XCELERATE

Guide To Becoming a Data-Driven Organization

Lead Generation & Marketing

1. Have staff consistently (monthly or quarterly) review both People and organizations in the CRM. Ensure no duplicates exist, and that all names are correct.
   Goal: Helps clarify options for administrators and improves reporting
2. Ensure the "Sales Rep" who is responsible for each contact in the CRM is assigned appropriately: reassign as needed.
   Goal: Helps identify who gets credit for referrals
3. Ensure that "Referred By" is entered on EVERY job. Utilize a "clean up" report to investigate and correct missing values.
   Goal: Helps identify and classify where leads are coming from
4. Ensure BDMs are entering notes for their contacts in the CRM (either through email integration or manually)
   Goal: Helps identify leading behaviors in contrast to leads received

Sales

1. Ensure the Work Authorization date is entered, or contract/work auth is uploaded as "Work Authorization."
   Goal: This is what signifies a job to be "Sold." It's extremely important for close ratios, dashboards, etc.
2. Create a follow-up data entry process for unsold jobs. Custom statuses can be used, or tasks can be generated in the system. However, it must be a standard convention in order to qualify for proper data. For instance, the task could be titled "Outreach - Sell Job," and the user assigned can add notes can provide the results from each attempt. Or a status could be added with the same name.
   Goal: Identifies inventory of jobs that need to be sold or closed early
3. Ensure a role is entered who is responsible for selling. This may be different for each organization. It may be the estimator, the salesperson, or the administrator. Ultimately, a person's name needs to be assigned to that job prior to it selling, and who is responsible for selling it.
   Goal: Helps identify who is responsible for closing the opportunities & and leads that have been received
4. Add a "rough estimate" total to unsold jobs onsite prior to writing an official estimate, with a guesstimate based on severity and size of the job.
   Goal: Helps prioritize which jobs to focus sales efforts on

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Operations

1. Ensure dates are entered correctly at least for these three major milestones: Arrive Onsite, Start Job, Job Completion.

    Goal: Helps provide timeliness metrics for dashboards and stakeholders

2. Ensure roles are entered for all responsible parties on the production side. This may be supervisors, lead technicians, office coordinators, etc. If each job may have a different person in the role, make sure the name is added to the job.

    Goal: Helps identify who is responsible to produce the work

Financial

1. Ensure that estimates written in Xactimate are added into the Financial>Estimates tab, with an appropriate dollar amount, even for unsold bid estimates.

    Goal: Helps provide financial information on jobs, prior to, during, and after production

2. Update the estimate values after the final settlement occurs, so that you can track how much of a delta exists between the initial and final values.

    Goal: Helps track the reductions being made after the job is complete.

A/R & Collectoins

1. Have your collections person utilize the "Scratchpad" and "Scratchpad Date" to write notes each week on progress in collecting. Whenever they attempt a new follow-up, have them update the "Scratchpad Date" to the current date. They can sort by the "Scratchpad Date" to identify the oldest, last touched job and stay on top of it.

    Goal: Helps track how long it's been since the last outreach date occurred, both on a micro (job) and macro (company) scale

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