Unanet

University

Unanet CRM by Cosential:

Managing Relationships (SDL)

PARTICIPANT GUIDE

Last Revised April 12, 2024

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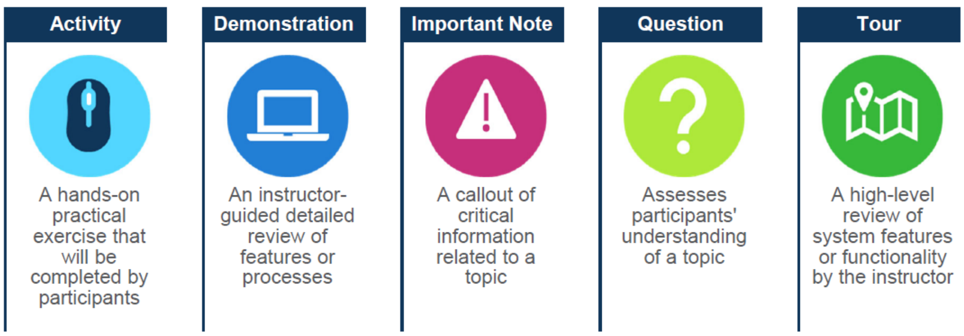
ABOUT THIS PARTICIPANT GUIDE

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



Unanet Contact Information

- VirtualUU@unanet.com

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

Experience Center

The Unanet Experience Center includes access to the Knowledge Center and Unanet University and is located at experiencecenter.unanet.com.

If you are new to the Experience Center, email the indicated party and follow the instructions you will receive via email to create an account.

- If you are a customer, send an email to support@unanet.com to request an account for the Experience Center.
- If you are a partner, send an email to partners@unanet.com to request an account for the Experience Center.

The following conditions must be met to be granted a support account:

- The "from" address must match the domain of your company.
- The company must have an active support agreement with Unanet.

COURSE INTRODUCTION

Your relationships are the key to winning work. 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 company records, contact records, the contact grid, and the activity grid – 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 viewing and building relationships.

Learning Objectives

After this session for **Managing Relationships**, participants will be able to:

- View Connections
- View Activities
- Manage Activities

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 CONNECTIONS

Learning Objectives

View Connections

- View Personnel relationships
- View Contacts in a Company
- Utilize Affiliate Contacts
- View Leads, Opportunities, and/or Projects
- Utilize Contact Grid

Introduction

Making connections as a business developer is key to fostering growth and building success. You will want to know how the CRM collects and maintains this vital information.

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

View Personnel Relationships

Personnel relationships are the link from your company to the client. In the different records these relationships indicate who has previously had contact or worked with the client.

Activity 1.1 – I'm trying to get an in with a new company in town that is going to have multiple projects coming up. How can I find out if anyone can help?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap the **magnifying glass** in top banner to search
   a. Begin typing a company name in the search bar to return results
2. Select a Contact from the search results
3. Tap the **Associations** tab
4. Scroll down to **Relationships** and find colleague(s)

NOTE: As another option, select the Company and view the Relationships

Web Activity Steps – Alternative Method

WEB

1. Place cursor in **Search** bar
   a. Begin typing the company name in the search bar
2. Select the company and view the record
3. Click the **More** tab
   a. Select **Relationship with Company – Associated Personnel**
   b. Find colleague(s)

NOTE: Your firm may be configured to utilize the Account Manager designation, which will list personnel attached to the company in the first section Company Summary Information.

Outlook Activity Steps – Alternative Method

1. Ensure the Unanet CRM side panel is open next to an email
2. Click on the Contact record of the client of interest
3. Scroll down and expand the **Personnel** section and find colleague(s)

View Contacts in a Company

Contacts are the people who work for your clients. It is beneficial to have an extensive list of contacts to build relationships that will help you pursue work.

Activity 1.2 – What people work at a company that I have a relationship with?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap **Contacts** tab along bottom menu
2. Open the filter that shows **All Companies**
   a. Select **My Companies**
3. Select a company
4. Tap the **Associations**
5. View list of contacts

Web Activity Steps – Alternative Method

WEB

1. Place the cursor in the search bar
   a. Check the box for **Companies** to filter results
   b. Begin typing in the search bar to return results
2. Click on the Company to view record details
3. Click on the **Contacts** link across top of the record
4. View list of contacts

Outlook Activity Steps – Alternative Method

OUTLOOK

1. Ensure the Unanet CRM side panel is open next to an email
2. Click on the **Search** button
    a. Select **Companies**
3. Enter in company name and select the company
4. Scroll down and expand the **Contacts** section
5. View list of contacts

Utilize Affiliate Contacts

Contacts are associated to a Company where they have their primary work, but there are instances where a Contact also has a relationship with other companies, opportunities, or projects in the CRM system.

Activity 1.3 – I just found out one of my contacts is on the Board of Directors at a hospital, how can I capture this?

Web Activity Steps – Alternative Method

WEB

1. Place cursor in **Search** bar
    a. Begin typing the company name
2. Select the affiliated company and view the record
3. Click the **More** tab
    a. Select **Affiliate Contacts**
4. Click **+Contact**
    a. Search for and select the contact in the pop-up window in the **Affiliate Contact** field
    b. Select an **Affiliate Role**
5. Click **Save**

View Leads, Opportunities, and/or Projects

Beyond personnel and contacts, there is a wealth of information that can be captured to help build a more complete profile of clients.

Tour 1.4 – I just started at this company and I need to know who our clients are, what work we've done for them, what work we're pursuing, and who's been talking to them.

Web – Primary Method

To view a complete list of clients you would want to start browsing over the Companies Grid. Within each Company record you can view Contacts, Leads, and Opportunities associated with that Company. In addition, you can access the Activity Log.

Outlook – Alternative Method

With the CRM add-in enabled and open next to an email you will see associated Contacts, Companies

Utilize Contact Grid

The Contact Grid provides a quick and easy way to view and sort Contacts. Many different fields can be turned on/off and organized to your liking, and also allows swift editing capability.

Activity 1.5 – How can I see which of my contacts are on the holiday card mailing list?

Web Activity Steps – Recommended Method

WEB

1. Click **Contacts** in left-side menu
2. Click the **Filter button** on the top of the grid
3. Click the **filter by Mailing Lists** dropdown
4. Select **Holiday Cards** mailing list
5. Click **Apply**

Activity 1.6 – How can I quickly add 5 contacts to a mailing list?

Web Activity Steps – Recommended Method

WEB

1. Click **Contacts** in left-side menu
2. Turn on **Mailing List** column
3. Choose a contact and double click the field under Mailing List
4. Open the dropdown and choose the mailing list
5. Repeat Steps 3-4 for four more contacts

LESSON 2: VIEW ACTIVITIES

Learning Objectives

View Activities

- View recent Activities
- Utilize Activities Grid
- Utilize Insights

Introduction

A compelling feature of the use of Activities is the ability to define, assign, and track activities crucial to business development. We can break these activities into three basic categories:

Tasks: A Task is an internally assigned piece of work.
Email: Electronic mail is typically uploaded via the Unanet CRM plug-in.
Events: Use Events to schedule and log interactions with clients, prospects, and colleagues.

View Recent Activities

Recent activities, such as events, recorded in to Contact and Company records allow a quick glance at what current discussions are taking place and who is involved.

Activity 2.1 – How can I see who has talked to a specific person recently and what was discussed?

MOBILE

Mobile Activity Steps – Recommended Method

1. Tap the **magnifying glass** in top banner to search
2. Tap the **Contacts** tab
3. Begin typing a contact name in the search bar to return results
4. Select a contact
5. Tap the **Activities** tab
6. Open an event
    a. View the details

OUTLOOK

Outlook Activity Steps – Alternative Method

1. Ensure the Unanet CRM side panel is open next to an email
2. Scroll down to **Events** and open any event for further details
3. Click a specific Contact under **People** to open the record and see **Events** specific to that Contact

Web Activity Steps – Alternative Method

1. Place cursor in **Search** bar
   a. Begin typing the Contact name in the search bar
2. Check the box for Contacts filter
3. Select the Contact
4. Click on the **Activities** link across top of the record
5. Scroll down and view the Activity Log

Utilize Activities Grid

The Activities Grid provides a quick and easy way to view and sort Activities. Many different fields can be turned on/off and organized to your liking, and also allows easy access to event details and associated records.

Activity 2.2 – How do I find a list of Activities I have to do coming up?

Web Activity Steps – Recommended Method

1. Click on Activities in the left-side menu
2. Click the filter button and select **My Events**
3. Hover over the **Status** column header
   a. Click the down **arrow**
   b. Check **Group By This Field**
4. Find the group of events that are **Not Started**

NOTE: It is recommended to create custom filters, such as “On or before 10 days from now” for “Not started” events.

Mobile Activity Steps – Alternative Method

1. Log in to CRM Mobile
2. View the My Activities Due Today widget on the home screen

Utilize Insights

It is vital to be prepared when conducting a touchpoint with a Client. Within a logged Event you can utilize all of the information the CRM provides to get ready.

Activity 2.3 – I’m going to a meeting and want to know about people and companies that I will be meeting.

Mobile Activity Steps – Recommended Method

1. Open the Event

2. Tap **View All** in the People section
    a. Open any record for further information
3. Go back and tap **View All** in the Associations section
    a. Open any record for further information

Web Activity Steps – Alternative Method

WEB

1. Click on **Activities** in the left-side menu
2. Identify your desired event
    a. Under **Attendees** column, open any Contact record
        i. Browse details
    b. Under **Companies** column, open the Company record
        i. Browse details

Outlook Activity Steps – Alternative Method

OUTLOOK

1. Ensure the Unanet CRM side panel is open next to an Outlook calendar meeting
2. Select a Contact and browse the details
3. Click the **back arrow**
4. Click on a Company and browse the details

LESSON 3: MANAGE ACTIVITIES

Learning Objectives

Manage activities

- Create Events
- Update Events

Introduction

Using Events to schedule and log interactions with clients, prospects, and colleagues will organize your calendar and also log critical information for your entire firm to access in the CRM. An Event supports multiple organizers and attendees, admin-defined Event types and dispositions, and notifications.

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

Create Events

Activity 3.1 – How can I easily log an event I was invited to?

Outlook Activity Steps – Recommended Method

OUTLOOK

1. Ensure the Unanet CRM side panel is open next to an email meeting invitation
2. Click the **+ New button**
3. Select **Event**
4. Enter a **Subject**
5. Update the **Starts** and **Ends** times
6. Add any other details
7. Click **Save and Close**

Mobile Activity Steps – Alternative Method

MOBILE

1. Click the **+ button** in the upper-right corner to add a new item
2. Select **Event**
3. Enter the required **Subject** field
4. Enter a **Location**
5. Check **All day event** or set date and time
6. Tap **Event Type** and select an option
7. Tap **Disposition** and select an option
8. Tap **Save**

Web Activity Steps – Alternative Method

WEB

1. Click the **+ Create New** button in the top right
2. Select **Event**
3. Enter a **Subject**
4. Update **Starts** and **Ends** times
5. Enter any other details
    a. Select an Event Type
    b. Select a Disposition
    c. Add Comments
    d. Add Attendees
    e. Make Associations
    f. Notify Personnel

Update Events

Activity 3.2 – I just left a meeting with a prospect, how can I log the details?

Mobile Activity Steps – Recommended Method

MOBILE

1. Open an Event from your home screen
2. Tap the **Edit** button in the upper-right corner
3. Scroll down to **Comments** and enter text
4. Tap the **Done** button in the upper-right corner
5. Scroll down to **Follow Up** and toggle on
    a. Enter a required **Start Date** and **Time**
6. Check **Include Comments**
7. Tap **Add Personnel** and enter name
8. Tap **Done**
9. Tap **Save**

Outlook Activity Steps – Alternative Method

OUTLOOK

1. Ensure the Unanet CRM side panel is open next to an Outlook calendar meeting
2. Open the Contact record
3. Open the **Events** section
4. Open the Event needing an update
5. Add **Comments**
6. Click **Save and Close**

Web Activity Steps – Alternative Method

WEB

1. Open Company record
2. Click the Contacts tab
3. View any associated contacts
4. Click Associated References tab to jump down in the record
5. View Associated Personnel

COMPLETION CERTIFICATE AND EVALUATION

Certificate of Completion

Upon course completion, a Certificate of Completion, including applicable CPE credits, is available to download from your Unanet University profile via Unanet's Experience Center. Completion status depends on the method used to attend the course:

- Instructor-Led Training (ILT) courses are marked as "Completed" once attendance has been recorded by the staff of Unanet University

- Self-Directed Learning (SDL) courses are marked as "Completed" upon achieving a passing score of at least 70% on the CPE Credit assessment

To access the Certificate of Completion from your Unanet University profile, navigate to the **User Menu > My Activities > Courses**, locate the completed course, and select the **Certificate** icon to download.

Course Survey

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