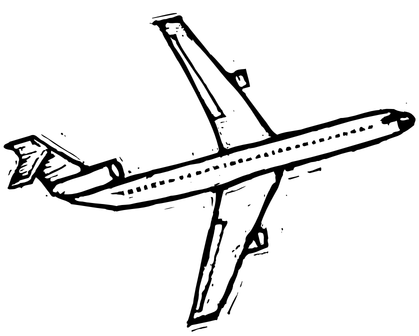
Get Back On Track For More Clients and Profits

By Judith Hector

There are a lot of reasons why shops get Clients & Profits: better job management, accurate costing, easier billing, complete financial analyses, full agency integration. There are probably as many reasons as there are agencies using it. But no matter how compelling or logical the reason was when the decision was made to buy it, sometimes the enthusiasm fades away after the box is opened.

Sure, getting Clients & Profits up and running isn't as easy as, say, installing new fonts. But it isn't as hard as it might seem either. And the beautiful thing is, once you get the Clients & Profits database framed with a few key elements, you're more than halfway done.



If you just bought Clients & Profits, or even if you bought it years ago but didn't get it fully running, follow this step-by-step guide to rev-up your Clients & Profits software. You'll end up with a clean, fast-running system that tracks jobs from the proposal to final billing, and leaves a data trail that can be compiled into hundreds of reports.

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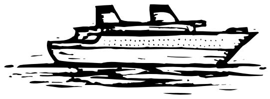
EVERYONE ON BOARD



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Develop a game plan

Tackle Clients & Profits like you would a new client job. First, get to know Clients & Profits. If you're not intimately familiar with the scope of tools built into Clients & Profits, crack open that feature guide and glance at the section tabs. You'll find everything there from Job Tickets to Media to General Ledger, plus a handy flowchart that illustrates how data entered at one end makes everyone's job easier down the road (no more double-entry!).

Once you have your head wrapped around Clients & Profits, zero in on the end goal. Figure out what you want to accomplish then, just like your creative brief, *write it down.* It will help you keep moving forward when you feel like you're slogging through hip-deep data with no end in sight. There is an end. We promise.

Don't be a control freak

OK, control is one thing, but control freak is entirely different. Unless you're superhuman or have months to spend ramping up, don't implement C&P single-handedly. Chances are, you wouldn't handle a client job by yourself, so why go Clients & Profits alone? While installing Clients & Profits isn't difficult, there are many details that you need to be mindful of. Getting a hand will significantly reduce the time it takes—and result in a much more complete implementation.

Get your managers involved. Delegate the responsibility of identifying what each department needs and who needs to do what. With this analysis, you can map out the process of your shop's workflow. Your objective is to make the data flow smoothly from beginning to end, and that means taking out some roadblocks. With confidential G/L accounts, the ability to hide costs, and other detailed user privileges, there won't be a problem with letting your staffers access Clients & Profits and keeping proprietary information under wraps.

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> Figure out what you want to accomplish then, just like your creative brief, *write it down.* It will help you keep moving forward when you feel like you're slogging through hip-deep data. Your objective is to make the work flow smoothly from beginning to end for faster and more accurate agency management.

Easy does it

Now that you have a work flow map in hand and the roles of your staffers identified, start building the database. Since you have the big picture written down (your goals and map) focus on the primary elements that will anchor your database: users, the chart of accounts, tasks, clients and vendors, and status codes. While the database can grow quite large over time, you only need to focus on these five areas to begin with.

Focus on current workflow

Enter just the data you need today (more can be added later) and with enough detail so work flows smoothly through the shop. Remember, when staffers add job information in the front end, billing and financial analysis are quicker and more accurate on the back end.

Chances are, if you have a good map, you won't need to revamp the database later. Don't let fear keep you from taking that first step: nearly everything can be edited so don't worry about making mistakes.

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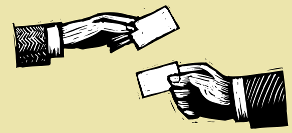


Building Relationships: Working with the Clients & Profits Helpdesk

Regardless of the where you work or what you do, working together is the foundation to building successful relationships. When you choose a system like Clients & Profits, you're starting a relationship that lasts for years. You'll find that the relationship with the C&P Helpdesk is vital to your success.

We're always here to help because our business relies on your satisfaction That's why we survey dozens of callers every week about the job we're doing. (We're especially proud that in 2002 over **93%** of respondents said that their calls to the helpdesk went very well).

Here are some tips for getting better help:

- Everyone who uses Clients & Profits at your company can call the Helpdesk. There's no limit or restrictions how often they can call.
- The Helpdesk is busiest from 9am-2pm, especially on Mondays and the day after holidays.
- We respond to phone calls first, then e-mails. Use e-mail if the question is fairly straightforward and you're not in a bind. For urgent problems, always call the Helpdesk instead.
- When you call the Helpdesk, our automated call system routes your call to the next available staffer. If no one is available, you'll be prompted to wait or leave a voice mail. If you leave a voice mail, it will be returned promptly.
- It's helpful to designate a "system manager" for Clients & Profits, someone who can coordinate training and support, maintain the database, and keep track of updates.
- In rare cases, C&P R&D may ask for a copy of your database to troubleshoot a hard-to-reproduce problem. If this happens, you don't need to stop working while we research the problem.

DESPERATE FOR DETAILS? JUST CLICK !

By Mindy Williams

With the release of Clients & Profits 5.0, the program's documentation was split into two parts: a printed **Feature Guide** and a new online **User Guide**.

The new Feature Guide (which is included as PDF files on your C&P 5.0 CD) provides a visual overview of the system's key features. In addition to explaining how each feature works, it offers more screen shots and captions to better illustrate what each window's fields, buttons, and links do.

What isn't included in the Feature Guide are step-by-step instructions; they've been converted into web pages and integrated in the Clients & Profits web site as an online user guide.

The idea was to simplify the printed manual—what new users use most—and focus on just what they need to get going. By making the user guide web-based, the printed manual got more room to introduce the upgrade's many new features (and keep the binder from getting even heavier).

A web-based user guide has several compelling advantages, too. First, it's searchable in ways a printed manual can never be; it's interactive, with links, FAQs, tech notes, tutorials, and sample reports; and, most importantly, it can be refreshed much more easily and frequently than a printed user guide.

Using the online User Guide couldn't be easier, either: Simply click button from any Clients & Profits 5.0 window. In seconds, the user guide page appears in your web browser (assuming you have an internet connection, of course). This means no more dog-eared or out-of-date pages—and no more fumbling through an index to find an answer.

You can see the online user guide by visiting **www.clientsandprofits.com/user_guide**

Mindy Williams is a senior member of the Clients & Profits Helpdesk and coedits the quarterly newsletters.

Want something changed? Here's how.

There's never been a shortage of opinionated users (that's for sure). But that's fine, because feedback from users like you has made Clients & Profits what it is today.

Since the first version of Clients & Profits was made way back in 1986, we've always been committed to making it do more and work better.

Your suggestions matter to us, whether it's a wish list request, a bug report, or just a comment about something you like or don't like. But with thousands of users, it became difficult to manage so much feedback. So we've developed a better way to make your voice heard:

www.clientsandprofits.com/support/bugs

It's simple: All you do is enter your e-mail address, the version of Clients & Profits you're using, and the issue's subject and description.

You'll get a confirmation e-mail within ten minutes. Your bug report or wish list request is logged into our automated R&D database, which lets us manage the feedback. As we review your issue, you can track its progress via e-mail—you'll even be notified via e-mail when the issue is resolved. It's a great way to stay in-the-know about the direction of Clients & Profits, so you can better plan your agency's future.

The fine print The bug report/wish list web page shouldn't be used for requesting technical support, since the system isn't monitored in real time; instead, send your e-mail to *helpdesk@clientsandprofits.com* Also, all feedback becomes the exclusive property of Clients & Profits, Inc. according to the terms defined in the Software Proposal and License Agreement. Please don't send us anything that your organization considers proprietary or confidential.

AN INSIDER'S GUIDE TO CLIENTSANDPROFIT

Get the information you need to work your best—right from the source!

The Clients & Profits Support web site—your online helpdesk—is your best source for 24-hour-a-day help for your Clients & Profits system. It's where you'll find answers, advice, tips, training and troubleshooting help that will keep your shop up-and-running.

The online helpdesk is available free to registered users with current support subscriptions.

Version micro-sites Each version of Clients & Profits has its own special web site. There you'll find sales information, upgrade FAQs, a buyer's guide, and links to each version's own support page. You'll also find links to each version's bug list, revisions list (which describes enhancements and fixes for each update) and known limitations.

System Manager News is a one-stop source for news and links for the tech types who manage Clients & Profits.

What's Hot discusses cutting-edge technology and how is works (or doesn't work) with Clients & Profits.

Deals lists the Helpdesk's best choices for the hardware and software for Clients & Profits.

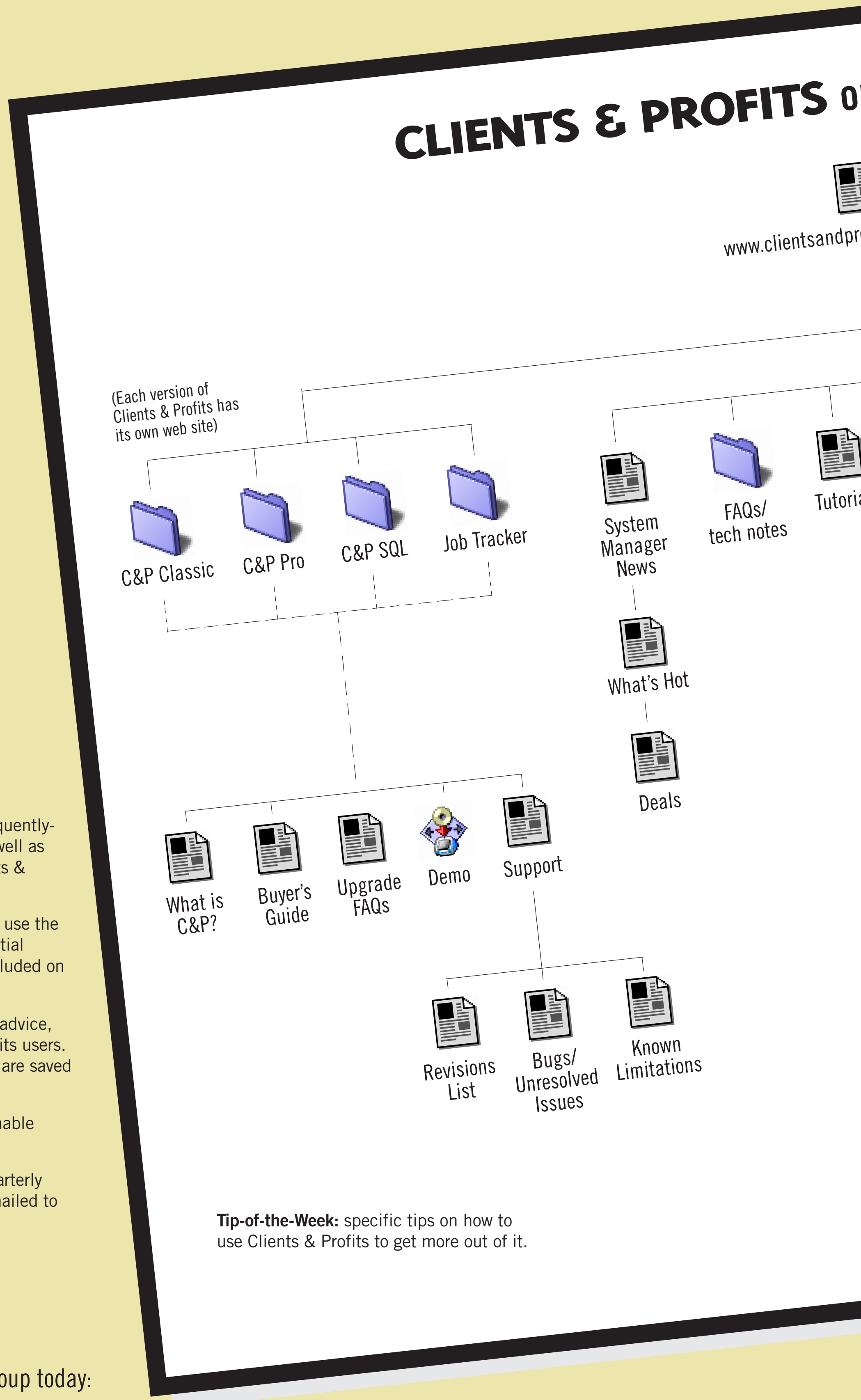
FAQs/Tech Notes contains answers to frequently-asked questions for dozens of topics, as well as detailed technical notes about how Clients & Profits works.

Tutorial If you're new to Clients & Profits, use the online tutorial to learn the system's essential functions. (A fully narrated version is included on the CD).

User Group is a great place to trade tips, advice, and suggestions with other Clients & Profits users. Postings from the user group discussions are saved in a searchable archive.

Tip-of-the-Week and **Daily Q&A** are searchable databases.

Newsletters has online versions of the quarterly Clients & Profits newsletters, which are mailed to your shop's key contact.



Join the FREE Clients & Profits User Group today:
www.clientsandprofits.com/user_group

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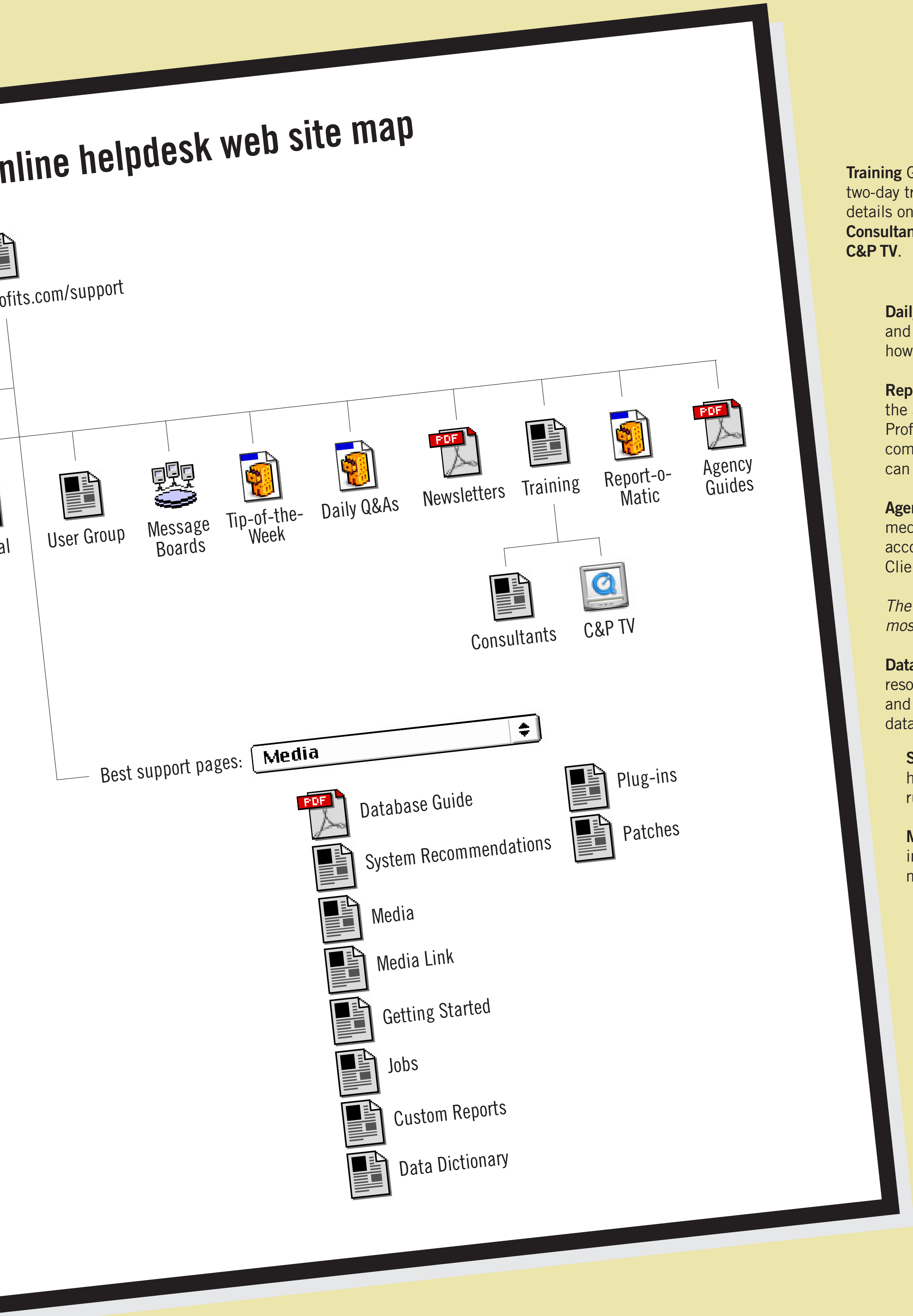


Training Get information about our popular two-day training classes here, as well as details on onsite training from independent **Consultants**. Most classes are webcast on **C&P TV**.

Daily Q&As: straightforward questions and answers about how things work, and how to better use Clients & Profits.

Report-o-Matic is an interactive guide to the 350+ reports offered from Clients & Profits. Sample reports, as well as the complete PDF-based Report Workbook can be printed here.

Agency Guides are job-specific (e.g., media buyer, production manager, accountant, etc.) guides to learning Clients & Profits.

The "best of" menu features some of the most useful support pages:

Database Guide is a do-it-yourself resource for managing, troubleshooting, and optimizing your Clients & Profits database.

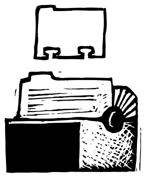
System Recommendations suggests hardware/OS combinations you need to run Clients & Profits.

Media (Media Link) has news and information about Clients & Profits' media planning and buying capabilities.

Custom Reports has example reports for the C&P report writer, which uses files and fields that are documented in the **Data Dictionary**.

Plug-ins are small add-on utilities that enhance Clients & Profits. **Patches** are bug fixes released between updates.

QUESTIONS AND ANSWERS



Q. We now have two offices, Atlanta and Chicago, with about 60 users each. Which version of Clients & Profits should we use?

For high-volume shops with hundreds of users (especially in a multi-site environment) and extremely large databases, the solution is Clients & Profits SQL. It's a "client/server" version of Clients & Profits Pro that uses Oracle8 or Microsoft SQL Server as its back-end database. These systems are more scalable, reliable, and customizable than a non-client/server system like C&P Pro. However, they're more expensive and need an experienced Oracle or SQL Server Database Administrator ("DBA") to install, configure, and maintain.

Q. There are so many reports in Clients & Profits. How can I know which to use?

One word: *Report-o-Matic!* It's an interactive, searchable web-based database that contains samples of over 350 production, media, billing, and financial reports: **www.clientsandprofits.com/report-o-matic.html**

Q. We've recently landed some new clients in distant citites, which means our AEs need to remotely access our database. Which version of Clients & Profits will let us do that?

My Clients & Profits! is a web server add-on for your C&P database that allows anyone with an internet connection—and the right access privileges, of course—to access clients, jobs, estimates, creative briefs, POs, and more.

Q. Is Clients & Profits compatible with Windows XP?

Yes.

Q. Is Clients & Profits compatible with Mac OS X?

Yes. All versions of Clients & Profits 5.0 run as a "classic" application using the OS 9 compatibility window in Mac OS X. For earlier versions of Clients & Profits, you'll need a new C&P installer (available only on CD), which replaces your existing C&P folder with the new OS X-compatible version. Everyone who uses C&P for Mac OS X needs the OS X v10.2 upgrade ("Jaguar") or later.

Q. Will Clients & Profits ever be OS X native?

Probably not anytime soon. Making Clients & Profits native requires rewriting the entire application from scratch. As we evaluated OS X in 2001, we had to choose between making it native or working on new (and frequently requested) features like asset management, the meeting maker and sales manager, importing time from Palm handhelds, e-mailing PDFs of estimates and invoices, and more. We extensively tested C&P on OS X and were satisfied with the program's compatibility and performance. So we decided to produce Clients & Profits 5.0 instead by simply releasing an old version as a native application (like Intuit did with QuickBooks Pro 5, for instance). We rewrite Clients & Profits every few years anyway, so it's likely to be native at some time in the future.

New clients in distant cities? Your AEs will need to access your database from the road:

My Clients & Profits! is a stand alone web server that lets you access various parts of your Clients & Profits database from any web browser. Get access to POs, jobs, estimates, creative briefs, and more while on the road, at a client's office, in a hotel room—anywhere there is an internet connection.

GUARANTEED GREAT IDEAS!

Tips From the Clients & Profits Experts

Some of our best consultants share their tips for putting Clients & Profits to work:

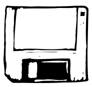
Work live *"Most production meetings happen in an agency's conference room. Instead of printing a production report, bringing it to the meeting, writing notes all over it, then going back to your desk and trying to read scribbles to update traffic, schedule, and status information afterwards, why not go live?,"* asks Cindy Westen. *"Bring a laptop into the meeting and update everything while it's being discussed (most shops have LAN-equipped conference rooms these days for presentations). Then when the production meeting is done—so are you! Everyone in the agency has up-to-the-minute information when they go back to their desks, ready to work."*

Track your time *"The financially smartest thing to do is keep accurate and current time sheets from all employees. Once, before I implemented Clients & Profits at an agency, they were told by a client that they wouldn't increase the agency's monthly retainer. The client said that the agency should work more efficiently and smarter, and therefore end up with more money in their pockets,"* says Gunther Maier. *"A short time after I installed the software and trained the employees, the agency was able to show the client that in fact they worked more on his account and had more projects than when the contract was negotiated. Being able to show the client reports on time spent on their jobs actually helped the agency increase their retainer fee a short time later."*

Handling tax-exempt clients *" On many state sales tax forms and returns, sales to tax-exempt clients such as public entities, charities, etc, must be totaled and reported separately. Here's a way to get monthly data without having to do any calculations,"* says Marty Pennoni. *"In the client setup, under Billing Info, enter the words "Tax Exempt" on the County line. When you print a monthly sales tax report, you'll get a separate list of all tax-exempt sales under a heading of "Tax Exempt", as well as a sub-total of those sales."*

THE END OF CLIENTS AND PROFITS

By Mark Robillard



Every now and then I hear rumors that Clients & Profits is closing down, giving up the ad business for good. We all know competitors will say anything, so why worry?

The reality (sadly, of course, for our competitors) is that we remain the leader in agency management software. The truth is that we've never been more committed to the business side of being creative.

I run the business on this one simple fact: Since all we do is agency management software, our business can only be as good as yours. Everyone here realizes that your success is our success. And your prosperity has been very much on our minds these last few years.

That's why we're working on new products and better services that can bring you more clients and profits—and all without raising our prices.

Here's what we've been up to:

C&P Classic/Pro/Job Tracker Clients & Profits 5.0 is our most ambitious upgrade ever, with dozens of major new features. It's years ahead of our competitors.

Clients & Profits SQL A client/server version of Clients & Profits Pro 5.0 is under development now for a 4Q 2003 release.

My Clients & Profits! An upgrade to the add-on web server that supports many of the features found in C&P 5.0 is due shortly.

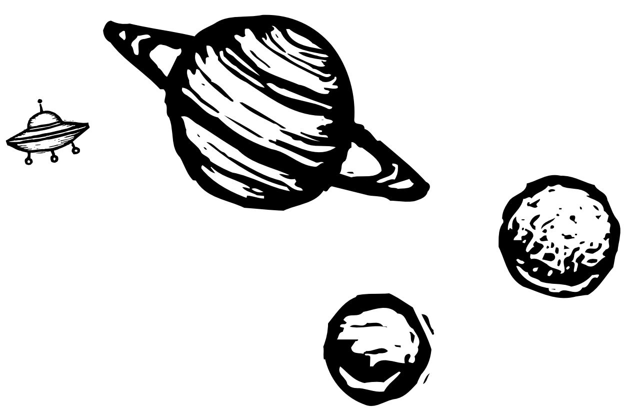
Web site We're working on a redesign of our award-winning web site that will improve web-based training (especially webcasts and video-on-demand) and expand the Clients & Profits User Group.

Helpdesk I've been committed to keeping our team together even as sales eased from the Y2K boom years. I'm proud to say that we haven't had to make a single layoff in any department.

If you're a Clients & Profits veteran, then you know you can depend on us for the long run. If you're new to Clients & Profits, then you have a lot to look forward to.

The end of Clients & Profits? Hardly.

Mark Robillard is the founder and president of Clients & Profits Inc. and developer of the Clients & Profits software.



Bookmark these best-of-Clients & Profits web pages

Ever wondered where to find the most up-to-date information about Clients & Profits? Want to learn to use it better? What about new system components? The answers to these questions and more are right at your fingertips!

www.clientsandprofits.com/whats_new *What's New*—Check it regularly to keep current on new updates, tips for using Clients & Profits better, new web pages, and more. Updated every Monday.

www.clientsandprofits.com/user_group *User Group*—As a C&P user, you're already a member of the User Group—just sign up. Participate in these lively discussions about any C&P- or agency-related topic online via e-mail.

www.clientsandprofits.com/support/FAQs *FAQs/Tech Notes*—Find answers to dozens of answers to frequently asked questions listed by topic. For more complex issues and how-to's, look for tech notes.

www.clientsandprofits.com/support/sys_mgr_news.html *System Manager News*—The latest news about how hardware, software, networks, and operating systems affect Clients & Profits.

www.clientsandprofits.com/training *Training class webcasts*—Watch the Clients & Profits training class live webcast here. Click the "Watch the Webcast" link to learn more about online viewing.

www.clientsandprofits.com/support/newsletters.html *Newsletters*—Useful tips, advice, and inspirational stories with topics like estimating, billing, timekeeping, and traffic. Read them online or download a printer-friendly Adobe Acrobat PDF files.

GET BACK ON TRACK (con't)

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Put the pedal to the metal

With the basics in place, it's time to get more out of Clients & Profits. There are dozens of tools built into Clients & Profits to help you speed up the current workflow. Setting them up takes a few minutes but saves hours each week by automating repetitive processes, plus jobs stay on schedule and on budget.

Another great way to pick up the pace is to get some training. Attend a C&P new-user training class or power-user Wednesday Workshop, or bring in an on-site trainer/consultant for specialized one-on-one training. Both provide a great opportunity to learn the in's and out's of Clients & Profits and, weighed against the cost of lost time and unrecovered expenses, are a real bargain.

Say what?!

For the first few months that your shop is running live, set up a feedback process so everyone who is using Clients & Profits can tell you what they think. You might want to set up a bulletin board on your local network, create an electronic mailbox to receive comments, or hold weekly meetings. It might take a little while to set up the feedback process, but the comments will be invaluable. You'll be able to find out what is and isn't working, why, and what needs to be fine-tuned. Remember, you're reaching for that goal—the one you put in writing—so don't be tempted to compromise with an "almost" system just because the going got a little gnarly. Clients & Profits can take your agency as far as you're willing to take it.

Keep the faith

If you've used Clients & Profits for years, or are still new to the system, the best way to keep your Clients & Profits running smoothly is to keep abreast of Clients & Profits news. Bookmark your favorite Clients & Profits web pages (see page 7 for best of the C&P web site), call the Helpdesk, and tune into training classes (they are broadcast live over the Clients & Profits web site, free of charge).

Clients & Profits also hosts an online user group so you can keep in touch with fellow Clients & Profits users to discuss everything from how much to bill for photocopies to salaries for new hires to better financial management tips. With nearly 1,000 registered members, the collective expertise is mind-boggling.

Clients & Profits is always searching for ways to make your experience more useful and more profitable. That's why the software is updated and upgraded regularly—and that's why we listen to your needs, just like you listen to your clients' needs. Tell us what you think, what you need, and where you want Clients & Profits to take you. If it's possible, we'll find a way to get there.

Judith Hector is the director of marketing for Clients & Profits. She coedits the quarterly newsletters.

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