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Benzschawel, Kelly L. *Development of Learning Objectives for Training Financial Advisors on CRM Application*

Abstract

Task Analysis is an important step in the Training Development Process. It helps to identify all content that needs to be included as well as to uncover the best sequence for training. Additionally, it aids the creation of training objectives, which are the foundation of a training program.

Currently, no formal training program exists for the CRM System used by Financial Advisors at ABC Financial. A formal training program is desired to increase Financial Advisor adoption of the CRM system and therefore efficiency. This study will begin the training development process by completing a task analysis and using the results to block training and develop training objectives.

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Table of Contents

Chapter I: Introduction

The Financial Services industry encompasses a variety of sectors that operate in a number of functions to facilitate generation of capital for for-profit and not-for-profit organizations, government bodies and municipalities. Fundraising is completed through the sale of stocks (rights to ownership of an organization), bonds (loans to an organization) and a number of other securities. Broker/Dealers assist individual and group investors in buying and selling these securities. While the technical role of a Broker/Dealer is to assist moving securities through the market, the most recognized role is to protect and grow the wealth of single and group investors (Securities Training Corporation, 2010).

Broker/Dealers interact with clients through individual Representatives. These representatives serve their clients through a variety of means. Representatives manage each client's portfolio of holdings based on the investment objectives, capacity and risk tolerance. Representatives may also provide support in the form of financial planning for future goals such as retirement, purchasing a home, children's education, etc. While these individuals' primary goal is to protect and grow the client's wealth, this goal is enveloped in the bigger picture of overall service to the client. The Representative and their team reassure clients in times of economic slowdown, provide investing education and work closely with accountants and attorneys to provide a well-rounded benefit to clients.

ABC Financial operates 5 unique business units, including a Broker/Dealer component comprised of Representatives. The brokerage entity comprises the largest business unit for ABC. Representatives at ABC are referred to as Financial Advisors (FAs). FAs operate in teams which could consist of the single FA and his/her Client Relationship Assistant (CRA) or a combination

of FAs and CRAs in a formal arrangement of work and profit sharing. For the purpose of this study, each option will be referred to as an FA Team.

FA Teams provide a high level of service to their clients; they routinely monitor clients' portfolios and communicate with them on a regular basis. Additionally, FAs are always looking for ways to grow their business by seeking out new clients and clients with higher net worth. Balancing these efforts requires a disciplined business model comprised of solid processes and capitalization on the use of available technology tools to increase efficiency.

At ABC, a Best Practices department exists to help FA Teams maintain and improve this balance. Best Practices provides a variety of tools and resources which can be adopted in whole or in part by FA Teams. These include business analysis tools, practice management resources and technology tools to support the business. Not only is this team new to ABC Financial, the concept is also one that is unique in the industry. The department exists to help teams develop processes, learn tools and technologies, accomplish team goals and improve their business.

Technology tools comprise the largest focus for the Best Practices Team. The firm's Client Relationship Manager (CRM) platform receives the largest portion of support from the Best Practices Team. CRM allows FA Teams to manage all contacts with their clients, analyze their service models, evaluate their practice and track progress with prospects and opportunities, while providing a means to manage workflow within the team. Best Practices manages this platform on a firm level and also supports it on an individual Team and User level (ABC Financial, 2011).

Bruckenstein (2010) surveyed more than 3,000 Financial Advisors about their technology usage. In this survey, the author noted that Microsoft Outlook, despite not being a Client Relationship Management tool, was reported as the most-used tool in the CRM category. From

this, Bruckenstein deduced that a large number of FAs do not understand what a CRM tool is, the value one could bring to their business, and the opportunity cost associated with not using such a tool, explaining that client relationships are at the heart of an FA's business. CRM allows the FA to systemize client communication and therefore enhance the relationship. Additionally, it can be used to manage workflow within the team to improve efficiency (Bruckenstein, 2010, CRM Software Section, para. 2 – 5).

Learning new technology and implementing it into one's business practices can be cumbersome. This is especially pertinent with the CRM System at ABC Financial for two reasons. First, the tool has only been available to FA Teams at ABC since September 2009, and second approximately half the FA Teams at ABC are new to the firm within the last 3 years and new teams continue to join the firm regularly from other firms that use different, if any, CRM system. Currently, FA teams and team members learn ABC Financial's technology tools, especially the CRM System, on an ad hoc, as requested basis. Aside from a handful of topic-specific written aids, no formal plan exists to train associates on the tools as a whole or to help drive full adoption. Formal training is needed, and the first step in training development is to complete a task analysis on the tools and processes to be taught.

Statement of the Problem

The Best Practices department at ABC Financial offers a CRM system to Financial Advisor Teams for managing their client relationships and service model. At the time of this review, no formal training on this tool exists. In order to develop training on the CRM System, objectives must be developed based on a thorough task analysis.

Morrison, Ross, and Kemp (2007) stated that "Training is expensive, yet it is essential to the healthy functioning of any organization" (p. 3). They explained that properly developed

training should improve performance and make employees more effective and efficient. This is especially true with the introduction of new processes and technology systems.

Various reasons exist for completing a Task Analysis. Commonly, task analysis is used to evaluate the need for training. Though the process is sometimes seen as requiring a large time commitment, it has historically been considered a time saver in the training development process. Two reasons completing a task analysis saves time were identified early in the history of task analysis and still hold true. Dean (1965) noted the training developer can identify gaps prior to beginning to develop the training, which saves effort in going back to incorporate missed material. Additionally, task analysis "forces the writer to analyze the subject matter logically and to write it up in language a trainee can understand" (p. 10). This continued focus on the learner perspective throughout the process can be invaluable. Similarly, the value of task analysis was recognized by another early adopter. Cummings (1968) explained that "overtraining, undertraining, training which starts at too high or too low a level, and ineffective training can be prevented by the use of more precise course development techniques" (p. 18). This includes a focus on Task Analysis, which helps determine what is needed without guessing and before the process gets too far down the road therefore avoiding wasted resources.

Objectives form the building blocks of the training program. Morrison et al., (2007) described instructional objectives as the map used to design instruction. The authors also found that objectives can be used as a check to ensure the training being developed will really improve performance of the task at hand. Finally, the authors identified that objectives keep the content focused (p. 16).

Purpose of the Study

ABC Financial has invited the author to complete this study as part of a training development project. The study is intended to evaluate the CRM system at ABC Financial via task analysis and to develop objectives from which current resources can be evaluated and appropriate training developed. Currently, FA Team members contacting a Best Practices Specialist receive ad hoc training on the component of inquiry based on the discretion of the individual Best Practices Specialist and the immediate request. Before the Best Practices team can determine and develop formal training components, the team must come to a full understanding of all functionality in the CRM system as well as objectives for training that are required for a user to fully incorporate the system into their business.

The literature review completed for this study identified a gap in the research on applications of task analysis. This study will contribute to the literature by providing an example of an application of task analysis methods in practice.

Assumptions of the Study

Assumptions of this study include:

1. Financial Advisor Teams desire to implement CRM.

2. Formal training cannot be developed without first understanding the tools and processes to be trained on as well as the knowledge necessary to implement these items.

3. Understanding of the training need is determined by task analysis.

4. Training is most effective when objective-based.

Definition of Terms

Affective Domain. The area of learning associated with developing attitudes, values or appreciations (Morrison, Ross and Kemp, 2007, p. 429).

Behavioral Objective. Objectives including an observable verb, subject, condition and criteria (Morrison et al, 2007, p. 429).

Best Practices Specialist. Member of the Best Practices Team operating as a representative expert on either Technology Productivity or Practice Management (ABC Financial Intranet, 2011).

Broker/Dealer. A person or firm in the business of buying and selling securities operating as both a broker and a dealer depending on the transaction. An agent who executes orders on behalf of clients, whereas a dealer acts as a principal and trades for his or her own account (Investopedia, 2011).

Client Relationship Assistant (CRA). Financial Advisor Team support member. Roles may vary and includes a variety of actual job titles (ABC Financial Intranet, 2011).

Cognitive Domain. The area of learning devoted to acquiring information, knowledge and intellectual abilities relative to a subject or topic (Morrison et al., 2007, p. 429).

Cognitive Objective. An objective used to describe learning mental skills that are not easily observed (Morrison et al., 2007, p. 429).

Customer Relationship Manager (CRM). The principles, practices, and guidelines that an organization follows when interacting with its customers (Investopedia, 2011).

Financial Advisor. One who provides financial advice or guidance to customers for compensation. They must carry the Series 65 license in order to conduct business with the public (Investopedia, 2011).

Financial Advisor Team. Any combination of Financial Advisors and Client Relationship Assistants who work collaboratively to serve a single base of clients at ABC Financial (ABC Financial Intranet, 2011).

Functional Job Analysis. A task analysis method using a limited, pre-defined set of terms (Jonassen et al., 1999).

Information Processing Analysis. A task analysis that analyzes cognitive tasks as a process or flowchart model (Jonassen et al., 1999).

Job Task Analysis. A task analysis method that sees tasks as a series of observable steps (Jonassen et al., 1999).

Learning Contingency Analysis. A task analysis method focusing on the way a task is learned as opposed to the way it is performed (Jonassen et al., 1999).

Learning Domain. Categories that define the scope and type of learning (Morrison et al., 2007).

Learning Hierarchy (Prerequisites Analysis). A task analysis method that identifies prerequisites and views tasks as a hierarchy of knowledge requirements (Jonassen et al., 1999).

Learning Objective/Instructional Objective. Statement describing what the learner is specifically required to learn or accomplish relative to a topic or task (Morrison, Ross & Kemp, 2007, p. 431).

Private Wealth Management. Business Unit at ABC Financial comprising of brokers aimed at working with individual clients for managing wealth (ABC Financial Intranet, 2011).

Procedural Analysis. A task analysis method that breaks tasks into steps as in a flowchart focusing on observable activities (Jonassen et al., 1999).

Psychomotor Domain. The area of learning that emphasizes performance of physical actions using muscles (Morrison et al., 2007, p. 432).

Task Analysis. A collection of procedures for analyzing the information needed to achieve the objectives (Morrison et al., 2007, p. 433).

Task Description. A task analysis method focusing on the interactions between a job performer and the environment/systems used to perform a job (Jonassen et al., 1999)

Training. Improving job performance through an educational program (Mallory, 1982).

Limitations of the Study

The Best Practices Department at ABC Financial, its CRM system and the system's customizations are individual and proprietary. Therefore, the findings of the study apply only to the system within ABC. While the assessment models used to conduct the study may have value, the results may not be relevant outside this organization. Additionally:

1. Assessment pertains only to the CRM System functionality as of the beginning of this study.

2. Task analysis based on recommended performance. Actual adoption will vary by team and individual.

3. Objectives assume novice level knowledge. Individual training plans for specific associates and teams would need to be developed based on individual current knowledge and skill level.

4. The analysis in this study applies only to ABC Financial and the tools and processes of the organization and cannot be generalized to other financial institutions.

Methodology

A thorough review of the literature will identify recommendations for completing a task analysis and developing objectives. Task Analysis will be completed on each element of the CRM system in place at ABC Financial at the start of this study. The results of the task analysis will determine blocks of training, and learning objectives will be created for each block. A pilot test of the task analysis will be reviewed by a group of 3 subject matter experts in December 2011. Feedback from the pilot group will be included as part of the analysis in Chapter 4. Recommendations for implementation and/or modification will be discussed in Chapter 5.

Summary

Chapter 1 provided the framework for this study, which will take the first steps in building training on ABC Financial's CRM platform. These first steps include analyzing all tasks encompassed by the software and creating learning objectives from the tasks that will become the building blocks for the training. Chapter 2 will review pertinent literature to guide the study. Chapter 3 will provide a detailed explanation of the methodology of this study and Chapter 4 will provide the results and analysis of the study, including the pilot test. Chapter 5 will discuss implementation, modification if applicable, and opportunities for further research.

Chapter II: Literature Review

Confusion about the differences between education and training are prevalent. Mallory (1982) explained that while education focuses on information, training should be focused on applications or jobs with the intention of impacting job performance. The author continued to state that "The only purpose for a technical training program is to improve performance of a task. If we establish acceptable limits for task performance, we can tell when the training has done its job" (p. 66). Thus, it follows that proper training requires a solid understanding of the tasks that comprise the subject of a training program.

Similarly, Holden (1984) stated "You cannot design hands-on practice, list performance criteria, or even decide what skills and knowledge to teach unless you know the specific tasks the job requires" (p. 35). This statement brings to the forefront the proper training development process: definition of tasks, development of objectives based on performance criteria and development of training to address these. This study focuses on the first two elements in that process: task definition and objective development.

A thorough review of related literature provided the basis for the development of this study. This review included an investigation into research surrounding three topic areas: the overall task analysis process, specific methods for task analysis and the development of learning objectives. These topics comprised the basis for the two component parts of the methodology.

Task Analysis

Dean (1965) defined Task Analysis as "a specialized method for writing up a procedural job as a basis for preparing instructional materials" (p. 9). Further, Hartley (2004) made a clear distinction between the sometimes confused terms of Job Analysis and Task Analysis explaining that job analysis is intended to break a job into duty areas and associated tasks. However, when a

Job Task Analysis is completed, the process goes further and breaks each task down into the steps required to complete it (pp. 20-21). Mallory (1982) explained that the tasks can be reviewed to determine the relevancy of the task and evaluate what type of training would be required to help an individual perform the task (p. 66).

Multiple variations on task analysis have existed. Jonassen, Tessmer, and Hannum (1999) placed these into five general categories: Job, Procedural and Skill Analysis Methods; Instructional & Guided Learning Analysis Methods; Cognitive Task Analysis Methods; Activity-Based Methods; and Subject Matter/Content Analysis Methods (pp. vii-viii). Each of these categories emphasized different elements in the task analysis process and had unique sets of goals.

Jonassen et al. (1999) explained the nature of Job, Procedural and Sill-Based Methods. The US Military developed these forms of Task Analysis during World War II when technical training was in high demand. The methods coming from that time period focused on systematic procedures that were rote in nature, and to this day many task analysis methods continue to focus on the mechanical nature of completing a job satisfactorily. However, a need exists today for training that goes beyond physical activities and accounts for the mental processes that underlie procedures. From that need, new concepts of Task Analysis and new Task Analysis models have emerged (p. 33).

Accounting for mental processes has been occasionally incorporated into procedurally based methods, but the need for analysis of these processes has also spawned the creation of entirely new categories of Task Analysis methods. These additional method categories extend the task into other arenas of activity. One such category, Instructional and Guided Learning Analysis Methods, as explained by Jonassen et al. (1999) focused on the way tasks or jobs are

best learned as opposed to how they're performed (p. 76). Additionally, the authors stated "the purpose of cognitive task analysis (CTA) is to model the actions and especially the knowledge and thinking that learners engage in when performing some task…the primary goal of CTA is to acquire a rich body of knowledge about a domain from experts and to assemble that knowledge into a model" (p. 107). Meanwhile, the authors describe Activity-Based Methods as "a hybrid of cognitive, Learning, Content, and in some cases, behavioral methods of analysis. The commonality of these methods is that they focus on human activity in context" (p. 157). Finally, Jonassen et al. (1999) found Subject Matter/Content Analysis Method focused on the organizational structure of the learning content (p. 199).

Job, Procedural & Skill-Based Methods

Task Description. Jonassen et al. (1999) described Task Description as a means to document interactions between a job performer, equipment used in the job and the job environment. The process involves organizing a system by breaking it down into jobs and tasks, and is considered a top-down approach. First the system is defined, then the jobs, then the tasks, etc. (p. 35). The method assumes that jobs can be broken down into sequentially smaller component parts and that success in the job is assumed when each component is successfully completed. Task Description method focuses on observable tasks (p. 41).

Task Description is not appropriate for all situations, as it does have some limitations. Jonassen et al. (1999) discovered that it was limited to the aspects of a task that can be described, because it was oriented toward processes involving operating equipment; therefore, its range was found to be limited. Additionally, it required a skilled analyst, yet it did not help select specific tasks for training (pp. 43-44).

Given these conditions, the author continued by explaining situations where Task Description may be an appropriate method. Task description was also found to be applicable to operation of tools or equipment; therefore, manufacturing was an ideal example. In addition, task description was determined to be beneficial in certain conditions when workers used technology systems to process information (p. 43). Even though this study focused on the operation of technology tools, the level of decision-making and individual choice in the operation of those programs ruled out this method for application in this study.

Procedural Analysis. Jonassen et al. (1999) explained that Procedural Analysis evolved from a combination of behaviorism, programmed instruction and computer programming. Behaviorism took the belief that performance is simply a chain of reactions to various stimuli, and, similar to programmed instruction, viewed tasks as a linear sequence. Similar to computer programming, this analysis incorporated flowcharting to account for more complex tasks (p. 45).

Procedural Analysis assumed that performance is a sequence of steps, all of which are observable, even those that were cognitive. Also, the method accounted for the fact that two different people may not proceed through the sequence in exactly the same way (Jonassen et al., 1999, p. 46-47). In these ways, the analysis technique was especially useful for describing performance of skilled workers and was often used to describe tasks such as assembly and repair. Procedural Analysis was very good at analyzing discrete actions but also accounted for some cognitive activities described in an observable manner (p. 45).

The first step listed by Jonassen et al (1999) in a Procedural Analysis process was to determine if the task was appropriate for the method. After an analyst has determined this as the correct method, the steps were listed as follows:

1. Write down the terminal objective

2. Choose a task performer for data collection

3. Choose a data collection method

4. Observe and record the task procedure

5. Review and revise the outline

6. Sketch a flowchart of the task operations and decisions

7. Review the flowchart

8. Field-test the flowchart

Jonassen et al. (1999) explained this method is useful because of the ease of learning and application, and the method can be adapted to include more cognitive tasks. Also, Procedural analysis simplified measuring and observing all the task steps because in the method each step became a performance objective and could therefore be used to assess performance. However, the authors also stated that the method was not good for primarily cognitive tasks, due to lack of observability. Also, the process was determined to be long and cumbersome and failed to reveal all the knowledge and skills needed to complete a task. Additionally, a sequence for training was not easily identified. Therefore, this method was not ideal for all situations.

Job Task Analysis. Jonassen et al. (1999) found that Job Task Analysis saw instruction as a means to improve job performance and assumed that completing a series of observable tasks constitutes successful job performance. The method involved an analyst capturing and listing the tasks and steps observed and completed in a successful performance of the task (p. 59). This method focused on observable performance, and any cognitive function was ignored. The method assumed jobs were described and trained on by referencing only observable aspects. Performance was based on what was done, not on what the learner knew. It also stated that

learners should be able to step right into the job and perform. Therefore, training was based directly on the job.

Jonassen et al. (1999) stated several advantages for this method, including ease and lack of necessity for formal training. The method was also fairly basic analysis and job-focused. However, only observable tasks could be analyzed and the technique was unable to be applied to bigger, more educational goals, because the method ignored cognitive elements of a job.

Functional Job Analysis. Jonassen et al. (1999) stated that Functional Job Analysis focused on the fact that what someone does to complete a job was different from the job itself. The method assumed that workers completed a limited number of things in a job, and these things were precisely defined. A job was broken into tasks, and successful completion of each task equated to satisfactory job performance. Additionally, the method depicted how job activities were related to data, people, and things in one of only a few ways. The goal in this method was consistency of language that made the job universally understandable and executable.

Jonassen et al. (1999) continued to explain the advantages if this method. For example, Functional Job Analysis provided a very concise description of tasks and allowed for easy comparison of tasks across multiple jobs. Additionally, the technique was very precise in both identifying worker activities and the way results were communicated, providing a standardized vocabulary for describing jobs.

However, the authors also listed multiple disadvantages of the Functional Job Analysis model. The method was restrictive in the means for defining work and in how tasks are conceptualized. Therefore, Functional Job Analysis was found to be fairly inflexible. The tool also forced all activities into a small number of categories which took away from some of the

otherwise descriptive nature. Finally, as outlined in the following steps, the method was very time consuming and required a high level of specificity, and some of the decisions required by the model were determined to arbitrary:

1. Identify the job to be analyzed.

2. Break the job into tasks.

    2.1. Observe Skilled performers

    2.2. Record what the performer is doing using a controlled set of descriptors

3. Write task statements

    3.1. Indicate the task performer

    3.2. Indicate what actions are performed by the performer using an action verb

    3.3. Indicate the object of the verb (to whom or what) the action is taken

    3.4. Describe tools, equipment or work aids that are used by the performer

    3.5. Describe expected output

4. Classify each task on the worker function scale

    4.1. Classify each task according to the interaction of the worker with data, people and things

    4.2. Specify the level of the activity of the worker involving data, people and things using the standard terminology for Functional Job Analysis

5. Identify the proportion of time in each area

    5.1. Identify the relative amount of time spent with data, people and things for each task. This will sum to 100% for each task.

6. Specify the related requirements

    6.1. Specify the instructional level for each task

    6.2. Specify the GED levels required for each task.

7. Record all information using a standardized form. (Jonassen et al., 1999, pp. 65-73)

Instructional & Guided Learning Analysis Methods

Learning Hierarchy (Prerequisites Analysis). Jonassen et al. (1999) described this

method as pinpointing prerequisite skills needed to perform an objective. The authors stated that

these prerequisites were viewed as a hierarchy where lower-level skills should be mastered first,

moving up to higher-level skills. This method easily identified skills a learner had not yet

mastered. The author found the Learning Hierarchy to be one of the most popular, aside from the

methods that are procedurally-based (p. 77). The author listed the following steps to completing

this method:

1. Familiarize yourself with the topic

2. State the final learning outcome, which should be a higher-level task

3. Identify the base/entry level knowledge the learners will have in regards to the final

    outcome

4. Identify first-level prerequisites

5. Identify second-level prerequisites

6. Identify third and subsequent level prerequisites

7. Determine how far to go in breaking down prerequisites

8. Construct the learning hierarchy

9. Verify the learning hierarchy (Jonassen et al, 1999, pp. 80-81)

Jonassen et al. (1999) identified multiple uses for this method including organizing

curriculum and identifying content and sequencing instruction. The technique had several

advantages, including easily identifying the content to be learned in order to master a job, and a

natural identification of the natural sequence for instruction through learning dependencies.

Learning Hierarchy analysis also complemented other analysis methods and helped uncover unnecessary content for removal. However, a limitation of this method required the analyst to be fairly skilled in instructional concepts (p. 83-85).

Information Processing Analysis. Jonassen et al. (1999) stated that "a designer conducting an IPA will describe the sequence of mental steps or operations used to accomplish a given task. The result of an IPA was usually a sequential outline or algorithm of the cognitive operations necessary to achieve a specific goal or objective" (p. 88). This process was similar to that of Procedural Task Analysis as both outlined a sequence of actions toward completion of a job, and the terms were used interchangeably. However, Procedural Task Analysis focused on observable tasks only, while IPA focused solely on unobservable cognitive steps. The process for completing an IPA was listed by the authors as:

1. Decide if the task is appropriate for IPA

2. Document the terminal objective

3. Select a Subject Matter Expert

4. Select a data-gathering procedure

5. Observe and outline the task steps

6. Review and revise the outline

7. Create a flowchart

8. Review the flowchart

9. Field test the flowchart

The process placed a focus on human performance and assumed human memory acted as an information processing system. It also believed that covert thinking processes were characterized and taught, but allowed for different individuals who performed a task in a

different sequence, so more than one algorithm for any given task was realized (Jonassen et al., 1999, p. 89).

The author found this system advantageous due to the description of covert thinking processes that were not observable and noted that IPA complemented other methods well. Also, this was a fairly easy method to learn and apply. IPA neither easily revealed the skills needed to complete a task, nor explained how the process is learned, and therefore was found to be difficult to teach. Additionally, because individual's thought processes varied, the ability to narrow a task down to just one process algorithm was difficult (Jonassen et al., 1999 pp.95-97).

Learning Contingency Analysis. Jonassen et al. (1999) stated that Learning Contingency Analysis was focused on the learning of a task as opposed to the performance of that task. The method was intended to help an instructional designer sequence training content and determine the appropriate delivery method. The method assumed that a trainer started with the desired outcome and that learning a complex task accomplished by learning the individual pieces. The model also addressed the fact that learning different behaviors required different learning conditions and that proper sequencing improved the effectiveness of learning (p. 99-102).

The author found these steps very time consuming as the analysis needed to be very detailed and required a skilled analyst. Also, the "big picture" could be easily missed because the method focused narrowly on specific behaviors. Also, Learning Contingency Analysis did not get far into cognition and was inappropriate for tasks that were not directly observable. Though the technique also had clear advantages, the model distinctly identified specific behaviors that are required for completing tasks and naturally uncovered a proper instructional sequence as well as instructional methods (Jonassen et al, 1999, 205).

Cognitive Task Analysis Methods

Militello and Hutton (1998) explained that Cognitive Task Analysis methods described and represented the cognitive elements of processes. These elements included: developing goals, decision-making, judgments, etc. Jonassen et al. (1999) listed the included methods as:

1. Goals, Operators, Methods, & Selection (GOMS)

2. Prediction, Actions, Results, Interpretation (PARI)

3. Decompose, Network, and Assess (DNA)

4. Cognitive Simulations

5. Case-Based Reasoning (p. 107-109)

These methods focused not so much on the tasks themselves but rather on the mental processes that drove the completion of tasks. The techniques often focused on the way a user interacted with a system and how people made decisions. (Jonassen et al., 1999, pp. 107-109)

Activity-Based Methods

Jonassen et al. (1999) stated that activity theory proposed learning activities were not separate from the intentions that drove them, the communities that informed the learners' interpretation of them, and the contextual forces that impeded or supported learning. These methods focused on the reason for learning a task as well as the way a learner would have approached the task (p. 160). The nature of this method appeared based more on learning-theory than a true task analysis method.

Learning Objective Development

Learning objectives were found to be useful in training for a variety of reasons. Morrison, Ross and Kemp (2007) explained three primary purposes of objectives:

1. They helped select and organize content so instruction could be effective.

2. They created a framework for evaluating learning.

3. They gave the learner guidance.

The second of these reasons was determined to be especially important when considering common mistakes in training practices. Byars and Crane (1969) discussed the tendency to judge effectiveness of a training program based on the enthusiasm of participants following a training event. In many cases, participants' opinions and impressions comprised the evaluation of the program. To this, Byars and Crane stated "However, enthusiasm cannot be taken as positive evidence of improved ability. Opinions do not properly reflect the effectiveness of training." (p. 38).

Objectives helped not only make training more effective, but also provided a means to measure effectiveness. As Byars and Crane (1969) stated, "objectives provide a framework for organizing a training program. They delineate the level of knowledge required in each subject area and provide guidance in selection of appropriate teaching methodology" (p. 38). These benefits made objectives invaluable in creating any training program.

Horton (2006) took a broad approach to training development by stating that "Design starts with a goal" (p. 9). He explained that before design could begin, a goal for the project must have been set, and that this should have started with a vision. The author explained that the real process should have been based on the organizational goal of the project which encouraged the developer to build the primary training objective. Furthermore, Morrison et al. (2007) noted that "Objectives are based on the results of the task analysis and provide a refinement and implementation of the needs of and/or goals for a project." (p. 109). The author explained that the goal of the instructional objectives was to identify what was needed to solve a performance problem. Morrison et al. (2007) continued to outline four steps in developing learning objectives:

1. Review the Task Analysis to identify knowledge, tasks and attitudes required

2. Group tasks based on goals and needs

3. Write objectives for each goal/need

4. Write objectives for any additional essential information

The author also identified two levels of objectives. Terminal objectives were overall objectives for major learning outcomes. Thus, enabling objectives described specific behaviors necessary to accomplish the terminal objective(s).

Objectives were broken down into three primary categories called Domains. The cognitive domain included objectives relating to information and knowledge and attracted the most attention in instructional programming. The psychomotor domain involved physical movement, and the affective domain pertained to attitudes, values and emotions, which were perceived as extremely important but were given the least attention. Although domains were sometimes difficult to classify, getting objectives in the right domain for the topic was found to be important to keep the content in scope (Morrison et al., 2007).

Morrison et al. (2007) explained two approaches to Cognitive Domain objectives. Behavioral objectives applied to all domains, which was found to be the more commonly applied approach. A behavioral objective was a specific statement that indicated what the learner demonstrated for mastery of the knowledge or skills through instruction. Objectives of this type comprised two essential components – an action verb and a subject referencing the content, and two optional elements – the criteria for minimum performance and the conditions of performance.

Morrison et al. (2007) also described another approach to developing cognitive learning objectives. The Cognitive Approach was found to be best for Cognitive objectives. Objectives

under this approach were comprised of two parts: the statement of the general objective and examples of specific types of performance. The advantage of this method was the focus on higher levels of cognitive learning.

Psychomotor Objectives were often the easiest to create because they were easily observed. They followed the same four criteria as behavioral cognitive objectives, but they were more specific with additional emphasis on performance criteria. Conversely, Affective Domain objectives were the most difficult because of abstract behaviors that were difficult to observe. These domains had two components: 1) cognitive, describing the attitude and 2) the behaviors that would signify attitude (Morrison et al., 2007).

Horton (2006) offered an alternative method for developing objectives in all the domains. He listed three steps in a quick formula for objective writing:

1. State what will be taught

2. Describe the learner

3. Identify the beginning requirements

This method appeared simple for developing objectives but was not in line with the true nature of learning objectives. Machles (2002) explained that "Training objectives are often written for performance in the classroom. Ideally, they should address the performance expected in the workplace" (p. 32). For this reason, previously discussed methods were better for creating true learning objectives.

Similarly, many authors have outlined what they believe makes for a good learning objective. Horton (2006) listed them as the following:

1. Clear – easily understood by anyone

2. Precise – specific enough to be measurable

3. Worthy – contributes to the overall goals of the program

Byars and Crane (1969) echoed these and added to them stating that the objectives should also tie up to corporate goals and that objectives should also be realistic.

Summary

Chapter 2 provided a review of the literature which revealed the existence of several methods for completing task analysis. However, these methods individually focused on one specific dimension of task completion and were not representative of the reality of completing a task which encompasses a variety of cognitive and psychomotor elements. Since processes such as these are deemed essential in completing tasks within the ABC Financial CRM System, two methods have been selected for use in this study: Procedural Analysis and Information Processing Analysis. These methods appear to be a natural fit as both focus on the steps of a process with each supporting decision points. In addition, the literature described Procedural Analysis and Processing Analysis as interchangeable, with the exception being the focus on strictly psychomotor or cognitive processes. Therefore, the researcher will combine these methods for this study.

The literature review also uncovered that applied examples of specific task analysis methods, especially Procedural Analysis and Information Processing Analysis, were lacking. Multiple reasons for this gap may exist. Therefore, this study will contribute to the body of literature of these methods in practice and may serve as a model for future study.

Ch. 3 will describe the specific methods used in this study, including methodology, data collection and proposed analysis. Sample size and demographics of the participants of the pilot study will also be depicted.

Chapter III: Methodology

The Best Practices department at ABC Financial offers a variety of tools to help Financial Advisor Teams be more effective and efficient and, in turn, grow their business. At the time of this review, no formal training on these tools exists. In order to evaluate the training needed on these tools, competencies must be developed based on a thorough task analysis.

A review of the literature revealed a number of recommendations for assessing the tasks encapsulated in CRM System at ABC Financial. This qualitative study will be completed in three phases: task analysis, blocking of tasks for training and development of learning objectives for each training block. The process will be completed as follows.

Task Analysis

Task analysis was completed through the following method, adopted from the procedures of Procedural Task Analysis and Information Processing Analysis (Jonassen et al, 1999).

1. Tasks will be listed based on business functions.

2. Sub-Tasks will be broken out as needed

3. Each task will be broken into composite steps.

4. For each task and its requisite steps, the following data will be included as documented in the Task Analysis Template (see Appendix C):

    a. Type of step (decision, activity, etc.)

    b. Potential pre-requisite knowledge, skills or abilities

    c. Parties involved

5. Flowcharts will be created from each Task

Development of Task Flowcharts

A flowchart was created for each identified task. The flowcharts depict the composite steps for the task based on the data gathered in steps 1-4 of the task analysis process. These flowcharts help identify dependencies as well as decision points. The graphic image provided by the flowcharts drives the next step of blocking tasks for training. Creation of the flowcharts followed a key of symbols (see Appendix D).

Pilot Study

Following completion of the task analysis, a pilot study was completed. Participants were asked to review the task analysis data and flowcharts to identify potential gaps and unclear items.

The sample for this pilot study included 3 subject matter experts (SMEs). These subject matter experts were chosen based on their role within ABC Financial. They represent the Best Practices Productivity Desk which owns and supports the CRM System, and the team represents the only subject matter experts at the firm. This team is currently comprised of two males and one female ranging from 25-31 years of age and with varying degrees of exposure to the tool and the users. Participation was voluntary. Feedback was submitted in type-written, hard copy in an anonymous fashion (see Appendix E).

Blocking of Tasks for Training

Based on the results of the Task Analysis, tasks and sub-tasks were grouped into blocks based on the following criteria:

1. Manageability – care should be taken that content would be manageable. Tasks that are exceedingly long or complex should not be grouped with other items.

2. Decision Points – Decisions Points should be considered as potential stopping points to allow the team to complete their decision and proceed based on their selection.

3. Related Tasks – Related tasks will be grouped together whenever appropriate, keeping in mind criteria 1.

4. Parties Involved – team and individual tasks should be blocked separately

Objective Development

Objectives for the tasks and sub-tasks in each training block were developed with a business-focus. Additionally, the tasks and sub-tasks were representative of the three objective domains as appropriate: cognitive, psychomotor, and affective. Objectives followed the behavioral method and described the expectation of a learner who completed the training. They each contain at minimum an action verb with a correlating subject and contain the criteria for minimum performance and the conditions of performance as appropriate.

The objectives were developed using the Behavioral Objective method developed as seen in Morrison, et al. This method is best as it applies to all objective domains. Behavioral Objectives contain two primary components: an action verb with a subject referencing the content as well as two optional components: the criteria for minimum performance and the conditions of performance (Morrison et al., 2007).

Limitations

This study is limited in application to the particular CRM system of ABC Financial. Many aspects of this tool have been custom-developed or otherwise tailored for ABC Financial. Therefore, while the task analysis and competency development processes could be modified and applied to other departments or organizations, the specific resulting plan will not be transferable

to any other organization or department within ABC Financial. Further investigation into the applicability of the study will be examined in Chapter 5.

Additionally, this assessment applies only to those system features readily available as of November 1, 2011. As business is ever-changing and always being re-examined, the tools offered by the Best Practices Department at ABC Financial may change. In such situations, the assessment process completed in this study would need to be applied to new content as appropriate for inclusion.

Summary

Chapter 3 described the methods used for this study and the sample size and characteristics for the pilot study. This study provides the basis necessary to develop training on the CRM software at ABC Financial. Using two Task Analysis Methods, Procedural Analysis and Information Processing Analysis, it i the steps necessary to complete all business tasks available within the system. Additionally, this analysis will be used to determine appropriate training blocks and to develop learning objectives to be used in developing training.

Chapter 4 will discuss the results of the study. It will examine the data gathered in the task analysis process and will outline the training blocks developed, competencies created. Additionally, it will share the feedback and results provided by the pilot study.

Chapter IV: Results

The methodology of this study was adopted from two task analysis models, Procedural Analysis and Information Processing Analysis (Jonassen et al, 1999). The task analysis process for this study included the following steps:

1. Tasks were listed based on business functions.

2. Tasks were reviewed for sub-tasks.

3. Each task was delineated into composite steps.

4. For each task (see Appendix F) and the requisite steps, the following data was included as documented in the Task Analysis Template (see Appendix C):

   a. Type of step (decision, activity, etc.)

   b. Potential pre-requisite knowledge, skills or abilities

   c. Parties involved

5. Flowcharts were created from each Task

A pilot study was conducted to evaluate the task list, task tables and flowcharts. Based on pilot feedback, all items were modified as necessary. The final documents were used to categorize tasks into training groups and develop competencies. The study resulted in 83 defined tasks that were grouped into 9 training blocks with 59 corresponding objectives.

Task Analysis

A list of all tasks that can be executed using the CRM system was developed, and sub-tasks were broken out as necessary (see Appendix C). A total of 83 tasks were identified. Each task was then broken out into its composite steps using a Task Analysis template (see Appendix D) and a Task Analysis Table was created for each individual task (see Appendix G). Based on

each table, a flowchart was developed to further illustrate the flow of composite steps as well as decision points (see Appendix H).

Pilot Study SME Review

A pilot study of SMEs was completed. The SMEs received the list of tasks, tables and flowcharts and were asked to complete a feedback form (see Appendix E). SME responses included any tasks that were missing from the task list, detailing any missing data and highlighting confusing steps. In summary, the pilot study found:

1. No additional tasks were identified as missing from the list of 83 tasks.

2. 12 steps were identified as missing from the task flowcharts.

3. 21 inconsistent/unclear steps were flagged for clarification.

4. 7 typing errors were found.

Based on pilot feedback, all flowcharts were updated as appropriate. Likewise, corresponding tables were modified for alignment.

Objective Development

Based on the results of the Task Analysis and Pilot study, tasks were grouped into training blocks based on Manageability, necessary team decisions, related tasks and parties involved (see Appendix I). 11 recommended blocks were identified.

Objectives were created using the Behavioral Objective method presented by Morrison, et al (2007) which described learner expectations and success upon completion of training. Per that model, the objectives each contained at minimum an action verb with a correlating subject and contain the criteria for minimum performance and the conditions of performance as appropriate. Resulting competencies for each training block are as follows:

Introduction to CRM

1. Define what a CRM System is.
2. Explain the value of a CRM system to a FA team.
3. Define the following terms and explain how they relate to a CRM System:
    a. Entity
    b. Contact
    c. Household
    d. Financial Account
    e. Holding
    f. Opportunity
    g. Company
    h. Marketing List
    i. Activity
    j. Service Model
    k. Prospect
4. Demonstrate how to select Multiple Records

Getting Started

1. Describe the hierarchy of records in CRM.
2. Demonstrate how to access the following records on their own and from each affiliated record type:
    a. Contact
    b. Household
    c. Financial Account
    d. Holding
3. Launch Activity Creator
4. Create an Activity in Activity Creator
5. Access a record from Activity Creator
6. Set Activity Creator Preferences
7. Access Alerts and Reminders

Working with Contacts

1. Create a contact
2. Demonstrate where to find all data on a contact record
3. Add a note for a contact
4. Add an address to a contact
5. Set a preferred address for a contact
6. Set a preferred phone for a contact
7. Complete the Mailings Tab for a contact
8. Edit multiple Contacts
9. Create a Company
10. Link a contact to a company
11. Complete the documents tab for a contact

Working with a Service Model

1. Explain the purpose of a Service Model
2. Define a service model for your team
3. Evaluate your service model

Activities

1. Create each of the following activities:
   a. Phone Call
   b. Task
   c. Appointment
2. Complete a group of activities
3. Re-open a group of completed activities

Keeping Clean Data

1. List the benefits of keeping data clean
2. Add a member to a Household
3. Add an Account Identifier to a Financial Account
4. Set a Primary Contact for a Household
5. Complete the Mailings tab for a Household
6. Merge 2 contacts
7. Deactivate a contact
8. Reactivate a contact

Lists in CRM

1. Explain the options for creating lists
2. Add categories to a record
3. Create a filtered view
4. Share a filtered view
5. Create a marketing list
6. Add a contact to a marketing list
7. Modify a marketing list

Marketing with CRM

1. List the options for communicating to clients and prospects with CRM
2. Create a mail merge template
3. Prepare a mailing
4. Generate a single letter and envelope for an individual contact
5. Send an email to a single contact
6. Send an email to a group of contacts
7. Initiate a communication from a marketing list

Customize CRM
1. Change the default records per page
2. Set the default view
3. Verify the time zone.

Opportunities
1. Define CRM Opportunity
2. Create an Opportunity through Opportunities and from a contact record
3. Evaluate the number of won and lost opportunities in a selected time period
4. View active opportunities
5. Edit an opportunity
6. Close and opportunity

Summary

Chapter IV outlined the results of the study as it completed a Task Analysis, grouped the

tasks into training blocks and assigned objectives to guide the content of the training segments. A

total of 83 unique tasks were identified and grouped into 9 training blocks with 59 corresponding

learning objectives. The steps in the process all played a role on the end result as well as on

making the subsequent steps in the process easier. Tables allowed for easy identification of steps

and step types which were then plotted in flow charts which displayed the steps in an easy-to-

follow fashion. And the definition of steps by the entire process easily identified prerequisite

tasks for sequencing of training as well as the required knowledge for the objectives.

Chapter V will examine the results of the study. It will identify the limitations of the

study as well as the conclusions that can be drawn from the study. Additionally, it will discuss

considerations for future research.

Chapter V: Discussion

This study reviewed the literature to evaluate task analysis methods. Based on that documentation, the researcher selected two task analysis models, Procedural Analysis and Information Processing Analysis, as appropriate task analysis methods and used the models outlined in the literature to execute a task analysis two task analysis models, Procedural Analysis and Information Processing Analysis (Jonassen et al, 1999). From the task analysis, a group of training blocks were determined and aligning objectives were written using the Behavioral Objective Model (Morrison et al., 2007).

Limitations

The Best Practices Department at ABC Financial, its CRM system and the system's customizations are individual and proprietary. Therefore, the findings of the study apply only to the system within ABC. While the assessment models used to conduct the study may have value, the results may not be relevant outside this organization. Additionally:

1. Assessment pertains only to the CRM System functionality as of the beginning of this study.

2. Task analysis based on recommended performance. Actual adoption will vary by team.

3. Objectives assume novice level knowledge. Individual training plans for specific associates and teams would need to be developed based on individual current knowledge and skill level.

4. The analysis in this study applies only to ABC Financial and the tools and processes of the organization and cannot be generalized to other financial institutions.

Conclusions

The study found a total of 83 tasks and grouped them into 9 training blocks. A total of 59 corresponding training objectives were written. The researcher determined that a pilot group is invaluable in completing a task analysis to ensure accuracy and consistency.

The Task Analysis process is time-consuming, which could be a reason for the limited amount of current research uncovered in the review of literature. Additionally, task analysis as described by Jonassen et al (1999), may appear repetitive in the need to create both tables and flowcharts. However, the researcher found a significant return on the investment of time as both tables and flowcharts each contributed a different component to the training blocking and competency development processes. Tables allowed for more detail around steps and identification of roles, and the tables also laid the foundation to make flowcharting move quicker. Flowcharts made it easy to identify repetitive steps across tasks that should be pulled out as separate tasks. Additionally, flowcharts are visually easier to follow and allow the reviewer to more identify decision processes more clearly. The two steps combined guide the task analyst to identify requisite knowledge for each task, which then guides the blocking of tasks to ensure learners are taught steps in the proper order. The Model for Behavioral Tasks correlated perfectly with the task analysis process as each task lent itself directly to the action and description needed for the accompanying objective (Morrison et al, 2007).

Recommendations

This research process highlights a number of recommendations for future research:

1. The literature review uncovered no task analysis models that completely aligned with the nature of the project. All models identified by Jonassen et al (1999) focused on either motor skills or cognitive skills, and this is a significant gap. The

nature of most tasks in the professional world requires a combination of these areas, and a blended method would make task analysis extremely more beneficial in the professional training arena.

2. Task analysis does an excellent job of capturing prerequisite skills, but the nature of the process makes identifying prerequisite knowledge more difficult. More research could be done on ways to incorporate a search for that knowledge into task analysis or how to blend other pre-training steps with task analysis to get the big picture.

3. Jonassen et al (1999) provided an excellent summary of task analysis models developed over time, and other sources such as Hartley (2004) discussed the theory of task analysis types. While there were a small number of examples of Cognitive Task Analysis available, such as Militello (1998), no current literature discussing applications of other methods was uncovered. This gap could signify a lack of adoption of the Task Analysis process in the training industry. This seems likely as the process is time consuming and the return on investment is hard to quantify. Also, it seems there is a mismatch of Task Analysis methods to work situations. As identified in Chapter II, the methods focus solely on either cognitive or psychomotor activities. A blended method accounting for the fact that most tasks require both skill types may improve adoption.

4. Additional research on the use of task analysis based on current models in the financial industry and industry in general may add body of literature and may also identify gaps in the training development process as well as highlight the value of the task analysis process.

Summary

      While this study focuses solely on application of a Task Analysis model within a single

organization, the results provide insights into the Task Analysis process as a whole. The

completion of the study highlights a return on investment for Task Analysis that is not

identifiable without completion of the process. Additionally, the study identified a need for

research into additional Task Analysis models that could better align with work processes within

industry.

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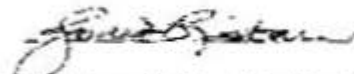
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Appendix A: Invitation to Conduct Study

ABC Financial

October 18, 2011

ABC Financial invites Kelly Benzschawel to conduct a task analysis of the CRM System at ABC Financial to develop training objectives. Results of this study will be used by the firm to improve training offered by the Best Practices Department on the CRM software.

ABC Financial Best Practices Department Manager

Appendix B: Solicitation to Participate in Pilot Study

Your participation is requested in a pilot study regarding the CRM platform. The study will analyze the business tasks completed in the CRM system and use the data to develop training blocks and objectives which can then be used by the department to improve existing and create new training on the system.

Participants will be asked to validate descriptions of steps for completing tasks within the system and to review learning objectives aligned to those tasks for completeness. Provided with electronic copies of all items for review, participants will submit feedback in typed format, hard copy so responses can be kept confidential.

Your participation in this study is voluntary. Should you prefer to be excluded from participation, please respond to me within 1 week from the date of this solicitation notice verbally, by electronic mail (e-mail) or in writing.

Sincerely,

Kelly Benzschawel
Student and researcher
University of Wisconsin, Stout

<u>Statement of consent</u>

I have read the above information. My questions have been answered to my satisfaction. I consent to participate in this study.

_____

Signature of Study Participant   Date

_____

Name   Telephone   Email

_____

Address   City   State, Zip

Appendix C: List of Tasks

Entity Level	#	Task
Activity	1	Create a task
Activity	2	Create an appointment
Activity	4	Create a phone call
Activity	6	Close a group of activities
Activity	7	Re-open an activity or group of activities
Activity	8	Sync Tasks to Outlook
Activity	9	Track a task to CRM
Activity	10	Sync Appointments to Outlook
Activity	11	Track an Appointment to CRM
Activity	12	Sync phone calls to Outlook
Activity	13	Set Regarding of an Email
Activity Creator	1	Launch Activity Creator
Activity Creator	2	Set Preferences for Activity Creator
Activity Creator	3	Create an Activity using Activity Creator
Activity Creator	4	Manage Reminders in Activity Creator
Activity Creator	5	Access a Contact, Financial Account or Household via Activity Creator
Activity Creator	6	Modify Team Members
Company	1	Create a Company
Company	2	Link employees to a company
Contact	1	Find a contact
Contact	2	Create a contact
Contact	3	Edit a Contact
Contact	4	Find Activities for a contact
Contact	5	Access Household Record for a contact
Contact	6	Access Financial Account(s) for a contact
Contact	7	Access Holdings for a Contact
Contact	9	Edit Multiple Contacts
Contact	10	Access Opportunities for a Contact
Contact	12	View Documents for a contact
Contact	13	Complete the Mailings Tab for a contact
Contact	14	Generate a Single letter/envelope for a contact
Contact	15	Merge Contacts
Contact	16	Add an Address for a Contact

Contact	17	Set the Primary Address for a Contact
Contact	18	Set the Preferred Phone for a Contact
Contact	20	Add a contact to a marketing list
Contact	21	Create an Opportunity for a contact
Contact	22	Send an email to a single contact
Contact	23	Send an email to a group of contacts
Contact	24	Change a Contact's Mailing Settings
Contact	26	Add a note for a contact
Contact	27	create a list of contacts
Contact	28	Deactivate a contact
Contact	29	Reactivate Contact
Contact	30	Sync Contacts to Outlook
Contact	31	Track a contact to CRM
Contact	33	Link a contact to a company
Financial Account	1	Find a Financial Account
Financial Account	2	Add an Account Identifier to a Financial Account
Financial Account	3	Access the Owner record for account
Financial Account	4	View holdings in an account
Financial Account	5	Access the Household for an account
General	1	Set default view
General	2	Set time zone
General	3	Set default records per page
Household	1	Find a Household
Household	2	Add a member to a household
Household	3	Find Household Members
Household	4	Add a note to a household
Household	5	Complete the mailings tab for a household
Household	7	View Accounts in a Household
Household	8	View holdings in a household
Household	9	View Opportunities for a Household
Household	10	Set the Primary Contact for a Household
Marketing List	1	Create a marketing list
Marketing List	3	Complete a mailing to marketing list members
Marketing List	4	Send a client-approved intranet document to a marketing list
Marketing List	2	Edit Marketing List Members

Multiple	1	Send a Personalized Letter
Multiple	3	Create a filtered view
Multiple	4	Share a view
Multiple	5	Create a mail merge template
Multiple	6	Implement a Service Model for Clients &/or Prospects
Multiple	7	Select multiple records
Multiple	9	Add Categories
Multiple	10	Monitor Service Model
Opportunity	1	Create an Opportunity
Opportunity	2	Edit an Opportunity
Opportunity	3	Complete an opportunity
Opportunity	4	Determine number of won opportunities in a given time period
Opportunity	5	Determine number of lost opportunities in a given time period
Opportunity	6	Track your active Opportunities
Opportunity	7	Create an activity for an opportunity

Appendix D: Task Analysis Template

One template will be completed for each Task and Sub-task.

Task/Sub-task					
Step	**Type of Step**	**Parties Involved**	**Necessary Resources**	**Prerequisites**	
(description of step)	(Action, decision, thought, etc.)	(FA, CRA, Team, Other)		(Task/Sub-task or individual step)	

Appendix E: Flowchart Key

The following symbol structure will be used in documenting the task steps in flowcharts:

Entry/End point:
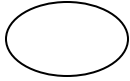
Action/Process:
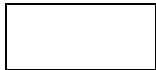
Decision:
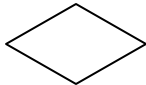
Pre-established process/pre-requisite

Preparation:
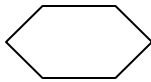
Sequencing
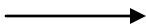
Appendix F: Subject Matter Expert (SME) Feedback Form

1. Please review the Task List provided and note any tasks you feel are missing from the Task List.

2. Please review the task flow charts. Complete the following table with notes on items that are

   unclear, absent, etc. Use extra pages as needed.

Task Name	Description of Missing/Unclear Step(s)

Appendix G: Task Analysis Data Forms

Activity #1 – Create a Task Activity				
Step	**Type of Step (if other than standard)**	**Party(s) Involved (if other than user)**	**Necessary Resources**	**Prerequisites**
Are you already in the record the activity is regarding?	Decision			
If NO, *use Activity Creator to create the activity	Pre-Defined Process			Activity Creator
OR, click Task from the New Activity button in the toolbar				
Enter all or part of the record's name, friendly name, account number or account identifier in the regarding search box				
Click the search button				
Select the record to be the regarding and click OK				
If YES, open the More Options menu, the New Activity menu and select Task				
Enter a subject for the activity				
Type the details of the activity				
Set the priority of the activity				
Is a user other than you the completer of the activity?	Decision			
If yes, type all or part of the user's name and press the [Enter] key or click the search icon				
If desired, check the notify owner box to have an email sent to the new owner				
If desired, check the Notify Me When Complete check box to receive an email when the activity has been completed				
*Does the activity qualify as a Client Touch or for updating	Decision			Establish Service Model

the Last Contact date?				
If yes, check the boxes as appropriate				
Select Start and Due dates and times				
Note: Reminders are based on the start times only	Information			
Select reminder time if desired				
Set the actual or estimated activity duration				
Click save as open if future				
Click Save as Completed if finished				
Click Save and New to save the activity as open and open a new, blank activity form				

Activity Creator #2 – Create an Appointment Activity				
Step	**Type of Step (if other than standard)**	**Party(s) Involved (if other than user)**	**Necessary Resources**	**Prerequisites**
Are you already in the record the activity is regarding?				
If NO, *use Activity Creator to create the activity				
OR, click Appointment from the New Activity button in the toolbar				
Enter all or part of the record's name, friendly name, account number or account identifier in the regarding search box				
Click the search button				
Select the record to be the regarding and click OK				
If YES, open the More Options menu, the New Activity menu and select Appointment				

Additional users or contacts aside from the regarding expected to attend?				
If no, leave Required field blank				
If yes, click the search icon for the Required box				
Select the record type in the drop down				
Type all or part of the name and click the search button				
Select the required record and use the arrows to move it to the right hand pane				
Repeat as necessary to add all required attendees				
Click OK				
Additional users or contacts aside from the regarding optional attendees?				
If no, leave Optional field blank				
If yes, click the search icon for the Optional box				
Select the record type in the drop down				
Type all or part of the name and click the search button				
Select the optional record and use the arrows to move it to the right hand pane				
Repeat as necessary to add all required attendees				
Click OK				
Enter a subject for the activity				
Type the details of the activity				
Set the priority of the activity				
Is a user other than you the completer of the activity?	Decision			
If yes, type all or part of the user's name and press the [Enter] key or click the search icon				

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
If desired, check the notify owner box to have an email sent to the new owner				
If desired, check the Notify Me When Complete check box to receive an email when the activity has been completed				
*Does the activity qualify as a Client Touch or for updating the Last Contact date?	Decision			
If yes, check the boxes as appropriate				
Want to notify other team members of the activity?	Decision			
If yes, check the Notify Team box				
*Modify Team if necessary				
Select Start and Due dates and times				
Note: Reminders are based on the start times only	Information			
Select reminder time if desired				
Set the actual or estimated activity duration				
Click save as open if future				
Click Save as Completed if finished				
Click Save and New to save the activity as open and open a new, blank activity form				

Activity #4 – Create a Phone Call Activity				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Are you already in the record the activity is regarding?	Decision			
If NO, *use Activity Creator to create the activity				Create an Activity Using Activity Creator
OR, click Phone Call from the New Activity button in the				

toolbar				
Enter all or part of the record's name, friendly name, account number or account identifier in the regarding search box				
Click the search button				
Select the record to be the regarding and click OK				
If YES, open the More Options menu, the New Activity menu and select Phone Call				
If the recipient of the call is different from the regarding, type all or part of the contact's name in the Recipient Search box				
Click the search button				
Select the recipient and click OK				
Enter a subject for the activity				
Type the details of the activity				
Set the priority of the activity				
Is a user other than you the completer of the activity?	Decision			
If yes, type all or part of the user's name and press the [Enter] key or click the search icon				
If desired, check the notify owner box to have an email sent to the new owner				
If desired, check the Notify Me When Complete check box to receive an email when the activity has been completed				
*Does the activity qualify as a Client Touch or for updating the Last Contact date?	Decision			Implement a Service Model
If yes, check the boxes as				

appropriate				
Want to notify other team members of the activity?	Decision			
If yes, check the Notify Team box				
*Modify Team if necessary				Modify Team Members
Select Start and Due dates and times				
Note: Reminders are based on the start times only	Information			
Select reminder time if desired				
Set the actual or estimated activity duration				
Click save as open if future				
Click Save as Completed if finished				
Click Save and New to save the activity as open and open a new, blank activity form				

Activity #6 – Complete an Activity or Group of Activities				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Browse to CRM – Activities				
Select one *or more records of the same activity type				Select Multiple Records
Click the Run Workflow button				
Select the Complete workflow				
Click OK to confirm the workflow				

Activity #8 – Sync Tasks to Outlook				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Launch Microsoft Outlook				

Open the CRM menu and select Options				
Select the Synchronization Tab				
Check the Tasks checkbox				
Verify the Set This Computer to be the Synchronizing Client checkbox is checked				
Confirm or check the Synchronize my items in my Outlook folders every box is checked				
Set the desired interval to run sync (minimum 15 minutes)				
Click OK				
Open the CRM menu and select Synchronize with CRM				

Activity #9 – Track a Task to CRM				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Launch Microsoft Outlook				
Open a task in Outlook				
Click the Track in CRM button				
Open the Set Regarding menu and click More				
Choose the record type from the drop down (Contact, Household, Financial Account, Company)				
Type all or part of the name and click the search button				
Select the record the task is regarding				
Click OK				
Save the task				

Activity #10 – Sync Appointments to Outlook

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Launch Microsoft Outlook				
Open the CRM menu and select Options				
Select the Synchronization Tab				
Check the Appointments checkbox				
Verify the Set This Computer to be the Synchronizing Client checkbox is checked				
Confirm or check the Synchronize my items in my Outlook folders every box is checked				
Set the desired interval to run sync (minimum 15 minutes)				
Click OK				
Open the CRM menu and select Synchronize with CRM				

Activity #11 – Track a Appointment to CRM

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Launch Microsoft Outlook				
Open a Appointment in Outlook				
Click the Track in CRM button				
Open the Set Regarding menu and click More				
Choose the record type from the drop down (Contact, Household, Financial Account, Company)				
Type all or part of the name and click the search button				
Select the record the Appointment is regarding				

Click OK				
Save the Appointment				

Activity #12 – Sync Phone Calls to Outlook				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Launch Microsoft Outlook				
Open the CRM menu and select Options				
Select the Synchronization Tab				
Check the Phone Calls checkbox				
Verify the Set This Computer to be the Synchronizing Client checkbox is checked				
Confirm or check the Synchronize my items in my Outlook folders every box is checked				
Set the desired interval to run sync (minimum 15 minutes)				
Click OK				
Open the CRM menu and select Synchronize with CRM				

Activity #13 – Set the Regarding on an Email				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Launch Outlook				
Open an email message to track				
Click the Track in CRM button				
Open the Set Regarding menu and click More				
Choose the record type from the drop down (Contact, Household, Financial				

Account, Company)				
Type all or part of the name and click the search button				
Select the record the Appointment is regarding				
Click OK				
Save the email				

Activity Creator #1 – Launch Activity Creator

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Option 1				
From Outlook, click the icon for Activity Creator				
Option 2				
From the CRM Window, click the icon for Activity Creator				
Option 3				
Open the Windows button on your desktop				
Open the Programs menu from the Windows menu				
Choose Activity Creator from the CRM menu				

Activity Creator #2 – Set Preferences for Activity Creator

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Launch Activity Creator				Launch Activity Creator
Click the Preferences button				
Check the boxes for the default record types to search				
Select the default activity type				
Choose an option for when to automatically check the Notify Owner check box				

Select when to check the notify me when complete check box				
Set any automatic checking options for Client Touch and Last Contact date on specific activity types				
Add reminder and duration default times				
Click Save				
Close the Preferences window				

Activity Creator #3 - Create an Activity using Activity Creator				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
*Launch Activity Creator				Launch Activity Creator
Select record types to search: Accounts Contacts Households Companies				
Enter all or part of the record's name, friendly name, account number or account identifier in the search box				
Click the search button				
Check the records to receive activities				
Enter a subject for the activity				
Type the details of the activity in the Description box				
Select the activity type				
Note that a "note" type does not create an activity. It is for general information record keeping only	Information			
Set the priority of the activity				
Is a user other than you the completer of the activity?	Decision			

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
If yes, type all or part of the user's name and press the [Enter] key or click the search icon				
If desired, check the notify owner box to have an email sent to the new owner				
If desired, check the Notify Me When Complete check box to receive an email when the activity has been completed				
*Does the activity qualify as a Client Touch or for updating the Last Contact date?	Decision			Create a Service Model
If yes, check the boxes as appropriate				
Want to notify other team members of the activity?	Decision			
If yes, check the Notify Team box				
*Modify Team if necessary				Modify Team Members
Select Start and Due dates and times				
Note: Reminders are based on the start times only	Information			
Select reminder time if desired				
Set the actual or estimated activity duration				
Click save as open if future				
Click Save as Completed if finished				
Click Save and View to open the activity and make additional modifications				

Activity Creator #4 – View Reminders in Activity Creator				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
*Launch Activity Creator				Launch Activity Creator

Step				
Click the Open Alerts & Reminders button				
Select any reminders to manage				
Select Open Item to view the activity				
Select Dismiss to prevent the reminder from appearing again				
Select Snooze and set a snooze timeframe to delay the reminder				
Select Dismiss All to prevent all reminders from appearing again				
Select Snooze all and set a snooze timeframe to delay all reminders				

Activity Creator #5 – Access a Contact, Financial Account, Household or Company via Activity Creator

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Launch Activity Creator				Launch Activity Creator
Check the box for the entity or entities you wish to find				
Type all or part of the Name, Friendly Name or Account Identifier in the Search Regarding box				
Type the enter key or click the search button				
From the search results, double click the record you would like to open				

Activity Creator #6 – Set Team Members for Notifications

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Launch Activity Creator				Launch Activity Creator
Select the Notify Team check box				

Click the search button				
Type all or part of the user's last name into the search box				
Click search				
Select a user in the left pane				
Use the arrows to move the user to the right pane				
Use the arrows to move any users to be removed from the team out of the right box				
Click OK				

Company #1 - Create a Company

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Browse to CRM – Companies				
Click the New button				
Enter the Company Name				
Enter the Rep Code				
Add additional information as available				
*Save the record				Save a record

Company #2 - Link employees to a company

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Company				Find a Company
Select Contacts from the left hand navigation				
Does the employee already have a contact record?	Decision			
If yes, Click Add Existing Contact				
Enter all or part of the contact's last name				
Click the Search button				
Select the contact from the list				

in the left box				
Use the arrow key to move the contact to the right pane				
Repeat to add additional contacts if desired				
OR				
If no, Click New Contact				
*Create a Contact record	Pre-Defined Process			Create a contact
Click Save and Close on the Contact record				
*Save the Company	Pre-Defined Process			Save a record

Contact #12 – View Documents for a Contact				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
*Find a Contact	Pre-Defined Process			Find a Contact
Click the Documents Tab				
Click the Browse button				
Navigate to the Contact's shard drive folder. Use the Back button as necessary.				
*Save the record	Pre-Defined Process			Save a record

Contact #13 – Complete the Mailings Tab for a Contact				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Determine how envelop/label, formal greetings and friendly greetings should read	Pre-work	Team		
*Find a Contact	Pre-Defined Process			Find a contact
Is a preferred address assigned?				
If no, *Set the Preferred address	Pre-Defined Process			Set the preferred address
If yes, Click the Mailings Tab				

Check the use preferred address checkbox				
Complete Name or Attention line, formal greeting and friendly greeting				
*Save the record	Pre-Defined Process			Save a record

Contact 1 – Find a Contact				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
*Access CRM	Pre-Defined Process			Access CRM
Click on CRM – Contacts from the My Work menu				
Search by Last name or browse?	Decision			
Type all or part of the First Name, Last Name or Friendly Name of the contact				
Press the Enter key or click the magnifying glass icon to initiate the search				
Use the Scroll Bar and/or page forward/back buttons to locate the desired contact				
In the bottom navigation, select the letter corresponding to the first letter of the contact's last name.				
Scroll and/or page through to find the desired contact				
Double-click the record to open it.				

Contact 2 – Create a Contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Access CRM	Pre-Defined Process			Access CRM
Click on CRM – Contacts from the My Work menu				
Click the New Contact icon				
Enter a minimum of a Last Name and Rep Code, as well as any other relevant general information.				
Click the Profile tab				
Enter any relevant personal information for the contact.				
Click the Administration tab.				
Add any desired team settings for the contact.				
Click the Documents Tab				
Browse to the contact's folder on the team shared drive.				
Click the Mailings Tab				
Complete the Mailings Tab with contact mailing preferences.				
*Save the Record	Pre-Defined Process			Save a record

Contact 3 – Edit a Contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find the contact	Pre-Defined Process			Find a contact
Edit the desired information				
*Save the record	Pre-Defined Process			Save a record

Contact 4 – Find Activities for a contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find the desired contact				Find a contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
record				
Want to see activities for the entire relationship, or the contact only?	Decision			
If Entire Relationship				
Select Summary from the left hand navigation menu				
Select the Start and End Date range to view				
Browse the activities				
If Contact Only				
Future or past activities?	Decision			
If future				
Select Activities from the left hand navigation menu				
Select the time period filter				
If past				
Select History from the left hand navigation menu				
Select the time period filter				

Contacts 5 - Access Household Record for a Contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Contact	Pre-Defined Process			Find a Contact
Click Households from the left navigation pane				
Double-click on a Household Record to launch that record				

Contact 6 – Access Financial Account(s) for a Contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Contact	Pre-Defined Process			Find a Contact
Click Financial Accounts in the left navigation pane				

Double Click a Financial Account Record to launch it				

Contact 7 – Access Holding(s) for a Contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Contact	Pre-Defined Process			Find a Contact
Click Holdings in the left navigation pane				
Double Click a Holding Record to launch it				

Contacts #9 – Edit Multiple Contacts

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Is the field to change 1 of the following? • First Name • Last Name • Middle Name • SSN/TIN • Birthday • Phone Number • Address • Citizenship • Occupation • DAML Account	Decision			Find a Contact
If Yes, cannot mass edit				
If No, Proceed				
Browse to CRM – Contacts				
*Select Records to edit	Pre-Defined Process			Select Records
Click Edit from the More Actions menu				
Enter New Data				
Click Save				

Contact 10 – Access Opportunities for a Contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Contact	Pre-Defined Process			Find a Contact
Click Opportunities in the left navigation pane				
Double Click an Opportunity Record to launch it				

Contacts #14 – Generate a Single Envelop/Letter for a Contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Prepare letter/envelope in MS Word	Pre-work			
*Find a contact	Pre-Defined Process			Find a contact
Click Copy Address in the toolbar				
Navigate to the prepared letter/envelope				
Right Click in desired location				
Select Paste from the right-click menu				

Contact #15 – Merge Contacts

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Locate Contacts to be merged via find or advanced find	Pre-Defined Process			Find a Contact & Advanced Find
*Select both contacts	Pre-Defined Process			Select Multiple Records
Click merge button				
Is either record integrated?				Identify integrated contact
If yes, select integrated record as master record				
If no, selected preferred master record				
Want to manually choose fields from each record?				

If yes, select fields to include from each contact				
If no, check select all fields with data checkbox				
Click OK				

Contact #16 – Add an Address for a Contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a contact	Pre-Defined Process			Find a Contact
Click More Addresses from the left navigation pane				
Click the New Address button				
Select the Address type				
Enter applicable fields				
Click Save and Close in the address record				
*Save the Contact	Pre-Defined Process			Save a record

Contact #17 – Set the Preferred Address for a Contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a contact	Pre-Defined Process			Find a Contact
Address already entered on the contact record?				
If no, *Add the address for the contact	Pre-Defined Process			Add an Address
If yes, click the Preferred Address search button				
Select the address				
Click OK				
*Save the record	Pre-Defined Process			Save a record

Contact #18 – Set the Preferred Phone for a Contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Contact	Pre-Defined			Find a Contact
Click Preferred Phone drop down				
Choose the phone type				
*Save the record	Pre-Defined			Save a record

Contact #20 – Add a Contact to an Existing Marketing List

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Contact	Pre-Defined Process			Find a contact
Click Marketing Lists in the left navigation pane				
Click Add to Marketing List button				
Select Marketing List to add to				
Click OK				
*Save the record	Pre-Defined Process			Save a record

Contact #21 - Create an Opportunity for a contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Contact	Pre-Defined Process			Find a Contact
Click Opportunities in the left hand navigation pane				
Click New Opportunity				
*Create Opportunity	Pre-Defined Process			Create an Opportunity
*Save the record	Pre-Defined Process			Save a record

Contact #22 - Send an email to a single contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites

*Find a Contact	Pre-Defined Process			Find a Contact
Verify Outlook is open. Open it if necessary				
Click the Send Email button or double click the email address				
A blank Outlook message will open				
Compose your message				
Click the Track in CRM button				
Click Send				
Close the Contact record				

Contact #23 - Send an email to a group of contacts				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Who are you sending to?	Decision			
*Use Advanced Find to create a filtered list of individuals; *Create or open a Marketing List; *Select multiple contacts	Pre-Defined Process			Create a filtered list; create a marketing list; select multiple records
Click the Send Email button				
Select the email setting (To:, CC:, BCC:)				
Compose the message in the Outlook window that opens				
*Set regarding on the Email	Pre-Defined Process			Set regarding of an email
Click Send				

Contact 24 – Change a Contact's Mailing Settings				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
*Find a Contact	Pre-Defined Process			Find a Contact
Select the Administration Tab				

Change Desired Settings				
*Save the Record	Pre-Defined Process			Save a record

Contact 26 – Add a Note for a Contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Contact	Pre-Defined Process			Find a Contact
Select the Notes Tab				
Click to enter a new note				
Enter the text of the Note				
Is a Subject or Attachment Desired?				
IF No, *Save the record	Pre-Defined Process			Save a record
If Yes, double click the new note to open the note form				
Enter the subject				
Add the attachment if desired				
Click Save and Close on the Note Record				
*Save the Contact record	Pre-Defined Process			Save a record

Contact 27 - Create A List Of Contacts

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Members Selected How? Based on criteria or hand-picked?	Decision			
If based on criteria, Create a view				Create a view
If hand-picked, *Create a Marketing List or *Add Categories	Pre-Defined Process			Create a Marketing List Add Categories

Contact 28 - Deactivate a contact

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Contact				Find a Contact
Select the Actions menu				
Select Deactivate				
Click OK to Confirm				

Contact 29 - Reactivate Contact				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Open Inactive Contacts View				
*Find a Contact	Pre-Defined Process			Find a Contact
Select or open Contact				
Select Actions menu				
Select Activate				
Click OK to confirm activation				

Contact 30 - Sync Contacts to Outlook				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Launch Microsoft Outlook				
Select Options from the CRM Menu				
Click the Synchronization Tab				
Check the Contacts box				
Verify "Update Company Fields with Parent Household Names" is not checked or uncheck the box				
Check the Synchronize the CRM in Outlook folders box and enter 15 in the minutes box				
Click OK				

Select the Modify Local Data Groups option from the CRM Menu				
Decide What contacts you would like to synchronize	Decision			
Click New				
Build filters for the desired contacts to sync				
Click Save As				
Enter a name for the filter				
Provide a description if desired				
Click OK in the Filter description window				
Click OK in the Local Data Groups window				
Select Synchronize with CRM from the CRM Menu				
Verify Contacts are Synchronized to Outlook				

Contact 31 - Track a contact to CRM

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Launch Microsoft Outlook				
Browse to Contacts				
Browse to the desired contact record				
Double-click the record to open it				
Click the Track in CRM button				
Click the View in CRM button				
Enter the appropriate rep code				
*Save the Record	Pre-Defined Process			Save a record

Contact #33 – Link a Contact to a Company

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Contact	Pre-Defined Process			Find a contact
Select the Profile Tab				
Click the search icon next to the Employer field				
Enter all or part of the company name in the search box				
Click the search button				
Select the company record for linking				
Click OK				
*Save the contact record	Pre-Defined Process			Save a record

Financial Account #1 – Find a Financial Account

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Access CRM	Pre-Defined Process			Find a Contact
Click on CRM – Financial Accounts from the My Work menu				
Type all or part of the Financial Account number, the Contact name or the Account Identifier into the search box				
Double click the record to open it				

Financial Account #2 – Add an Account Identifier

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Financial Account	Pre-Defined Process			Find a Financial Account
Enter Account Identifier as desired				
*Save the record	Pre-Defined Process			Save a record

Financial Account #3 – Access the Owner record for an Account

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Access a Financial Account Record	Pre-Defined Process			Find a Financial Account
Click once on the Owner Name				

Financial Account #5 – Access the Household for an Account

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Access a Financial Account Record	Pre-Defined Process			Find a Financial Account
Select Holdings from the Left hand navigation pane				

Financial Account #5 – Access the Household for an Account

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Access a Financial Account Record	Pre-Defined Process			Find a Financial Account
Click once on the Household name				

General #1 – Set the Default View

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Click Options from the Tools Menu				
Select the Workplace Tab				
Select the desired entity for the default page				
Click OK				

General #2 – Set Time zone

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Is Microsoft Outlook Open?				
If Yes, Close all Outlook				

windows, CRM and Quick Create				
If No, proceed				
*Access CRM				Access CRM
Select Options from the Tools menu				
Select Preferred Time Zone				
Click OK				

General #3 – Set Default Records per Page

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Select Options from the Tools menu				
Select the preferred number of records per page				
Click OK				

Household #1 – Find a Household

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Click on CRM – Households from the My Work menu				
Search by name or browse?	Decision			
Begin Option 1				
Type all or part of the Household Name or Friendly Name				
Press the Enter key or click the magnifying glass icon to initiate the search				
Begin Option 2				
Use the Scroll Bar and/or page forward/back buttons to locate the desired Household				
Begin Option 3				
In the bottom navigation, select the letter corresponding to the first letter of the				

Household name				
Scroll and/or page through to find the desired contact				
End Options				
Double-click the record to open it				

Household #2 – Add a Member to a Household

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Does the New Member already have a contact?				
If No, *Create a Contact record	Pre-Defined Process			Create Contact
IF Yes, Proceed				
*Find the Household	Pre-Defined Process			Find Household
Click Household Members from the left navigation pane				
Click Add Existing Contact				
Enter all or part of contact's last name				
Click the search button				
Select the contact in the left box				
Use the arrows to move the contact to the right box				
Click OK				
*Save the record	Pre-Defined Process			Save a record

Household #3 – Find Household Members

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Household	Pre-Defined Process			Find a Contact
From the left navigation, select Household Members				
Double click to open a Household Member record if				

desired.				
*Save the record	Pre-Defined Process			Save a record

Household #4 - Add a Note to a Household

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Household	Pre-Defined Process			Find a Contact
Select the Notes Tab				
Click to enter a new note				
Enter the text of the Note				
Is a Subject or Attachment Desired?				
IF No, *Save the record	Pre-Defined Process			Save a record
If Yes, double click the new note to open the note form				
Enter the subject				
Add the attachment if desired				
Click Save and Close on the Note Record				
*Save the Contact record	Pre-Defined Process			Save a record

Household #5 – Complete the Mailings Tab

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Determine how team would like to format the following items: • Envelope/Address Label Name line • Formal Greeting line in a letter • Friendly Greeting line in a letter	Pre-work	Entire Team		
*Find a Household	Pre-Defined Process			Find a Household
Is a Primary Contact Set?	Decision			

If no, *Set the Primary Contact	Pre-Defined Process			Set the Primary Contact for a Household
If yes, proceed				
Confirm the Primary Contact has a preferred address	Pre-Defined Process			Set the Preferred address for a Contact
Select the Mailings Tab				
Complete Name Line 1 as decided for envelope/mailing label name line				
Check the Use Preferred Address from Primary Contact box				
Complete Formal greeting line as determined				
Complete Friendly greeting as determined				
Would you like mailings from the firm to use this address information and formal greeting line?	Decision			
If yes, check the Use for Firm-Driven Mailings box and click OK to verify				
IF no, proceed				
*Save the record	Pre-Defined Process			Save a record

Household #5 – Complete the Mailings Tab				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Determine how team would like to format the following items: • Envelope/Address Label Name line • Formal Greeting line in a letter • Friendly Greeting line in a letter	Pre-work	Entire Team		
*Find a Household	Pre-Defined Process			Find a Household

Is a Primary Contact Set?	Decision			
If no, *Set the Primary Contact	Pre-Defined Process			Set the Primary Contact for a Household
If yes, proceed				
Confirm the Primary Contact has a preferred address	Pre-Defined Process			Set the Preferred address for a Contact
Select the Mailings Tab				
Complete Name Line 1 as decided for envelope/mailing label name line				
Check the Use Preferred Address from Primary Contact box				
Complete Formal greeting line as determined				
Complete Friendly greeting as determined				
Would you like mailings from the firm to use this address information and formal greeting line?	Decision			
If yes, check the Use for Firm-Driven Mailings box and click OK to verify				
IF no, proceed				
*Save the record	Pre-Defined Process			Save a record

Household #7 – View Accounts in a Household				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
*Find a Household	Pre-Defined Process			Find a Household
Click on Financial Accounts in the left navigation				
Double click an account to open it if desired				
Save the record				

Household #8 – View Holdings for a Household

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Household	Pre-Defined Process			Find a Household
Select Holdings from the left navigation				
Open any holding record as desired				
Save the record				

Household #9 – View Opportunities for a Household

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Household	Pre-Defined Process			Find a Household
Select Opportunities from the left navigation				
Double Click an Opportunity to open it if desired				
*Save the record	Pre-Defined Process			Save a record

Household #10 – Set the Primary Contact for a Household

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Household	Pre-Defined Process			Find a Household
Click the lookup button for the Primary Contact field				
Type all or part of the contact last name in the search box				
Click the search button				
Select the desired contact from the list				
Click OK				
*Save the record	Pre-Defined Process			Save a record

Marketing Lists #1 – Create a Marketing List				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Browse to CRM – Marketing Lists				
Click New				
Enter a Name for the Marketing List				
Assign a Rep Code to the Marketing List				
Click Save				
Select Marketing List Members from the left navigation pane				
Click the Manage Members icon				
How are you adding members? Based on searchable criteria or individual selection?	Decision			
If Individual Selection, Select Use Lookup to Add Members				
Click OK				
Type all or part of the contact's last name				
Click the Search Button				
Select the desired Contact in the left pane				
Use the arrows to move the Contact to the right pane				
Repeat the process to search for and add additional if desired				
Click OK				
If Adding based on searchable criteria				
Select Use Advanced Find to Add Members				
Click OK				
Add desired filters				
Are you adding all or some of the results?				
If adding all, select Add All the Members Returned by the Search to the Marketing List and click Add to				

Marketing List				
If adding only some of the contacts, *Select records to add, Choose Add only the selected members to the marketing list and click add to marketing list	Pre-Defined Process			Select multiple records
*Save the record	Pre-Defined Process			Save a record

Marketing List #2 – Edit Marketing List Members

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Marketing List	Pre-Defined Process			Find a Marketing List
Select Marketing List Members from the left navigation pane				
Adding Members or Removing Members?	Decision			
Adding Members				
Click Manage Members in the toolbar				
How are you adding members? Based on searchable criteria or individual selection?	Decision			
If Individual Selection, Select Use Lookup to Add Members				
Click OK				
Type all or part of the contact's last name				
Click the Search Button				
Select the desired Contact in the left pane				
Use the arrows to move the Contact to the right pane				
Repeat the process to search for and add additional if desired				
Click OK				
Or				
If Adding based on searchable criteria				
Select Use Advanced Find to Add				

Members				
Click OK				
Add desired filters				
Are you adding all or some of the results?				
If adding all, select Add All the Members Returned by the Search to the Marketing List and click Add to Marketing List				
If adding only some of the contacts, *Select records to add, Choose Add only the selected members to the marketing list and click add to marketing list				Select multiple records
Removing Members				
Removing Members individually or based on searchable criteria or remove all members that do not match criteria?				
If Individually, select the individual for removal				
Open the More Actions menu and choose Remove from Marketing List				
OR				
If by searchable criteria, select Manage Members from the toolbar				
Choose Use Advanced Find to remove members and click OK				
Add filters for the criteria of the individuals you would like to remove.				
Remove everyone or selected individuals?				
If everyone, select Remove all the members returned by the search from the marketing list.				
Or				
If only select individuals, *select individuals for deletion	Pre-Defined Process			Select multiple records
Click Remove only the selected members from the marketing list				
Click Remove from Marketing List				

Or				
Remove members that do not meet searchable criteria				
Select Manage Members				
Choose Use Advanced Find to evaluate members and click OK				
Add search criteria for records to keep and click Find				
Keep all returned records or only selected records?				
If all, select Keep all the members returned by the search in the marketing list and click Update Marketing List				
If only selected, select the records to keep				
Click Keep only the selected members in the marketing list and click Update Marketing List				
*Save the Marketing List	Pre-Defined Process			Save a record

Marketing List #3 – Complete a Mailing to Marketing List Members				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
*Find a Marketing List	Pre-Defined Step			Find a Marketing List
Email or Printed document?				
If Printed, click the mail merge button in the top toolbar.				
*Complete the mail merge	Pre-Defined Step			Send a Personalized Letter
If Email, selected marketing list members or all members?				
If all members, click the Send Email button in the top toolbar				
If selected members, *select members to email	Pre-Defined Step			Select Multiple Records
Click the Send Email button in the middle toolbar				

*Send Email to multiple contacts	Pre-Defined Step			Send a mass email

Marketing List #4 – Send a Client-Approved Intranet Document to a Marketing List

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Launch Intranet				Find a Contact
Search for the document to send				
Check the E-Mail checkbox for the document(s) to be sent				
Click Send Email from the lower left News Headlines box				
Verify documents to send and size limit				
Click next				
Select email text to include				
Enter a salutation if desired				
Click next				
From the Contacts Folder dropdown box, select CRM Marketing Lists				
Select the Marketing List to send to				
Use the right arrow to move the list into the "This E-Mail will be sent to:" pane				
Click send email				

Multiple #1 – Send a Personalized Letter

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Decide to whom the letter will be sent • Contacts/Households/Financial Accounts • Based on searchable criteria/individually selected	Decision			
Decide how to build the list • Marketing List • Filtered View	Decision			
Prepare your Mailing List				

If necessary, *select the individuals on the list who will receive the letter	Pre-Defined Process			Select Multiple Records
Click the Mail Merge icon				
Select Letter from the Merge Type options drop down menu				
Select a starting document				
Choose the desired option for which records to merge				
Are additional data fields needed, or are you starting with a blank document?	Decision			
If yes, click the data fields button				
Check the boxes for the data fields you would like to bring into the merge, changing entity level as necessary				
Click OK				
Click OK to begin the merge				
Word will launch and a list of all recipients brought to the merge will open	Information			
Deselect any recipients to exclude, if desired				
Modify the formatting and content of the letter as desired				
Click the Next: Preview Your Letters option				
Recipients can be scrolled through for preview using the arrow keys in the wizard box. However, you cannot change individual recipient information in this preview mode	Information			
Click Next: Complete the merge				
Want to modify individual recipient data or save the merged document for later use?				
If yes, select the Edit Individual Letters option				
If no, select the Print option to send some or all letters to the printer				
A box will open asking which records to merge. Select the correct option to				

merge to all records, the current record or specific record numbers.				
A box will open asking to create activities	Information			
Do you want the letters tracked to the recipients' CRM records?				
If no, choose Do not create Microsoft Dynamics CRM Activities				
If yes, choose Create Microsoft Dynamics CRM activities				
Click the Activity Details box				
Modify the Subject to a meaningful title for the letter and modify other fields as desired				
Note that the default works in most cases for all fields other than the subject	Information			
Click OK				
Click OK again in the Create Activities Box				
A process will run individually creating activities. This can take several minutes	Information			
Your documents will print or a new MS Word document will open				
Close the Mail Merge window				
Click OK when a box opens asking you to Stop Current Microsoft Dynamics CRM mail merge				
Click No when asked to save the document				

Multiple #3 – Create a Filtered View				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Browse to the record type you'd like to filter				
Select a view from the views dropdown to start from				
Click the Advanced Find button in the toolbar				
The Filters for the starting view should be displayed				

Click Show Details to open the filters for editing				
To add a filter, click select and choose the field to filter from the drop down				
Change the qualifier as appropriate (equals, contains, contains data, etc)				
Enter the filter data in the right field				
Add additional filters as necessary				
To modify the columns and layout, click the Edit Columns Button				
To delete columns, select the column to delete				
Choose remove				
To add columns, click Add Columns				
Choose the record level of the field to add				
Check the boxes of any fields to be added				
Click OK				
To reorder columns, choose a column and use the arrows on the right to move the column to the desired position				
To change the sort order, select Configure Sorting				
Choose the column to sort on				
Select Ascending or Descending				
Click OK				
Click Find to preview the view and confirm it is as desired				
Click Back to Query to finalize				
Click Save As				
Enter a name for the view				

Multiple #4 - Share a view				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Click Advanced Find from the toolbar				

Select the Saved Views tab				
Choose the view to share				
Open the More Actions menu				
Select Sharing				
Click Add User/Team				
Type user's last name in the search box				
Select the user and use the arrows to move it to the right box				
Repeat to add additional users as necessary				
Check the boxes to control the access level				
Note that a user with only read access will be able to fully use the view and modify records within the view	Information			
Click OK				

Multiple #5 – Create a Mail Merge Template				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Browse to the entity level the template will be used with				
Select one or more records				
Click the Mail Merge icon				
Select the document type from the Merge Type options drop down menu				
Base the template on an existing template? (recommended)				
If yes, choose the template				
If no, select Blank Document				
Need additional data fields or starting with a blank document?				
If yes, click the data fields button				
Check the boxes for the data fields you would like to bring into the merge, changing entity level as necessary				
Click OK				

Click OK to launch the merge				
Word will open and a list of recipients will open	Information			
Modify the formatting and content of the document				
Select Next: Preview Your Letters				
Make any additional edits as necessary				
Click Next: Complete the merge				
Select Upload Template to CRM				
If a box opens asking if you want to update the current mail merge template, click No to create a new template				
A window will open	Information			
Provide a name for the template				
Click Save and Close				
Close the Mail Merge window				
Click OK when a box opens asking you to Stop Current Microsoft Dynamics CRM mail merge				
Click No when asked to save the document				

Multiple #6 – Implement a Service Model for Clients/Prospects				
Step	**Type of Step**	**Party(s) Involved**	**Necessary Resources**	**Prerequisites**
Determine how you will select tiers I – IV	Pre-work	Whole Team		
Determine the specific services you will provide and how often you will communicate with each service tier	Pre-work	Whole Team		
*Filter for records to assign a specific tier	Pre-Defined Process			Create a filtered list
*Select records to assign the tier	Pre-Defined Process			Select multiple records
*Edit records to assign the tier	Pre-Defined Process			Edit multiple contacts
Repeat for each tier				

*Create activities for records based on service model	Pre-Defined Process			

Multiple #7 – Select Multiple Records

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Browse to any view				
Select a record				
Are the records to be selected continuous?	Decision			
If yes, hold the [shift] key and click the last record to select.				
All records between will be selected	Information			
OR				
If no, hold the control key and individually click records to select				
Note that browsing to the next page will de-select any records previously chosen	Information			

Multiple #9 – Add Categories

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
*Find a Record	Pre-Defined Step			Find a Contact/Household/Financial Account
Select the Administration Tab				
Are Categories Listed Already?	Decision			
If No, type the category as desired				
If Yes, following the last entry type a comma and a space followed by the category as desired				
*Save the record	Pre-Defined Step			Save a record

Multiple #10 – Monitor Service Model

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites

Browse to CRM – Reports				
Evaluate Prospects or Clients?	Decision			
If Prospects, select the Service Summary for Contacts report				
If Clients, select the Service Summary for Households report				
Click Run Report				
Click the arrows next to Days Since Last Contact to see who is overdue for contact				

Opportunity #1 - Create an Opportunity

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Is the opportunity for an existing client or does the prospect already have a contact record?	Decision			
If no, *Create a Contact	Pre-Defined Process			Create a Contact
Browse to CRM – Opportunities				
Click New				
Add a topic				
Select the Lookup button next to the Potential Customer field				
Choose Household or Contact from the dropdown				
Type all or part of the contact or Household name				
Click the search button				
Select the record				
Click OK				
Complete other fields as desired				
*Save the record	Pre-Defined Process			Save a record

Opportunity #2 - Edit an Opportunity

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites

Browse to CRM – Opportunities				
Select and open the opportunity to edit				
Modify fields as needed				
*Save the record	Pre-Defined Process			Save a record

Opportunity #3 - Complete an opportunity

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Browse to CRM – Opportunities				
Select and Open the Opportunity to complete				
Select Close Opportunity from the Actions menu				
Choose whether the opportunity was won or lost				
Select a reason for the outcome				
Enter the actual revenue				
Choose the date the opportunity was closed				
Click OK				
*Save the record	Pre-Defined Process			Save a record

Opportunity #4 - Determine Number of Won Opportunities in a Given Time Period

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Browse to CRM – Opportunities				
*Create a filtered view using filters won opportunities and for closed date	Pre-Defined Process			Create a filtered view
View the filtered list; bottom toolbar will display the number of records				

Opportunity #5 - Determine Number of Lost Opportunities in a Given Time Period

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Browse to CRM – Opportunities				

*Create a filtered view using filters lost opportunities and for closed date	Pre-Defined Process			Create a filtered view
View the filtered list; bottom toolbar will display the number of records				

Opportunity #6 – Track Active Opportunities

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Browse to CRM – Opportunities				
From the Views drop down, select Open Opportunities				
Sort by columns as preferred; for example by sales stage or estimated close date				
*Update Opportunities as needed	Pre-Defined Process			Update Opportunity

Opportunity #7 – Create an Activity for an Opportunity

Step	Type of Step	Party(s) Involved	Necessary Resources	Prerequisites
Browse to CRM – Opportunities				
Open the Opportunity for the Activity				
From the Actions menu, select Add Activity and choose the Activity type				
*Create the activity record	Pre-Defined Process			Create an Activity

Appendix H: Flowcharts

Create a Task Activity

Create an Appointment Activity

Start Process

Are you already in the record the activity is regarding?
— No → Use Activity Creator to create the activity — OR — Click Appointment from the New Activity button in the toolbar → Enter all or part of the record's name in the regarding search box.
— Yes → Open the More Actions menu, the New Activity menu and select Appointment

Click the Search button → Select the record to be the regarding and click OK

Are additional users or contacts expected to attend?
— No → Leave Required Field blank
— Yes → Click the search icon for the required box → Select the record type in the dropdown → Type all or part of the name and click the search button → Select the required record and use the arrows to move it to the right hand pane

Repeat as necessary to add all required attendees → Click OK → **Are there additional optional attendees?**
— No → Leave Optional field blank
— Yes → Click the search icon for the required box → Select the record type in the dropdown

Type all or part of the name and click the search button → Select the optional record and use the arrows to move it to the right hand pane → Repeat as necessary to add all optional attendees → Click OK → Enter a subject for the activity → Type the details of the activity

Set the Priority of the activity → **Is a user other than yourself the completer of the activity?**
— Yes → Type all or part of the user's name and press Enter or click the search icon → If desired, check the notify owner box to have an email sent to the new owner → If desired, check the Notify Me When Complete check box to receive email when the activity is completed → **Does the activity qualify as client touch or last contact?**
— No

Check boxes as desired → **Want to notify others of the activity?**
— Yes → Check the Notify Team checkbox → Modify Team if necessary → Select Start and Due date dates and times → Note reminders are based on start times
— No

Select reminder time if desired → Set the actual or estimated activity duration → Click Save as Open if future — OR — Click Save as Completed if finished — OR — Click Save and New to save as open and launch a blank phone call activity → **End Process**

Create a Phone Call Activity

Start Process → Are you already in the record the activity is regarding?

No → Use Activity Creator to create the activity — OR — Click Phone Call from the New Activity button in the toolbar → Enter all or part of the record's name in the regarding search box.

→ Click the Search button → Select the record to be the regarding and click OK

Yes → Open the More Actions menu, the New Activity menu and select Phone Call

If the recipient of the phone call is different from the regarding, type all or part of the name in the recipient box → Click the Search button → Select the recipient and click OK → Enter a subject for the activity → Type the details of the activity → Set the Priority of the activity

Is another user the completer of the activity? — Yes→ Type all or part of the user's name and press the Enter key or click the search icon → If desired, check the notify owner box to have an email sent to the new owner → If desired, check the Notify Me When Complete box to receive an email when the activity is completed → Does the activity qualify as a client Touch or Last Contact? — Yes→ Check the boxes as appropriate

No —

Went to notify other team members of the activity? — Yes→ Click the Notify Team box → Modify Team members if necessary → Select Start and Due date and times → Note: reminders are based on start times → Select reminder time if desired

No —

Set the actual or estimated activity duration → Click Save as Open if future — OR — Click Save as Completed if finished — OR — Click Save and New to save as open and launch a blank phone call activity → End Process

Complete Activities

Start Process → Browse to CRM - Activities → Select Activities of the same type to be completed → Click the Run Workflow icon.

→ Select the Complete Activities workflow → Click OK to confirm the workflow → End process

Reopen Completed Activities

Start Process → Browse to CRM - Activities → Select Activities of the same type to be reopened → Click the Run Workflow icon.

Select the Reopen Activities workflow → Click OK to confirm the workflow → End process

Sync Tasks to Outlook

Start Process → Launch Microsoft Outlook → Open the CRM menu and select Options → Select the Synchronization tab → Check the Tasks checkbox → Verify the Set This Computer to be the synchronizing Client checkbox is checked

Confirm or check the Synchronize my items to my Outlook folders every box is checked → Set the desired interval to run sync (minimum 15 minutes) → Click OK → Open the CRM menu and select Synchronize with CRM → End Process

Track a Task to CRM

Start Process → Launch Microsoft Outlook → Open a Task in Outlook → Click the Track in CRM button → Open the Set Regarding menu and click More → Choose the record type from the drop down

Type all or part of the name and click the search button → Select the record the task is regarding → Click OK → Save the Outlook Task → End Process

Sync Appointments to Outlook

Start Process → Launch Microsoft Outlook → Open the CRM menu and select Options → Select the Synchronization tab → Check the Appointments checkbox → Verify the Set This Computer to be the synchronizing Client checkbox is checked

Confirm or check the Synchronize my items to my Outlook folders every box is checked → Set the desired interval to run sync (minimum 15 minutes) → Click OK → Open the CRM menu and select Synchronize with CRM → End Process

Track an Appointment to CRM

Start Process → Launch Microsoft Outlook → Open an Appointment in Outlook → Click the Track in CRM button → Open the Set Regarding menu and click More → Choose the record type from the drop down

Type all or part of the name and click the search button → Select the record the Appointment is regarding → Click OK → Save the Outlook Appointment → End Process

Sync Phone Calls to Outlook

Start Process → Open the CRM Menu and select Options → Select the Synchronization tab → Check the phone calls checkbox → Verify the Set This Computer to be the Synchronizing Client checkbox is checked

Confirm or check the Synchronize my items in my Outlook folders every box is checked → Set the desired interval to run sync (minimum 15 minutes) → Click OK → Open the CRM menu and select Synchronize with CRM → End Process

Set the Regarding on an Email

```
Start Process → Open the Email Message to track → Click the Track in CRM button → Open the Set Regarding menu and click More → Choose the record type from the drop down menu

Type all or part of the name and click the search button → Select the record the Email is regarding → Click OK → Save the Email → End Process
```

Launch Activity Creator

```
From Outlook, click the icon for Activity Creator

Start Process → From the CRM Window, click the icon for Activity Creator → End Process

Open the Windows button on your desktop → Open the Programs menu from the Windows menu → Choose Activity Creator from the CRM Menu
```

Set Preferences for Activity Creator

```
Start Process → Launch Activity Creator → Click the Preferences button → Check the boxes for the default record types to search → Select the default activity type → Choose an option for when to automatically check the Notify Owner check box

Select when to check the notify me when complete check box → Set any automatic checking options for Client Touch and Last Contact Date → Add reminder and duration default times → Click Save → Close the Preferences Window → End Process
```

Create an Activity via Activity Creator


```
Start Process → Select Record Types to Search → Enter all or part of the record's name, friendly name, account number or account identifier in the search box → Click the search button → Enter a subject for the activity

Type the details of the activity in the Description box → Select the Activity Type → Note: A "Note" is for general information only → Set the Priority of the Activity → Is a user other than yourself the completer of the activity?

Yes → Type all or part of the user's name and press the Enter key or click the search icon → If desired, check the notify owner box to have an email sent to the new owner → If desired, check Notify Me When Complete to receive an email when the activity is completed → Does activity qualify as Client Touch or for updating Last Contact date?

No → Want to notify others of the activity?

Yes → Check boxes as appropriate

Yes → Check the Notify Team box → Modify Team Members if necessary → Select Start and Due dates and times → Reminders are triggered based on start time only

No → Select reminder time if desired → Select the actual or estimated activity durateion → Is activity completed or for future or want to modify further?

Completed → Click Save as Completed
Open → Click Save as Open
Modify → Click Save and View
```

Manage Reminders in Activity Creator

Start Process → Launch Activity Creator → Click the Open Alerts & Reminders button → Select any reminders to manage → View, Snooze some or all or Dismiss some or all?

- Select Open Item to view the activity
- Select Dismiss to prevent the reminder from appearing again
- Select Snooze and set a snooze timeframe to delay the reminder
- Select Dismiss All to prevent all reminders from appearing again
- Select Snooze all and Set a snooze timeframe to delay all reminders

End Process

Access a Contact, Financial Account, Household or Company via Activity Creator

Start Process → Launch Activity Creator → Check the boxes for the entity or entities you wish to find → Typ all or part of the Name, Friendly Name or Account Identifier in the search Regarding box

Type the enter key or click the search button → From the search results, double click the record you would like to open → End Process

Set Team Members for Notification in Activity Creator

Start Process → Launch Activity Creator → Select the Notify Team check box → Click the search button → Type all or part of the user's last name into the search box → Click Search

Select a user in the left pane → Use the arrows to move the user to the right pane → Repeat if necessary → Use the arrows to remove any user's from the right pane for exclusion → Click OK → End Process

Create a Company

Start Process → Browse to CRM - Companies → Click the New button → Enter the company name

Enter the Rep Code → Add additional details as available → Save the record → End Process

Link Employees to a Company

Start Process → Find a Company → Select Contacts from the left hand navigation → Does the employee already have a contact record?

No → Click New Contact → Create a Contact Record

Yes → Click Add Existing Contact → Enter all or part of the contact's last name → Click the Search button → Select the contact in the left box

Use the arrows to move the contact to the right pane → Repeat to add additional contacts as desired → Save the Company record → End Process

Find a Contact

Start Process → Access CRM → Click on CRM – Contacts from the My Work menu → Choose to Search by name or browse by full list or alphabetically

Browse Full List → Use the Scroll Bar and/or page navigation to locate desired contact

Search by Last Name → Type all or part of the first name, last name or friendly name of the contact → Press the Enter key or click the magnifying glass icon to initiate the search

Browse List Alphabetically → In the bottom navigation, select the letter corresponding to the first letter of the last name → Scroll and/or page through to find the desired contact

Double Click the record to open it → End Process

Create a Contact

Start Process → Access CRM → Click CRM Contacts from the My Work menu → Click the New Contact icon → Enter at least Last Name and Rep Code and any other relevant general information

Click the Profile tab → Enter any relevant personal information for the contact → Click the Administration Tab → Add any desired team settings for the contact → Click the Documents Tab

Browse to the contact's folder of the team shared drive → Click the Mailings Tab → Complete the Mailings Tab with contact mailing preferences → Save the record → End Process

Edit a Contact

Start Process → Find a Contact → Edit the desired information → Save the Record → End Process

Find Activities for a Contact

```
Start Process → [Want to see activities for the entire relationship or the contact only?]
  — Entire Relationship → [Select Summary from the left navigation] → [Set the Start and End Date range to view] → [Browse activities] → End Process
  — Contact Only → <Future or Past Activities?>
        — Future → [Select Activities from the left navigation menu] → [Select the time period filter] → [Browse activities]
        — Past → [Select History from the left navigation menu] → [Select the time period filter] → [Browse activities]
```

Access Household Record(s) for a Contact

```
Start Process → [Find a Contact] → [Click Households in the Left Navigation Pane] → [Select Household Record. Double-click to open.] → Complete
```

Access Financial Account Record(s) for a Contact

```
Start Process → [Find a Contact] → [Click Financial Accounts in the Left Navigation Pane] → [Select Financial Account Record. Double-click to open.] → Complete
```

Access Holding Record(s) for a Contact

```
Start Process → [Find a Contact] → [Click Holdings in the Left Navigation Pane] → [Select Holding Record. Double-click to open.] → Complete
```

Edit Multiple Contacts

Start Process → Are the fields to edit mass-edit capable? → Edit Individual → Browse to CRM - Contacts

Select Records to Edit → Click Edit from the More Actions menu → Enter new data → Click Save → End Process

Access Opportunities for a Contact

Start Process → Find a Contact → Click Opportunities in the left navigation pane → Double Click an Opportunity Record to launch it → End Process

View Documents for a Contact

Start Process → Find a Contact → Click the Documents Tab → Click the Browse Button

Navigate to Contact's shared drive folder. Use Back Button as necessary. → Finished with record?

No → Click Save

Yes → Click Save and Close

→ Complete

Complete the Mailings Tab for a Contact

Start → Determine how envelope/labe, formal greetings and friendly greetingsl should read → Find a Contact → Preferred Address Assigned?

Preferred Address Assigned? — No → Set Preferred Address

Preferred Address Assigned? — Yes

Click the Mailings Tab → Check the use preferred address checkbox → Complete Name or Attention line, formal greeting and friendly greeting

Finished with record? → Click Save → Complete

Finished with record? → Click Save and Close → Complete

Generate a Single Envelope/Letter for a Contact

Start → Prepare Letter/ Envelope in MS Word → Find a Contact → Click Copy Address in toolbar

Navigate to prepared letter/ envelope → Right Click in desired location → Select Paste from right-click menu → Complete

Merge Contacts


```
Start → Locate Contacts to be merged via find or advanced find → Select both contacts → Click Merge button → Is either record integrated?

Is either record integrated?
  Yes → Set Integrated Record as master record
  No → Select Preferred master record

Set Integrated Record as master record → Want to manually select fields from each record?
Select Preferred master record → Want to manually select fields from each record?

Want to manually select fields from each record?
  No → Check select all fields with data checkbox
  Yes → Select fields to include from each contact

Check select all fields with data checkbox → Click OK → Conplete
Select fields to include from each contact → Click OK
```

Add an Address to a Contact


```
Start Process → Find a Contact → Click More Addresses from the left navigation pane → Click the New Address button → Select the Address Type → Enter applicable fields → Click Save and Close on the address record. → Finished with record?

Finished with record?
  No → Click Save
  Yes → Click Save and Close

Click Save → Complete
Click Save and Close → Complete
```

Set the Primary Address for a Contact

```
Start Process → Find a Contact → Address already entered on the Contact?
```

Address already entered on the Contact? — No → Add Address to Contact

Address already entered on the Contact? — Yes → Click Preferred Address search button

Add Address to Contact → Click Preferred Address search button

Click Preferred Address search button → Select Address → Click OK → Finished with record?

Finished with record? — No → Click Save → Complete

Finished with record? — Yes → Click Save and Close → Complete

Set the Preferred Phone for a Contact

Start Process → Find a Contact → Click Preferred Phone Dropdown and select phone type → Finished with record?

Finished with record? — No → Click Save → Complete

Finished with record? — Yes → Click Save and Close → Complete

Add a Contact to an Existing Marketing List

Start Process → Find a Contact → Click Marketing Lists in the left navigation pane → Click Add to Marketing List Button → Select Marketing List to add to → Click OK → Finished with record?

- No → Click Save → Complete
- Yes → Click Save and Close → Complete

Create an Opportunity for a Contact

Start Process → Find a Contact → Click Opportunities in the left navigation pane → Click New Opportunity button → Create Opportunity → Complete

Send an Email to a Single Contact

Start Process → Find a Contact → Click the Send Email button or double click the email address → In the Outlook message that opens, compose message → Click the Track in CRM button → Click Send → Complete

Send an Email to a Group of Contacts

```
Start Process → Who are you sending to? →
    Use Advanced Find to create filtered list
    Create or open Marketing List
    Select multiple contacts
→ Click Send Email Button → Select email settings (To:, CC:, BCC: )
→ Compose message in Outlook window that opens → Set Regarding on the Email → Click Send → Complete
```

Change a Contact's Mailing Settings

```
Start Process → Find a Contact → Select the Administration Tab → Change the desired Settings → Save the record → End Task
```

Add a Note for a Contact

Start Process → Find a Contact → Select the Notes Tab → Click to Enter a new note → Enter the text of the note

Is a subject or attachment desired? — Yes → Double click the note to open the note form → Enter the subject → Click the paper clip icon to add an attachment → Click Save and Close on the Note record

No → Save the record → End Process

Create a List of Contacts

Start process → Members selected based on criteria or hand-picked? → Create a View → End Process

Create a Marketing List → End Process

OR

Add Categories

Deactivate a Contact

Start Process → Find a Contact → Select the Actions menu → Select Deactivate → Click OK to confirm deactivation → End Process

Reactivate a Contact

Start Process → Open Inactive Contacts View → Find a Contact → Select one or more Contacts → Select the Actions Menu → Select Activate → Click OK to Confirm activation → End Process

Link a Contact to a Company

Start Process → Find a Contact → Select the Profile Tab → Click the Search icon next to the Employer field → Enter all or part of the company name in the search box → Click the search button → Select the company record for linking → Click OK → Save the contact → End Process

Find a Financial Account

Start Process → Access CRM → Click on CRM - Financial Accounts from the My Work menu → Type all or part of the Financial Account number, Contact name or Account Identifier into the search box → Click the search button → Double-click the record to open it → End Process

Add an Account Identifier to a Financial Account

Start Process → Find a record → On the General Tab, edit the Account Identifier field as desired → Save the record → End Process

Access the Owner record for an Account

Start Process → Find a Financial Account → Click once on the Owner Name to open the Contact record → End Process

View the Holdings for an Account

Start Process → Find a Financial Account → Select Holdings from the left hand navigation pane → End Process

View the Holdings for an Account

Start Process → Find a Financial Account → Select Holdings from the left hand navigation pane → End Process

Access the Household record for an Account

Start Process → Find a Financial Account → Click once on the Household Name to open the record → End Process

Set the Default View

Start Process → Click Options from the Tools Menu → Select the Workplace Tab → Select the desired entity for the default page → Click OK → End Process

Set Time Zone

Start Process → Is Outlook open?

Yes → Close all Outlook windows, CRM and Quick Create → Access CRM

No →

Select Options from the Tools menu → Select Preferred Time Zore → Click OK → Click OK → End Process

Set Records Per Page

Start Process → Select Options from the Tools menu → Select the Preferred number of records per page → Click OK → End Process

Find a Household

Start Process → Access CRM → Click on CRM - Households from the My Work menu

Type all or part of the Household Name or Friendly Name into the search box → Press the Enter key or select the search icon to initiate the search

Search Name

Search by name, browse by letter or browse whole list

Browse all → Use the scroll bar and/or page forward/back buttons to locate the desired Household

Browse by letter → Select the letter corresponding to the first letter of the Household name → Scroll and/or page through to find the desired contact

Double-click the record to open it → End Process

Add a Member to a Household

```
Start Process → Does the New Member already have a Contact? → No → Create a Contact
                                                             → Yes
```

Find a Household → Click Household Members from the left navigation pane → Click add existing Contact → Enter all or part of contact's last name → Click the Search button

Select the desired contact from the left box → Use the arrows to move the contact to the right box → Click OK → Save the Record → End Process

Find Household Members

Start Process → Find a Household → From the left navigation, select Household Members → Double click to open a Household Member record if desired. → Save the record → End Process

Add a Note to a Household

Start Process → Find a Household → Select the Notes Tab → Click to enter a new note → Enter the text of the note → Is a subject or Attachment Desired?

Yes → Double-click the new note to open it for editing → Enter the subject → Add an attachment if desired → Click save and close on the note record → Save the contact record → End Process

No → Save the contact record

Complete the Mailings Tab for a Household

Start Process → Determine how the team would like to format various mailing options → Find a record → Is a Primary Contact Set? → No → Set a Primary Contact

Yes ↓

Confirm the Primary Contact has a preferred address → Select the Mailings tab → Complete Name Line 1 as decided for envelope/ mailing label name line → Check the Use Preferred Address from Primary Contact box → Complete the Formal greeting line as determined

Complete the Friendly Greeting line as determined → Would you like mailings from the firm to use this address information and formal greeting line? → Yes → Check the Use for Firm-Driven Mailings box and click OK to verify → Save Record → End Process

No →

View Accounts in a Household

Start Process → Find a Household → Click on Financial Accounts in the left navigation → Double click an account to open it if desired → Save the record → End Process

View Holdings in a Household

Start Process → Find a Household → Click on Holdings in the left navigation → Double click any holding record to open it if desired → Save the record → End Process

View Opportunities for a Household

Start Process → Find a Household → Click on Opportunities in the left navigation → Double click an Opportunity to open it if desired → Save the record → End Process

Add a Primary Contact to a Household

Create a Marketing List

Complete a Mailing to Marketing List Members

Start Process → Find a Marketing List → Email or printed document?
- Printed → Click the mail merge button in the top toolbar → Complete the mail merge
- Email → Selected members or all members?
  - All → Click the Send Email button in the top toolbar → Send Email to Multiple Contacts → End Process
  - Selected → Select members to email → Click the Send Email button in the middle toolbar → Send Email to Multiple Contacts

Send a Client-Approved Intranet Document to a Marketing List

Start Process → Launch Intranet → Search for the document to send → Check the E-Mail checkbox for the document(s) to be sent → Click Send Email from the lower left News Headlines box → Verify documents to send and size limit → Click Next → Select email text to include → Enter a salutation if desired → Click Next → From the Contacts Folder dropdown box, select CRM Marketing Lists → Select the Marketing List to send to → Use the right arrow to move the list into the "This E-Mail will be sent to:" pane → Click Send Email → End Process

Edit Marketing List Members

```
Start Process → Find a Marketing List → Select Marketing List Members from the left navigation pane → Adding or removing members —Add→ Add Members to Marketing List
```

—Remove→

```
Removing Individually, based on searchable or all members that do not meet criteria? —Individual→ Select member(s) for removal → Open More Actions menu → Choose Remove from Marketing List → Click OK to confirm removal
```

—Searchable—

```
Select Manage Members from the toolbar → Choose Use Advanced Find to remove members → Click OK → Add filters for the criteria of the individuals to be removed → Remove all or some returned individuals? —All→ Select Remove all the members returned by the search from the marketing list
```

—Selected—

```
Select individuals for removal → Choose Remove only the selected members from the marketing list → Click Remove from Marketing List
```

Do Not Meet Criteria

```
Select Manage Members → Choose Use Advanced Find to evaluate members → Click OK → Add filters for criteria of records to KEEP → Click OK
```

```
Keep all records that meet the criteria or select members to keep? —All→ Select Keep all the members returned by the search → Click Update Marketing List → Save the Marketing List → End Process
```

—Selected→

```
Select records to keep → Click Keep only the selected members in the marketing list → (to Click Update Marketing List)
```

Send a Personalized Letter

Create a Filtered View

Share a View

```
Start Process  →  Click Advanced      →  Select the Saved   →  Choose the view to  →  Open the More
                  Find from the           Views tab             share                 Actions menu
                  toolbar

Select Sharing  →  Click Add User/     →  Type user's last   →  Select the user     →  Repeat to add
                   Team                    name in the search    and use the arrows     additional users as
                                           box                   to move it to the      necessary
                                                                 right box

Check the boxes  →  Sharing            →  Click OK           →  End Process
to control the      Level of
access level        View allows
                    user to
                    change the
                    records just
                    not the view
```

Create a Mail merge Template

```
Start Process → Browse to the entity level the template will be used with → Select one or more records → Select the document type from the Merge Type options drop-down menu → Base the template on an existing template? (recommended)
```

Yes / No

```
Choose the template → Select blank document → Need additional data fields or starting with a blank document? → Click the data fields button → Check the boxes for the dta fields you would like to bring into the merge, changing entity level as necessary
```

```
Click OK → Click OK to launch the merge document → MS Word and a list of recipients will open → Modify the formatting and content of the document → Select Next: Preview Your Letters
```

```
Make any additional edits as necessary → Click Next: Complete the Merge → Select Upload Template to CRM → If a box opens asking if you want to update the current mail merge template, click No to create a new template → In the window that opens, provide a name for the template
```

```
Select Save and Close → Close the Mail Merge window → Click OK when a box opens asking to stop the current Mail Merge → Click No when asked to save the document → End Process
```

Implement a Service Model for Clients/Prospects

```
Start Process → Determine how to select tiers I - IV → Determine services and frequencies for each tier → Filter for records to assign a specific tier → Select records to assign the tier
```

```
Edit records and assign the tier → Repeat process for each tier → Create activities for records based on service model → End Process
```

Select Multiple Records

Start Process → Browse to any view → Select a record → Are the records to be selected continuous?

Hold the shift key and click last record to select → All records between clicked records will be selected

Hold the control key and individually click records to select → Browsing to the next page will de-select any records previously chosen → End Process

Add Categories to a Record

Start Process → Find a Contact → Select the Administration Tab → Are any categories already listed?

No → Type the category entry

Yes → Following the last entry type a comma and a space followed by the category → Save the record → End Process

Monitor Service Model

Start Process → Browse to CRM - Reports → Evaluate Prospects or Clients?

Prospects → Select the Service Summary for Contacts report

Clients → Select Service Summary for Households → Click Run Report → Click the arrows next to Days Since Last Contact to see who is overdue for contact → End Process

Create an Opportunity

Start Process → **Is the opportunity for a client or prospect that already has a contact record?** —No→ Create a Contact

Yes ↓

Browse to CRM - Opportunities → Click New → Add a topic → Select the Lookup button for the Potential Customer field → Choose Household or Contact from the drop down menu → Type all or part of the contact or Household name

Click the search button → Select the record → Click OK → Complete other fields as desired → Save the record → Complete the record

Edit an Opportunity

Start Process → Browse to CRM - Opportunities → Select and double-click to open the opportunity to edit → Modify fields as needed → Save the record → End Process

Complete an Opportunity

Start Process → Browse to CRM - Opportunities → Select and double-click to open the opportunity to edit → Select Close Opportunity from the Actions menu → Choose whether the opportunity was won or lost

Select a reason for the outcome → Enter the actual income if appropriate → Choose the date the opportunity was closed → Click OK → Save the record → End Process

Determine Number of Won Opportunities in a Given Time Period

Start Process → Browse to CRM - Opportunities → Create a filtered view with State = Won and Closed Date = chosen date range → Click Find to view the list; bottom toolbar will display the number of records → End Process

Determine Number of Lost Opportunities in a Given Time Period

Start Process → Browse to CRM - Opportunities → Create a filtered view with State = Lost and Closed Date = chosen date range → Click Find to view the list; bottom toolbar will display the number of records → End Process

Track Active Opportunities

Start Process → Browse to CRM - Opportunities → From the Views dropdown, select Open Opportunities → Click the column headers to sort as desired → Update Opportunities as needed → End Process

Create an Activity for an Opportunity

Start Process → Browse to CRM - Opportunities → Open the Opportunity for the Activity → From the Actions menu, select Add Activity and choose the Activity Type → Create the Activity Record → End Process

Appendix I: Training Blocks

1. Introduction to CRM

   a. Select multiple records

2. Getting Started

   a. Access a Contact, Financial Account or Household via Activity Creator

   b. Access the Household for an Account

   c. Access the Owner record for an Account

   d. Add a note to a household

   e. Create an Activity using Activity Creator

   f. Find a Contact

   g. Find a Financial Account

   h. Find a Household

   i. Find Household Members

   j. Launch Activity Creator

   k. Manage Reminders in Activity Creator

   l. Modify Team Members

   m. Set Preferences for Activity Creator

3. Working with Contacts

   a. Access Financial Accounts for a contact

   b. Access Holdings for a Contact

   c. Access Household Record for a Contact

   d. View Accounts in a Household

   e. View Holdings in a Household

     f.   View Holdings in an Account

     g.   Add a note for a contact

     h.   Add an Address for a Contact

     i.   Change a Contact's Mailing Settings

     j.   Complete the Mailings Tab for a Contact

     k.   Create a Company

     l.   Create a Contact

     m.   Edit a Contact

     n.   Edit Multiple Contacts

     o.   Find Activities for a Contact

     p.   Link Employees to a Company

     q.   Set the Preferred Phone for a Contact

     r.   Set the Primary Address for a Contact

     s.   View Documents for a Contact

     t.   Link a Contact to a Company

     u.   Access Financial Account

4. Working with a Service Model

     a.   Implement a Service Model for Clients and/or Prospects

     b.   Monitor Service Model

5. Activities

     a.   Close a group of activities

     b.   Create a phone call

     c.   Create a task

    d. Create an appointment

    e. Re-Open an activity or group of activities

6. Keeping Clean Data

    a. Add a member to a Household

    b. Add an Account Identifier to a Financial Account

    c. Complete the mailings tab for a Household

    d. Deactivate a Contact

    e. Merge Contacts

    f. Reactivate Contact

    g. Set the Primary Contact for a Household

7. Lists in CRM

    a. Add a Contact to a Marketing List

    b. Add Categories

    c. Create a filtered view

    d. Create a list of Contacts

    e. Create a Marketing List

    f. Edit Marketing List Members

    g. Share a view

8. Marketing with CRM

    a. Complete a mailing to marketing list members

    b. Create a mail merge template

    c. Generate a single letter/envelope for a contact

    d. Send a client-approved intranet document to a marketing list

    e.   Send a personalized Letter

    f.   Send an email to a group of contacts

    g.   Send an email to a single contact

9. Customize CRM

    a.   Set default records per page

    b.   Set default view

    c.   Set time zone

10. Using CRM with Outlook

    a.   Set Regarding of an Email

    b.   Sync Appointments to Outlook

    c.   Sync Contacts to Outlook

    d.   Sync Phone Calls to Outlook

    e.   Sync Tasks to Outlook

    f.   Track a Contact to CRM

    g.   Track a Task to CRM

    h.   Track an Appointment to CRM

11. Opportunities

    a.   Complete an Opportunity

    b.   Create an Activity for an Opportunity

    c.   Create an Opportunity

    d.   Create an Opportunity for a Contact

    e.   Determine number of lost opportunities in a given time period

    f.   Determine number of won opportunities in a given time period

g. Edit an Opportunity

h. Track active Opportunities

i. View Opportunities for a Household