

Really.



synergist

How to

Ops guide

Building an Opportunity

BUILDING YOUR OPPORTUNITY

All jobs must be built from a Plan as an opportunity first, ready for when the client signs the contract and supplies a PO (Only at this point does a job become live).

The “client facing budget” is what we use to build the billing plan. The “budget model” is what we use to build our estimates.

TIME ESTIMATES

Based on the plan, you will need to create a monthly ‘Agency fee’ depending on the length of the campaign.

As an example the Phases will simply be labelled JANUARY, FEBRUARY, MARCH etc.

You will also need to create any ‘Bought In’ Phases, these will be some or all of the following:
JAN Data | JAN Media | JAN Telemarketing etc.

It is good practice to have a “Bought in Service” for every “Agency Fee” phase. This just means if we outsource anything there is a phase there to put the cost to.

This will be identifiable by simply putting the word OUTSOURCED at the beginning of the Phase name. For example ‘OUTSOURCED JANUARY’. You only need to create one Outsourced version of each Phase to cover the whole campaign.

You will then need to create the stages within each Agency fee phase. First you need to click into a Phase and then go to the Schedule tab.

The screenshot shows the 'Phase MARCH' interface in Travelodge. The 'Schedule' tab is selected and highlighted with a yellow circle. The interface includes the following fields and information:

- Title:** MARCH
- Comments:** (Empty text area)
- Status:** Live
- Phase type:** # Agency Fee
- Priority:** - Blank -
- Display order:** 016
- Project:** (Empty field)
- Contact:** Amy Osborne
- Phase owner:** (Empty field with user icon)
- Quoted:** 0.00
- Order no:** 00846911
- VAT:** 1 (20%)
- Bill by:** Quote/Estimate
- Start:** 01/03/2023
- Due:** 31/03/2023
- Change dates:** (Button)

Now click on 'New'. To name a stage you need to reference the Plan and identify what tasks are planned for the month you are creating. For example, in the image below the task for the month of March are: **Account Management, Marketo Management, Core: Content & HTML, Core: Email copywriting.**

Phase MARCH

Travelodge

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

All | Actions | **New** | Filter | Delete | Search

<input type="checkbox"/>	Key	Phase/Seq	Description	Start	Due	Done	Date	Comment
<input type="checkbox"/>		017-1	Account Management	01/03/2023	31/03/2023		00/00/0000	
<input type="checkbox"/>		017-2	Marketo Management	01/03/2023	31/03/2023		00/00/0000	
<input type="checkbox"/>		017-3	Core: Content & HTML creation	01/03/2023	31/03/2023		00/00/0000	
<input type="checkbox"/>		017-4	Core: Email copywriting (inc live inbox monitor)	01/03/2023	31/03/2023		00/00/0000	

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Referring to the plan again, you can now put the time estimates under each stage. Whilst still in the Phase click on the 'Estimates' tab, then click on the 'Quick estimate' tab.

Phase MARCH

Travelodge

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

Full estimate | Time and bookings

Estimate Phase Summary | Actions | New | Filter | **Quick estimate** | Calendar | Authorised & locked

Stage Filter | Add Stage

Description	Units		Cost
	Estimated	Actual	Estimated
MARCH			
Account Management	102.00		4901.09
Marketo Management	44.00		2986.28
Core: Content & HTML creation	78.00		5167.62
Core: Email copywriting (inc live inbox monitoring)	19.50		1041.54
Sub totals			
Totals / Net estimated profit	243.50	0.00	14096.53
Gross estimated profit			

Within the 'Quick estimate' tab you can now add the total number of hours required for each charge code associated with the Stage. In the two screen shots below, you can see the planned hours for the Account Management in March, and then how this is added in Synergist to match.

Marketo Inflation Agency Fee Inflation		Mar							
Campaign Running Costs		AE	AM	AD	Planner	Copywriter	Design	Developer	MA
ACCOUNT MANAGEMENT									
Strategy & Planning		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Account Management		37.01	31.16	29.70	4.05	0.00	0.00	0.00	0.00
Marketo Management		0.00	0.00	0.00	0.00	0.00	0.00	0.00	43.70
CREATIVE									
Content & HTML creation		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Core: Content & HTML creation		0.00	7.20	0.00	0.00	17.55	34.76	17.78	0.00
Intent: Content & HTML creation		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Email copywriting (inc live inbox monitoring)		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Core: Email copywriting (inc live inbox monitoring)		14.63	5.23	0.00	0.00	0.00	0.00	0.00	0.00
Intent: Email copywriting (inc live inbox monitoring)		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
DATA									
Initial data license, cleaning and upload		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
H2 data topup									
Monthly intent data									
TELEMARKETING									
Dialling team									
Telephone no. domain and SSL Cert renewal									
MARKETO									
Marketo licence									
Campaign Total (Excl VAT)		52	44	30	4	18	35	18	44
Excluding									
LinkedIn account upgrades (Estimate)									
Photography / image licenses									
Domain Purchases									

Quick estimate
1/00005300.017 MARCH

Stage: - All -

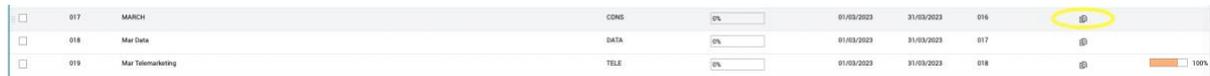
Time Materials

Filters
Staff: - Blank -
Charge code type: []
 Show allocated estimate rows that have a zero value

Description	Resource	Qty	Units	Charge rate	Recommended charge
Account Management					
**Account Executive		37	+ hours	80.99	2996.63
**Account Executive		31	+ hours	80.99	2510.69
**Account Manager		30	+ hours	98.42	2952.60
**Account Director		0	+ hours	123.12	
**Group Account Director		0	+ hours	67.50	
**CSD Director		0	+ hours	65.35	
**Planning Director		4	+ hours	62.36	249.44
**Planner		0	+ hours	130.38	
#Data Analyst		0	+ hours	68.25	

Now you have created the first monthly Phase you can then follow the same process to create the subsequent Phases for each month.

If the next phase is very similar to the last one you can duplicate it. To duplicate a Phase click on the icon as indicated below:



<input type="checkbox"/>	017	MARCH	CONS	0%	01/03/2023	31/03/2023	016	
<input type="checkbox"/>	018	Mar Data	DATA	0%	01/03/2023	31/03/2023	017	
<input type="checkbox"/>	019	Mar Telemarketing	TELE	0%	01/03/2023	31/03/2023	018	 