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Your Company Name.

GoldMine Audit



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For Your Customer's Name, Here Ltd.

*Conducted in June 2002 to help our
customers receive maximum results from
their GoldMine system.*

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The Audit Process:

I will work with your company to construct a suitable audit for your customers and industry. This is an excellent way to both offer your customer added value in consultancy and to get your foot in the door for additional business.

The following sample is the write-up that was presented to the customer following the audit. This audits design meant it could be done through a telephone interview, a face-to-face interview, or an e-mailed questionnaire.

This was a valuable tool used in conjunction with project review days at a discounted rate and brought in additional revenue in products and services.

Audits can, not only be used for customers, but are also an excellent tool for checking the productivity and efficiency of your own company.

** Note, all names of companies and individuals within this document have been changed.*

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Date Conducted: June 2002

Auditor: Michelle Figg, Freelance

Telephone Respondent(s): Ms Suzy Q

Current Version of GoldMine: 5.5

Platform: SQL

Number of Licences: 100

Number of Workstations with GoldMine: Approx. 115

Individuals Currently Using GoldMine: Approx. 85 (With 7 in Germany)

Number of Sales People: Approx. 4

Number of Marketing People: Approx. 4 (working with Sales)

Number of People with Access to GoldMine via Laptops: 2

Synopsis of Situation:

(Insert Customer's Company Name Here..) initially purchased GoldMine with the intention of assisting the marketing sales departments. The product is intended to ensure better contact management with customers and potential customers.

Since the installation of GoldMine the staff is using many of the basic features. According to the telephone interview, overall company morale on GoldMine is low. There are also various features that the sales and marketing staff are not utilising. The marketing department are running some events through GoldMine but use another software product as well. They are also doing email shots and very basic campaign analysis.

Through the telephone interview, it was learned that the marketing and sales department runs reports and forecasts through Excel. They are not using the literature fulfilment centre or creating opportunities.

Currently, Suzy Q lists the following issues needing attention:

- There are hundreds of users and it is difficult to get them all using the product properly or to have total employee buy-in of GoldMine.
- The company has considered looking at alternative solutions.
- GoldMine needs to be more user friendly for calculating. They have not understood how to do this with GoldMine and this is why everyone prefers using Excel.

- They would like to be able to easily see who the last person contacted on a particular contact record was by a click of a button. The respondent, Suzy Q believes Crystal is helping with this a bit but more could be done.

Currently, Suzy Q is the GoldMine Systems Administrator and has also attended GoldBox, GoldMine SQL, and Crystal Reports. Amy Doe has attended the Marketing and Sales with GoldMine course and John Doe has been trained on GoldBox.

Suzy Q is currently one of the only staff members with a broad knowledge of GoldMine. She currently has the ability to write SQL queries and use the Lookup.Ini. Suzy will be leaving the company in the autumn of 2002 and her replacement will in need of training.

They have expressed an interest in upgrading to version 5.7 yet has been hesitant due to past bugs in GoldMine. She says there are currently no real outstanding problems to deal with.

Two members of the staff have access to GoldMine via laptops. Two people are syncing GoldMine to their pda devices. *Insert Company Name* is running GoldMine over two sites and are synchronising every hour through a private network via VPM. Currently the sales staff does not have access to GoldMine outside of the office and they have thought about the possibility of GoldMine Everywhere.

According to the interview, overall lack of morale is low and lack of training is contributing to the low success rates of the GoldMine Project. Suzy Q would like to see more features being used including Crystal Reports and would like to see GoldMine become the hub of all the company data.

Features Unused:

The following is a list of features that are currently not being utilised by This Particular Company.

GoldMine as a Sales Tool:

- Sales Forecasting
- Completing Sales
- Opportunity Manager
- Conversion Reports
- Average Conversion Time
- Forecast Sales Reports (*Said they would if they were using it right)
- Closed sales reports
- Pipeline Reports

GoldMine as a Marketing Tool:

- Leads Analysis
- Info centre (For sharing marketing collateral and information)

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The following is a list of tasks which the most competent GoldMine user (and most users) is unaware of, not using, or requires additional training on:

- Searching for additional contacts
- Importing data from your website
- Scheduling multiple activities
- Viewing and using the activity list
- Adding additional contacts
- Attaching created documents to the record
- Running Reports and Creating GoldMine reports
- Creating Crystal Reports
- Building filters with Brackets, ands and ors
- Merging one group into another group
- Creating macros
- Creating projects
- Changing email to be HTML based
- Creating fancy email shots with graphics

ONLY SUZY Q CAN CURRENTLY PERFORM THE FOLLOWING:

- Building SQL queries
- Importing new data
- Synchronising
- Creating new databases
- Trouble shooting synchronisation
- Importing data to update existing data
- Getting rid of duplicate records
- Deleting lots of contact records
- Automated Processes
- Writing the Lookup.Ini
- Making entries into the BDE
- Permissions in SQL for GoldMine
- Creating Users
- Using territory re-alignment
- Goldmine Analysis Features
- Backing up GoldMine
- Global Replaces
- Importing and Exporting data
- Creating use defined fields
- Creating views of information
- Setting Access Rights
- Creating read-only files

*Suzy will be leaving the company soon

Recommendations For Success:

- Using the Infocentre to share marketing and sales collateral and company information
- The second release of version 5.7 is available now and there are no problems with upgrading to it. This would be a Free upgrade.

- Further training for GoldMine users and the new GoldMine administrator is necessary. The most economical way to do this would be to adopt a “Train the Trainer” approach. For example, Tim Marsden, the new GoldMine Administrator could take Introduction to GoldMine, Advanced GoldMine, Crystal Reports, Train the Trainer, SQL Administration, and Systems Administration – then train This Company's employees in various break-out training sessions.
- Purchase an annual support contract at a low cost of £7,200.
- Purchase annual upgrade protection entitling you to free upgrades for 1 year at £35 per licence.
- This Company needs a strong GoldMine partner to help refocus. They must have a strategy meeting with Your Company Name. If the GoldMine initiative continues to remain the same, the project will dwindle into failure and cost the company money. Managing Director of Your Company Name has been handling GoldMine project recovery for over 20 years and believes this project can be up and running properly for a lot less money than dismissing it entirely. Most companies are unlikely to pull off a project recovery such as this on their own.

Your Company Name would be willing to begin project recovery by spending a ½ day with This Customer's senior team (not just the current GoldMine users and administrators) to get the overall GoldMine buy-in restored. In order to ensure success and company buy-in of GoldMine, senior team leaders must project that enthusiasm from the top down. If the senior leaders do not support and use the product with enthusiasm, neither will the employees.

From that point, we recommend taking advantage of our Project Recovery day at the reduced cost of £500 and then begin the consultancy days necessary revamp your entire GoldMine project and fulfil the requests made by Suzy Q.

The Clients Requested Additional Information On:

- Opportunity Manager to track sales (Sales Success with GoldMine training course)
- Registering details from a website into GoldMine (Egrabber Products)
- Producing quotations via GoldMine
- Making product information available to be emailed through GoldMine (Our Marketing with GoldMine training course)
- Sage Link – Accounting software link
- Zapcode – Postcode software
- Doing email shots (and fancy graphics)
- Changing Email to be HTML based (Our Marketing with GoldMine training course)
- Using the Infocentre to share marketing collateral and company information (Our Marketing with GoldMine training course)