

**Really.**



**synergist**

**How to**

-----  
Ops guide

Billing Plans

## BILLING PLANS

A Billing plan needs to be added to each monthly phase. As you can see in the snippet of the plan below the value of the plan is split between phase types. Agency Fee, Bought In, Data, Media & Telemarketing.

If we were building March into Synergist, our phases would look like this:

|                     |      |                                 |            |            |
|---------------------|------|---------------------------------|------------|------------|
| MARCH               | CONS | <input type="text" value="0%"/> | 01/03/2023 | 31/03/2023 |
| MARCH Media         | MEDP | <input type="text" value="0%"/> | 01/03/2023 | 31/03/2023 |
| MARCH Telemarketing | TELE | <input type="text" value="0%"/> | 01/03/2023 | 31/03/2023 |
| MARCH Data          | DATA | <input type="text" value="0%"/> | 01/03/2023 | 31/03/2023 |

This means that the nominal codes will be correct for Agresso. Invoices to the client (planned value column in Synergist) are rolled up and invoiced at phase level.

In the picture below you would total all the values the Mar- 23 this shows £53,427.00 needs to be invoiced to the client in the month March.

| Activity  | Rate            | Agency Fee      | Bought in service | Data           | Media          | TM             | Mar-23         |
|---|-----------------|-----------------|-------------------|----------------|----------------|----------------|----------------|
| <b>Campaign setup &amp; management</b>                      |                 |                 |                   |                |                |                |                |
| Ongoing Database Management                                 | £8,067          | £8,067          | £0                | £0             | £0             | £0             | £672           |
| Delivery account management                                 | £44,771         | £44,771         | £0                | £0             | £0             | £0             | £3,731         |
| Response handling & reporting                               | £20,316         | £20,316         | £0                | £0             | £0             | £0             | £1,693         |
| H2 Database Cleaning & Set-up                               | £187            | £187            | £0                | £0             | £0             | £0             | £0             |
| Office H2 Database Top-Up                                   | £9,000          | £0              | £0                | £9,000         | £0             | £0             | £0             |
| Horeca H2 Database Top-Up                                   | £2,250          | £0              | £0                | £2,250         | £0             | £0             | £0             |
| <b>Email campaign</b>                                       |                 |                 |                   |                |                |                |                |
| HTML Email: Template and Iterations                         | £10,235         |                 |                   |                |                |                | £0             |
| HTML and FU Email: Copy and Build                           | £43,989         |                 |                   |                |                |                | £0             |
| Lead Gen and FU Email: Copy and Build                       | £30,806         | £10,287         | £0                | £0             | £0             | £0             | £5,601         |
| <b>LinkedIn campaign</b>                                    |                 |                 |                   |                |                |                |                |
| Organic social campaign                                     | £13,345         | £13,345         | £0                | £0             | £0             | £0             | £1,112         |
| Paid social campaign core                                   | £26,362         | £11,362         | £0                | £0             | £15,000        | £0             | £2,197         |
| Paid social campaign hypersegment                           | £22,810         | £935            | £0                | £0             | £21,875        | £0             | £0             |
| <b>Telemarketing</b>  |                 |                 |                   |                |                |                |                |
| Telemarketing   | £58,133         | £4,000          | £0                | £0             | £0             | £54,133        | £4,844         |
| <b>ABM</b>  |                 |                 |                   |                |                |                |                |
| Key account list formation                                  | £2,037          | £0              | £2,037            | £0             | £0             | £0             | £0             |
| Key account sales enablement packs x5                       | £23,492         | £23,492         | £0                | £0             | £0             | £0             | £23,492        |
| <b>Hyper Segment</b>  |                 |                 |                   |                |                |                |                |
| Hyper segment - 3rd party media liasing with weber          | £3,768          | £3,768          | £0                | £0             | £0             | £0             | £0             |
| Hyper segment - Quantatative Survey phase 1                 | £15,198         | £5,198          | £10,000           | £0             | £0             | £0             | £0             |
| Hyper segment - Expert recruitment and interviews           | £23,987         | £4,154          | £19,833           | £0             | £0             | £0             | £0             |
| Hyper segment - e-Book Design, Copy and Amends              | £4,935          | £4,935          | £0                | £0             | £0             | £0             | £0             |
| Hyper segment - itterations per hypersegment                | £11,840         | £11,840         | £0                | £0             | £0             | £0             | £0             |
| <b>Conversion Flow</b>                                      |                 |                 |                   |                |                |                |                |
| BOF email copywriting and build                             | £11,257         | £11,257         | £0                | £0             | £0             | £0             | £2,814         |
| BOF - sponsored Inmails management, copywriting & reporting | £4,885          | £4,885          | £0                | £0             | £0             | £0             | £1,221         |
| BOF - sponsored Inmails media                               | £7,500          | £0              | £0                | £0             | £7,500         | £0             | £625           |
| BOF: Intent Data Database Purchase, Cleaning and Set-up     | £4,694          | £1,254          | £0                | £3,440         | £0             | £0             | £1,173         |
| BOF - Tipsheet Design, Copy and Amends                      | £17,000         | £17,000         | £0                | £0             | £0             | £0             | £4,250         |
| Content Hub Refresh   | £6,040          | £6,040          | £0                | £0             | £0             | £0             | £0             |
| Content Hub Updates   | £2,097          | £2,097          | £0                | £0             | £0             | £0             | £0             |
| <b>Total (Excl VAT)</b>                                     | <b>£519,522</b> | <b>£216,063</b> | <b>£40,454</b>    | <b>£45,434</b> | <b>£80,558</b> | <b>£54,133</b> | <b>£53,427</b> |

All revenue recognition invoices (recognise tab) are invoiced at stage level.

| Activity  | Agency Fee      | Bought in service | Data           | Media          | TM             | Mar-23         |
|---|-----------------|-------------------|----------------|----------------|----------------|----------------|
| <b>Campaign setup &amp; management</b>                      |                 |                   |                |                |                |                |
| Ongoing Database Management                                 | £8,067          | £0                | £0             | £0             | £0             | £672           |
| Delivery account management                                 | £44,771         | £0                | £0             | £0             | £0             | £3,731         |
| Response handling & reporting                               | £20,316         | £0                | £0             | £0             | £0             | £1,693         |
| H2 Database Cleaning & Set-up                               | £187            | £0                | £0             | £0             | £0             | £0             |
| Office H2 Database Top-Up                                   | £0              | £0                | £9,000         | £0             | £0             | £0             |
| Horeca H2 Database Top-Up                                   | £0              | £0                | £2,250         | £0             | £0             | £0             |
| <b>Email campaign</b>                                       |                 |                   |                |                |                |                |
| HTML Email: Template and Iterations                         |                 |                   |                |                |                | £0             |
| HTML and FU Email: Copy and Build                           |                 |                   |                |                |                | £0             |
| Lead Gen and FU Email: Copy and Build                       | £10,287         | £0                | £0             | £0             | £0             | £5,601         |
| <b>LinkedIn campaign</b>                                    |                 |                   |                |                |                |                |
| Organic social campaign                                     | £13,345         | £0                | £0             | £0             | £0             | £1,112         |
| Paid social campaign core                                   | £11,362         | £0                | £0             | £15,000        | £0             | £2,197         |
| Paid social campaign hypersegment                           | £935            | £0                | £0             | £21,875        | £0             | £0             |
| <b>Telemarketing</b>  |                 |                   |                |                |                |                |
| Telemarketing   | £4,000          | £0                | £0             | £0             | £54,133        | £4,844         |
| <b>ABM</b>  |                 |                   |                |                |                |                |
| Key account list formation                                  | £0              | £2,037            | £0             | £0             | £0             | £0             |
| Key account sales enablement packs x5                       | £23,492         | £0                | £0             | £0             | £0             | £23,492        |
| <b>Hyper Segment</b>  |                 |                   |                |                |                |                |
| Hyper segment - 3rd party media liasing with weber          | £3,768          | £0                | £0             | £0             | £0             | £0             |
| Hyper segment - Quantatative Survey phase 1                 | £5,198          | £10,000           | £0             | £0             | £0             | £0             |
| Hyper segment - Expert recruitment and interviews           | £4,154          | £19,833           | £0             | £0             | £0             | £0             |
| Hyper segment - e-Book Design, Copy and Amends              | £4,935          | £0                | £0             | £0             | £0             | £0             |
| Hyper segment - itterations per hypersegment                | £11,840         | £0                | £0             | £0             | £0             | £0             |
| <b>Conversion Flow</b>                                      |                 |                   |                |                |                |                |
| BOF email copywriting and build                             | £11,257         | £0                | £0             | £0             | £0             | £2,814         |
| BOF - sponsored Inmails management, copywriting & reporting | £4,885          | £0                | £0             | £0             | £0             | £1,221         |
| BOF - sponsored Inmails media                               | £0              | £0                | £0             | £7,500         | £0             | £625           |
| BOF: Intent Data Database Purchase, Cleaning and Set-up     | £1,254          | £0                | £3,440         | £0             | £0             | £1,173         |
| BOF - Tipsheet Design, Copy and Amends                      | £17,000         | £0                | £0             | £0             | £0             | £4,250         |
| Content Hub Refresh   | £6,040          | £0                | £0             | £0             | £0             | £0             |
| Content Hub Updates   | £2,097          | £0                | £0             | £0             | £0             | £0             |
| <b>Total (Excl VAT)</b>                                     | <b>£216,063</b> | <b>£40,454</b>    | <b>£45,434</b> | <b>£80,558</b> | <b>£54,133</b> | <b>£53,427</b> |

Below is a snippet of the March Agency Fee phase. We want to ensure both our planned value & recognise totals at the bottom match, otherwise the month end Rev Rec report will not balance at the end of the campaign.

| <input type="checkbox"/> | Month | Year | %      | Planned (£) | Recognise | Notional costs | Profit forecast | Billed (£) | Invoices | Comment  |      |
|--------------------------|-------|------|--------|-------------|-----------|----------------|-----------------|------------|----------|--|------|
| <input type="checkbox"/> | Mar   | 2023 |        | £3731.00    | £0.00     | £0.00          | £0.00           | £0.00      |          | 5292.016 Mar Delivery account management                               | EDIT |
| <input type="checkbox"/> | Mar   | 2023 |        | £1693.00    | £0.00     | £0.00          | £0.00           | £0.00      |          | 5292.016 Mar Response handling & reporting                             | EDIT |
| <input type="checkbox"/> | Mar   | 2023 |        | £5601.00    | £0.00     | £0.00          | £0.00           | £0.00      |          | 5295.016 Mar Lead Gen and FU Email: Copy and Build                     | EDIT |
| <input type="checkbox"/> | Mar   | 2023 |        | £1112.00    | £0.00     | £0.00          | £0.00           | £0.00      |          | 5295.016 Mar Organic social campaign                                   | EDIT |
| <input type="checkbox"/> | Mar   | 2023 |        | £947.00     | £0.00     | £0.00          | £0.00           | £0.00      |          | 5295.016 Mar Paid social campaign core                                 | EDIT |
| <input type="checkbox"/> | Mar   | 2023 |        | £334.00     | £0.00     | £0.00          | £0.00           | £0.00      |          | 5295.016 Mar Telemarketing   | EDIT |
| <input type="checkbox"/> | Mar   | 2023 |        | £1221.00    | £0.00     | £0.00          | £0.00           | £0.00      |          | 5295.016 Mar BOF - sponsored Inmails management, copywriting & reporti | EDIT |
| <input type="checkbox"/> | Mar   | 2023 |        | £4250.00    | £0.00     | £0.00          | £0.00           | £0.00      |          | 5295.016 Mar BOF - Tipsheet Design, Copy and Amends                    | EDIT |
| <input type="checkbox"/> | Mar   | 2023 |        | £313.50     | £0.00     | £0.00          | £0.00           | £0.00      |          | 5295.016 Mar BOF. Intent Data Database Purchase, Cleaning and Set-up   | EDIT |
| <input type="checkbox"/> | Mar   | 2023 |        | £2814.00    | £0.00     | £0.00          | £0.00           | £0.00      |          | 5295.016 Mar BOF email copywriting and build                           | EDIT |
| <input type="checkbox"/> | Mar   | 2023 |        | £23492.00   | £0.00     | £0.00          | £0.00           | £0.00      |          | 5292.0016 Mar Key account sales enablement packs x5                    | EDIT |
| <input type="checkbox"/> | Mar   | 2023 |        | £672.00     | £0.00     | £0.00          | £0.00           | £0.00      |          | 5295.016 Mar Ongoing Database Management                               | EDIT |
| <input type="checkbox"/> | Mar   | 2023 | 5.49   | 0.00        | 4250.00   | 0.00           | 4250.00         | £0.00      |          | 5295.016 Mar BOF - Tipsheet Design, Copy and Amends RR                 | EDIT |
| <input type="checkbox"/> | Mar   | 2023 | 1.58   | 0.00        | 1221.00   | 0.00           | 1221.00         | £0.00      |          | 5295.016 Mar BOF - sponsored Inmails management, copywriting & RR      | EDIT |
| <input type="checkbox"/> | Mar   | 2023 | 0.00   | 0.00        | 672.00    | 0.00           | 672.00          | £0.00      |          | 5295.016 Mar Ongoing Database Management RR                            | EDIT |
| <input type="checkbox"/> | Mar   | 2023 | 0.00   | 0.00        | 3731.00   | 0.00           | 3731.00         | £0.00      |          | 5292.016 Mar Delivery account management RR                            | EDIT |
| <input type="checkbox"/> | Mar   | 2023 | 0.00   | 0.00        | 1693.00   | 0.00           | 1693.00         | £0.00      |          | 5292.016 Mar Response handling & reporting RR                          | EDIT |
| <input type="checkbox"/> | Mar   | 2023 | 0.54   | 0.00        | 313.50    | 0.00           | 313.50          | £0.00      |          | 5295.016 Mar BOF. Intent Data Database Purchase, Cleaning and Set RR   | EDIT |
| <input type="checkbox"/> | Mar   | 2023 | 0.00   | 0.00        | 5601.00   | 0.00           | 5601.00         | £0.00      |          | 5295.016 Mar Lead Gen and FU Email: Copy and Build RR                  | EDIT |
| <input type="checkbox"/> | Mar   | 2023 | 0.00   | 0.00        | 1112.00   | 0.00           | 1112.00         | £0.00      |          | 5295.016 Mar Organic social campaign RR                                | EDIT |
| <input type="checkbox"/> | Mar   | 2023 | 0.00   | 0.00        | 947.00    | 0.00           | 947.00          | £0.00      |          | 5295.016 Mar Paid social campaign core RR                              | EDIT |
| <input type="checkbox"/> | Mar   | 2023 | 0.00   | 0.00        | 334.00    | 0.00           | 334.00          | £0.00      |          | 5295.016 Mar Telemarketing RR  | EDIT |
| <input type="checkbox"/> | Mar   | 2023 | 3.63   | 0.00        | 2814.00   | 0.00           | 2814.00         | £0.00      |          | 5295.016 Mar BOF email copywriting and build RR                        | EDIT |
| <input type="checkbox"/> | Mar   | 2023 | 30.33  | 0.00        | 23492.00  | 0.00           | 23492.00        | £0.00      |          | 5292.0016 Mar Key account sales enablement packs x5 RR                 | EDIT |
| Totals                   |       |      | 104.88 | £46180.50   | £46180.50 | £0.00          | £46180.50       | £0.00      |          |  |      |

**Purch & Exp**

When we have an expense to raise against a job (A cost to a supplier). We will need to ensure we are raising the cost against the correct phase. This will show us which revenue the cost is going against. For example: If we have a Telemarketing cost £4100.91 to raise for 4M for Marh.

We would go into our March Telemarketing phase. We can see from the billing plan we have already planned in a cost £4511 to cover the cost to supplier. This is accounting the mark up.

Phase MARCH Telemarketing

Nespresso

Print Export Email Phase Actions

Details Dashboard Schedule Estimate Quote Billing plan Invoices Activities Purch & exp Time Materials Attachments Contacts

Actions New Delete Remaining to plan -£4511.00

|                          | Month | Year | %    | Planned (£) | Recognise | Notional costs | Profit forecast | Billed (£) | Invoices | Comment                       |
|--------------------------|-------|------|------|-------------|-----------|----------------|-----------------|------------|----------|-------------------------------|
| <input type="checkbox"/> | Mar   | 2023 |      | £4511.00    | £0.00     | £0.00          | £0.00           | £0.00      |          | 5295.018 Mar Telemarketing    |
| <input type="checkbox"/> | Mar   | 2023 | 0.00 | 0.00        | 4511.00   | 0.00           | 4511.00         | £0.00      |          | 5295.018 Mar Telemarketing PR |
| Totals                   |       |      |      | 0           | £4511.00  | £4511.00       | £0.00           | £4511.00   | £0.00    |                               |

We can then go to our Purch & Exp tab to raise a PO. We enter the cost amount under the *actual costs*. (The estimated column is what we estimated the cost to be).

We can then raise the PO in our accounting system Agresso, the PO will be produced, approved and sent to the supplier. Upon raising the PO we will get ref number (*requisition number*). This is then added the PO we have raised in Synergist under Their Ref. This way we can keep track of the POs we have raised in both systems. We can know click 'approve this purchase' to complete this task.

Purchase: Nespresso Mar Telemarketing hours 100 (75 Office, 25 HORECA): 005496

Nespresso 1/00005295.018 MARCH Telemarketing

Supplier 4M  
 Contact - Blank -  
 Their ref 100014068

Details Text Lines Invoices Delivery Notes Tender Attachments

Main details

Stage  
 Ordered by\* Melody Johnson  
 Markup method None  
 Supply type\* Telemarketing  
 Description\* Nespresso Mar Telemarketing hours 100 (75 Office, 25 HORECA)

Status

Mark as investment / non-chargeable  
 Approved  
 Picked for  
 Estimate  Quote  Option

Cancel this purchase  
 Approve this purchase

|            | Actual     | Estimate   |                    |
|------------|------------|------------|--------------------|
| Date       | 01/03/2023 | 01/03/2023 |                    |
| VAT        |            | 1 (20%)    |                    |
| Cost       | 4100.91    | 4100.91    | Original cost 0.00 |
| Charge Out | 4100.91    | 4100.91    |                    |

## Converting an Opportunity to a Live job.

After we complete an opportunity, we need a contract in place before we can make the job *live* in Synergist. When we are ready to convert a job live we can do this by selecting Live from the drop down menu.

The screenshot shows the Synergist interface for an Opportunity titled "Nespresso Data Governance Budget Plan". The "Status" dropdown menu is open, and the "Live" option is highlighted and circled in red. Other visible fields include "Expected" (00/00/00), "Start" (01/07/2023), "Due" (31/08/2023), "Quoted" (£15028.00), "Order no", "VAT" (1 (20%)), "Bill by" (Quote/Estimate), "Sales status" (Open - New), "Pipeline" (Blank), "Rating" (Blank), "Source" (Blank), and "Notes".

We will then get the following message:

The screenshot shows a confirmation dialog box with a warning icon. The text reads: "Change all the phase statuses & dates to match the job?". There are two buttons: "Change" (with a checkmark) and "No" (circled in red). At the bottom right, there are "Cancel" and "Promote" buttons.

We select no. This will ensure all the dates we have built in phases stay the same.

All we have left to do is adjust the Gantt chart at phase level so each stage in the correct month. This will help with the client services capacity reporting.

At job level go to phases, click onto Gantt. We can now move each stage to make sure it is sat under the correct month.

Opportunity **Nespresso Data Governance Budget Plan** OPP 1/5280

Nespresso Print Export Email Opp Actions Cancel Save & Close

Details | Dashboard | **Phases** | Schedule | Estimate | Phase quotes | Billing plan | Invoices | Activities | Time | Attachments | Contacts

List | Billing plan | **Gantt**

Days | Weeks | Months Download Preferences

| Description        | 2023 |                                       |                            |     |     |
|--------------------|------|---------------------------------------|----------------------------|-----|-----|
|                    | Jun  | Jul                                   | Aug                        | Sep | Oct |
| Nespresso Data ... |      | Nespresso Data Governance Budget Plan |                            |     |     |
| 001 July Acco...   |      | 001 July Account Management           |                            |     |     |
| July Accoun...     |      | July Account Management               |                            |     |     |
| Planning           |      | Planning                              |                            |     |     |
| 002 Aug Accou...   |      |                                       | 002 Aug Account Management |     |     |
| Aug Accoun...      |      |                                       | Aug Account Management     |     |     |
| Planning           |      |                                       | Planning                   |     |     |

The job build is now complete, you now can go back to the teams and check their rev rec is sat in the correct month.