A Guide To Using CIS CRM
The Principles of Using CIS CRM
CRM functionality gives you the tools to track and manage all of your CIS project leads whether you are a manager, single user or part of a larger team. With CIS CRM you can also stay up to date with client (and competitor) activity.

1.1 USING CIS CRM EFFECTIVELY
The journey from turning opportunities into new business begins with your search profile – setting out clearly what projects your company are interested in. It is important to define and prioritise your profile in terms of the sectors, regions and stage of project lifecycle that present you with the best opportunities.

By doing this you will be able to streamline the large volume of project leads available into a manageable set of candidates for your business.

Having a profile that is too wide in scope will yield too many leads and quickly become unmanageable.

The other important element of making CIS CRM work efficiently for you is time. You need to set aside time each day or week to keep your pipeline up to date and manageable.

Getting your profile right and spending a little time each week on your prospects will make CIS CRM an effective tool in generating new business opportunities. The CIS team are always on hand to help you define your profile.

1.2 THE CIS SALES CYCLE
Once you have defined your profile and are receiving regular details of relevant projects through your saved searches then by following these steps you can be sure that your pipeline is up to date in terms of yielding you the best quality opportunities.

1. Track Projects & Set a Recall Date
Look at new leads presented by your profile and track those that you feel offer an opportunity. Decide what action you are going to take on these opportunities and set a recall date for that action or for any future action.

2. Action alerts from CIS
Once you track a project CIS will monitor it and send you an alert if anything significant changes. For example if the project goes out to tender or if planning is decided. When you receive these alerts you can look at the tracked project and decide if the change in the project’s status warrants any action on your part. As this is a tracked project you will already have a future recall date set and actions to take and it may be that these are sufficient regardless of the change in project status.

3. Action Projects Due for Recall
From your tracked project list you will quickly see which projects are due for recall. By examining your project notes you can take the appropriate actions. After making notes on your latest actions you can then set a future recall date for the project or, if it no longer represents and opportunity, you can stop tracking the project and record an outcome i.e. Contract Won, Contract Lost or whatever reason you have for no longer tracking it.
Tracking Projects in CIS CRM
2.1 TRACKING AND ASSIGNING PROJECTS

Begin tracking projects using CIS CRM by searching for projects you may be interested in or use one of your predefined saved searches. From the results list you will see that you have the option to track any of the projects.

- To track a project and assign it to yourself simply click the Track Project button
- If you have administrative privileges you can track and assign projects to other members of your team
- If a project is already tracked by one of your colleagues you will clearly see this from the list
- Tracking projects from the Project listing will automatically assign a recall date for the current day’s date.

The Project Listing above may not have enough information for you to decide if you want to track a particular project or not. In such cases you will have to click on the project title to look at the project details to learn more.

As with the project listing the facility to track the project is available. Once you click the Track Project button the CRM information becomes available for you to record your own specific project details.
2.2 RECORDING YOUR OWN PROJECT DATA

**€5m - Medical Centre**
- Midlands Regional Hospital, Block Road, Portlaoise

<table>
<thead>
<tr>
<th>PROJECT ID</th>
<th>DATE UPDATED</th>
<th>COUNTY</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>770042</td>
<td>13/03/2015</td>
<td>Co. Laois</td>
<td>€5,000,000 (Estimate)</td>
</tr>
</tbody>
</table>

**MY PROJECT DETAILS**
- **Assigned To:** Linda Moloney
- **Recall Date:** 8/02/2016
- **My Project Notes:**

**PROJECT DESCRIPTION**
13th March 2015: Main Contractor Purcell Construction, Co. Galway has been appointed for the construction of a new two-storey building providing a new acute medical assessment unit (amau) and day services unit together with new link corridor within the existing main hospital building with total gross floor

**Assigned To:** Shows who the project is assigned to. If you have administration privileges you can change this assignment to another member of your team.

**Known As:** You can give the project a meaningful name which will be used throughout the site instead of the CIS project name.

**My Project Notes:** Here you can record your own project notes which will be available for anyone in your company to see. Use this section to share information which will be useful to you and your colleagues.

**Recall Date:** When you are tracking a project you are required to have a Recall Date which is the date you next want to take and follow up action on the project.

**My Value:** Here you can enter the project value in terms of the financial opportunity to your business.
2.3 SETTING RECALL DATES

Setting recall dates on projects is central and essential to tracking and managing your pipeline of opportunities. Deciding to track a project means that it represents an opportunity. To progress that opportunity you will need to take some action on it. It may be a phone call to an architect or contractor initially. Based on the feedback you get and the intelligence you gather you will need to set a future recall date for further actions.

Many projects have very long timeframes and it can be difficult to remember your conversations and actions for projects you have not been working on for several months. By keeping this intelligence within CIS CRM you and your colleagues are up to date and can quickly get up to speed on pursuing the opportunity.

By recording your notes on past and future actions and setting recall dates for your projects you will easily manage your pipeline of opportunities using CIS CRM.

The key to success in this regard is spending a little time each day on your pipeline. Leaving it even a week or two can render it unmanageable or at least require several hours of valuable time to get it back in shape. Again we cannot stress enough the importance of having a good profile to begin with so that your choice from the available leads is manageable.

2.4 RECORDING NOTES AND ACTIONS

There are two areas in which you can record notes in CIS CRM.

My Project Notes
My Project Notes allows you to record general information about a project. This can be an ‘at-a-glance’ overview or other useful information about the project. If you are working as part of a team this sort of shared information can be very useful. For the company it means that the value of the knowledge and experience of individual users can be shared by everyone.

My Project Activity
Recording a note in My Project Activity keeps a chronological record of all your actions and interactions in your pursuit of a project opportunity. This allows you to quickly see what the latest action your (or a colleague) has taken on a project and an indication of what needs to be done next.

To see the complete list of project activity click View All Activity.
2.5 SETTING PROJECT OUTCOMES
At some stage during your pursuit of a project lead a point in time will arrive when you will know whether you have won the contract or not.

Winning an Opportunity
When you win an opportunity you may still want to use CIS CRM to continue to track the project so you can use the system to fulfill the obligations of the contract. However for analysis purposes it is still useful to record that the contract has been won.

To do this click the **Set Outcome** button and record the relevant details:

**Project Outcome:** Options are Won, Lost and Other. If the contract is not won or lost then use ‘Other’ to specify your reason for no longer tracking the project

**Outcome Notes:** Record any relevant notes based on the outcome of the project. This can provide useful information when analysing all of your project outcomes.

**Outcome Date:** The date you won, lost or stopped tracking the project.

**Stop Tracking:** If you have won the project you may wish to continue to track it for the purposes of fulfilling the contract. In all other you will stop tracking the project to remove it from your pipeline.

Losing an Opportunity
Even the loss of an opportunity to a competitor can still provide useful information for you and your colleagues. By analysing outcomes you can often discern trends that provide useful information when pursuing future contracts. e.g. Do your lost contracts seem to be in a particular region? Are they with a particular developer, contractor or architect? Are you consistently losing contracts to the same competitor?

Other Reasons to Stop Tracking a Project
Besides winning or losing a contract there can be many other reasons why you no longer need to track a project lead:

- Project has been cancelled
- Not the opportunity you first perceived it to be
- Specifications are locked
- Too costly to pursue
Viewing and Managing Your Pipeline in CIS CRM
3.1 WORKING WITH YOUR PIEPLINE

The pipeline of projects that are being tracked is accessible from your Dashboard. At a glance this will tell you the number of projects and companies you are currently tracking and the status of these.

To view your pipeline of projects click My Projects. By default the list of projects you are currently tracking is displayed in chronological order of Recall Date. If you do not have Administrative privileges you can only see the projects you are tracking. Administrative users can view the pipeline of all users collectively or any individual user.

Projects are displayed in Recall Date order meaning those projects which are due for recall next appear at the top of your list. If a project is past the date assigned for recall it will be highlighted as Overdue.

To action a project in your list simply click the Project Title to view the full project details including your own project notes and actions. To return to your projects click Back to Tracked Projects from the project details page.
3.2 FILTERING YOUR PIPELINE
You can filter your tracked projects to look at projects you are tracking (Active) or to look at projects you are no longer tracking (Inactive): The choices for the Status by which you can filter projects are:

**Active Projects:** These are projects you are still actively tracking.

**Inactive Projects:** These are the projects you are no longer tracking

**With Outcome:** These are all of the projects which have an outcome (whether you are still tracking them or not). You may want to use this list to get an overview of all the projects won and lost.

**All:** To view all the projects in your pipeline

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3.3 REPORTING AND ANALYSIS
There are various options for outputting your tracked projects whether you want to see a report of your projects or use the data for analysis, reporting of in some other system.
Managing Your Team in CIS CRM
Managing Your Team

The full benefit of CRM is realised when it is shared by many users. Sales Managers, directors and others can quickly get an overview of how the company is doing by viewing the open opportunities across the company. They can also check individual key projects to see how they are progressing and analyse projects won and lost. This strategic view of the company allows managers and owners to plan for future contracts and adjust strategy and procedures with the full knowledge of the company’s current and past activity.

4.1 ADDING USERS

Adding new users to CIS CRM can only be done by users who have administrative privileges. To add a new user to your team click Add an Additional User from your dashboard.

4.2 TEAM ADMINISTRATION

The actions related to team administration are accessible from the Dashboard – **Administer my team**.

### CRM Team Administration

**Assign Administrative Access**

This options allows you to assign a user with administrative privileges. Users with such privileges can track and assign projects to other users and can see the activity and status of all users on the team.

**4.3 REASSIGN TRACKED PROJECTS AND COMPANIES TO ANOTHER USER**

When a user leaves or is no longer a part of the team you can reassign all of their tracked projects and companies, including notes and actions, to another user. That way none of the active prospects and associated intelligence is lost and can be easily picked up and progressed by the replacement user.
Tracking Companies in CIS CRM
5.1 WHY TRACK COMPANIES?
As well as tracking projects that may yield opportunities for your business, users can also track companies. By tracking a company you will be alerted when that company becomes active on projects or when a significant update occurs on a project with which that company is involved. Generally speaking there are three reasons to track company activity on CIS CRM.

1. Key Clients
   Keeping up to date with the activity of your key clients and can alert you to new opportunities. It is also means by which you can keep abreast of the activity of your important customers.

2. Prospects
   CIS CRM company tracking is a great way to keep up to date with the activity of those companies you would like to do business with in the future. By getting alerts on their activity and being able to see what projects they are actively involved in you can be made aware of opportunities where you have a chance to engage directly.

3. Competitors
   By monitoring your competitor’s activity you can see what projects they are working on, where they are working and who they are

5.2 HOW TO TRACK COMPANIES
Wherever companies are listed on CIS you will have the opportunity to track them. Whether it is via a company search or simply through a listing of company’s associated with a project.
To track a company simply click the Track Company Button from the list of companies displayed. As with project tracking you can click the company name to see the full company details and all associated CRM data available.

**Assigned To:**
Shows who the Company is assigned to. If you have administration privileges you can change this assignment to another member of your team.

**Known As:**
You can give the company a different name to that assigned and this will be used in your tracked companies’ page.

**My Company Notes:**
Here you can record your own notes on the company which will be available for anyone in your company to see. Use this section to share information which will be useful to you and your colleagues.

**Recall Date:**
When you are tracking a company you are required to have a Recall Date which is the date you next want to review the company or take a follow up action.

Many companies use this date as a customer care action point. So for example if you want to schedule a customer care call once or twice per year you can use the recall date to schedule this.

**My Value:**
Here you can enter a value to represent the value of business associated with the company if applicable

**Project Activity:**
Record all of you interactions with the company to keep a chronological history of activity.
5.3 MANAGING TRacked COMPanies
The list of companies that are being tracked is accessible from your Dashboard. At a glance this will tell you the number of companies you are currently tracking and of the status of these.

To view your tracked companies click My Companies. By default the list of companies you are currently tracking is displayed in chronological order of Recall Date. If you do not have Administrative privileges you can only see the companies you are tracking. Administrative users can view the complete list companies tracked by all users collectively or any individual user.

Companies are displayed in Recall Date order meaning those companies which are due for recall next appear to the top of your list. If a Company is past the date assigned for recall it will be highlighted as Overdue.

To action a company in your list simply click the Company Name to view the full company details including your own company notes and actions. To return to your companies click Back to Tracked Companies from the company details page.

To stop tracking a company simply click the Stop Tracking button. You will be prompted for an Outcome where you can specify the reason you no longer want to track the company.
CONFIDENTIALITY OF CUSTOMER INFORMATION

CIS CRM offers you the opportunity to track and manage your project leads from CIS. With this facility you can record your own project and company specific information.

We treat the confidentiality of our customer’s information very seriously and we can assure you of the following in this regard:

• Your information is securely stored on CIS Servers with the latest security software and a secure backup methodology.

• CIS staff do not have access to customer’s information recorded on the CIS website. The information is accessible by our developers at a data level but access to individual user data is not permitted. Analysis of the data may be conducted from time to time to help us monitor and improve the CRM service but no individual user data will be accessed during such analysis.

• The information you store on projects and companies is YOUR information whether you remain a subscriber to CIS or not.

• With your permission we can provide you with details of all of your stored information should you need it.