

## Project Summary & Excerpt

### *Customer Contacts Database Best Practices Guide*

May 2004

#### **Project Summary**

**Format:** 60-page printed manual, 4-color, spiral bound

**Software Used:** Microsoft Word, Paint Shop Pro 8

**Project Summary:** During the initial system rollout (post-Beta) phase, Amy Janczy was hired to: (1) assess how users were succeeding in transitioning from individual customer contact systems to the new Web-based database and (2) develop a “best practices” manual.

**Phase I:** In this 20-hour discovery phase, on-site interviews were performed with six Beta testers, the database developer and department head to determine intended and actual system usage, users’ likes and dislikes and barriers to success. In addition, a thorough review of the database was performed to confirm issues raised by rollout users and to uncover additional problem areas that could impact system usability and data integrity.  
Deliverables: Rollout report including recommendations for numerous software changes; detailed outline for Best Practices Guide.

**Phase II:** After incorporating outline changes, work began on the Best Practices Guide with a 30-hour estimate. Initial research and writing were performed on site in part to determine which stability issues were confined to off-site database access. Simultaneously, Amy Janczy facilitated several meetings with the developer and key staff to resolve remaining database inadequacies, including changes to field names, options and workflow to improve usability and the value of captured data. Software changes extended project timeframes and resulted in additional 15 hours of work. Final Best Practices Guide featured updated screenshots and incorporated comments from developer, client contact and several users.

#### **Best Practices Guide: Outline**

##### CHAPTER 1. GETTING STARTED

- What is the Customer Contacts Database?
- Using the CCD
- Viewing Data Records
- Static View Commands
- Right-Click Menu Commands

##### CHAPTER 2. RECORDING COMPANIES AND CONTACTS

- Adding Companies
- Adding Contacts

##### CHAPTER 3. RECORDING ACTIVITIES

- What Should I Record?
- What Level of Detail is Needed?
- Adding An Activity Record
- Main Activity Level Fields
- Fields in Activity Tabs

##### CHAPTER 4. ADVANCED TASKS

- Changing Your CCD Identity
- Viewing Reports
- Searching by Keyword in Dynamic View
- Viewing Records in Dynamic View
- Exporting to Excel

## **Best Practices Guide: Excerpt**

Note: Text and images have been altered and/or omitted to protect client confidentiality.

### ***What Should I Record?***

When deciding what activities to record in the CCD, ask yourself the following questions:

- ◆ Would I want to refer back to this activity record in the CCD and be able to view the date/notes/attachments and other selections I can record for this event?
- ◆ If someone took over [my job], could that person easily pick up where I left off, even in the middle of negotiations?
- ◆ Would *other staff* (including the managing director) potentially benefit from seeing this record (now, months or even many years from now)?
- ◆ Is this record needed for any *automated reporting* being performed with CCD records? For example, activity reporting can be automated when staff use the CCD regularly. However, an individual who doesn't keep up with CCD entries is likely to have to continue manual reporting to supervisors.

If the answer to *all* of these questions is **NO**, you do not need to record this activity in the CCD. However, if the answer to any question is **YES**, CLIENT's efforts may well benefit from your taking the time to accurately enter the activity record today. The following table may help you decide.

**Table. Recommendations: Activities to Record**

<b><i>Recommended</i></b>	<b><i>Not Recommended</i></b>
<p>A meeting with a potential customer, including any notes on its results and follow-up activities. Instead of creating a separate activity record for each contact in attendance, store the information under the "main" contact and select the names of other attendees in the Activity Participants tab.</p> <p>An initial telephone inquiry from customer (record the source of the lead).</p> <p>A series of e-mails received in the same day regarding a point of negotiation, summarized in the Notes of one activity record. Multiple e-mails may be attached.</p> <p>Sending out a draft agreement of any kind. When you send a Draft, you must set Status to Draft (Negotiation Details). This causes CCD to create a new agreement number and initiates a record in the main company database.</p>	<p>Creating separate activity records for each contact person attending the meeting.</p> <p>Record of a phone call to reschedule a meeting.</p> <p>Creating separate records for each of several related e-mails received in the same day regarding a point of negotiation.</p> <p><u>All</u> draft agreements need to be recorded, as this record triggers the initial record in [the main company database]. All activities with this contact are then maintained in [the main database].</p>