April 2007

The GoldMine® Advisor

Editor

DJ Hunt

Contributors

Rafael Zimberoff

Chris Wettre

Mike Meyer

Greg Anderson

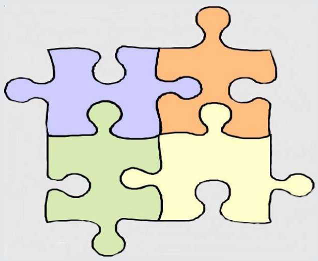
Eric Turnipseed

Joanne Wilson

Gene Marks

In This Issue

GoldMine SQL Database Maintenance - Automated & Easy



by

Rafael Zimberoff

We all appreciate the stability of GoldMine SQL. The database is rock solid, and fast! Good bye to rebuilding data files, reindexing, and booting everyone out of GoldMine for system maintenance.

SQL Server is a beautiful thing, and if you are still on SQL v7, get up to at least SQL Server 2005.

Did you know that even on SQL Server, you can still pack, and reindex your tables? And if you do not use synchronization, you can get a real performance BOOST. The actual performance boost will vary. We found on our system, that had gone a few years with no significant maintenance, that some operations became significantly faster (particularly operations against the CAL table).

Here is what we did:

- Make a SQL Script to refresh indexes
- Make a SQL Script to pack the tables
- Make a SQL Script to zap the TLOG tables

We put those scripts on the SQL Server Scheduler, so they run automatically, say once a week.

Presto! A faster GoldMine system!

Note: These steps should be done by someone with solid SQL Server administration skills. **Improper implementation could disable your system**. Make backups first. Know how to restore backups second (!). And if anything goes wrong, go to your consultant for help (not the author!).

The author runs this script on his production GoldMine v6.5 SQL system.

The SQL to refresh an index is pretty easy:

```
DBCC DBREINDEX (CONTHIST, ‘’, 90)
```

That will rebuild all the indexes on the CONTHIST table. So simply make a script that hits your main transactional tables, for example:

```
DBCC DBREINDEX (CONTHIST, ‘’, 90)
go
DBCC DBREINDEX (CONTACT1, ‘’, 90)
go
DBCC DBREINDEX (CONTACT2, ‘’, 90)
go
DBCC DBREINDEX (CONTSUPP, ‘’, 90)
go
DBCC DBREINDEX (CAL, ‘’, 90)
go
DBCC DBREINDEX (MAILBOX, ‘’, 90)
```

(Continued on Page 2)

Legalese

Editor: **DJ Hunt**

Although I try to edit these articles for content and accuracy, I cannot always guarantee their content is 100% accurate. Should you use anything from this newsletter, you do so at your own risk. All information contained herein is not intended as specific advice, but as a general point of discussion.

All articles are freely contributed by their author. In many cases the authors have had a technical expert, in the area of the document, preview the document for content and accuracy.

All major article contributors will have a business card displayed on the last page of this document. You are encouraged to clip the business card, and save it. Do not contact the author directly unless, at the end of their article, they have made a declaration of sorts that states that you may contact them personally.

All questions, and future articles should be submitted to:

DJ.Hunt@DJ-Hunt.com

If you are including screenshots, they should be no wider than 3.57" US. Their print resolution should be 300 dpi, and they should be in jpg format.

Major contributors are asked to also submit a 1" US wide portrait photo. The print resolution should be 300 dpi, and the format should also be a jpg format.

We accept all articles, however, the editor reserves the right to determine which articles are included, and in which issues they are included.

I am your editor:

DJ Hunt
Computerese
152 Pratt Road
Fitchburg, MA 01420
USA

(978)342-3333

DJ@DJ-Hunt.com
www.DJ-Hunt.com

(Continued from Page 1)

```
go
DBCC DBREINDEX (LOOKUP, '', 90)
go
DBCC DBREINDEX (CONTGRPS, '',90)
go
```

I would say that CAL, MAILBOX, and CONTGRPS are three of the most important.

To rebuild (or 'pack') a table, we use the SQL Clustered Index type. Adding a Clustered index to a table causes SQL to physically reorganize the table. So if there are parts of the table full of deleted records, those will be purged out, and the table will be nice, and cleanly organized.

We do not want these Clustered Indexes to sit around. So we simply create them, and then delete (DROP) them. This way we get our tables packed, but we do not incur any performance hits during production use.

Here is the SQL to do this:

```
CREATE CLUSTERED INDEX GTTEST ON
[dbo].CAL([recid])
go
drop index CAL.GTTEST
go
```

The most important tables are those that see significant deletions. Here at Z-Firm, we run this script against CAL, LOOKUP, CONTGRPS, CONTSUPP, MAILBOX, and CONTACT1.

Lastly, we want to zap the TLOG tables.

This is ONLY for sites that do not use GoldSync!

GoldMine maintains data known as 'sync log' or TLOG data all the time. Even if you do not use the Sync feature. If you use GoldMine Synchronization, **STOP**, do not follow these steps!

But if you do **NOT** synchronize, then this data is building up.... For no good purpose. When the TLOG tables get big enough, GoldMine performance will take a hit. Also, you are backing up those huge TLOG tables.... But you don't need to.

My first step is to use the option in Query Analyzer to script the TLOG tables as CREATE scripts. Find the two tables in the Object Browser: CONTTLOG and GMTLOG. On each one, right click, and choose the option "Script Object to New Window as Create." Once I have the CREATE scripts in hand, I make a script that looks like this:

```
drop table CONTTLOG  — This part written by hand
go
drop table GMTLOG
go

— Recreate the objects to keep GM happy.
— ( This part ( below ) from the CREATE scripts made
— by Query Analyzer )

CREATE TABLE [CONTTLOG] (
        [SYNCSTAMP] [varchar] (7) NOT NULL ,
        [LOGSTAMP] [varchar] (7) NULL ,
        [ACTION] [varchar] (2) NULL ,
```

(Continued on Page 3)

(Continued from Page 2)

```
        [TABLEID] [varchar] (1) NOT NULL ,
        [FRECID] [varchar] (15) NOT NULL ,
        [FIELDNAME] [varchar] (10) NOT NULL ,
        [USERID] [varchar] (9) NULL
) ON [PRIMARY]
GO

CREATE INDEX [CTLOGDAT] ON
[dbo].[CONTTLOG]([TABLEID], [SYNCSTAMP]) WITH
FILLFACTOR = 90 ON [PRIMARY]
GO

CREATE UNIQUE INDEX [CTLOGTRN] ON
[dbo].[CONTTLOG]([TABLEID], [FRECID], [FIELDNAME])
WITH FILLFACTOR = 90 ON [PRIMARY]
GO

CREATE TABLE [GMTLOG] (
        [SYNCSTAMP] [varchar] (7) NOT NULL ,
        [LOGSTAMP] [varchar] (7) NULL ,
        [ACTION] [varchar] (2) NULL ,
        [TABLEID] [varchar] (1) NOT NULL ,
        [FRECID] [varchar] (15) NOT NULL ,
        [FIELDNAME] [varchar] (10) NOT NULL ,
        [USERID] [varchar] (9) NULL
) ON [PRIMARY]
GO

CREATE INDEX [GTLOGDAT] ON
[dbo].[GMTLOG]([TABLEID], [SYNCSTAMP]) WITH
FILLFACTOR = 90 ON [PRIMARY]
GO

CREATE UNIQUE INDEX [GTLOGTRN] ON
[dbo].[GMTLOG]([TABLEID], [FRECID], [FIELDNAME])
WITH FILLFACTOR = 90 ON [PRIMARY]
GO
```

So now I have nice empty TLOG tables. GoldMine will not be burdened by inserting into TLOG tables that already have zillions of (useless for me) rows.

Time to: **Set it, and Forget it!**

The most important thing is to set this up as a scheduled job in SQL Server. This way, the data will always be in top shape.

The steps (based on SQL Server 2000 Enterprise Manager – similar for SQL Server 2005):

1. In Enterprise Manager, open your SQL Server
2. Navigate to Management | SQL Server Agent
3. Open the Jobs node
4. On the right, in the list of Jobs, right click, select New Job
5. Give the Job a name (say GoldMine Maintenance Script)
6. Go to the Steps tab, press New
7. Now name the step. For example "Zap TLOGs"
8. In the Command area, paste in your SQL, Press OK
9. In the Schedules tab, give it a Schedule. I would put this kind of thing every Sunday night at 10 PM.

Done!

You can order the scripts any which way, but the index rebuild should come last for best results.

You now have an auto-maintaining SQL database!

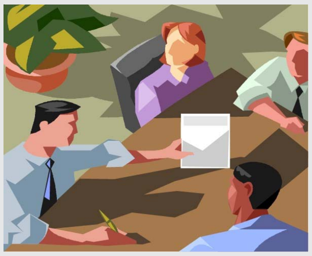
This same technique can be used to automatically insert flags into the database based on existing data (kind of like Automated Processes). Also, we use it to set history result codes correctly, so that web orders in History look the same as our order entry system History records.

SQL scripts, and the scheduler are every GoldMine admin's friend.

Editorial Note:

Rafael Zimberoff is Product Manager at Z-Firm LLC. Z-Firm, as many of you are aware, is the maker of **ShipRush**, **FaxRush**, **EmailRush**, and the **OmniRush** faimily of products for GoldMine.

FrontRange Dumps GoldMine Standard Edition



by

DJ Hunt

I prophesized this coming in the June 2005 issue of The GoldMine Advisor, and we are only now realizing the prophesy. FrontRange has announced that they will be Sunseting GoldMine Standard Edition (at least that is what I believe that I heard). FrontRange feels that it will take a couple of months to **Sunset** GoldMine SE.

Their new tiering structure will be:

GoldMine Corporate Edition
GoldMine Premium
GoldMine Enterprise Edition

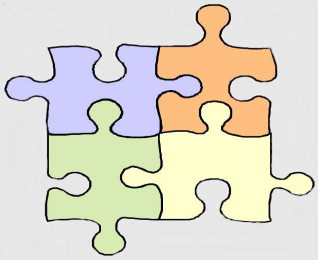
The latest that I have heard is that FrontRange will continue to sell GoldMine 6.7 Standard Edition through its Distribution Channel, Ingram Micro, until the stock is dry, and that GoldMine Partners will still be able to purchase bulk GoldMine 6.7 Standard Edition licensing from FrontRange. FrontRange has not, however, made any commitment to develop GoldMine Standard Edition any further then its final GoldMine 6.70.70226 (current Release Candidate) release.

I believe that about the only things that we may be assured of for GoldMine 6.70 Standard Edition is that FrontRange will probably release a build that is that is compatible with Internet Explorer 7. They will probably release a build that is installable on Windows Vista, and that will be it.

FrontRange has not formally released GoldMine 6.70.70226 although it is in Release Candidate status as of this writing. FrontRange Technical Support is allowing complaining endusers (the squeaky wheel gets the grease) to download this build. This is the same position that FrontRange initially took with the GoldMine/QuickBooks 4 Link.

I'm thinking that this would give our GoldMine 6.7 Standard Edition users about 3 years of usability before they must decide to update to GoldMine CE/PE/EE or move on to another CRM Solution.

Wireless GoldMine Access



by

Chris Wettre

wMobile Delivers Live Wireless Access to GoldMine

Frankie Fabulous is an account manager for Wicked Valves, a regional hydraulic distribution company. In preparation for a customer visit he pulls out his Palm Treo mobile phone, and presses a single short cut key on the phones keyboard. In seven seconds he is connected live to his company's GoldMine database, and can review information about up-to-date sales statistics, accounts receivable, and customer service calls for his customer. Well prepared, he goes inside to meet his customer. After the meeting, Frankie again pulls up his Treo telephone, and enters his meeting notes to complete his GoldMine contact activity. Frankie also schedules a task in GoldMine for Freddy Faithful, his inside sales assistant. Frankie moves on to his next appointment – completely up to date on his sales administration – and leaving the rest of his organization informed of any latest developments.

What is wMobile?

wMobile is an application that runs in the web browser of any mobile telephone with a data connection. Typical such phones are popular Blackberry, Palm Treo, and Windows Mobile devices offered by all the major wireless phone carriers. It requires no installation by the user, and can be deployed in minutes. wMobile is software that you purchase to own, and to install on your own server. The wMobile server connects directly to your GoldMine CRM application to provide live interaction with GoldMine to the remote telephone devices.

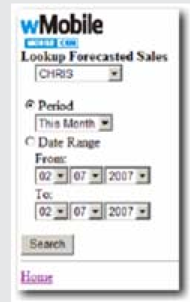
Fast Contact Management

From getting the phone number for a single contact to reviewing detailed account information, wMobile delivers flexible, and intuitive functionality to remote users of GoldMine. The fast search bar enables a user to type in any portion of any contact name or organization name to search for contacts stored in the GoldMine database. It takes only seven seconds from pressing a launch key on the phone device to the wMobile application being ready for commands by the user. wMobile offers support for GoldMine contact groups. This feature enables a user to quickly work with subsets of contacts such as 'New Leads', 'Top Customers', 'This Month Expirations' etc.

Activity Management

Managing activities is a key feature of a CRM system. With wMobile a user is able to complete scheduled, and unscheduled activities as well as to schedule new activities for themselves or for any other GoldMine user. wMobile users can quickly access today's scheduled calls, and appointment in one click from the main menu. Users can review completed activities in context of a specific account or for a specific user, and time period.

Forecast Management



To be up to date on sales forecasts is important to most sales organizations. Easy access to update any period sales forecasts is a key wMobile feature. The user can quickly pull up forecasted sales records from GoldMine for periods such as 'This Month', 'Next Month', 'This Quarter', 'Next 30 Days' and more. The user can add new forecasts, and edit existing ones. Since all the updates are live in GoldMine there no excuses for not producing up-to-date sales forecast reports.

Dashboard Metrics

We have provided a reporting tool enabling a user to quickly review key GoldMine metrics in summary, and drill down detail format. A sales manager using wMobile would be able to quickly review the number of calls, and appointments made, the number of new contacts created, and other key metrics across the manager's entire team. The user would be able to drill down into any metric number, and see the detail records behind the numbers.

Data Security

We take data security seriously. wMobile respects all security settings that you have configured in GoldMine system. Concepts such as record ownership, curtaining, field read write access, and user groups are fully supported.

To protect data transmitted over the internet we support Secure Socket Layer (SSL) connections that encrypt all transmissions between device and server.

Lastly you are protected by the fact that wMobile does not require you to store any of your account data on the device itself. Account data stays on the server, and if a telephone device is lost, there is no risk of your customer information falling into the wrong hands.

Ease of Administration

Installation of wMobile is accomplished in approximately one hour. We provide an administration console where you can easily manage all settings, and customizations. GoldMine customizations such as field label changes, custom fields, and custom field lookups are automatically inherited by wMobile without any need for adjustments. wMobile may be customized to enable access to information from other applications, and

(Continued on Page 5)

(Continued from Page 4)

databases from the remote telephone device. Examples of such customizations are customer survey screens, order entry, and submission processes.

Take the FREE wMobile Test Drive

If you own GoldMine Corporate Edition, we would like to invite you to take our software for a test drive. Your GoldMine Partner will coordinate an installation on your web server, and deliver a five user – fifteen day evaluation license at no cost or obligation to you.

View the Product Demonstration Videos

Starting wMobile - www.w-systems.com/web/wmobile_overview.wmv
Working w/Contacts - www.w-systems.com/web/wmobile_contacts.wmv
Working w/Activities - www.w-systems.com/web/wmobile_activity.wmv
Working w/Dashboard - www.w-systems.com/web/wmobile_dashboard.wmv
Working w/Administration - www.w-systems.com/web/wmobile_console.wmv

Customer Intelligence (Part I)

by

Mike Meyer

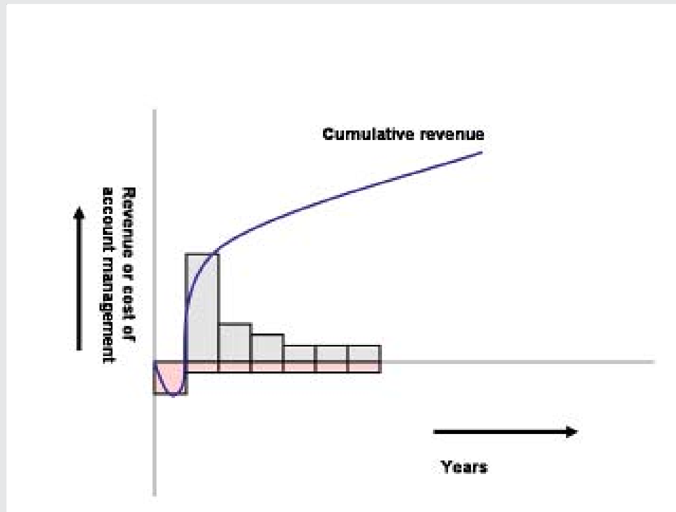
How Businesses Can Boost Revenue, and Margin Using Data They Already Own

A Head-Start with Accessories, Spares and Services

Businesses which sell technical or complex products to other organization should have a head-start when it comes to sales of closely related spares, accessories, preventative maintenance, repairs, and additional professional services.

In sectors like industrial products, test & measurement instruments, and diagnostic equipment the opportunity to sell add-on products and services can be worth many times more than the initial sale. The margin gains can be even higher since, in our experience, the margin on the add-on sales is typically 50 per cent higher than on the initial product. The opportunity to sell service contracts is particularly attractive since they are often paid up-front, and the credit risk is small.

Commentators agree. For example, Accenture claims that if businesses are mainly organized around initial capital sales of industrial equipment they may leave as much as 90% of the potential lifetime revenue 'on the table'. Accenture considers that spares, accessories, maintenance, training, operator certification, leasing costs, and other add-on products or services are all potentially within the portfolio of original equipment vendors.



Analysis of customer lifetime revenue for an industrial product

Most businesses already store enough data to analyze the cumulative revenue over time of their individual customers, segments or the entire business. However, few of them have the skills, experience or time to access that data and turn it into actionable information.

We don't always find that this head-start is exploited. Many vendors of technical or complex products and services only achieve a very small proportion of these add-on sales. Sometimes the opportunity goes to a direct competitor, sometimes to a general facilities management organization or customer internal engineering group but sometimes it isn't fully exploited by anyone.

The principle also applies to suppliers of technical or professional services. Suppliers of technical or professional services (for example, legal, environmental, financial) often have a successful business with just one geographical branch of their client base or in just one service speciality.

Failure to sell add-on products and services can often hurt the vendor more seriously than in the pocket since poor maintenance, failure to upgrade, calibrate or refresh the equipment application through new accessories can seriously reduce user satisfaction, impacting loyalty. In addition, the user's compliance, and subsequent liability can also be affected if regular services or calibrations are missed.

There are many reasons for failing to exploit add-on products and services opportunities. We often encounter human factors, for example, field-based capital equipment sales people receive better training, incentives, and accolade than the office-based colleagues who sell the add-ons. Even the field-based team is often inadequately rewarded when they sell 'mere' accessories. In our experience, it's the lack of *Customer Intelligence* that is most important. The staff who are responsible for marketing, and selling these add-on products and services can't access enough information about the sales history to make appropriate and timely offers. They don't know what 'assets' the customer had when they were installed or what the detailed specification or upgrade history is. They don't receive alerts when warranties or prior service contracts expire. And if there is a reliability problem or breakdown they generally don't find out.

Definition

Customer Intelligence is a measure of the power of a business to access, link and exploit the contact, transaction, and specialist data about their customers that is scattered in their computerised operational systems.

(Continued on Page 6)

(Continued from Page 5)

Who and Where are Those Responsible?

This is intended for the large number of general, sales, business development, marketing, and customer service managers who are responsible for sales growth, margin enhancement, and customer satisfaction in small and medium-sized businesses that sell complex, technical products and services.

Their businesses may be independent or, just as likely, small, arms-length subsidiaries or agents of larger, international organizations. Some of these businesses employ just a handful of people, but others might be UK subsidiaries of a division of an international organization with more than 100,000 employees. They operate across a range of complex, technical products and services. For example, we have recently worked with suppliers of:

- Materials testing equipment for manufacturers and laboratories
- Internet security hardware, software and services for banks, insurance and other businesses
- Diagnostic products and services for hospitals
- Catering equipment for restaurants, staff canteens, public institutions, and bulk meal preparers
- Therapeutic equipment for hospital intensive care units
- Microscopes, and other instruments for laboratories
- Business and Financial Services to accountancy firms

These audiences are usually already experienced users of computerised operational business systems, including invoicing, field service, and customer contact or customer relationship management (CRM) systems, and they may be software experts in their own domains. But most are frustrated by their inability or lack of resources to link the information in their scattered operational business systems to provide really useful *Customer Intelligence*. This *Customer Intelligence* deficit is holding these business people back.

Customer Intelligence Deficit Appears in Several Guises

If a sales executive wishes to make a timely, and appropriate offer of an accessory, upgrade or other complementary product or service to a customer they need to know the detailed history of sales and service interactions with the user, and likely also with technical influencers, and professional buyers.

If a marketing team wishes to pick a target group of users to inform about a new upgrade or service the team needs to be able to analyze who might benefit, and then extract relevant contact data.

If a service call center correspondent or field service engineer is to react appropriately to the urgency, priority, and skills or spares needed for an equipment breakdown at a customer site then comprehensive information about the site, service contract status, equipment, and application is needed.

When a new sales person joins an equipment vendor they must become active as fast as possible (or 'hit the ground running'). Ease and speed of access to customer, and prospect information are vital.

However, many organizations suffer from a complete disconnect between different components of their customer information, in our language, a *Customer Intelligence* deficit.

As a result different departments in the same business occasionally drown their customers in conflicting, and inappropriate initiatives. For example, credit control, services, and sales might all speak independently to one or more contacts at a customer on a single day without sight of each other's actions or results. The messages are individually reasonable: the payment's overdue, the contract is up for renewal, the equipment's 7 years old, and could be replaced. But the whole is completely unreasonable because the customer bought an extended warranty, the account's overdue because he was incorrectly charged for a service intervention under the warranty, and the sales person can't access any transactional or contract information.

Of course, the opposite is just as likely: a customer with a genuine need for an upgrade to meet a new requirement is not identified, and no sales or other team member contacts him.

This is not always the marketing department's fault. They select a list of all installed equipment sites that have a specific, old software version or accessory. The intention is to run an upgrade campaign. The only sources available to Marketing for this data are the field service or invoicing databases. There they find only the name of the customer site engineer or the customer head office invoice clerk. As yet they know nothing about the buyer or the specifiers, or main users, or where they are. The marketing initiative will be very inefficient, and likely to fail unless they can find a way to link the data from the field service or invoice system with the data in their CRM database, and thereby identify additional, relevant contacts at the customers.

To work effectively, sales, marketing and services teams need to access, link, and analyze at least four of their current information sources:

- Customer contact information (including users, influencers and buyers)
- History of products/services delivered
- Detailed field service information
- Customer satisfaction measures, and other acquired data

We examine how to bring together the useful, but scattered and inconsistent information about customers that resides in the above systems, and sometimes, elsewhere.

Further, we discuss how to make the information accessible to those authorized to use it wherever they are, including at the office, at the customer site, at home, and in the airport car park.

Businesses That Don't Exploit Their Customer Information May Lose Them.

Businesses are always under pressure from investors and managers to increase sales, and raise profits. But for our clients that sell technical or complex products or services it is hard or even impossible to find genuinely new customers.

At the same time their existing customers are dwindling because of:

- frequent consolidations

(Continued on Page 7)

(Continued from Page 6)

- mergers and takeovers

- joint purchasing initiatives

- outsourcing

In many sectors, for example, in hospital equipment or automated manufacturing, substantial new capital projects are rare, and fraught with complex, highly-regulated, and fragmented customer buying processes.

Today's customers are also more sophisticated. In some cases they measure the lifetime cost or total cost of ownership of such equipment, and use the results to negotiate down equipment and services contracts prices.

Today's customers are usually less loyal, and generally prepared to switch suppliers. Sometimes those who switch get lower prices, and reduced services costs while the new supplier even cross-trains the operators, and looks after existing assets from the former supplier.

There is much more competition from fast-learning, and very enterprising organizations around the world. Distance is no longer the barrier it once was, and increasingly these new competitors can meet the standards, and regulations that formerly protected the incumbents.

So, in the face of all these threats, it is vital to secure additional, higher-margin business from ongoing customers, and raise customer satisfaction, therefore loyalty.

Why Has the Customer Intelligence Deficit Arisen?

Businesses have always sought to centralize, and make better use of *Customer Intelligence*. In most cases, until the mid 1980s, the most common method was the Rolodex - a giant rotating card index or the DayTimer.

Then multi-user Contact Management Solutions capable of running on PC networks became available.

Often these Contact Management Solutions were used like electronic card indexes, with the facility to record, and plan customer interactions. These solutions of the 1980s have matured into the CRM systems we encounter today, but the quality or range of data stored has changed little in 20 years.

Sales people have often resisted this type of business application, complaining that data entry is time-consuming, that access to data encourages their managers to probe their activity intrusively, and that they themselves gain little or no value in return. This negative assessment can only be turned around by adding useful information that helps the sales and marketing teams achieve their objectives. For example, by introducing transactional information about products and services sold, equipment breakdowns, calibrations, upgrades, and possibly even credit worthiness, and measures of customer satisfaction, and feedback.

Still today, in most organizations a sales or marketing person who wishes (and is authorized) to see a transaction, delivery, service and payment history for a customer or aggregated group of customers is likely forced to have four or five computer application windows open at one time or even call at the office to check paper files in several departments. For the future, many businesses have committed to introduce integrated applications where, theoretically, one database or data warehouse stores all the data, and therefore, *Customer Intelligence*. Such projects consume a vast amount of time, resource, and introduce some risk and disruption.

Further, these aspirational integrated applications rarely encompass all the organization's business operations.

They focus on the operations like accounting that are more or less common throughout most businesses. But they tend to offer only superficial functionality for more specialized applications, for example, field services, where engineers attend sites, and spare parts must be fitted then replenished. And we've already said that field services functionality is the best source of data about upgrades, breakdowns, and other important elements of the intelligence sought.

Even where integrated applications provide a good solution for the 'horizontal' functions like accounting, it's common to hit hitches, for example, where the customer's buying office, maintenance location, and invoice addresses are in different continents!

Migrating data from an older, stand-alone system to a new, integrated application often poses big dilemmas.

It's very time consuming to migrate every piece of history therefore some is inevitable sacrificed.

Regrettably, in our experience, buying an integrated application from one of the renowned integrated software application vendors does not help answer questions like:

- Who has not yet upgraded their (now obsolete) D4533 weigh scale?

- Who came to our user conference but does not have a preventative maintenance contract; and when were they last called?

- Which customers made more than twice the average of breakdown calls?

- Which maintenance contracts that expired in 2005 have not been renewed?

Customer Intelligence is an Approach, NOT a Product!

There is no single 'out-of-the-box' solution to the important business challenge of *Customer Intelligence*.

Most often the information that is required by the sales and marketing teams to achieve their add-on product and services sales objectives has already been painstakingly entered into the operational computer system of another department just down the corridor. However, as far as the sales and marketing teams are concerned, it is dispersed, inaccessible, and inappropriately presented.

Our approach is to learn from discussions with the client's sales and marketing team about which information is required to meet their business needs, where, and how it needs to be made available.

We identify the best data source for each item and migrate it from the operational database where it's stored to a second system

(Continued on Page 8)

(Continued from Page 7)

that is already available to the users wherever they are, and understood by them. This second system is usually the sales or marketing database, contact management system or CRM application.

Our first step is to identify the best *source* of the data; for example, in the invoice or accounting system or in a field service application. Subsequently we agree with the client the *target* destination, and preferred method of storage and display of the new information. For example, using redundant tables in an existing CRM application or adding new tables there.

In most CRM applications it is possible to create additional tables to store sales history and service calls as well as membership of marketing campaigns.

Then we copy, transform, and match the source data to the target.

Transformation can be used to automatically modify data items (for example, to shorten or edit part numbers or reformat phone numbers).

At this stage it will often be necessary to force-match the source data to the destination data since company codes, account numbers, and company or contact names may be different between the source, and the destination databases. Matching might require creation of intermediate 'match codes' using characters or digits from several data 'fields', for example, company name, telephone number, post code, etc. Alternatively, there are standard automated matching techniques that are useful in some circumstances. Once matched, the transformed or edited data can be written into the target database.

Subsequently the whole operation must be tested and, if appropriate, the success of the matching process must be measured and reported.

Since sales and service events are on going, all the data is dynamic; so the target must be refreshed regularly from the source applications. For example, new sales history must be added. The frequency of the refresh depends on the nature of the business. Most of our clients agree that weekly refreshes keep the sales team sufficiently up-to date, but it's theoretically possible to automate very frequent refreshes. Further, if real-time data is required, provided the user is connected to the right data source on a network or the internet, then it is possible to deliver real time views of external data, for example, up-to-the-minute sales history, from within a CRM or contact management system.

Automation opportunities also exist. Instead of relying on sales people to interrogate their systems for opportunities, alerts can be displayed on the computer desktops of the sales, and other staff teams when warranties or contracts are about to expire or one of several other 'triggers' occurs.

Editorial Note:

We thank **Mike Meyer** for this **Customer Intelligence** whitepaper, and we will have Part II in Junes issue of **The Goldmine Advisor**. In the mean time, we encourage all readers to contribute articles to **The GoldMine Advisor**. Anything at all that will help GoldMine users better understand their GoldMine product will likely make it into the newsletter at some point. If you don't have a complete article, whitepaper, or 3rd party product exposé then how about just some **Tips, Tricks & Things**?

Reprint (**FrontRange Whitepaper**)

10 Ways to Better Manage Sales Leads

by

Greg Anderson

If you're looking for ways to increase revenue—and what smart entrepreneur isn't—one of the fundamental processes you need to review is your lead management program. Prospect leads can originate in a variety of ways, and there is often only a very loose structure in place to manage and react to those leads. Your sales pipeline and your ability to hit revenue targets all begin with good lead management. Try these ten strategies for improving your lead management efforts.

1. Develop a concrete definition of a lead and make sure all employees understand it.

One of the biggest disconnects between sales and the rest of the company is the definition of a lead. When does a prospect become a lead that a salesperson will actually work on? It's estimated that 90 percent of the leads that are sent to sales staff are never acted upon. And there are generally two primary reasons for that. First, the lead is routed to the wrong person and never gets passed along to the correct person or at least not in a timely fashion. Second, the lead isn't ready to engage with a salesperson yet. So the sales person will make one, maybe two contacts with that prospect and then move on to "lower hanging fruit." For better sales effectiveness, your sales staff and the rest of the company need a more granular definition of when a prospect becomes an actual lead that should be forwarded to sales.

2. Install an effective customer relationship management (CRM) tool.

For optimal sales effectiveness, you need to provide employees with a tool that captures information about each and every interaction with your prospects and customers. This includes integrating your different channels, such as your website.

3. Track the source.

People most often hear about your company and products and services through ads, referrals, online banner ads or some other form of advertising. You need to keep track of what actually caused these suspects to raise their hands so you can better determine what works and what doesn't. In addition, it's important to capture the source of each intervening event so you can determine such things as how many times you need to touch a customer or what order of touches work best. If you don't capture the source, you have no way of figuring out what's working.

4. Distribute your leads quickly.

Studies have shown that if you respond within 48 hours of a prospect contacting you, your sales closing rate goes up dramatically. Think about your own experiences. How many times have you tried to contact a company to request information and they never get back to you? By responding quickly, you set yourself apart from your competitors.

(Continued on Page 9)

(Continued from Page 8)

5. Nurture your leads.

Depending on the products and services you offer, most people are probably not ready to buy based on their first interaction with you. Best practices call for nurturing your leads over time. You need to develop campaigns that allow you to touch your prospects multiple times so you can move them through the sales cycle until they're ready to think about actually purchasing from you.

6. Excite your sales staff about each prospect.

The best salespeople focus on detailed qualifying, and so should the rest of your staff. The more information you have about a prospect, the more excited your salespeople will be about the lead. Whoever's collecting prospect information needs to extract additional information from every prospect with each interaction, including such things as "what interested you about our products" and "why is it important to you." They should also try to may the organization so your salespeople are getting in touch with the decision-makers in each company.

7. "Tag, you're it."

How do you save those interesting bits of information about customers and prospects? If you tag your records with the names of your competitors on deals, what their objections are, whether they'll be a referral or not, which products they already own and so on, you can then find those detail fast in the future. This allows you to leverage what you learn in order to be more successful.

8. Treat your prospects like customers.

By capturing the source I mentioned above in #2 about each prospect, anyone at your company can answer a call from that prospect and more effectively answer their questions. This will have a significant impact on your prospects and will cause them to want to engage with your team further.

9. Measure everything you do.

But in order to measure your results, you need to decide what you want to measure and why. Then you can capture the correct information upfront. And once you have the right information, you can determine the return on investment of your campaigns and focus on the campaigns and prospects that will increase your sales pipeline.

10. Hold regular meetings with your sales staff and anyone else involved in the sales process.

You should meet with appropriate staff members on a regular basis to review lead quality, win/loss records, and tracking CRM systems so you can continue to improve your sales effectiveness.

Bonus Tip: Preload your database with the right prospects.

Your customers are the first step in prospecting sales leads. Most people think they already know who their customers are, but many companies tell us they find a few surprises when they do an analysis of their customer base. So confirm what you know about your customers. Then, once you know who your customers are, define a few key attributes about them. This could be external attributes such as geography, SIC code, company size (employee count and revenue), or internal attributes such as products, territory, credit type and contract type. Now you can use the profile of your best customers to better define and acquire new prospects.

Tips, Tricks & Things

Pet Peeve with GoldMine

by

Doug Costello

You asked for info or input for the newsletter. This may not be what you are looking for, but it is my #1 pet peeve with GoldMine. They haven't fixed this bug in the 9 years I have been using the program.

Reports

In the **Contact Profile (Detailed)** report, history entries are truncated at the end of a page.

Background

I have meetings with prospects, and take lengthy notes at these meetings, then enter them into Goldmine for future reference. I print out the detailed report when I prepare for future meetings, or print reports for my staff so they are updated.

Pet Peeve

In this report, when it comes to one of these lengthy notes, and it cannot print the whole note by the end of a page, it truncates the note, and begins printing the next note at the top of the next page. It doesn't print the whole note!! It just ignores the unprinted material, and goes to the next note. I miss a lot of information this way, and, when it happens, I have to go into the specific entry, and clip it into Word. Then I print it from Word. I might have to do this several times. This is not what I expect from GoldMine. Even Microsoft fixed this problem (widow/orphan control) in Word when it was the DOS version.

I rely on this report heavily to provide a history of all activity, and the fact that the report does not completely print all the entries is a significant failing of what is a very powerful program. I have sent e-mails to the Product Manager at FrontRange in the past, but they haven't addressed it in the numerous upgrades since then.

Editorial Note:

As you elluded to, this is a well known issue, and has been around for many years. There are two work-a-rounds of which I am aware.

Work-a-Round A

Print the report dierectly to the Printer. **Do Not** print the report to the window first, as this will always truncate Notes.

Work-a-Round B

Use your **GM+Views/GM+Browser** to display your History items, including Notes in a chronological order. This is discussed in the Hacker's Guide series of books.

Tips, Tricks & Things

Out of Office Reply

by

Eric Turnipseed

*If you use GoldMine for E-mail, you can use GoldMine's powerful features to enable an **Out of Office Reply** when you are on the road or out of your office. Microsoft Exchange and Outlook 2003 have a system built-in for this, and it is recommended that you use Exchange/Outlook's functionality. However, you can follow these instructions to configure your GoldMine to handle Out of Office Replies.*

For the GoldMine User who will be out

How to Configure Out of Office Replies

In summary, you will configure your E-mail, create an E-mail template, create an E-mail Rule, and then enable that rule. Here are the steps to follow:

1) Edit | Preferences | E-Mail (Internet) | Accounts | Edit | ... ensure that 'Auto-retrieve', and 'Auto-delete' are both enabled (checked) for your E-Mail Account

2) Edit | Preferences | E-Mail (Internet) | Retrieval | 'Retrieve mail every ___ minutes... enable this feature, and set to every 10 minutes or whatever setting you would like. You might want to wait and enable Automatic Retrieve once you are actually ready to leaving your office, and enable your Out of Office Rule (setup later).

3) Also enable, 'Skip read messages (recommended)', and 'Send queued messages'... if you would like to not respond to spam messages, enable the 'Skip messages from contacts not on file'. This feature will only download E-mail from senders that exist in your GoldMine database by E-mail address. If the sender is not already in GoldMine, the E-mail message will be ignored, and left on the E-mail server for you to handle manually.

4) Edit | Custom Templates | E-mail templates... you will need to create an E-mail Template to inform senders that you are out of the office, and any other information you might want to provide to them. This is accomplished by Right Clicking on the E-mail Templates, and selecting New... give your template a name in the Subject line like 'Out of Office From Monday, 01/02/2007 thru Friday 01/05/2007... fill in the Body of the E-mail with whatever information that you would like... then Save your template, and close the Document Management Center.

5) View | E-mail Center | In the left hand pane at the top, Right Click on your Account Name | Options | Setup E-mail rules. You may see an E-mail Rule information box. You can read this to learn more about GoldMine's E-mail Rules, and even click a hyperlink to learn more. Click OK to continue. Using the Toolbar, click New | New Rule Set | Enter 'Out of Office Reply' as your new rule set name. Select Incoming E-mail as the type of E-mail this rule should handle | Next | ANY ONE of the following conditions must be true | New...

Mail Field: TO

Logical Condition: Contains

Value: yourname@yourcompany.com

... then click OK | Next | New

Action on Mail: Reply

Template: Select your Out of Office template you created earlier

Send Immediately

... then click OK | Finish. Make your new Rule Active by Right Clicking on the Rule, and selecting Active (to enable the radio button). Save, and close your E-mail Rules Center.

Your GoldMine is now configured to properly handle your E-mail, and send an automatic Reply to the Sender using your Out of Office Template.

How to Get GoldMine to Process Your Mail

Option #1: Log into GoldMine, and Leave Running on your Desktop

This is not the best option because this leaves your GoldMine running on your desktop. This would not work if you have a laptop, and are taking it with you. But if you leave GoldMine open, and logged in, GoldMine will then begin handling your Out of Office Replies.

Option #2: Have a GoldMine Server Agent running on the Server or on another GoldMine User's GoldMine Desktop

Ideally, you would have your IT consultant or IT person setup and run a GoldMine Server Agent on the Server to process your E-mail while you are gone. To do this, GoldMine will need be open, and running on the Server or in a Terminal Server session running in the back-ground. This is an important point. If GoldMine is not open, and running on the server, your mail will not be processed correctly. If you do not want to configure this on the server, any GoldMine user could configure, and run a Server Agent while they are logged in.

1) Open GoldMine on the server, and log in as a user with Master Rights

2) Select Tools | Server Agents | Agents Administrator | Sending/ Retrieving E-mails

3) In the User's Settings drop down, select the GoldMine User who be out of the office. If more than one person will be out of the office, you can use the Apply to other users, and use the Select Users buttons. Set the Active Period for when you would like the Server Agent to handle the mail for this user. Then select the Frequency of how often in the Active Period you would like the Server Agent to process the mail.

4) Click OK to close the Server Agents Administrator

5) Tools | Server Agents | Start Server Agents...this will enable the Server Agent to run based on the schedule you specified in Step #3 above, and handle the Out of Office user's E-mail.

...once again, the Server Agent must be up, and running to properly process the E-mail for the user.

(Continued on Page 7)

Tips, Tricks & Things

(Continued from Page 6)

Turning Off Out of Office Reply

When the GoldMine User Returns to the Office

Once you return to the office, you will need to stop or turn off the Out of Office Reply.

1) Turn OFF the Server Agent running on the Server or on a desktop

2) View | E-mail Center | Right Click your Account Name in the Top Left Hand pane | Op-tions | Setup E-mail Rules | Clear the Radio button next to your Out of Office rule. This will make this rule inactive. Save, and close the E-mail Rules Center.

Summary

As with any feature of GoldMine, you would need to test your configuration. For Out of Office Replies, you may want to test this at time when you are not receiving a lot of E-mail so that you are not automatically replying to live E-mail. After setting it all up, have another user or use an external E-mail account like Yahoo to send a message to yourself, and test the reply feature (just make sure if you enabled 'Skip messages from contacts not on file', that you have your external E-mail account stored in your GoldMine contact record).

Accessing Folder from the Taskbar

by

Joanne Wilson
JWilson@TheTrainers.ca

This is a cute tip that works so well. Using the Taskbar to access commonly used folders

I find that everyone is using the Taskbar, and I have a wonderful tip:

Go to Explorer, and find the path in the address for a particular folder you alway seem to access, and copy the address path.

Insert a New Item, select Website (not Documents), and paste this address into the URL with a Caption naming the Folder (something that you'll remember the next time that you see it).

Select an Icon, and OK.

Test it out when you need something from that folder, and let me know if you love the tip. Feedback just means I will go out, and find the next lastest greatest tip.

Editorial Note:

If you don't get a response directly to your tips, do not get discouraged. Everyone submit your **Tips, Tricks & Things**. I guarentee you that eventually they will get published. We are always looking for articles on GoldMine, 3rd party add-ons to GoldMine, Tips, Trick & Things. It is very hard publishing a newsletter without material publish. Please submit input to: **DJ@DJ-Hunt.com**

Adding Holidays to your Calendar

by

Gene Marks

You can add holidays to your GoldMine calendar by doing the following:

* Open your calendar (view/calendar)
* Right click in the calendar area, and choose Options/Preferences
* Click on the Holidays button
* There will be a list of holidays for different countries, etc. Check the box for the list of holidays you want added to your calendar
* You can remove any holidays you do not want on the calendar by highlighting the holiday, and clicking on remove or add a new holiday if one is not on the list by clicking on new, and adding the information
* Click on OK, and the holidays will now appear at the top of the calendar on the specific date

Outdated Information

by

Gene Marks

A client asks: One of our key fields has information that is outdated, and we need to change it on every record. Do we have to go through each record one at a time to do this?

No, you do not have to go through each record. You can do a Global Replace to change the field.

* Go to Tools/Global Replace Wizard, and the Global Replace Wizard Box appears
* Choose Replace a Field with a Value
* On the next screen choose the field you want to replace, and enter the information you want placed in the field. Click on Next
* The next screen will allow you to verify the information you just entered. If it looks good click on Next
* The next screen allows you to replace the field in all records or choose a filter to change the field just in the filtered records – choose which option you will be using (you would create filters if there are several items you want to replace in the field, and replace the item in each filter with the new information).
* Click on Next, Finish, and the new information will replace the old information in the field

Tips, Tricks & Things

Unlinking/Linking History

by

Gene Marks

Sometimes a call or appointment needs to be re- linked to another contact record. To do this, follow these steps:

* Right click on the history item that you want to link to another record, and choose Edit
* The completed box will appear, and the Link to box will be greyed out at the bottom
* Find the new record that you want to link the history item to, and select that contact record
* Go back to the completed box, and you will now be able to click on the Link to box to link the history item to the current record (you may have to click your cursor in the box for the Link to option to become available)
* Click OK

Editors Note: You may only do this through the Activity List in GoldMine 7.00.

This Issues Major Contributors

Your Publisher/Editor

Computerese

DJ Hunt
GoldMine Technical Support

152 Pratt Road
Fitchburg, MA 01420
USA

(978)342-3333
DJ.Hunt@DJ-Hunt.com
http://www.DJ-Hunt.com

GoldMine SQL Database Maintenance - Automated & Easy

Z-Firm LLC

Rafael Zimberoff

120 Lakeside Avenue
Suite 101
Seattle, WA 98122
USA

(206)812-7874
Rafael@ZFirmLLC.com
http://www.ZFirmLLC.com

Wireless GoldMine Access

W-Systems Corporation

Chris Wettre

19 Spear Road
Suite 101
Ramsey, NJ 07446
USA

(800)775-8378
CWettre@W-Systems.com
http://www.W-Systems.com

Customer Intelligence Part I

Siftwork

Mike Meyer

12 Boyn Hill Road
Maidenhead
SL6 4HF
United Kingdom

+44 1628 629576
Mike.Meyer@Siftwork.com
http://www.Siftwork.com

10 Ways to Better Manage Sales

FrontRange Solutions Inc

Greg Anderson

4410 Bays Water Drive
Colorado Springs, CO 80920
USA

(719)532-7595
Greg.Anderson@FrontRange.com
http://www.FrontRange.com

Out of Office Reply - Tip

The Automation Station, Inc.

Eric Turnipseed
President

180 East Fifth Street
Suite 260
Saint Paul, MN 55101
USA

(651)224-2246
ETurnipseed@AutomationStation.com
http://www.AutomationStation.com