

Fast•Class File

Client Data System

Volume 67: Dynamic Report Contest Winners

The winners of the first CDS Dynamic Report Contest are –

Grand Prize: Jane Schilz

Dynamic Report: New Potential Clients Report

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.

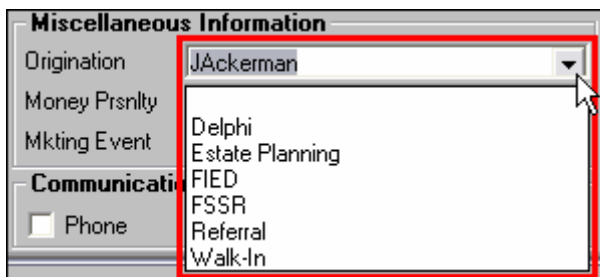


Figure 1: AlphaNum field customized (Origination) with added custom choices in the Miscellaneous Information section of the Contact Personal tab.

The second customized field used in this report is the **ALPHAKEY** field in the **Miscellaneous Information** section which has been re-named **Mkting 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.

Miscellaneous Information

Origination

Money Prsnlty

Mkting Event 081/2005/03/15 - MBI Money Mgt Conf

Communication Privacy

Phone Mail E-Mail

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.

Important Dates

Created on 09/04/1997 MARK

Modified on 08/12/2005 MARK

Last Letter on 12/15/1999 MARK

Last Action on 07/21/2005 MARK

Next Action on 08/25/2005 MARK

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:

Report Properties

Column Definition Selection Criteria Output Type Output Package Description

Last Name First Name Source Sub Source Origination

Columns Available

- Client No
- Suffix
- Middle
- Greeting
- Title
- Type
- Sub Type
- Occupation
- Job Title
- Birth Date
- Age

Columns Selected

- Last Name
- First Name
- Source
- Sub Source
- Origination
- Mkting Event
- Created on
- Last Action
- Last Action on
- Next Action
- Next Action on

Sort By

(A) Last Name

Direction

Ascending Descending

Total SubTotal

OK Cancel Apply Help

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:

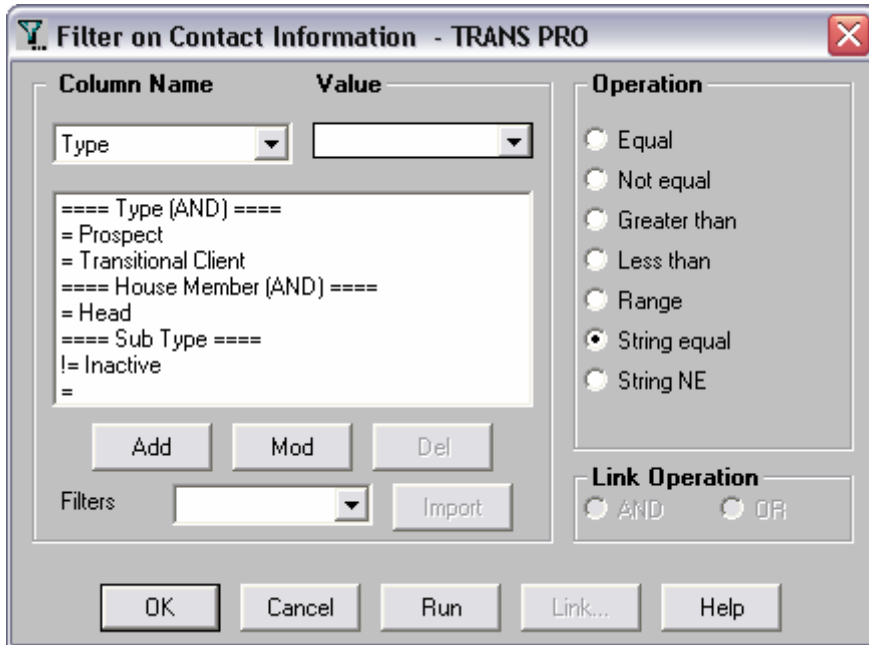


Figure 5: Filter detail on the Trans Pro filter included with the New Potential Clients dynamic report.

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.

Last Name	First Name	Source	Sub Source	Origination	Mktng Event	Created on	Last	Last Action on	Next Action	Next Action on
Abernathy	Brad	Odell	VJohanson	JAckerman	081/2005/03/15 - MBI Money M	07/14/2005	MARK	07/29/2005	MARK	08/15/2005
Adams	Franklin	Odell	VJohanson	FSSR	063/2005/04/10 - Successful Re	07/14/2005			EILEEN	08/17/2005
Anderson	Phillip	Odell	LMerideth	JAckerman	081/2005/03/15 - MBI Money M	07/23/1992	ED	07/22/2005	ED	08/18/2005
Ansong	David	Odell	VJohanson	FSSR	081/2005/03/15 - MBI Money M	08/11/1983	EILEEN	07/20/2005	EILEEN	08/19/2005
Antonsen	Robert	Odell	LMerideth	FSSR	063/2005/04/10 - Successful Re	12/01/1987	MIKE	06/15/2001	MIKE	08/22/2005
Bicosta	Stephen	Anderson	VJohanson	JAckerman	081/2005/03/15 - MBI Money M	12/17/1985	ED	06/23/2005	ED	08/22/2005
Drake	Frank	Odell	LMerideth	vWalk-In		03/01/2000				
Foremann	Timothy	Paladian	VJohanson	FSSR	081/2005/03/15 - MBI Money M	01/04/1980	MIKE	04/20/2005	MIKE	08/23/2005
Foremann	Regina	Odell	VJohanson	Referral		05/05/2005	NORMA	05/16/2005		
Gerkin	Harry	Anderson	LMerideth	JAckerman	081/2005/03/15 - MBI Money M	03/01/2000				
Halverson	Randall	Anderson	VJohanson	FSSR	063/2005/04/10 - Successful Re	01/28/1985	MIKE	07/07/2005	MIKE	08/24/2005
Hasnain	Amir	Odell	VJohanson	Estate Planning	092/2005/01/23 - Family Securi	09/22/1980			ED	08/23/2005
Laymen	Gregory	Paladian	VJohanson	JAckerman	081/2005/03/15 - MBI Money M	10/01/1981				
Le Duque	Joanne	Odell	VJohanson	FSSR	063/2005/04/10 - Successful Re	10/29/1980	MIKE	07/07/2005	MIKE	08/25/2005
Mariondale	Henry	Odell	LMerideth	Estate Planning	081/2005/03/15 - MBI Money M	02/17/1983	MIKE	07/07/2005	MIKE	08/26/2005
Ohara	Sammy	Anderson	CSchneider	JAckerman	081/2005/03/15 - MBI Money M	08/04/1981			NANCY	08/18/2005
Schmidt	Randolf	Odell	LMerideth	MAdcock	023/2005/06/17 - Napa Retreat	03/01/2000	EILEEN	07/07/2005	EILEEN	08/19/2005
Scranton	Robert	Paladian	VJohanson	JAckerman	081/2005/03/15 - MBI Money M	09/18/1981				
Smith	Robert	Odell	VJohanson	Estate Planning	092/2005/01/23 - Family Securi	07/14/2005	NANCY	07/19/2005	NANCY	08/19/2005
Yamagata	Yoshio	Paladian	CSchneider	JAckerman	081/2005/03/15 - MBI Money M	03/09/1982	EILEEN	04/15/2005		

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)						
Last Name	First Name	Source	Sub Source	Origination	Mkting Event	
Mariondale	Henry	Odell	LMerideth	Estate Planning	081/2005/03/15 - MBI Money M	
Smith	Robert	Odell	VJohanson	Estate Planning	092/2005/01/23 - Family Secur	
Hasnain	Amir	Odell	VJohanson	Estate Planning	092/2005/01/23 - Family Secur	
Antonsen	Robert	Odell	LMerideth	FSSR	063/2005/04/10 - Succesful Re	
Ansong	David	Odell	VJohanson	FSSR	081/2005/03/15 - MBI Money M	
Adams	Franklin	Odell	VJohanson	FSSR	063/2005/04/10 - Succesful Re	
Halverson	Randall	Anderson	VJohanson	FSSR	063/2005/04/10 - Succesful Re	
Foremann	Timothy	Paladian	VJohanson	FSSR	081/2005/03/15 - MBI Money M	
Le Duque	Joanne	Odell	VJohanson	FSSR	063/2005/04/10 - Succesful Re	
Abernathy	Brad	Odell	VJohanson	JAckerman	081/2005/03/15 - MBI Money M	
Gerkin	Harry	Anderson	LMerideth	JAckerman	081/2005/03/15 - MBI Money M	
Bicosta	Stephen	Anderson	VJohanson	JAckerman	081/2005/03/15 - MBI Money M	
Laymen	Gregory	Paladian	VJohanson	JAckerman	081/2005/03/15 - MBI Money M	
Anderson	Phillip	Odell	LMerideth	JAckerman	081/2005/03/15 - MBI Money M	
Ohara	Sammy	Anderson	CSchneider	JAckerman	081/2005/03/15 - MBI Money M	
Scranton	Robert	Paladian	VJohanson	JAckerman	081/2005/03/15 - MBI Money M	
Yamagata	Yoshio	Paladian	CSchneider	JAckerman	081/2005/03/15 - MBI Money M	

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.

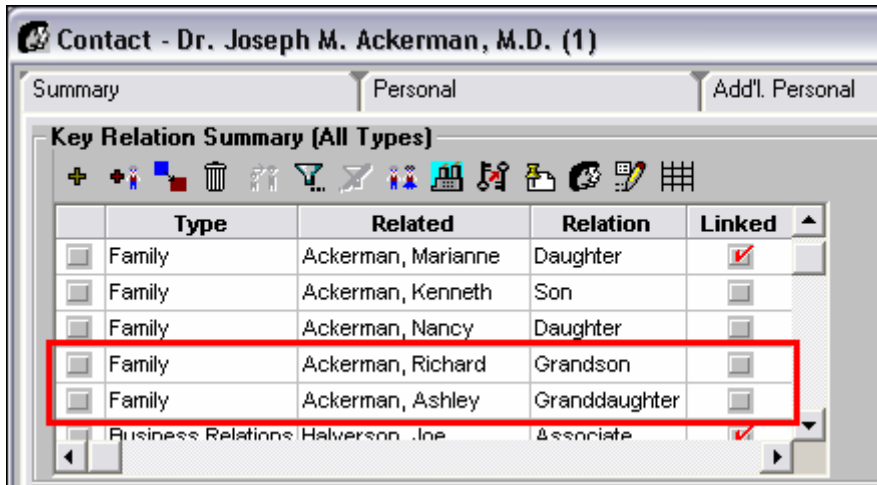


Figure 8: The Key Relation Summary on the Key Relations tab of a contact record (Grandchildren highlighted).

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

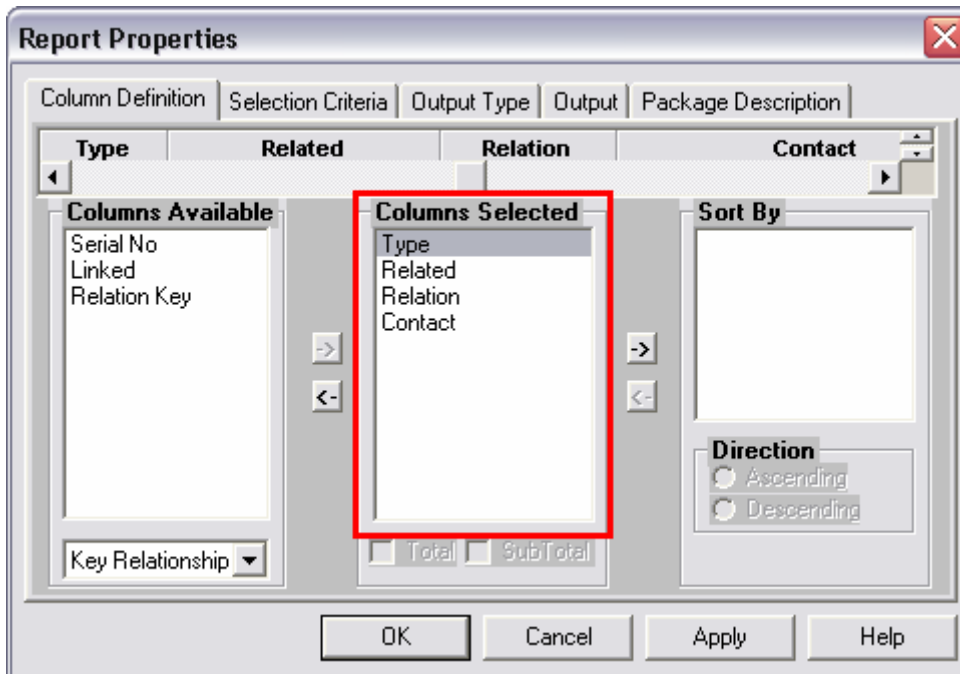


Figure 9: The Column Definition of the Grandchildren for Insurance report.

The filter attached to the Grandchildren for Insurance report will find all Key Relations identified as a Granddaughter or Grandson.



Figure 10: The GRANDCHILD filter attached to the Grandchildren for Insurance report.

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.

Type	Related	Relation	Contact
Family	Ackerman, Richard	Grandson	Ackerman, Joseph
Family	Ackerman, Ashley	Granddaughter	Ackerman, Joseph
Family	Anthony, Stephen	Grandson	Anthony, Brian
Family	Christiansen, William	Grandson	Christiansen, Carolina
Family	Christiansen, Sheryl	Granddaughter	Christiansen, Carolina
Family	Thompson, Fred	Grandson	Christiansen, Carolina
Family	Christiansen, Ingrid	Granddaughter	Christiansen, Carolina
Family	Holman, Bernadette	Granddaughter	Holman, Mariko
Family	Holman, Chloe	Granddaughter	Holman, Mariko
Family	Iverson, Courtney	Granddaughter	Iverson, Francis
Family	Smith, Paula	Granddaughter	Iverson, Francis
Family	Smith, Julia	Granddaughter	Iverson, Francis
Family	Smith, Robert	Grandson	Iverson, Francis
Family	Iverson, Brian	Grandson	Iverson, Francis

Figure 11: The Grandchildren for Insurance dynamic report.

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 New Potential Clients Report and the Grandchildren for Insurance report will be available for download from the Fast Forward page at the end of Fast Class V.67 and on the Dynamic Report Download page in the CDS Training and Support Center.

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**.

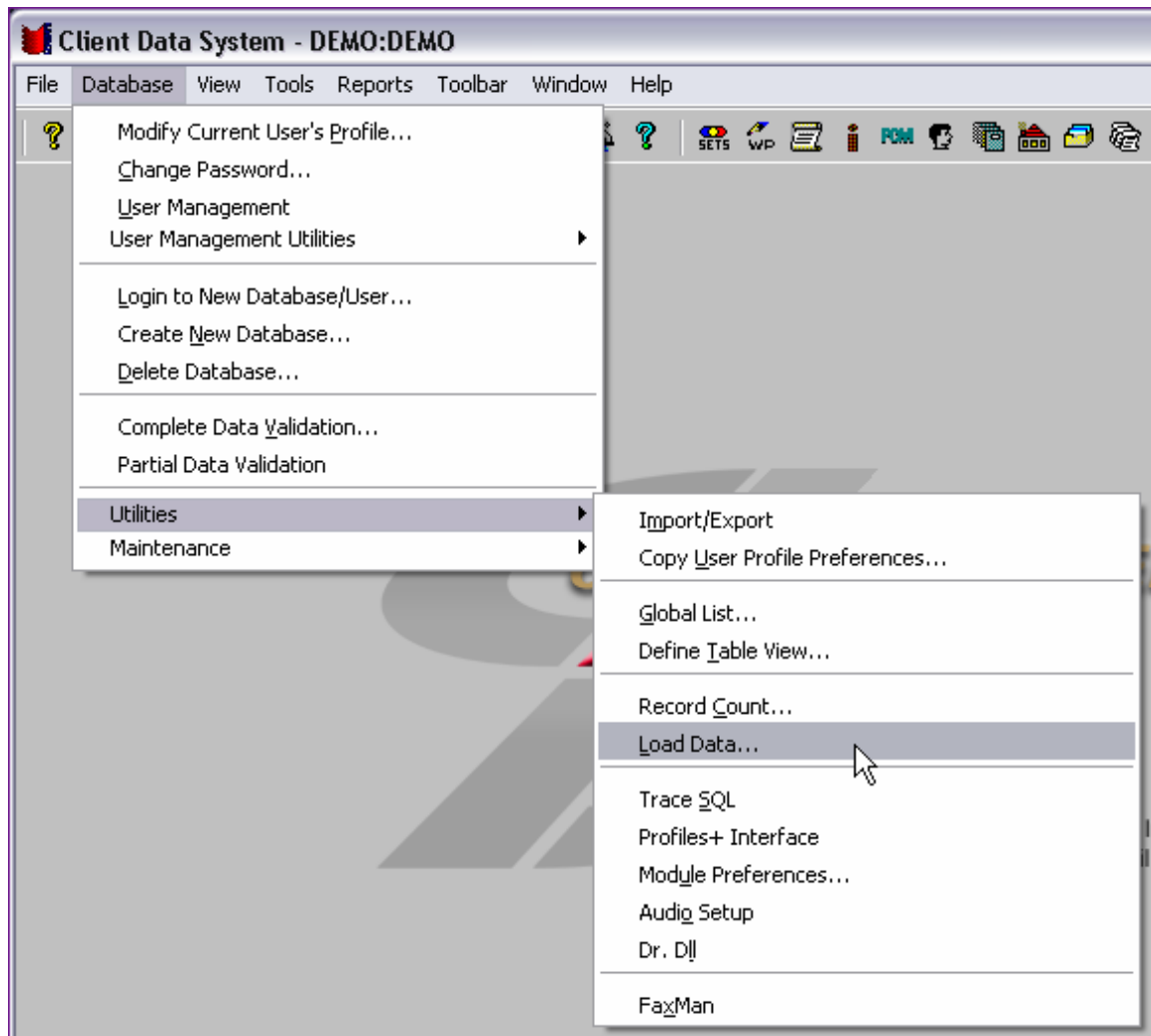


Figure 12: The Utilities menu (Load Data option selected).

- Select the **Other Files (*.dmp)** option in the **Select Data Load Options** window.

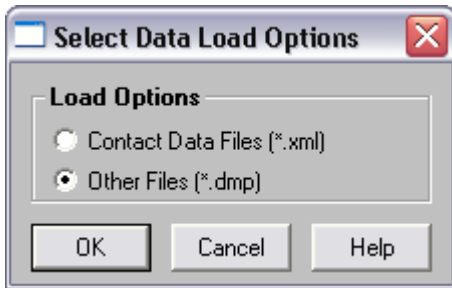


Figure 13: The Select Data Load Options window.

- Click **OK**.
- When the **Load File** window opens, use the **Look in** drop-down field to locate the .dmp files.

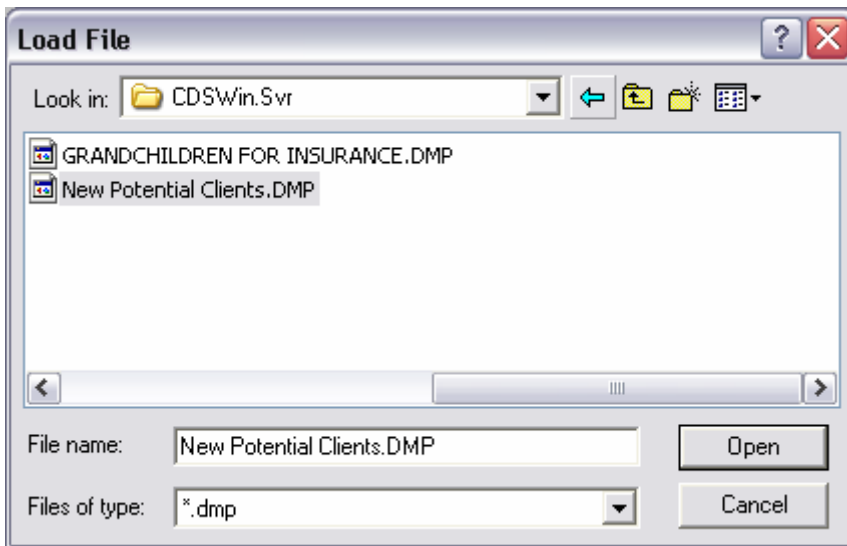


Figure 14: The winning dynamic report .dmp files as seen in the Load File window

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