The winners of the first CDS Dynamic Report Contest are –

**Grand Prize: Jane Schilz**

**Runner-Up: Denise Wahl**
Dynamic Report: Grandchildren for Insurance Report

### New Potential Client Report

The New Potential Client Report is built on the Contact table and is designed for the President, Owner, or Management of a firm to track the status of potential clients who have attended a seminar.

The New Potential Client report takes advantage of two custom fields available on the Contact **Personal** tab. The First **AlphaNum** field in the **Miscellaneous Information** section has been re-named the **Origination** field and is used to track how a prospect came to Morgan Kenwood. Jane has created a number of custom choices for the drop-down to ensure data integrity. If a prospect was referred by an existing client, then the name of client is entered in the **Origination** field.

![Figure 1: AlphaNum field customized (Origination) with added custom choices in the Miscellaneous Information section of the Contact Personal tab.](image)

The second customized field used in this report is the **ALPHAKEY** field in the **Miscellaneous Information** section which has been re-named **Mktng Event** (Marketing Event). This field is used to track information regarding the most recent Morgan Kenwood event that the prospect attended. As an example, seven times a year, Morgan Kenwood holds Seminars covering topics such as retirement and estate planning. If a prospect attends one of these seminars, information regarding the seminar is entered in this field.

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Figure 2: ALPHAKEY field customized as Mkting Event (Marketing Event) with Marketing Event data entered.

The New Potential Client report also incorporates important date fields from the Additional Personal tab. The Last Action on and Next Action on fields automatically capture dates from the most recent completed activity and the next scheduled activity in the CDS calendar. This information is added to the report to ensure that prospects are being followed up with and identify opportunities with prospects that may not have had any recent contact.

Figure 3: The Last Action on and Next Action on fields in the Important Dates section of the Additional Personal tab.

The column definition of the New Potential Clients report is as follows:

Figure 4: Column Definition of the New Potential Clients report.
The **TRANS PRO** filter attached to the New Potential Clients report will find all contacts identified as prospects and transitional clients. See below for additional filter criteria:

**Figure 5: Filter detail on the Trans Pro filter included with the New Potential Clients dynamic report.**

In the report layout, the columns containing **Origination** and **Marketing Event** data from the custom fields are next to each other. This column organization makes it easy to see when the last event was attended and to determine whether or not walk-in or referral prospects have taken advantage of a seminar.

The **Important Dates** columns are grouped together making it easy to see the progress of prospects as they move through the sales pipeline.

**Figure 6: The New Potential Clients dynamic report.**
This report is also useful for identifying clients that have become centers of influence by making referrals. By re-sorting this report according to **Origination**, it is easy to see clients who have referred a number of prospects. After identifying a center of influence, advisors can reach out and be sure to thank their loyal clients.

![New Potential Clients (21)](image)

**Figure 7:** The New Potential Clients dynamic report sorted by Origination to identify centers of influence.

This report is run once a week. Jane indicated that this report is an important part of Morgan Kenwood’s prospect outreach as it is an effective tool used to identify “…the workflow in the office and what it takes to get a client on board.”

**Note:** In order for **Next Action on** data to populate correctly, you may need to toggle between the report and the contact record. Select the contact by double-clicking the row with the contact information in the report, and then select the Additional Personal tab in the contact record. Toggle back to the report and the Next Action on date will be populated correctly.

**Important:** Adding this report to CDS will not make changes to the customizable AlphaNum and ALPHAKEY fields in CDS. Nor will custom choices be added to either field.
Grandchildren for Insurance Report
The Grandchildren for Insurance report is built on the Key Relations table and includes a filter that will find all contacts identified as a Granddaughter or Grandson.

Figure 8: The Key Relation Summary on the Key Relations tab of a contact record (Grandchildren highlighted).

The column definition of the Grandchildren for Insurance report is as follows:

Figure 9: The Column Definition of the Grandchildren for Insurance report.

The filter attached to the Grandchildren for Insurance report will find all Key Relations identified as a Granddaughter or Grandson.
When the report is run you will see a listing of all contacts identified as granddaughters or grandsons and the report also includes a column with the name of the grandparent.

When submitting this report, Denise indicated that they “…have cases in which the grandparent will pay the premium for life insurance on their grandchild. It is a way that the grandparent can offer a phenomenal gift to their grandchild – especially if the parents of the grandchild might not be able to afford a life insurance policy.” The policies typically purchased by grandparents are whole life insurance policies with a guaranteed...
purchase option rider, allowing the grandchild to purchase additional insurance as he or she gets older.

**Adding the Winning Dynamic Reports to CDS**


The download will consist of a .zip file that will contain the dynamic report in .dmp file format.

After you have downloaded and unzipped the file:

- From the main screen in CDS, select **Database** in the main menu.
- In the **Database** menu, select **Utilities**.
- In the **Utilities** menu, select **Load Data**.

![Figure 12: The Utilities menu (Load Data option selected).](image)

- Select the **Other Files (*.dmp)** option in the **Select Data Load Options** window.
Click **OK**.
- When the **Load File** window opens, use the **Look in** drop-down field to locate the .dmp files.

Select the dynamic report file and click **OK**. The dynamic report with filters will be loaded into CDS.