Unanet University

Unanet CRM by Cosential:

Managing Leads and Opportunities (SDL)

PARTICIPANT GUIDE

Last Revised March 14, 2024

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ABOUT THIS PARTICIPANT GUIDE

This document serves as a supplement to the training courses offered through Unanet University. Participants should use this workbook to complete exercises in the student Unanet system while attending the course. Additionally, participants should record notes and actions for reference when working within their own Unanet system.

Symbols used in this guide

Activity	Important Note
Demo	Question
Tour	

Unanet Contact Information

- VirtualUU@unanet.com

Send questions here for information about courses, course schedule, unanetuniversity.com, certifications, and enrollments. This is a mailbox that is monitored daily.

Support Portal

The Unanet Support Portal is now located at support.unanet.com. If you are unsure of how to access the portal, you can acquire a login using the steps below:

> To obtain a login to the Unanet support portal or to create a new ticket, send an email to support@unanet.com with "Support Portal ID request" in the Subject line.
>
> The following conditions must be met to be granted a support account:
> - The "from" address must match the domain of your company.
> - It must NOT be a generic email account (e.g., it cannot be from gmail.com, aol.com, or msn.com).

The company must have an active support agreement with Unanet.

COURSE INTRODUCTION

Unanet CRM by Cosential makes it easy to maintain a single source of truth for all companies and contacts used for business development purposes. This course will cover how business developers can view vital information in lead and opportunity records, create, edit, assign, and convert leads and opportunities – both on-the-go with Unanet CRM Mobile and at-the-desk using Unanet CRM for Outlook or Unanet CRM on the web.

In this course, you will learn which of the different access points of mobile, outlook, and web application will quickly and easily accomplish high volume tasks for managing leads and opportunities.

Learning Objectives

After this session for **Managing Leads & Opportunities**, participants will be able to:

- View Leads and Opportunities
- Manage Leads
- Manage Opportunities

Roles & Access

Unanet CRM by Cosential is a role-based system which provides security and access based on the roles assigned to the user by the System Administrator.

During this course, students will be instructed to log-in to Unanet CRM by Cosential utilizing specific user personas which contain the appropriate roles in order to access and complete the required activities.

Please note, the password is case sensitive; login name is not.

Job Title	Unanet Role	Name	Unanet login Username	Password
Business Development Representative	**CRM User**	Joe Manning	**jmanning**	**welcome**

LESSON 1: VIEW LEADS AND OPPORTUNITIES

Learning Objectives

View Leads and Opportunities

- Search for Leads and Opportunities
- Utilize Leads and Opportunity Grid

Introduction

At any point during your workday or work week you might need to find particular details about a project. Luckily, Unanet CRM handles all of that, and you have options on how to access it.

The following activities highlight use cases that a business developer will commonly encounter.

Activity 1.1 – How do I find a potential project I'm going to be working on?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap the **magnifying glass** in top banner to search
    a. Begin typing the project name in the search bar to return results
2. Tap the **Opportunities** tab below the search bar to filter
3. Find project and tap to open the record

Web Activity Steps – Alternative Method

WEB

1. Place cursor in **Search** bar
    a. Check box next to **Leads** and **Opportunities** to filter results
    b. Begin typing the project name in the search bar to return results
2. Select the project and view the record

NOTE: If you do not know the Lead or Opportunity Name you can search the Company and view the Associated Opportuities or Associated Leads in the Company record. You could also search for the known Contact and view Opportunities associated to that contact in the Contact record.

To use Unanet CRM for Outlook you can search for it from within Outlook or use the App Market in Unanet CRM.

Outlook Activity Steps – Alternative Method

OUTLOOK

1. Ensure the Unanet CRM side panel is open next to an email
2. Click **Search** bar

3. Select **Opportunities**

NOTE: The search function in the Outlook add-in does not have an option to search for Leads, so the project will have to be entered in as an Opportunity.

4. Begin typing the opportunity name, company name, opportunity number (or keyword) in the search bar to return results
5. Click on the Opportunity to view the details

Opportunity Grid

The Opportunity Grid allows you to quickly review and edit records in a list view, similar to managing data in a spreadsheet. When enabled, the Grid is the landing page of the Opportunity module. Here, you can edit data, filter records, save custom settings, group/sort data, add/remove and rearrange columns, add tasks/events, and access full Opportunity records.

Activity 1.2 – For our monthly BD meeting, how do I view all of my upcoming pursuits?

Web Activity Steps – Recommended Method

WEB

1. Click on **Opportunities** in the left-side menu to open the Opportunities Grid
2. Click the **Filters** button
3. Open the records per page dropdown menu at the end of the second row of Filters and Settings
    a. Select **100 records per page**
4. Open **Any Status** dropdown menu in second row of Filters and Settings
    a. Select **Open**
5. Click **Apply Filters**
6. When hovering any column header, click on the down arrow on the right side
    a. Hover over **Columns,** and check the boxes for
        i. Opportunity Name
        ii. Stage
        iii. Client
        iv. Opportunity Number

NOTE: The items in the columns list must be enabled by the Overall Firm Administrator in order to be included for selection.

7. Drag **Opp Number** to the right of Opportunity Name
8. Hover over the **Stage** column header, click on the down arrow on the right side
    a. Click **Group By This Field**

LESSON 2: MANAGE LEADS

Learning Objectives

Manage Leads

- Create and edit a Lead
- Assign a Lead
- Convert a Lead
- Log an Event

Introduction

Leads are not usually an official part of a pipeline. They are typically used to log a rumor or unofficial tidbit of information to keep an eye on.

Lead records often have few required fields, sometimes only the Lead Name. The following activities highlight use cases that a business developer will commonly encounter that include additional details to showcase what is available in the record.

Activity 2.1 – A client we have worked with before emailed me to let me know they may be moving next year. How can I log this potential project so that leadership is aware?

Outlook Activity Steps – Recommended Method

OUTLOOK

1. Ensure the Unanet CRM side panel is open next to an email
2. Click on the **+ New** button in the top banner
3. Select **Lead**
4. Enter the **Lead Name**
5. Open the **Lead Source** dropdown menu
    a. Select **BD/Networking**
6. Open the **Stage** dropdown menu
    a. Select **Assigned**
7. Click **Save**

NOTE: More information can be added, but a Lead record does not require many fields. These, along with available value lists, are configured by the Overall Firm Administrator.

Mobile Activity Steps – Alternative Method

MOBILE

1. Tap the **+ Add** button in the upper right of the top banner
2. Tap **Lead**
3. Enter the **Lead Name**
4. Enter **Potential Client** company
    a. Begin typing company name in the search bar to return results

    b. Select the company
5. Tap **Primary Contact**
    a. Begin typing contact name in the search bar to return results
    b. Select the contact
6. Tap **Stage** and select your option
7. Tap **Lead Source** and select your option
8. Tap **Ticker Date** and enter a date
9. Tap **Notes** and enter summary of email
    a. Tap **Done**
10. Tap **Categorization**
    a. Tap **Practice Areas and** select your option
    b. Tap **Done**
11. Tap **Save**
12. Tap **View** in the green *Lead created* banner to go directly to the new record

NOTE: For the mobile version more information was included in the Lead record to help illustrate the navigation of the mobile app.

Web Activity Steps – Alternative Method

WEB

1. Use the search bar to find the company for any leads that may already exist
    a. Enter company name and select
2. Click **Associated Leads** tab
    a. View the existing leads
3. Click the **+ Lead** button in the upper-right of the Associated Leads section
4. Enter a **Lead Name**
5. Open Lead Source dropdown
    a. Select **BD/Networking**
6. Click **Save**

Activity 2.2 – I've received new details on a lead, how do I log those details?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap **More** in the module bar on the bottom banner
2. Tap **Leads**
3. Select a Lead
4. Tap **Edit** in the upper-right hand corner
5. Tap **Stage** and select an option
6. Tap **Score** and select an option
7. Tap **Save**

NOTE: This activity used the module bar to find a list of leads, but there is always the option to use the magnifying glass to search for any type of record.

Web Activity Steps – Alternative Method

WEB

1. Click **Leads** in the left-side menu to open the Leads Grid
2. Next to the desired lead, click the down arrow
   a. Select **Lead Details**
3. Click **Edit Lead**
4. Update the following fields:
   a. Lead Source: **BD/Networking**
   b. State**: Georgia**
5. Click **Save**
6. Scroll down to **Lead Categories/Types**
   a. Click the **cube** next to **Primary Categories**
      i. Check the box for **Higher Education**
      ii. Click **Submit**

Following up on Leads

Lead records can be updated with additional information or modified to fit changing information. Two particularly important updates include assigning personnel to a lead and converting a lead to an opportunity. There are also some interesting ways that Unanet CRM allows you to track your leads.

Activity 2.3 – While viewing new leads, how do I assign them to my team?

Web Activity Steps – Recommended Method

WEB

1. Click **Leads** in the left-side menu to open the Leads Grid
2. Next to the desired lead, click the down arrow
   a. Select **Lead Details**
3. Scroll down to the **Assigned To** section
   a. Click **+Assign Personnel**
      i. Search for and select a personnel
      ii. Click **Save**

NOTE: From the Leads Grid there is an option to Assign Lead to Me from the down arrow next to each lead

Using the **$ Convert to Opportunity button** on a Lead will automatically change its Status to “Closed—Converted to Opportunity” and create an Opportunity record with the same name. This process also transfers most of the basic data and relationships from the Lead record to the new Opportunity record.

Activity 2.4 – We've determined we are going to chase a project. How can I convert the lead to an opportunity?

WEB

Web Activity Steps – Recommended Method

1. From the Leads Grid, or through a search, find and open the lead record
2. Click the **$ Convert to Opportunity** button along the top

NOTE: There can be several additional options when you hover over this button

3. Scroll through newly created Opportunity record and add any details
4. Tap **Save**

Activity 2.5 – How do I ensure that I don't forget to check in a Lead?

MOBILE

Mobile Activity Steps – Recommended Method

1. Tap the **magnifying glass** in top banner to search
2. Tap the **Leads** tab below the search bar to filter
3. Begin typing the lead name in the search bar to return results
4. Tap **Edit** in the upper right corner
5. Tap **Tickler Date** and enter a date
6. Tap **Save**
7. Tap the **Home** button to see the lead in the **My Leads to Check in On** section

NOTE: Utilizing Events in the Activities section of a lead record can also serve to set reminders.

For managing leads on the web app it is useful to utilize the Leads widget on a dashboard.

WEB

Web Activity Steps – Alternative Method

1. From you Home page, click **Dashboard Settings**
2. Click the **+ button** to add a new tab
3. Change the **Layout** to **1 Column**
4. In the Contact Manager section, click the **+ button** on Leads
5. Hover over any column header and click on the **down arrow**
    a. Hover over **Columns**
        i. Find **Tickler Date** and ensure it is checked
6. If necessary, scroll horizontally to find Tickler Date and drag it within view
7. Click in the empty Tickler Date field in the Leads Grid
    a. Enter a date

NOTE: The Overall Firm Administrator will need to create a Workflow to have the system automatically send reminder emails configured to the entered tickler date

LESSON 3: MANAGE OPPORTUNITIES

Learning Objectives

Manage Opportunities

- Create and edit Opportunities
- Mass edit Opportunities
- Move an Opportunity to a different stage
- Set up My Opportunity Pipeline
- Set up My Opportunity Grid
- Utilize My Opportunity Pipeline
- Complete a Go-No-Go form
- Log an Event

Introduction

In the constantly shifting world of business development, you need to access and create/update information regarding your pursuits.

The following activities highlight use cases that a business developer will commonly encounter.

NOTE: Opportunity records may require certain or additional fields depending on the configuration for your firm set by the Overall Firm Administrator.

Activity 3.1 – One of our key clients reached out about an upcoming project, how do I create an Opportunity?

Mobile Activity Steps – Recommended Method

MOBILE

Part 1: Check company for any existing Opportunity records

1. Tap the **magnifying glass** in top banner to search
2. Begin typing the company name in the search bar to return results
3. Tap the **Companies** button to filter
4. Open the Opportunity record
5. Tap **Associations**
6. Scroll down to Opportunities and click **View all**
7. Scan the list to verify the Opportunity doesn't already exist

Part 2: Create the Opportunity record

1. From the Home screen, tap the **+ Add** button
2. Select **Opportunity**
3. Enter the **Opportunity Name**
4. Tap **Client Company**
    a. Search for and select the company
5. Tap **Contact** and select the contact
6. Tap **Stage** and select the stage
7. Tap **Categorization**
    a. Tap **Primary Categories**
        i. Select a **Category**
        ii. Tap **Done**
8. Tap **Save**

Outlook Activity Steps – Alternative Method

OUTLOOK

Part 1: Check company for any existing Opportunity records

1. Ensure the Unanet CRM side panel is open next to an email
2. Click on the **Search** button
    a. Select **Opportunities**
        i. Enter new Opportunity name to check for an existing record
    b. Click the **back arrow**

Part 2: Create the Opportunity record

1. Click on the **+ New** button in the top banner
    a. Select **Opportunity**
        i. Choose **Unanet CRM Default** from the options
2. Enter the following required fields under General Info:
    a. Opportunity Name: **New School Building**
    b. Client Company: **ABC Contractors**
    c. Stage**: 01-Prospecting**
3. Enter any other pertinent details
4. Click **Save**

Web Activity Steps – Alternative Method

WEB

Part 1: Check company for any existing Opportunity records

1. Search for and select a company
2. Select **the Associated Opportunities** tab along the top
    a. Ensure the Opportunity does not already exist

Part 2: Create the Opportunity record

1. Click the **+Opportunity** button on the top-right side of this section
    a. Select **Unanet CRM Default** from choices
2. Enter the following required fields under General Info:
    a. Opportunity Name: **New Campus Building**
    b. Client Company: **ABC Contractors**
    c. Stage**: 01-Prospecting**
3. Enter any other pertinent details
4. Click **Save**

Activity 3.2 – If I find out who the architect will be on a project I'm chasing, can I add them on the go?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap the **magnifying glass** in top banner to search
2. Tap the **Opportunities** button to filter
3. Search for and select the Opportunity
4. Scroll the tabs and tap **Associations**
5. Tap **Associate Company**
    a. Search for and select a Company
    b. Tap **Role** and select the role
6. Tap **Save**

Mass Edit Opportunities

Updating many records to include a specific field such as a Firm Org or Primary Category can be troublesome to edit on record at a time. In order to make edits to a group of records you will need to have an Administrator use a Data Manipulation Tool.

Demo 3.3 – We recently imported a bunch of Opportunities. How do I make sure they are properly categorized?

Web Activity Steps – Recommended Method

WEB

1. Click **Opportunities** in the left-side menu to open the Opportunities Grid
    a. View missing or incorrect information you'd like to be inputted for all or selected records
2. Click the **Administration** button in the top right of the screen
    a. Select **Contact Manager Administration**
        i. Scroll down to **Data Manipulation Tools** and select **Opportunity Data Update Tool**
3. For the Advanced Search, scroll down to **OPPORTUNITY CATEGORY/TYPES**

    a. Select **Manufacturing** from **Primary Categories**
    b. Click the **Search for Opportunity button**
4. Click the **+Add** button in the upper right
5. In the top section, click **Update Categories**
6. In the **Primary Categories** scrolling list, select **Industrial**
7. Click the **+Add** button in the upper right
8. Click **OK** on the pop-up window to confirm
9. To view the changes, go back to the Opportunity Grid
    a. Click **Filters**
        i. Select **Practice Areas** – **Manufacturing & Industrial**
        ii. Click **Apply Filters**

Following up on Opportunities

Checking in on your opportunities is easily done via the Opportunity Grid but also with the My Pipeline. You must configure your My Pipeline view and select Stages before being able to view Opportunities in My Pipeline. To view open pursuits, for example, you would want to include preliminary stages before Closed-Won, Won, Closed-Lost, or Inactive.

Configure your My Pipeline view in My Preferences by clicking on your User Profile. Under My Preferences > Opportunity Preferences there is an Opportunity Pipeline section.

Opportunities may have conditional requirements when moving stages depending on the configuration for your firm set by the Overall Firm Administrator.

Activity 3.4 – I'm reviewing my pipeline and we've decided to submit on an Opportunity, how do I move it forward?

Outlook Activity Steps – Recommended Method

OUTLOOK

1. Ensure the Unanet CRM side panel is open next to an email
2. In the Outlook sidebar, click the Unanet CRM add-in
    a. If it is not pinned to the sidebar, you can click the All Apps button and find it that way
3. With the Opportunity Pipeline view open, find the desired Opportunity
    a. Drag and drop the card from current column to the desired column

NOTE: If a stage has conditional requirements Outlook will present what needs to be completed before the stage can be moved forward.

NOTE: Clicking on the Opportunity from the add-in will open the record in the web app, and any information can be updated in that form.

Mobile Activity Steps – Alternative Method

1. Search for record and select from Opportunities filter
2. Tap **Edit** in the upper right corner
3. Tap **Stage** and select new stage
4. Tap **Save** in the upper right corner

Web Activity Steps – Alternative Method

1. Search for or use Opportunity Grid to open the Opportunity record
2. Click the Edit button on the top right of the General Information section
    a. Open the **Stage** dropdown and select the desired **Stage**
3. Click **Save**

NOTE: The web app has the Pipeline view, as seen in Outlook, to move cards from stage to stage. There is a My Pipeline link in the upper right of the Opportunities module.

Activity 3.5 – How do I see key metrics for my open pursuits in my Pipeline?

Outlook Activity Steps – Recommended Method

1. From the Opportunity Pipeline view, click the Preferences button Preferences in the upper left
2. Open the **Opportunity Metric** dropdown and select desired dollar field
3. In the **Card Details** section, open the three dropdowns and choose desired fields
4. Click the Opportunities button Opportunities in the upper left to return to the Pipeline view and view the updated card details

Web Activity Steps – Alternative Method

1. Click on your **User Profile**
    a. Select **My Preferences** > **Opportunity Preferences**
2. Open the **Opportunity Metric** dropdown and select desired dollar field
3. In the **Card Details** section, open the three dropdowns and choose desired fields
4. Click **Opportunities** in the left-side menu and then click the **My Pipeline** link to return to the Pipeline view and view the updated card details

Activity 3.6 – How do I organize my pipeline so I can efficiently review pending opportunities with my colleagues?

Web Activity Steps – Recommended Method

WEB

1. Click **Opportunities** in the left-side menu to open the Opportunities Grid
2. When hovering any column header, click on the down arrow on the right side
    a. Hover over **Columns,** and check the boxes for
        i. Opportunity Name
        ii. Opportunity Number
        iii. Stage
        iv. Client
        v. Lead Business Developer
3. Scroll to find the Lead Business Developer column
    a. Drag and drop the column closer to the left-hand side
4. Hover over the **Lead Business Developer column** and click the down arrow
    a. Select **Group By This Field**
5. Click the **Stage column header** to sort by Stage within the groups

Activity 3.7 – How do I complete a Go-No-Go form for an internal evaluation of our chances of winning a pursuit?

Outlook Activity Steps – Recommended Method

OUTLOOK

1. From your My Pipeline view, choose an opportunity in the **Prospecting stage**
2. Open the additional options by clicking the **horizontal three dots**
    a. Select **Edit Opportunity**

NOTE: If you do have an option in the additional options for Go/No-Go Form know that this legacy feature will be replaced by a new Forms functionality

3. Click Forms in the left-side menu
4. In the Forms section, click **Add Form**
5. Select **Go/No-Go Simple** Form
6. Enter the details for each question
7. Click **Submit** in the upper-right corner
8. Click **Submit** in the pop-up window
9. Click **Close** in the upper right
10. Click **Save** at the bottom
11. To view the completed form you can open Opportunity Details from the card and view the record in the web app

Web Activity Steps – Alternative Method

WEB

1. From the Opportunity Grid, click the **arrow** next to the desired Opportunity
    a. Select **Opportunity Details**
2. In the tabs at the top of the record, click **More**
    a. Select **Forms**
3. Click the **+ Add Form** button
4. Select **Go/No-Go Simple**
5. Enter the details for each question
6. Click **Submit** in the upper right
7. Click **Submit** in the pop-up window
8. Click **Close** in the upper right
9. Refresh your record, and navigate to Forms to see completed form

COMPLETION CERTIFICATE AND EVALUATION

The Learning Management System (LMS) will generate a completion certificate (including **CPE credits**, where applicable) which will be available to the participant under their Transcript section of the LMS.

We appreciate your feedback on our courses and encourage you to complete the course evaluation.