



The New Generation CRM

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Agenda

- Strategic Vision – Mission and Culture
- RE Imagined CRM
- Our CRM Experience
- Next Steps

APG Mission and Culture

- Values, respects and rewards hard work and innovation
- Provides every associate the tools necessary, such as crm, to be successful in his or her job – including ongoing training, technology and more



Before we invested the time into launching CRM, we needed to RE Imagine a new process and change perceptions.

Sales Staff without CRM



Sales Staff with CRM





Our CRM Experience

- Initially sales reps thought it was only for Big brother watching
- Reps did not see the benefit for the investment in time
- Previous CRM tools were cumbersome requiring extra steps outside the crm

Change was needed.



Customer Relationship Management is not just a software tool, it's a strategy!

- Forecast for a longer period of time into the future
- Manage a visible pipeline
- Integrate with our current systems
- Replace spreadsheet tracking of sales
- Get to a point of predictive modeling for the future

Team

Sales to Goal



Individual

Sales to Goal



Easy to read 3-month view of actual, goal and pipeline

The Pipeline

Classified Date: Publication Revenue Type: Both Go

Sales Rep Info

Pipeline

Activity

Sales Comparative

Held/Unfinished Ads

Opportunities with Ads

Forecasting

Managers

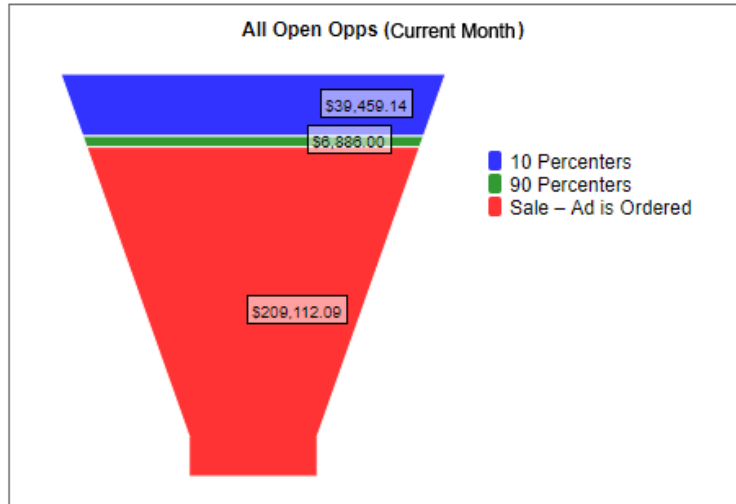
Pipeline Actual

From: 02/01/19 To: 04/30/19

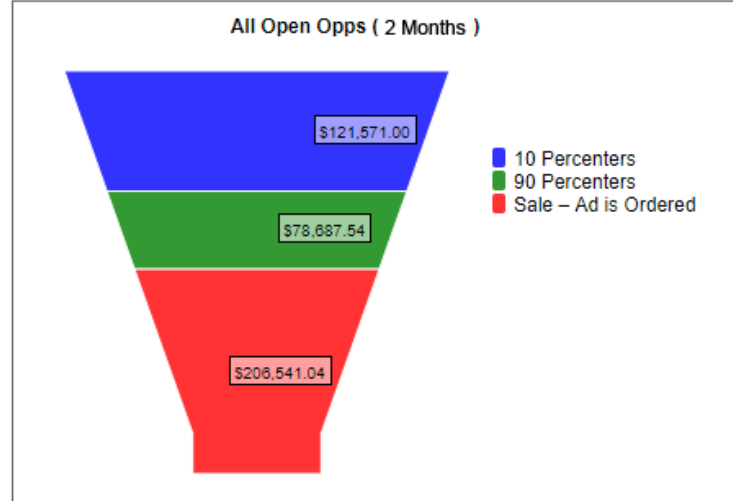
Stages to Ignore: 4 selected Breakout by: Stage and Op Type Budget: 2019 APG ECM Go

Totals										Feb19 90 Percenters Preprints								Feb19 90 Percenters ROP Advertising					
Sales Team		Print\$	Digital\$	PrintActual\$	DigitalActual\$	PrintForecast\$	DigitalForecast\$	PrintGoal\$	DigitalGoal\$	Print\$	Digital\$	PrintActual\$	DigitalActual\$	PrintForecast\$	DigitalForecast\$	PrintGoal\$	DigitalGoal\$	Print\$	Digital\$	PrintActual\$	DigitalActual\$	PrintForecast\$	DigitalForecast\$
CALL CENTER	+	\$223,807.89		\$67,473.33	\$670.00	\$331,596.35	\$1,606.80	\$331,596.35	\$1,606.80											\$81.35			
CENTRAL REGION	+	\$557,571.35		\$113,045.53	\$6,947.39	\$307,741.38	\$19,128.06	\$307,741.38	\$19,128.06			\$27,669.84		\$10,213.83		\$10,213.83		\$2,168.00		\$52,903.85		\$65,178.05	
NEW MEDIA	+	\$430,555.20		\$212,553.92		\$402,496.22	\$7,846.51	\$402,496.22	\$7,846.51			\$103,543.93		\$93,610.56		\$93,610.56				\$29,502.48		\$19,512.39	
NORTH REGION	+	\$763,842.98		\$263,889.04	\$5,221.00							\$46,323.26								\$94,840.03			
PRINCETON WEB PLANT	+	\$1,623,923.57																					
SOUTH REGION	+	\$1,624,542.45	\$494.00	\$460,131.16	\$13,582.28	\$1,028,590.88	\$38,885.89	\$1,018,560.88	\$38,885.89			\$24,938.67		\$18,181.09		\$18,181.09		\$5,263.02		\$160,963.41		\$98,847.83	
SPECIALTY PUBS	+	\$67,596.88		\$65,817.50																\$33,428.00			
WEST REGION	+	\$883,656.81		\$320,329.14	\$14,307.56	\$642,659.09	\$56,168.67	\$642,659.09	\$56,168.67			\$15,627.99		\$8,579.14		\$8,579.14				\$117,914.41		\$117,355.44	
		\$6,175,497.13	\$494.00	\$1,503,239.62	\$40,728.23	\$2,713,083.92	\$123,635.93	\$2,703,053.92	\$123,635.93			\$218,103.69		\$130,584.62		\$130,584.62		\$7,431.02		\$489,633.53		\$300,893.71	

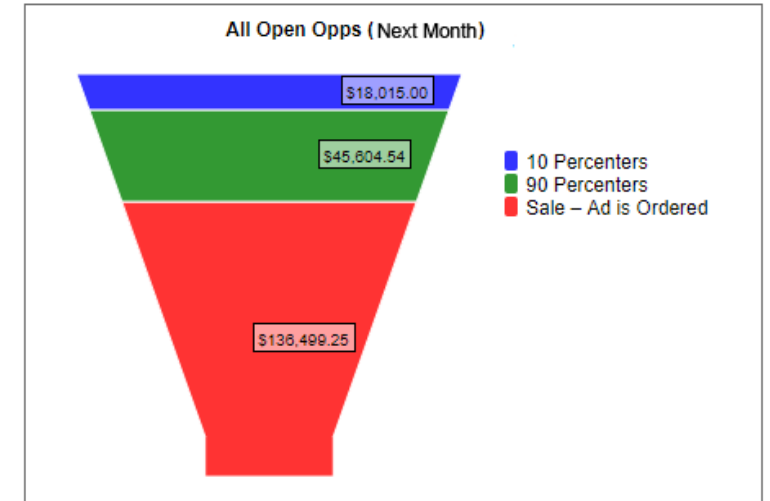
All Open Opportunities.



All Open Opportunities.



All Open Opportunities.



We are now booking revenue opportunities and these can be viewed easily over a three month period.

Sales Activity

Username	Sales Team	New Clients	Prospects	New Opportunities	Closed (Sale Made)	Closed (No Sale)	Appts	Calls	Todos	Emails
Telemarketers		0	0	0	4	0	0	65	0	0
Telemarketers		1	3	0	5	1	0	73	0	0
Telemarketers		0	8	1	0	0	12	69	0	0
Telemarketers		0	1	3	0	0	16	16	0	0
Telemarketers		2	2	2	3	0	7	55	0	0
Dan Matos	Upper Shore	1	1	15	6	3	0	0	0	92
Jason Oneil	Upper Shore	4	0	25	1	2	12	51	0	0
Amy Bennett	Upper Shore	0	0	0	17	12	2	0	0	2
Lisa Minto	Upper Shore	0	3	4	2	0	1	0	0	43
Jon Ekroos	Upper Shore	1	0	7	8	4	3	0	0	12
Thomas Zhang	DC Military	2	0	22	7	3	14	20	0	13

Client Name	Contact	Subject	Opportunity Notes	Activity Notes
CHESTERBROOK RESIDENCES		DC Military Magaine/ At Ease Magazine		Hi Kelly, I just left a voice message for your on the phone and wanted to see your thoughts on the new magazine. We are really excited about the opportunity of having your guys join us at At Ease Magazine. I can offer you're the new low ad rate and the best location if you get in on the first issue. We are really excited about the opportunity of getting this launched with you in time for fall
Laurie Verge		Your voice Message		Hello Lauren, wow Summer flew by and I did not ever have time to catch up with you about the trade show in Denver. I hope your guys found success with Northrup Grumman and met with everyone. I know it can be difficult to find everyone at that show because of the tight window. I am excited to talk to you about At Ease and the opportunities for you guys to partner with us. This new luxury magazine has been a labor of love for us, but we are proud of where it is and how it is trending. So please let me know what I can do to support you

Emails Sync with CRM

Many Benefits of CRM

Create Opportunity

Opportunity Data									
Opportunity Type	Stage	Print Prob.	Digital Revenue	Projected Close	Actual Close				
Preprints	90 Percenters	90	709	125	03/21/2019				
Preprints	10 Percenters	10	1072	189	03/21/2019				
Owner: Michael Specht		90	505	89	03/28/2019				
ROP Advertising	90 Percenters	90	90	9	04/04/2019				
ROP Advertising	10 Percenters	10	679	120	03/28/2019				

Book Order from Opportunity

Opportunity Data									
Opportunity Type	Stage	Print Prob.	Digital Revenue	Projected Close	Actual Close				
Special Section	Sale - Ad is Ordered	100	499	0	02/14/2019	02/15/2019			

Create order from this opportunity

Comparative Reporting by Product and Sales by Ad Rep

Rep	Pub	Revenue 02/01/19 to 04/30/19	Revenue 02/01/18 to 04/30/18	Revenue Diff
Total 3	2	\$15,615.40	\$14,216.00	\$1,399.40
Michael Specht	Online Advertising	\$0.00	\$106.57	(\$106.57)
Michael Specht	Outside Pub Waconia Patriot	\$1,652.00	\$1,934.43	(\$282.43)
Beau Siegel	Online Advertising	\$782.75	\$701.06	\$81.69
Beau Siegel	Outside Pub Waconia Patriot	\$11,640.65	\$10,008.94	\$1,631.71
Kristi Pexa	Online Advertising	\$66.31	\$100.00	(\$33.69)
Kristi Pexa	Outside Pub Waconia Patriot	\$1,473.69	\$1,365.00	\$108.69

Export to:

Account	Pub	Client Name	Revenue 02/01/19 to 04/30/19	Revenue 02/01/18 to 04/30/18	Revenue Diff
Total 46	2		\$12,423.40	\$10,710.00	\$1,713.40
364946	Online Advertising	FIRST MINNESOTA BANK N A	\$20.50	\$20.00	\$0.50
364946	Outside Pub Waconia Patriot	FIRST MINNESOTA BANK N A	\$396.50	\$385.00	\$11.50
424064	Online Advertising	CARVER COUNTY PUBLIC HEALTH	\$20.46	\$0.00	\$20.46
424064	Outside Pub Waconia Patriot	CARVER COUNTY PUBLIC HEALTH	\$252.54	\$0.00	\$252.54
424164	Online Advertising	MARKETPLACE FOODS	\$20.46	\$21.75	(\$1.29)
424164	Outside Pub Waconia Patriot	MARKETPLACE FOODS	\$252.54	\$243.25	\$9.29
424261	Online Advertising	LUCE LINE LODGE	\$20.46	\$20.00	\$0.46
424261	Outside Pub Waconia Patriot	LUCE LINE LODGE	\$252.54	\$245.00	\$7.54
424265	Online Advertising	WATERTOWN-MAYER SCHOOL	\$25.31	\$25.28	\$0.03
424265	Outside Pub Waconia Patriot	WATERTOWN-MAYER SCHOOL	\$680.69	\$659.72	\$20.97
424273	Online Advertising	MAYER LUTHERAN	\$20.46	\$20.00	\$0.46
424273	Outside Pub Waconia Patriot	MAYER LUTHERAN	\$252.54	\$245.00	\$7.54

Net Difference	Revenue Percent Difference
\$3,731.88	100.00%
\$1,152.13	100.00%
\$1,020.50	100.00%
\$815.14	100.00%
\$719.00	100.00%
\$637.49	100.00%
\$554.00	100.00%
\$508.00	100.00%
\$499.00	100.00%
\$495.00	100.00%
\$485.00	100.00%
\$471.42	100.00%
\$450.00	100.00%
\$440.00	100.00%
\$407.00	100.00%
\$399.00	100.00%
\$392.00	100.00%
\$345.06	100.00%

Gains and Losses

Current Date Range

From: 02/01/19  To: 02/28/19

Comparative Date Range

From: 02/28/18  To: 02/28/18

Top: 30 ☒ Gainers ☐ Losers Tran Typ

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APG Q2 Initiatives

Reports

- Forecast model will be at the account level and roll up to become the forecasting reports for our CEO
- Track trends in business sectors
- Performance ratios
- Understand opportunities within revenue segments and trends
- Budget from forecasted data

Predictive Modeling

- Using historical data to predict revenue from opportunities and orders scheduled to show sales reps many customers need to be entered in their pipeline to meet their sales goals.

Proposal Writing Tool

- Sales staff will be able to create their custom proposals based on demographics, digital and print product offerings and promotions.

Third Party Integration Email Blasts

- Sales staff will be able to send email blasts to email customers, prospects and segments in their list from customers in pipeline, orders booked or proposals sent.

Questions?