



# Score Client Points With Better Account Management

*By Mindy Williams*

**T**he second worst thing you can tell a client is: "I'll have to get back to you on that." (The absolute worst thing you can say is, of course: "We seem to have, um, misplaced that information.") No matter how tactfully you put it, your client knows you lost that vital info—and you know they know.

It's a sticky situation, and account executives face them everyday. Whether they're on the road or in the office, AEs need a good system to track everyday details to stay on top of jobs while keeping the big picture in focus. Clients & Profits can help.

With Clients & Profits, office-bound AEs have all the information they need just a few mouse clicks away. And if they're on the road, all they need is a web browser and My Clients & Profits! to access the database. When AEs have access to the information they need, they'll be able to better manage client relationships and profitability goals.



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## SCORE CLIENT POINTS



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Clients & Profits' tools for better account management begin with the client account, which maintains all of the key client-related information like contact names, phone and fax numbers, email addresses, web site address, client-based projects, billing rates—and especially budget amounts. “Our AEs are proactive with client budgets,” says Craig Barnes, owner of The MBC Group, “and many times they help the clients set them up.” AEs at MBC have monthly AGI goals, and they use Clients & Profits to actively track and forecast their progress.

### Adding jobs on the road

Since they know more about new jobs than anyone else, AEs at MBC add their own jobs, whether they are on the road with My C&P! or in the office. Estimates, change orders, creative briefs, automatic email, and job reports help AEs stay on top of their clients' work. “The strength of Clients & Profits,” says Craig, “is that all of that information is always at their fingertips.”

Estimates, which can be revised any number of times, can be approved online. And once they're approved, Clients & Profits can automatically send an email to production managers letting them know that the job is a go. Change orders, which can also trigger an automatic email, include a checkbox to track client approval. And getting a client's signature on the

final estimate and any change orders (even if there's no amount to charge) could save a lot of grief when it comes time to bill the job.

### Staying focused on client goals

The creative brief, also part of the job ticket, keeps everyone on the same page. Using the creative brief fields, AEs can define

the job as a strategic process, present it for client approval, then refer to it as the job unfolds. Greg Eckel, president of Design Crew Marketing Solutions, uses the creative brief to keep everyone—clients, vendors, and staff—focused on the clients' goals. “Clients & Profits is our process,” he says, “and using it builds a level of trust with our clients.”

Each major turning point in a job (like status changes) is automatically recorded in the job diary. Manual entries can be added, too, then emailed to any staffer—or even the client—to record important job information. “I always use the job diary to record all communication with a client about a job and everything that happens of

note,” says Shaun Schleif, AE at David & Associates. Staffers can also add job diary entries when they're adding notes to their time cards just by clicking a checkbox in the time card window.

### Job diaries, access privileges

Each client account also has a diary, and anyone with the right access privileges can

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## What do you like about account management with Clients & Profits?

A recent survey asked: What do you like about account management with Clients & Profits? Their answers explain why so many shops use it as their only agency management system.

- Tracks all client-related billing information, including billing rates, sales tax and finance charges
- Job- and client-based diary entries record everything about a client's jobs and centralize and document important communication with clients
- Easily review year over year historical information about clients with details or summarized
- Tracks budgets, estimates, costs, billings, projects and schedules by client
- Various tools, such as the job snapshot and job progress, give AEs different perspectives on how jobs are developing

### How do you compare?

- 93% use C&P for account management
- Average number of AEs per shop: 6
- 76% of AEs always or mostly print their estimates from Clients & Profits
- 75% of the shops surveyed require change orders signed by clients.
- 26% use job and/or client diaries
- Over 50% use job creative briefs
- AEs determine what's to be billed in 56% of shops surveyed
- 62% use the job summary or job progress as their main prebilling report

## MY CLIENTS & PROFITS! IS YOUR ROAD WARRIOR

By Judith Hector

The fastest, easiest way for AEs to add new jobs into your Clients & Profits database is to enter them right from the client's office using My Clients & Profits!, the web server add-on for Clients & Profits. With My Clients & Profits! and a phone jack, AEs can access your office's Clients & Profits database as quickly as they can log onto the internet.

With just a few mouse clicks, AEs can add, view, and edit job tickets, estimates, creative briefs, job costs, billing status, and more. They can also review client and vendor information for status or billing notes—a key step to help avoid costly delays and embarrassing mix-ups.

AEs can stay in touch with the home office from their hotel rooms, the airport, or the corner coffee shop (okay, even the beach if they have a modem, but they'll never admit it). With My Clients & Profits!, AEs can achieve three goals:

- They'll spend less time in front of a computer at the office and more time interacting with clients. That means more

work for your shop, and bigger commissions for them.

- They can get up-to-the-minute information to take into a client meeting, even when they're on the road. Clients will be wowed and think you guys are super heroes.

- They can enter new jobs, change orders, or important information right away so your production staff can start working almost immediately. Faster turnaround can give you a competitive edge—and you'll minimize staff downtime.

My Clients & Profits! lets AEs add out-of-pocket expenses they incur on the road (e.g., client lunches, lodging charges, etc.) when they happen. By keeping on top of expense reports, AEs can better handle their work-related cash flow, and accountants can better plan for issuing reimbursements.


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### Job progress-- AE's window into job profitability

The "bottom" bottom-line is job profit. The trick is to get AEs motivated to achieve it. The way to motivate them is to give them the tools to see it for themselves.

 Marty Pennoni, a long-time Clients & Profits user and consultant, says, "I tell every client that the most important report for job management is the Job Progress. If jobs are estimated correctly, hourly rates set correctly, and the company is staffed correctly, (basically doing everything owners should do), it's a simple matter: Manage your job costs at gross to finish at or under the estimate. If you do this consistently, you will be profitable."

 Job progress is a report...and much, much more! It's an entire job management area within each job ticket. (Choose Edit > Job Progress to open the window.) AEs quickly determine how an entire job is progressing through focusing on each task's budgeted vs. actual amounts, along with showing percentage of completion for each task and the job as a whole.

 And AEs can change their view to tasks belonging to a certain group through a pop-up menu. So, for example, they can zero in on the account service, creative or production aspects of the work. This ability reveals and pinpoints potential problems well before completion, enabling AEs to be proactive with clients.

 If an AE has questions about individual costs, they can highlight that task or tasks, then click the Costs button. All transaction details appear for easy review. Also, task billings and purchase, insertion and broadcast orders are reviewed in the same way.



# JOB PROGRESS

A one-stop source for a job's up-to-the-minute estimate, hours, and costs

The Job Progress report is a client report that shows up-to-date totals for a job. It's ideal for making your point at client meetings, since the client will see each job's estimate, hours, and costs—but with markups and commissions, not the actual costs. Clients (and nosy staff members) won't see they agency's cost rates, either.

1. You can print Job Progress reports for one job at a time or for a range of jobs for one client. By entering a range of production or billing status codes, you can see which jobs are stalled, pending client approval for example. By focusing on certain status ranges, you'll know which jobs—or clients—need follow up.

2. The Job Progress report gives an at-a-glance overview of the job's estimate, change orders, and actual amounts spent so you'll know if costs and time are on track. By keeping tabs on this critical information, AEs can either rein in the job to keep it's spending on track—or approach the client with a change order.

3. Each of the job's tasks is listed with estimated amounts, followed by costs (including change orders, labor, and open POs,) and billing amounts. You'll be able to see how the costs for each line item are contributing to the job's profitability.

4. The Estimated Hours and Actual Hours columns compare how many hours were planned to complete the job versus time spent so far. A quick comparison between estimated and actual labor hours and the production status will send up a red flag for any potential pitfalls, while there's still time to make changes.

5. The Open POs column tells you not only the dollars committed to a task, but also whether or not a PO has been issued. If there's no amount in the open POs column and billings don't match the estimate, you can bet a PO hasn't been issued yet.

6. Every kind of cost is included, i.e., time, A/P, expenses, internal charges, job cost transfers and check amounts directly costed to the job. The gross (billable or marked up) amounts are subtotaled by task providing important task by task totals as well as total gross costs for this job.

Clients & Profits Sample DATA

### Job Progress

Number: REE-308  
 Client: REE  
 Project: Gateway  
 Production Status: 500  
 Type: Newsletter

Gateway Plaza Newsletter  
 Reynolds Electronics  
 Ready to Billing Review

Task:	Description:	Estimate:	Chg Orders:	H
ADD	Art Direction	360.00	--	
CCM	Comprehensive Layout	270.00	--	
	<b>Creative</b>	<b>630.00</b>	--	
CTP	Typesetting	90.00	--	
PRD	Mechanical Art Assembly	140.00	--	
COL	Color Marking	90.00	--	
CLY	Computer-Aided Layout	300.00	--	
CPR	Computer-Aided Production	540.00	--	
	<b>Production</b>	<b>1,160.00</b>	--	
CGP	Computer-Generated Color	96.00	--	
	<b>Fulfillment</b>	<b>96.00</b>	--	
PJC	Project Coordination	80.00	--	
	<b>Account Management</b>	<b>80.00</b>	--	
PA	Project Administration	70.00	--	
	<b>Administration</b>	<b>70.00</b>	--	
<b>TOTAL:</b>		<b>2,036.00</b>		

Specifications:

To print the Job Progress report:

Choose View > Job Tickets then choose File > Reports. Click on the Job Accounting link then select the Job Progress report.

Est. Hours:	Actual Hours:	Open POs:	Labor, Costs @ Gross:	AE/Team: SAG	Billings:	Unbilled:
4.00	6.00	--	540.00		360.00	180.00
3.00	2.00	--	229.68		270.00	-40.32
<b>7.00</b>	<b>8.00</b>	--	<b>769.68</b>		<b>630.00</b>	<b>139.68</b>
1.00	1.00	--	90.00		90.00	8 --
2.00	1.00	--	70.00		140.00	-70.00
1.00	1.00	--	90.00		90.00	--
3.00	3.00	--	300.00		300.00	--
6.00	6.00	--	540.00		540.00	-70.00
<b>13.00</b>	<b>12.00</b>	--	<b>1,090.00</b>		<b>1,160.00</b>	
--	--	3,481.31	36.32		96.00	-59.68
--	--	<b>3,481.31</b>	<b>36.32</b>		<b>96.00</b>	<b>-59.68</b>
1.00	1.75	5 --	140.00		80.00	60.00
<b>1.00</b>	<b>1.75</b>	--	<b>140.00</b>		<b>80.00</b>	<b>60.00</b>
1.00	--	--	6		70.00	-70.00
<b>1.00</b>	--	--			<b>70.00</b>	<b>-70.00</b>
--	--	3,481.31	2,036.00		2,036.00	--

Estimate + Change Orders:  
 Estimate Remaining:  
 Hours Remaining:  
 Gross Costs + Open POs:  
 Advance Billings:

2,036.00  
 0.00  
 0.25  
 3,567.31  
 --

7. Billed amounts from posted A/R invoices are listed by task and totalled for this job showing the AE any previous billings.

8. The Unbilled column shows the total costs, time, and expenses that are ready to be billed now. It increases whenever A/P, time cards, and expenses are posted, then reduced when the job is billed. It always shows the difference between the job's total gross costs less billings.

9. The Estimate + Change Orders amount reflects the total amount the client has agreed to pay for the work.

10. The Estimate Remaining amount shows the job's total estimate less its billings to date. It lets you know how much money is left to spend on the job.

11. The Hours Remaining amounts show the job's total estimate hours less its actual hours posted from time cards. You'll zero in on the labor portion of this job to see how many hours are left to complete the work.

12. The Gross Costs + Open POs amount is the sum of outside costs (from A/P), including markups, plus open POs/IOs/BOs. You'll know the total outside costs associated with this job.

13. If the job was billed in advance, you'll see the amount of its advance billing here. This total decreases when advance billings are applied to subsequent job billings.

## ACCOUNT MANAGEMENT QUESTIONS AND ANSWERS



### **Q. I'm an AE with over three dozen clients. How can I monitor the status of hundreds of their jobs?**

Monitor all your clients' work through a nifty little field called *AE/Team*. Your initials are entered on all your clients and copied to each of their new jobs. Many job reports are printed for only your *AE/Team* initials, pinpointing the information you need to see. Print the Daily Job Status report to review where each of your clients' jobs are in their development, based on your shop's production status codes. This provides a big picture overview.

### **Q. How can I get scheduling details for all my jobs without tracking down our traffic manager?**

Because all of your client's jobs have your *AE/Team* initials, you can print most of the scheduling reports for your initials only. This provides a task by task breakout of scheduled work for all your clients. You'll see when the work starts and is due, as well as who is assigned to do the work. One of many reports to print is the Work To Do. (Choose View > Work To Do, select the "Due for *AE/Team*" option, enter your initials, then enter work date range.)

### **Q. I have many large corporate clients who have dozens of billing contacts and different billing addresses. How can I keep this all straight at billing time?**

Use divisions to track accounts for large corporate clients. First add a client that

serves as the main client. Then, add each different billing address with its corresponding contact as a separate client. In each subsequent client's division area, enter in the client code for the main client. You'll always know which clients belong together by their division information. And at billing time, the right billing address and contact will be listed on the client's invoices with no rekeying of information. (In *Clients & Profits Pro* and *C&P SQL* you're also able to reunite clients that belong to a single division when printing client account agings and statements.)

### **Q. My production and creative co-workers constantly asking about creative, production and marketing goals of jobs. What can I do to inform everyone and keep from having to repeat myself?**

Use a job's creative brief to provide staffers who need to know about the work's creative, production and marketing goals. It is a permanent part of a job ticket and centrally located, so it's there any time someone needs to refer to it.

### **Q. I want to review on a weekly basis all of my client's outstanding invoices. What's the easiest way?**

Use a client account aging printed for your *AE/Team* initials only. The subsequent aging has unpaid invoices for your clients only. It's a great way to stay informed on who's paying and who's not. Cash flow for your shop is so important to its financial health. You could call clients whose invoices are past due.

**Monitor all your clients work through a nifty little field called *AE/Team*.**

**Your initials are entered on all your clients and copied to each of their new jobs.**

**Many scheduling and job reports can print for only your *AE/Team* initials pinpointing the information you need to see.**



## **GUARANTEED GREAT IDEAS!**

### **Account Management Tips from Real Clients & Profits Users**

These *Clients & Profits* users share their tips on how they manage their client accounts better:

**Do it in writing and get it signed** *"Do not start any jobs until you have a signed contract. Do not change orders as soon as the client requests something beyond the original contract. Make sure the client signs the change order before doing the additional work"* says Laurie Wilkinson of Reed Sendecke Inc. *"There must be a purchase order for every outside cost incurred on a job and it must be signed off by someone with the proper authority."*

**Status codes mean business** *"On a daily basis, our AEs use the production and billing status codes to produce reports that enable them to take action,"* says Donna Lipp of The Hemisphere Group Inc. *"They know what jobs are with clients, what jobs need signed estimates, what jobs are at the vendor and what jobs are closed and ready to bill."*

**Document, document, document** *"Put everything that someone may want to know, now and in the future, in the job and/or client diaries,"* says Tami Lester of Wilson Chapman. *"Review the information in the diaries often. You can learn a lot about clients' habits, as well as your shop's."*

**They bought it; so use it** *"Use *Clients & Profits* and all of its features—they are an AE's friend,"* says AnneMarie Greene of The MBC Group. *"It's so simple to use areas like estimates and creative briefs. Plus, everything is easy to find and monitor because it's all in one database, tracked by job number. I also like the billing windows and reports, like the job snapshot and job summaries. They help monitor a job's profitability - examining both time spent and outside costs."*

**They bought it; so use it, pt. 2** *"Use every resource available to you provided by *Clients & Profits*,"* says Felicia Sparks of Benton Newton & Partners Advertising. *"Do not be a lazy AE!"*



## THE JOB DIARY: REMEMBER EVERYTHING

By Danni Sandroni Smith



Job diaries are the way to keep up to date on a job's "happenings." Not only does Clients & Profits track job activity and history through automatic entries, AEs can also document meetings, changes, calls, etc. by entering a manual job diary entry.

Recording every detail in the diary consolidates all information for easy reference rather than trying to track down staffers or locate job jackets to obtain pertinent job information. A diary entry shows when, what, and who was involved with an activity and/or change. Added and saved very quickly, they are sorted by the date they were added, by who added the entry or took the action, and by what was done (also known as their subject).

Also, as a staffer is adding their time card, any individual time entry's description can be automatically recorded as a diary entry. Taking this action should be reserved for time entries that are in some way

notable or critical to a job's development.

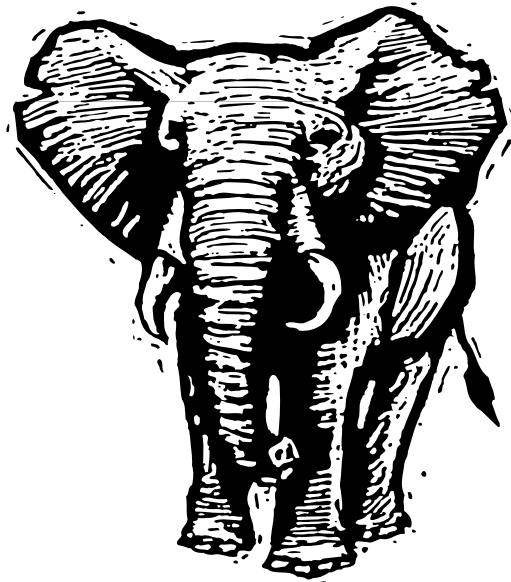
AEs often need to review the diary entries they added themselves, which is easy to do. In the Job Diary window, choose the pop-up menu to show "user generated entries only." Entries made by C&P are then temporarily hidden, showing only those added manually.

A manual entry can be sent via C&P email to any staff member, or even to a client by typing their email address onto the cc: line, to immediately inform them of the news.

Even document any mistakes that were made during the job. Reviewing a job diary for any previously made errors can help in preventing them from reoccurring. Use job diaries to keep all job-related details, even the ones you'd rather forget, in one, easily-accessible location.

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## Six Slick Account Management Reports

Knowing and reviewing the right reports makes all the difference between being proactive with clients and staff or letting details slip through. To successfully manage their client accounts, AEs often use these reports:

**AE List by AE/Team:** Shows the percentage of estimate remaining for each job and a subtotal for each client. With each job's production status identifying where a job is in its development, AEs can take action if a job is about to go over estimate.

**Client Time by Task:** Quickly review all time entered for each client subtotaled by task. See how staff time was spent on each client for a given date range. Individual time entries don't appear on this report, so you get the big picture overview.

**Job Billing Worksheet by AE:** A prebilling report that shows important dollar amounts for AEs to review before determining what's to be billed. There's even a designated area for AEs to write amounts to be billed or instructions to the biller.

**Work To Do for AE/Team:** A scheduling report that shows AEs all scheduled work for their clients. No more tracking down the traffic manager to learn who's doing what and when.

**AE Client Invoice Aging:** An accounting report that shows outstanding Accounts Receivable invoices for an AE's clients. No more tracking down the business manager to find out who has paid and who hasn't.

**Change Order by AE:** With changes happening quickly on jobs, this report tracks what the changes are and whether or not they've been approved by clients.

## SCORE CLIENT POINTS (con't)



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add and email a note. For example, if a client requests a strategy meeting to discuss next year's promotion plan, the AE can add an entry in the client diary, then email the entry to the creative director and the client.

### No-brainer billing

AEs can print dozens of reports that select information based on the AE/Team sort field (this is usually the AE's initials). They can track their own jobs' costs, billings, purchase orders, change orders, and traffic and schedules. They can also quickly gather information, both current and historical, on all their clients without having to track down a harried manager or dusty job folder.

The exclusive Job Snapshot shows in an instant how close the job is to completion. "Billing is a no brainer now," says Lisa Tuckett, the senior account manager at Hodgson/Meyers Communications. "Our billing time has been cut by three-fourths with C&P." AEs lay the groundwork for the accounting department with reports like detailed job summary, job commitments and unbilled job costs. "If the estimate is properly done," Lisa says, "all the billings for the job are as expected, and the clients become really, really comfortable with our entire work process using Clients & Profits."

### Easy review of internal, external costs

To stay current on the work, AEs can print a Daily Job Status report showing their own jobs. Many other reports can be printed for one AE, making it easy to pinpoint their clients' work. The Job Progress gives AEs a quick look at all costs for a job, with the ability to zero in on select groups. They can also review internal and external costs with the budgeted vs. actual detail. And job costs are only a mouse-click away.

The profitability reports can be sorted by client, giving details for each job or an overview by client. These reports are great tools for figuring out which clients actually add to the bottom line. Profitability is taken a step further in Clients & Profits with the Client P&L Analysis, a report that factors in the shop's overhead before determining a client's profitability.

Account management runs a full circle, from winning good clients and keeping them informed, to sharing job details with the rest of the staff, to billing promptly and accurately. Remember, there is no such thing as too much communication. With Clients & Profits, AEs communicate easily with both clients and staffers. "Our AEs often give our clients financial information about their jobs well before the client could get that information from their own business," Craig says. Now that's account management!

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*Mindy Williams is a senior member of the Clients & Profits Helpdesk. She teaches the new-user training classes and edits the quarterly newsletters.*

CLIENTS & PROFITS is job production and accounting software designed especially for creative businesses. Since 1986, more advertising agencies have chosen Clients & Profits over any other agency management software for Macintosh and Windows. Over 2,200 ad agencies, graphic design firms, and corporate marketing departments use Clients & Profits to track jobs, costs, and billings every day. For more information, send email to [info@clientsandprofits.com](mailto:info@clientsandprofits.com).

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