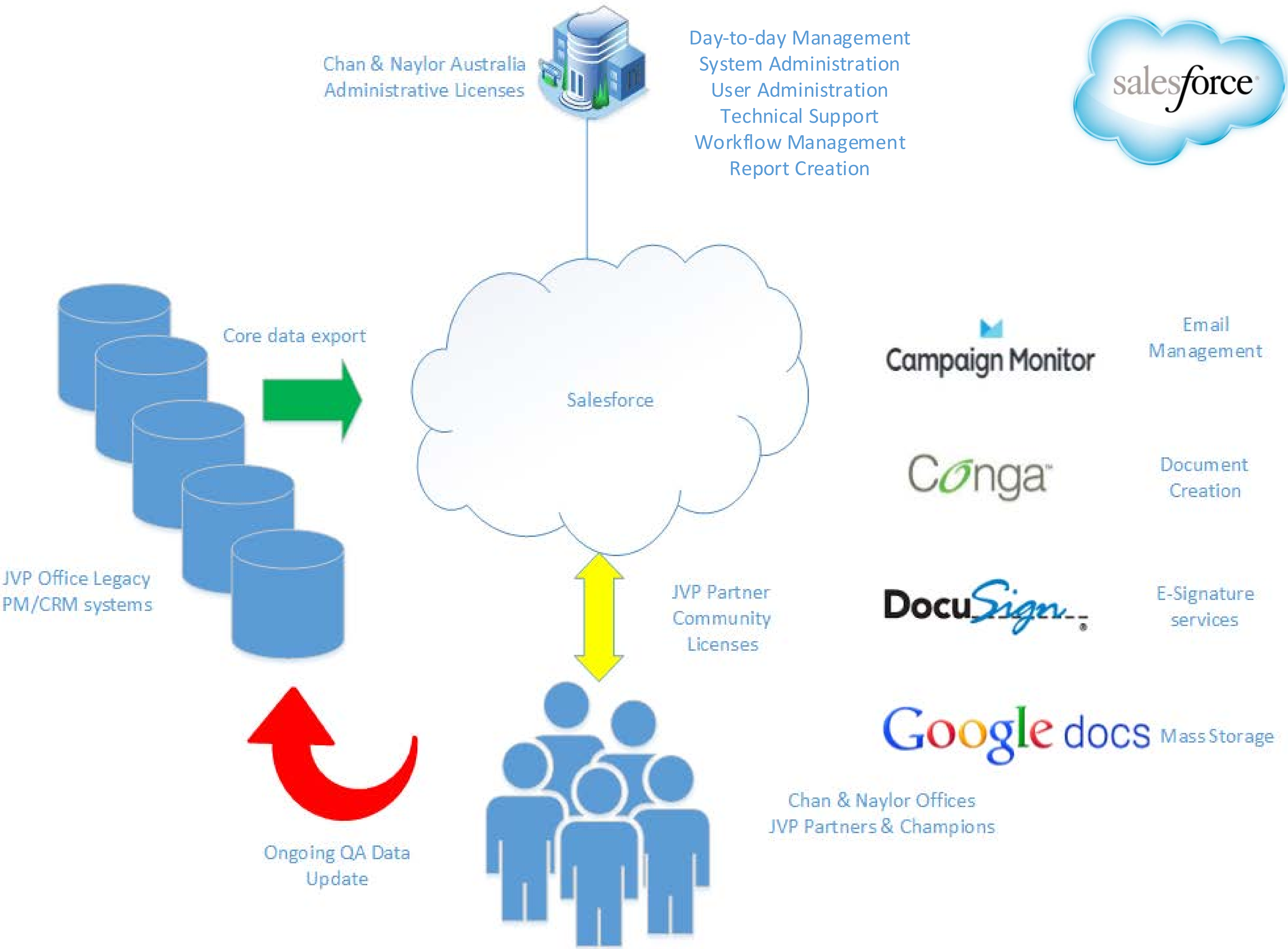
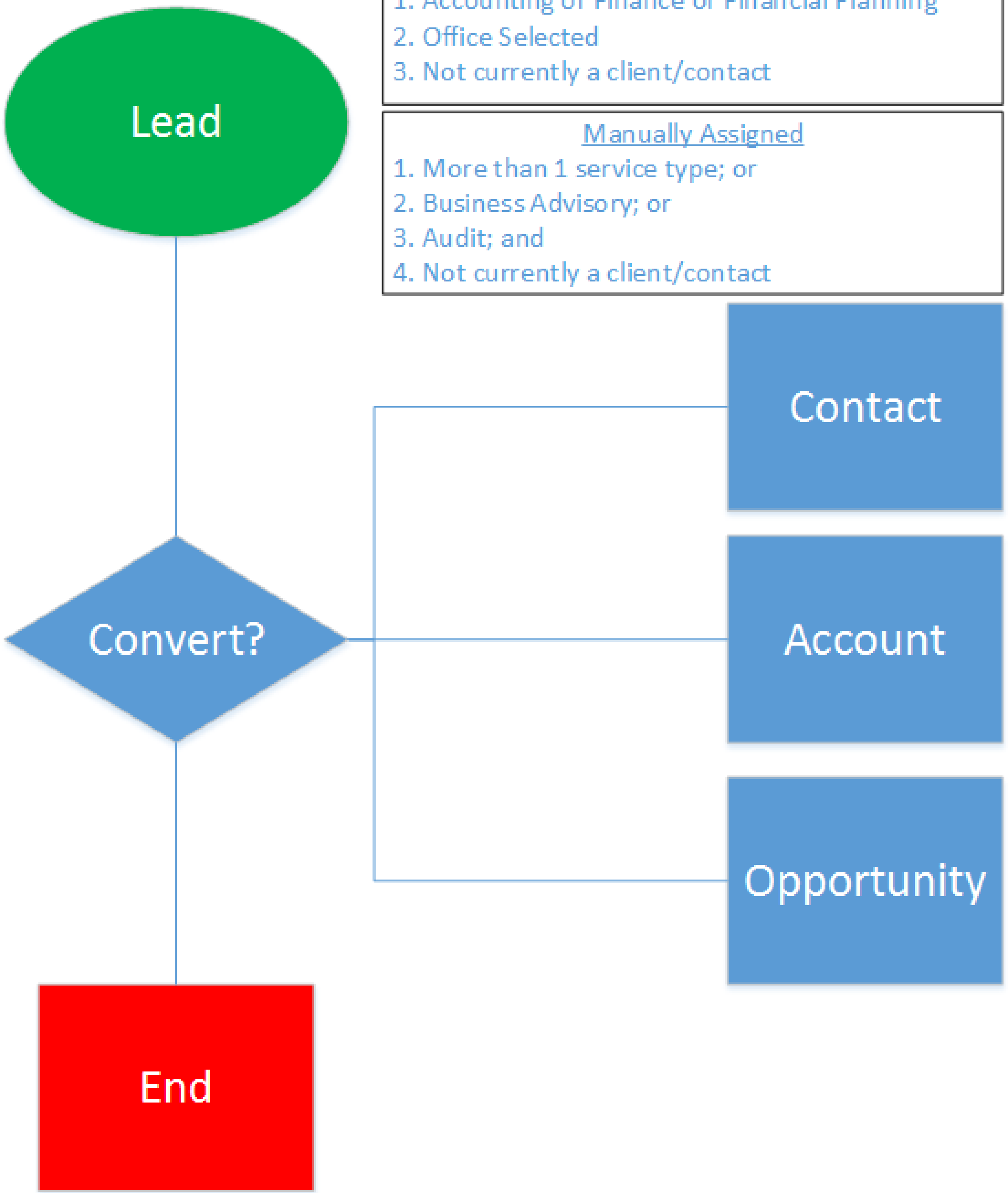
- Glossary of Terms
  - Web to Lead Forms: Automatic Assignment Rules
  - Lead
  - Contact = Individual
  - Account = Entity/Company/Trust
  - Opportunity: Closed Won / Closed Lost
  - Service: Ability to refer internally & limited share
  - Partner Community – Security for record ownership
  - Chatter (Collaboration & Support)



Chan & Naylor Australia
Administrative Licenses
Day-to-day Management
System Administration
User Administration
Technical Support
Workflow Management
Report Creation
salesforce
Core data export
Salesforce
Campaign Monitor
Email
Management
Conga
Document
Creation
DocuSign
E-Signature
services
Google docs
Mass Storage
JVP Office Legacy
PM/CRM systems
JVP Partner
Community
Licenses
Chan & Naylor Offices
JVP Partners & Champions
Ongoing QA Data
Update



Automatically Assigned

1. Accounting or Finance or Financial Planning
2. Office Selected
3. Not currently a client/contact

Manually Assigned

1. More than 1 service type; or
2. Business Advisory; or
3. Audit; and
4. Not currently a client/contact

Lead Scoring

Based on responses to Web to Lead form
Out of 20 for Core 3 services
Out of 14 for BA/Audit
Represented as a % to assist with prioritisation

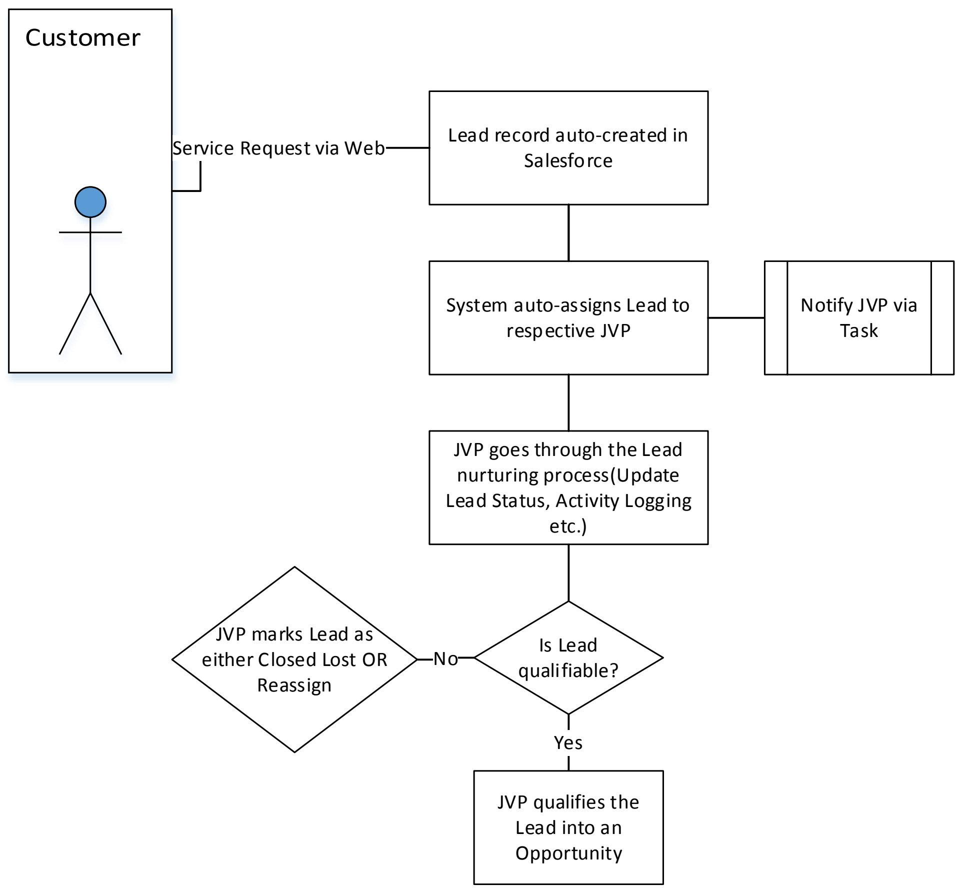
Email Templates

1. Auto Email responder (Lead Submission)
2. 3 day reminder notification
3. 5 day reminder notification
4. Change of Ownership notification
5. Update Legacy system data request

Reporting

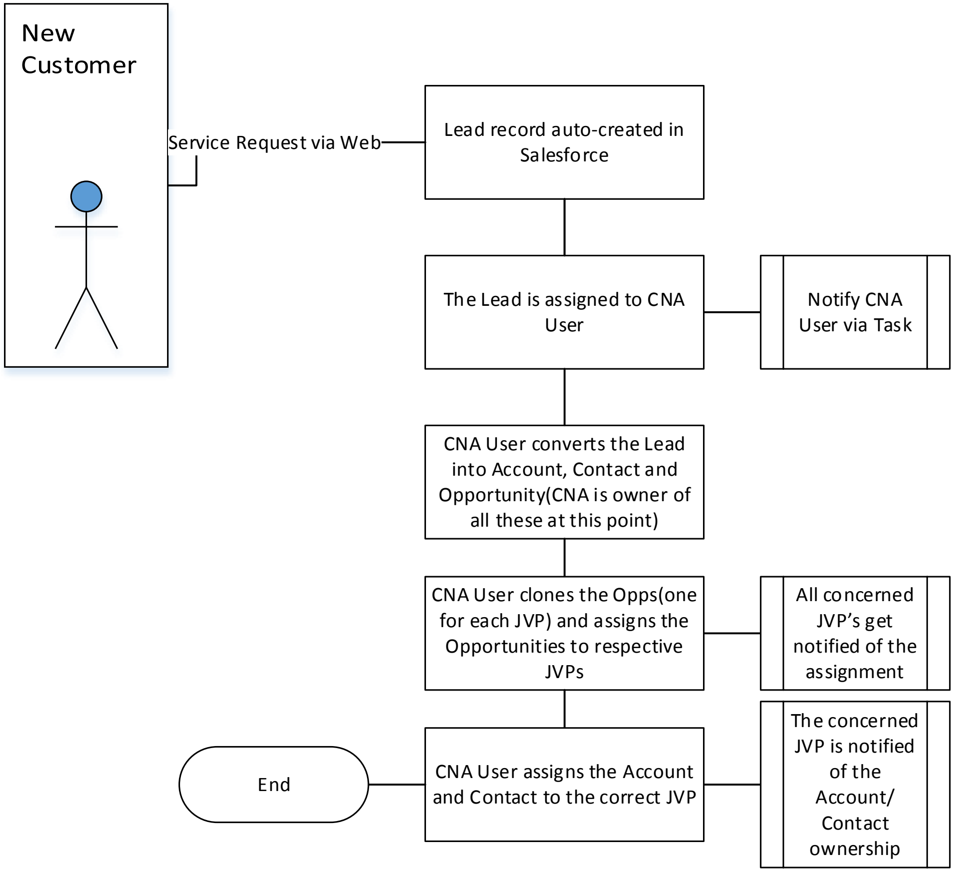
1. Sales Conversion Rate
2. Lead Close Rate (Success & Fail)
3. Opportunity Pipeline
4. Lead by Source
5. Opportunity by State, by JVP, by Revenue
6. Quarterly/Annual report for alliance partners
7. Subscription Status

Lead Scenario #1



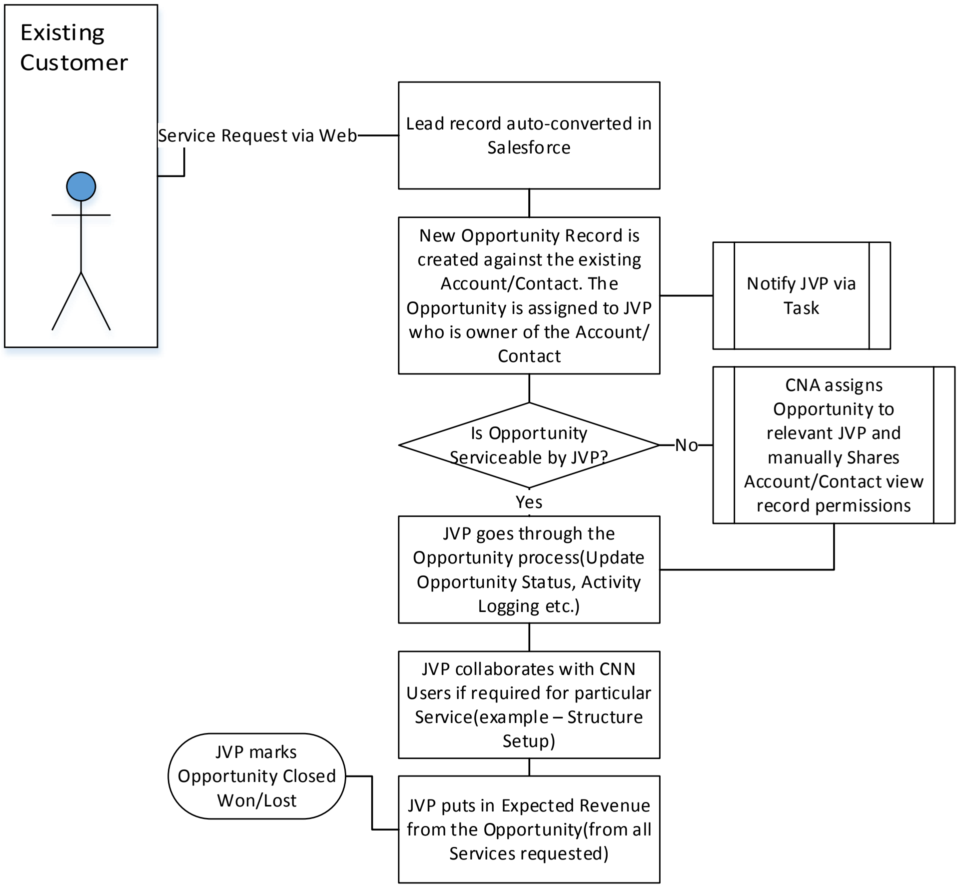
USE CASE: NEW CUSTOMER REQUESTS SERVICE(S) OF SAME TYPE

Lead Scenario #2



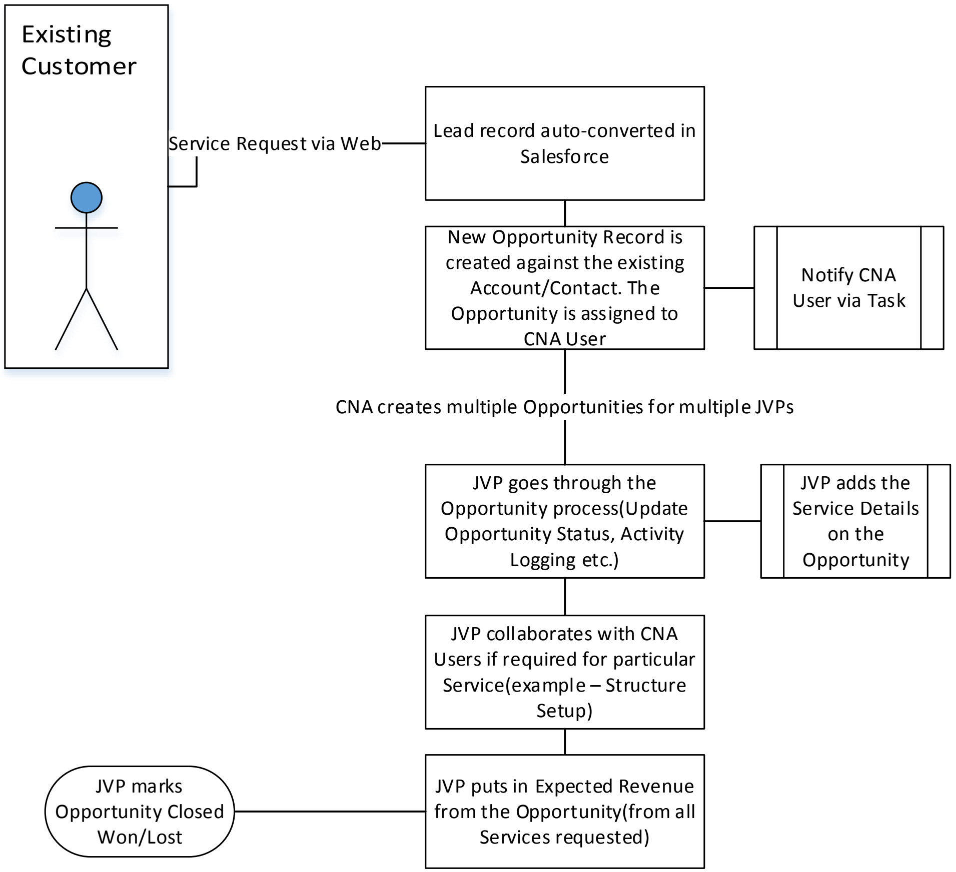
USE CASE: NEW CUSTOMER REQUESTS SERVICE(S) OF DIFFERENT TYPES

Opportunity Scenario #1



USE CASE: NEW CUSTOMER REQUESTS FOR SERVICE(S) OF SAME TYPE

Opportunity Scenario #2



USE CASE: EXISTING CUSTOMER REQUESTS SERVICES OF DIFFERENT TYPES

Monitored Fields

No.	Type	Field Name	Action
1	Contact Detail	Contact Owner	Email Client Manager for PM update
2	Contact Detail	Name	Email Client Manager for PM update
3	Contact Detail	Casual Name	Email Client Manager for PM update
4	Contact Detail	Job Title	Email Client Manager for PM update
5	Contact Detail	TFN	Email Client Manager for PM update
6	Contact Detail	DOB	Email Client Manager for PM update
7	Contact Detail	Date Deceased	Email Client Manager for PM update
8	Contact Detail	NLC Date	Email Client Manager for PM update
9	Contact Detail	Account Name	Email Client Manager for PM update
10	Contact Detail	Client ID	Email Client Manager for PM update
11	Contact Detail	Group ID	Email Client Manager for PM update
12	Contact Detail	CN Home Office	Email Client Manager for PM update
13	Contact Detail	CN Partner	Email Client Manager for PM update
14	Contact Detail	CN Client Manager	Email Client Manager for PM update
15	Contact Detail	CN Staff	Email Client Manager for PM update
16	Contact Detail	Phone	Email Client Manager for PM update
17	Contact Detail	Mobile	Email Client Manager for PM update
18	Contact Detail	Fax	Email Client Manager for PM update
19	Contact Detail	Home Phone	Email Client Manager for PM update
20	Contact Detail	Email	Email Client Manager for PM update
21	Contact Detail	Mailing Address	Email Client Manager for PM update
22	Contact Detail	Newsletter Subscription	Email Client Manager for PM update
23	Account Detail	Account Owner	Email Client Manager for PM update
24	Account Detail	Account Name	Email Client Manager for PM update
25	Account Detail	ABN	Email Client Manager for PM update
26	Account Detail	ACN	Email Client Manager for PM update
27	Account Detail	SFN	Email Client Manager for PM update
28	Account Detail	Phone	Email Client Manager for PM update
29	Account Detail	Email	Email Client Manager for PM update
30	Account Detail	Billing Address	Email Client Manager for PM update

Changes to of any of the above fields will generate a notification to the record Owner