Unanet University

Unanet CRM by Cosential:
Tracking and Analyzing Data (SDL)

PARTICIPANT GUIDE

Last Revised February 15, 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
- Demo
- Tour
- Important Note
- Question

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

A business developer wants to quickly see and analyze their pipeline to make sure they meet or exceed their goals. An executive or division head, however, wants to analyze the big picture and be able to gauge accurate sales growth and trust their predictability.

The dashboard in Unanet CRM home page provides shortcuts to actions and quick visual representations of data. The dashboard is built using widgets that can be configured to create a view that gets you what you need. It easily allows you to know critical information at a glance enabling you to track and analyze data.

In this course, you will learn to track personal progress and firm progress using the dashboard and various widgets. Also, you will utilize some reporting features to make data easily accessible.

Learning Objectives

After this session for **Tracking and Analyzing Data**, participants will be able to:

- Track personal progress
- Track firm progress
- Utilize reporting

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: TRACK PERSONAL PROGRESS

Learning Objectives

Track personal progress

- View upcoming potential projects
- Track sales goals

Introduction

Business Developers use dashboards and widgets that are relevant to their work, which includes viewing up-and-coming work, their projects and related details, personal goals and targets, and keeping a healthy pipeline.

The following activities highlight use cases that a Business Developer will commonly encounter.

View Upcoming Potential Projects

Having insight into existing and upcoming projects is paramount for success as a Business Developer. There are a few ways to access and display projects that will be handy to review on a regular basis.

Opportunity Pipeline Widget

This widget allows you to create a pipeline funnel diagram that groups Opportunities by stage to quickly display how many Opportunities are at the different stages along with other important grouped details that are easily configurable.

Activity 1.1 – How can I visualize my pipeline from my dashboard?

Activity Steps on Web App

1. From your home page, click **Dashboard Settings** in the upper-right of a dashboard
2. Scroll down the Dashboard Items list
3. Click the **+** next to **Opportunity Pipeline**
4. Close the Settings pop-up window
5. On the new widget click the **gear icon** to configure
    a. Update widget settings
        i. Title: **My Pipeline**

ii. Fee Source: **Firm Estimated Fee**
iii. Personnel: **Joe Manning**
iv. Check **Show dollar amount**

6. In the bottom section on the **Stages tab**, click **Check All**
   a. Uncheck Stages **10, 11, 12, 13**
7. Click **Save**

NOTE: The selection of these stages will display Open Opportunities, and not Closed or Inactive, that are of interest to a Business Developer.

8. On the Pipeline diagram, click on the **yellow Prospecting section** to view the Opportunity Grid for the Opportunities included in the Prospecting stage.

NOTE: This will open the Opportunities Grid to view the Opportunities in the selected Stage.

Opportunity Grid: My Pipeline

My Pipeline is a great tool to view relevant, specific data in a view similar to a Kanban board. My Pipeline is primarily targeted for use in Outlook, but there is also the ability to use the same function in the web app.

Key features include dragging and dropping Opportunities through stages, refreshing your view with quick searches, easily identifying flagged Opportunities, and configuring for your specific purposes to display data most important to you.

Each Opportunity is represented by a card organized by stage that can be dragged from stage to stage. On each card the displayed information can be customized. Also, on each card you can access more options to have the option to:

- open Opportunity details
- edit the Opportunity
- add new sub Opportunity
- add new Event

Activity 1.2 – How can I visualize my pipeline from the Opportunity Grid?

Activity Steps on Web App

Part 1: Configure Opportunity Pipeline

1. Click the **user profile icon** in the upper-right of the screen
2. Select **My Preferences**
3. In the bottom section, click the link for **Opportunity Preferences**
4. In the second section, configure the following:

a. Opportunity Metric: **Factored Fee**
b. Opportunity Stages: click **+Add** and select all **Open and Pending** stages
c. Card Details: **Factored Fee**, **Estimated Selection Date**, **Days in Stage**
d. Card Labels: **Offices**

5. Click **Save**

Part 2: Open Opportunity Pipeline

1. Click **Opportunities** on the left-side menu
2. In the upper-right, below the user profile icon, click the **My Pipeline** link
3. Click the **horizontal three-dot** (more options) **menu** on any card
4. Select **Opportunity Details** to view the full Opportunity record
5. Return to the My Pipeline browser tab and press and hold on any card and drag to any column

Top Deals Widget

This widget shows your top Opportunities by volume. By default, it shows a bar chart with the top ten deals, which can be displayed by Opportunity Name or Company name. The Chart Type is also customizable to change the format of the display to column chart, pie chart, etc.

Activity 1.3 – How can I see the top Opportunities I'm working on?

Activity Steps on Web App

1. From a dashboard, add the Top Deals widget
    a. Click **Dashboard Settings**
    b. Click **+ button** next to **Top Deals** at the bottom of the second section Module: Contact Manager
2. Close the Settings pop-up window
3. On the new widget, click the **gear icon** to configure
    a. Complete the following configuration on the first tab **Widget Options**:
        i. Title: **My Top Project Pursuits**
        ii. Chart Type: **Bar**
        iii. Fee Type: **Firm Estimated Fee**
        iv. Item Label: **Opportunity Name**
    b. Check the box for **Include the total of your top opportunities in the title**
    c. Open the **Filters tab**
        i. Personnel: Search and enter **Joe Manning**
    d. Open the **Stage Types tab**
        i. Check **Open** and **Pending**
4. Click **Save**

Track Sales Goals

The Sales versus Goals widget charts your Opportunities by actual sales, projected sales, and sales goals. You will need privileges to “write” in the Goals module to create a goal. If you do not have the appropriate privileges, then an Administrator will need to create the goal.

Activity 1.4 – How can I evaluate my personal progress toward my sales goals?

Activity Steps on Web App

Part 1: Set up a Goal

1. Go to **Goals** module in the left-side menu
2. Click the **+New Goal button** with the green plus icon
3. Complete the following:
    a. Select **Goal Type: Sales Goal**
    b. Assign to Personnel as needed
        1. Search and select **Joe Manning**
4. Set Default monthly goal: **100,000**
5. Click **Create Goal** button
6. Scroll to the right to see the numbers distributed in the table

NOTE: You can assign a goal to entire organization, or individual offices, divisions, studios, and also companies for further refinement.

Goals cannot be edited. If something needs to be modified, then you will need to delete the goal and create a new goal.

Part 2: Configure the Widget

1. Open a personal dashboard (not a shared dashboard): **My Dashboard**
2. Add the Sales vs Goal widget
    a. Click **Dashboard Settings**
    b. Click **+ button** next to **Sales vs Goal** in the third section Module: Goals
3. Close the Settings pop-up window
4. On the new widget, click the **gear icon**  to configure
    a. Complete the following configuration on the first tab **Widget Settings**:
        i. Enter Title: **Sales Goal Percent**
        ii. Height: **300**
        iii. Chart Type: **% of Goal**
        iv. Start Year: **2020**
        v. Year Count: **3**

vi. Series 1: **Personnel**
vii. Goal Type: **Sales Goal**

TIP: Make sure that you give it a name that makes sense to you and will tell you exactly what you're looking for. Avoid leaving the name Sales Goal Gauge.

5. Open the **Actual Settings** tab
    a. Choose the following:
        i. Fee Source: **Firm Estimated Fee**
        ii. Date Source: **Close Date**
6. Open the **Personnel** tab
    a. Search and select **Joe Manning**
7. Click **Save**

NOTE: The Actual Settings should be selected to match what your firm has chosen as the preferred fee field.

LESSON 2: TRACK FIRM PROGRESS

Learning Objectives

Track firm progress

- Access public dashboards
- Duplicate a widget
- Track sales goals
- Customize opportunity widgets

Introduction

Business Developers use dashboards and widgets that reflect work for their personal goals, but also for team and firmwide progress.

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

Access Public Dashboards

Administrators create default dashboards for use by employees in the firm with standard, helpful widgets pre-loaded. These can be used as a template where the user can configure and customize to their liking.

Activity 2.1 – How can I get my homepage to have the Firmwide Public Dashboard?

Activity Steps on Web App

1. From the home page, open the **Dashboard dropdown menu** at the top-left of the shown dashboard
2. Find the shared dashboard for the firm
    a. named **Firmwide Public Dashboard**
    b. tagged with name of the creator of dashboard in parentheses
3. Click into another module, let's choose the **Companies** module
4. Click the **Home icon** to go back to the dashboard

NOTE: The last used dashboard will stay set unless manually changed. After moving to other modules, or logging out, you will always see the last used dashboard upon returning to the Home page.

Track Sales

There are over forty widgets available grouped into categories for Activities, Contact Manager, Goals, Personnel, Projects, Reports. Three basic, useful widgets not falling into the aforementioned categories are Recently Viewed, Shortcuts, and Web Browser.

Widgets provide many functions, and each widget has configuration options to display a wide slice of data or a narrow slice of data. For example, many widgets can zero in on a Date Rage, Primary Category, Stage, and Firm Orgs. Here are some use cases.

Sales vs Goal Widget

The Sales versus Goals widget can be customized to display data for teams, offices, practice areas, and companies. For this use case we will focus on a specific office, change the chart type to include actual, projected, and goal.

Activity 2.2 – How can I evaluate my team's progress towards goals?

Activity Steps on Web App

1. From a dashboard, click the clone icon on the Sales vs Goal widget from Activity 1.4
2. On the new widget, click the **gear icon** to configure
3. Complete the following configuration on the first tab **Widget Settings**:
    a. Enter Title: **Austin Office Sales vs Goal**
    b. Height: **450**
    c. Display: **Bar**
    d. Start Year: **2020**
    e. Year Count: **1**
    f. Series 1: **Offices**
    g. Goal Type: **Sales Goal**
4. Go to the **Projected Settings tab** and select:
    a. Fee Source: **Firm Estimated Fee**
    b. Date Source: **Estimated Selection Date**
5. Go to the **Stages (Projected) tab** and select **05, 06, 07, 08,** and **09**
6. Go to **Personnel tab** and remove **Joe Manning**
7. Go to the **Offices tab** and select **Austin**
8. Click **Save**

A goal assigned to an Office must exist in the Goals module for the widget to have data to display.

Sales vs Goal Over Time Widget

The Sales versus Goals over Time widget charts your Opportunities by actual sales, projected sales, and sales goals for the time frame of your choosing. This is a multi-series chart because it measures three things.

Activity 2.3 – How can I monitor my firm's ability to achieve our sales goal?

Activity Steps on Web App

1. From a dashboard, add the Sales vs Goal Over Time widget
    a. Click **Dashboard Settings**
    b. Click **+ button** next to **Sales vs Goal Over Time** at the bottom of the third section Module: Goals
2. Close the Settings pop-up window
3. On the new widget, click the **gear icon** to configure
    a. Complete the following configuration on the first tab **Widget Options**:
        i. Title: **Firmwide Sales Vs. Goal Over Time**
        ii. Chart Type: **Multi-series Line**
        iii. Start Year: **2020**
        iv. Year Count: **1**
        v. Series 1: **Months**
        vi. Goal Type: **Sales Goal**
    b. Check the box for **Accumulate values**
    c. Open the **Goals tab**
        i. Check boxes for **Actual** and **Goals**
    d. Open the **Actual Settings tab**
        i. Select Fee Source: **Firm Estimated Fee**
        ii. Select Date Source: **Opportunity Close Date**
    e. Open the **Stages (Actual) tab**
        i. Check **11-Closed Won**
    f. Open the **Projected Settings tab**
        i. Select Fee Source: **Firm Estimated Fee**
        ii. Select Date Source: **Estimated Selection Date**
    g. Open the **Stages (Projected) tab**
        i. Check **08-Shortlised** and **09-Interviewed**
4. Click **Save**

The Sales Goal Gauge is another widget that uses a unique chart type to visualize actuals in relation to accumulating sections of sales goals.

Hit Rate and Win Rate Widgets

Three widgets are dedicated to hit and win rates. The Hit Rate widget displays the Opportunity hit rate with firm estimated fee. The Hit Rate by Office widget displays a bar graph of hit rates by office. The Win Rate widget shows a stacked column chart of the win to loss ratio.

Activity 2.4 – How can I track my firm's win rate by office?

Activity Steps on Web App

1. From a dashboard, add the Win Rate widget
    a. Click **Dashboard Settings**
    b. Click **+ button** next to **Win Rate** at the bottom of the third section Module: Goals
2. Close the Settings pop-up window
3. On the new widget, click the **gear icon** to configure
    a. Complete the following configuration on the first tab **Widget Options**:
        i. Title: **Austin Win Rate**
        ii. Chart Type: **Stacked Column**
        iii. Data Type: **Win Rate**
        iv. Fee Type: **Sum, Firm Estimated Fee**
        v. Group: **Offices**
    b. Open the **Filters tab**
        i. Select Date Filter: **Close Date**
        ii. Set Date Range to Specific Dates
            1. Start Date: **01/01/2020**
            2. End Date: **12/31/2023**
    c. Open **Stage Types tab**
        i. Check **Closed/Lost** and **Closed/Won**
4. Click **Save**

Opportunity Summary Widget

The Opportunity Summary widget is a snapshot of your firm's opportunities. The key to configuring this widget is knowing where your firm stores its cost/fee information for Opportunities. This widget shows the following:

- Title
- Projects Awarded Fee source
- Hit Rate Fee Source
- Pipeline Fee Source
- Opportunities Fee Source
- Year Settings

Activity 2.5 – How can I see a quick summary of my firm's year-to-date progress?

Activity Steps on Web App

1. From a dashboard, add the Opportunity Summary widget
   a. Click **Dashboard Settings**
   b. Click **+ button** next to **Opportunity Summary** fifth from the bottom of the second section Module: Contact Manager
2. Close the Settings pop-up window
3. On the new widget, click the **gear icon** to configure
   a. Complete the following configuration on the first tab **Widget Options**:
      i. Title: **Firm YTD Progress**
      ii. Projects Awarded Fee Source: **Factored Fee**
      iii. Hit Rate Fee Source: **Factored Fee**
      iv. Pipeline Fee Source: **Factored Fee**
      v. Opportunities Fee Source: **Factored Fee**
      vi. Currency: **United States Dollar (USD)**
      vii. Year Settings: **Calendar Year**
4. Click **Save**

Opportunity Financial Data Widget

This widget is a very flexible, powerful widget that includes an array of filtering options to analyze Opportunity financial data in various ways. The following activity includes a few use cases showing how this widget can be customized.

Activity 2.6 – How can I see open Opportunities grouped by different filters?

Activity Steps on Web App

Part 1: Create a Chart for Open Opportunities by Lead BD

1. From a dashboard, add the Opportunity Financial Data widget
   a. Click **Dashboard Settings**
   b. Click **+ button** next to **Opportunity Financial Data** seventh from the bottom of the second section Module: Contact Manager
2. Close the Settings pop-up window
3. On the new widget, click the **gear icon** to configure
   a. Complete the following configuration on the first tab **Widget Options**:

        i. Title: **Austin Win Rate**
    b. Title: Open Opportunities by Lead BD
    c. Height: **600**
    d. Chart Type: **Column**
    e. Data Type: **Fee**
    f. Fee Type: **Sum**; **Firm Estimated Fee**
    g. Group 1: **Personnel**
4. Open **Filters** tab
    a. Select in **Staff Role: Lead Business Developer**
5. Open **Stage Types** tab
    a. Select **Open**
6. Click **Save**

NOTE: This column chart shows bars representing the sum of the firm estimated fee dollar amounts. Upon hovering a specific bar the Count will be displayed. Conversely, if you chose Count for Fee Type a hover would display the Sum.

Duplicate a Widget

It is very useful to duplicate (clone) an existing, configured widget to adjust it to meet a similar need. This eliminates the extra work of creating the widget from scratch. Be aware that cloning will carry over all settings, filters, and selections.

Part 2: Create a Chart for Open Opportunities by Lead BD and Practice Area

1. Clone the widget from Part 1, by clicking the **Clone button** next to the X
2. Configure the widget by clicking the **gear icon**
3. Update widget settings
    a. Title: **Open Opportunities by Lead BD and Practice Area**
    b. Chart Type: **Stacked Column 3D**
    c. Group 2: **Practice Areas**
4. Click Save
5. On the legend, click **Corporate** to unselect that Practice Area from being displayed

Part 3: Create a Table for Open Opportunities by Lead BD and Practice Area

1. Clone the widget from Part 2, by clicking the **Clone button** next to the X
2. Configure the widget by clicking the **gear icon**
3. Update widget settings
    a. Chart Type: **Multi-Series List Results**
4. Click **Save**

Opportunity Analysis Widget

This widget is a special configuration of the Opportunity Financial Data widget customized to display aggregate details about money fields, record counts, and percentages.

Activity 2.7 – How can I create an analysis of opportunities we pursue versus what we are awarded by practice area?

Activity Steps on Web App

1. From a dashboard, add the Opportunity Analysis widget
    a. Click **Dashboard Settings**
2. Create a new tab on your dashboard by clicking the **+ button** across the top bar above Tab Title and Layout
    a. Title the tab **Analysis**
    b. Choose a layout of **1 Column**
    c. Click **+ button** next to **Opportunity Analysis** just passed halfway of the second section Module: Contact Manager
3. Close the Settings pop-up window

NOTE: It is beneficial to allow the whole screen to display this widget with the use of a 1 column layout to see the numerous columns of data available.

4. On the new widget, click the **gear icon** to configure
    a. Complete the following configuration on the first tab **Widget Options**:
        i. Title: **Opps Pursued vs Won by Practice Area**
        ii. Fee Type: **Firm Estimated Fee**
        iii. Group 1: **Practice Areas**
        iv. Select Fields to display: check all
    b. Open the **Total Opps Config tab** and configure:
        i. Date Filter: **Close Date**
        ii. Date Range:
    c. Open the **Total Opps Stages tab** and configure:
        i. Check stages **11-Closed Won** and **12-Closed Lost**
    d. Open the **Opp Group Config tab** and configure:
        i. Date Filter: **Close Date**
        ii. Date Range:
    e. Open the **Opps Group Stages tab** and configure:
        i. Check stage **11-Closed Won**
5. Click **Save**

It is important to ensure that the Date Filter and Date Range are the same on Total Opps Config and Opp Group Config tabs.

LESSON 3: UTILIZE REPORTING

Learning Objectives

Utilize reporting

- Run reports
- Utilize web browser widget

Introduction

Most Business Developers are not going to be creating reports on a daily basis. Instead, they will likely be utilizing reports that have already been set up by your administrators and power users. For that reason, it is most helpful to make efficient use of the Reports Home page and incorporate reports onto your dashboard.

Run Reports

The Reports module displays a component bar at the top listing the core data modules for which reports can be designed. The tabs on the main page grid allow you to move between four different report types:

- **My Last Viewed Reports** - Most recently run by your user account.
- **My Private Reports** - Created by your user account and set as private.
- **My Reports** - Created by your user account and set as public.
- **All Reports** - All Standard Reports (15 are provided), plus all public reports created by all user accounts within your firm.

Activity 3.1 – How can I set a report as a "My Report"?

Activity Steps on Web App

Part 1: Set a report as a My Report

1. Open the **Reports** module from the left-side menu
2. Open desired report
3. Click the **Add to my reports** button Add to my reports in the top right of the Report Results grid
4. Go to **Reports Home**
5. Open the third tab **My Reports** to see the report has been added

Part 2: Add My Reports widget to dashboard

1. From a dashboard, add the My Reports widget
    a. Click **Dashboard Settings**
    b. Click **+ button** next to **My Reports** in the last section Module: Reports
2. Close the Settings pop-up window
3. On the new widget, click the **refresh icon** to load

Utilize Web Browser Widget

Activity 3.2 – How can I make a report I run every day appear on my dashboard?

Activity Steps on Web App

1. Run the report
2. On the webpage that loads report results, copy the URL
3. From a dashboard, add the Web Browser widget
    a. Click **Dashboard Settings**
    b. Click **+ button** next to **Web Browser** in the fourth section Module: None
4. Close the Settings pop-up window
5. On the new widget, click the **gear icon** to configure
    a. Complete the following configuration on the first tab **Widget Options**:
        i. Title: **Best Opp Report**
        ii. Paste the URL
        iii. Height: **1000**
6. **Click Save**

NOTE: It is beneficial to allow the whole screen to display this widget with the use of a 1 column layout to see the numerous columns of data available in reports.

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.