

Managing BD projects (ajeraComplete only)

Goal: To use Business Development phases to track your wins and losses and analyze your marketing efforts.

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With Business Development (BD), you can:

- Manage leads and opportunities.
- Track your BD efforts.
- Increase your win rate.

This lesson shows you how you can use a BD template to get a head start on winning and starting a project.

Step 1: Open a project template with a BD phase

You can create a Business Development project from scratch, but it is much easier to use one of the two BD templates available in ajeraComplete: Bottom-up with Business Development or Top-down with Business Development.

1. Click **Setup > Projects**. The Project Command Center appears.
2. Click the **New** button and select one of the BD templates.
3. Look at how the template is set up on the Project Info tab > General subtab.

The screenshot shows the 'Project Command Center' window. At the top, there's a search bar and radio buttons for 'ID', 'Description', and 'Client'. Below is a table with columns: Description, Start Date, Completion Date, Est Start Date, Hours Budget, and Hours Actual. The table lists 'New Project', 'Oakland Heights Medi...', and 'Stephenson Estate Kit...'. To the right of the table is a Gantt chart for the year 2011, with dates from 14 Aug to 6 Nov. On the right side of the window are buttons for 'New', 'Delete', and 'Hide Gantt', along with some icons.

The 'Project Info' tab is active, with the 'General' subtab selected. On the left, a project tree shows 'New Project' expanded to 'Business Development', which includes 'Basic Services' (Schematic Design, Design Development, Construction Docs, Bidding & Negotiation, Construction Admin) and 'Additional Services'. The main form on the right has fields for: Description (New Project), ID, Department (Architectural), Project type, Project manager, Principal in charge, Marketing contact, and Location. The Status is set to 'Preliminary'.

Four callout boxes provide additional information:

- Top-left callout:** "The BD phase is at the top of the project tree." (points to 'Business Development')
- Top-right callout:** "If you want, you can create more BD phases by clicking the Copy button (not shown) at the bottom of the Project Command Center." (points to the bottom of the project tree)
- Bottom-left callout:** "Standard production phases are included so you can start billing as soon as you win the project." (points to the 'Basic Services' list)
- Bottom-right callout:** "Leave the status as Preliminary because the project is not billable . . . yet." (points to the 'Status' dropdown)

Step 2: Link each production phase to a BD phase

You can track multiple BD efforts in a project. For example, a potential client might require a proposal for each production phase. You would then apply a percent chance of winning to each BD effort so that you can track each BD phase and its related production phase in your project reports.


1. In the project tree, click a production phase to select it.
2. On the General subtab, link the phase to a BD phase.

The screenshot shows the 'Project Info' window with the 'General' subtab active. The 'Marketing phase' dropdown is set to 'Business Development'. The 'Status' dropdown is set to 'Preliminary'. The 'Description' field contains 'Schematic Design'. The 'Department' is 'Architectural'. The 'Project type' is empty. The 'Project manager', 'Principal in charge', and 'Marketing contact' fields are empty. The 'Location' field is empty. The 'Marketing phase' field has a dropdown arrow button next to it.

Notice how the status is Preliminary, just like the project status.

Each production phase automatically has the same status as the project.

Here is where you link the production phase to a BD phase.

If you have only one BD phase, each production phase is automatically linked to it. If you have more than one BD phase, click the  button and select the BD phase you want.

Step 3: Define the BD phase

After you link each production phase to the correct BD phase, you can then define the BD phases.

1. Click the BD phase in the project tree to select it.
2. Click the **Business Development** subtab.

Marketing Info

Description: Business Development

Client: Dawson Developers

Owner: Dawson Developers, Bryan Evens

AE:

Project type: Medical Facilities

Priority: Medium

% Chance of winning: 80

Scope:

Fees

Total project: 5,250

Construction: 4,500

Contract: 236,250

Consultants: 78,750

Total project: 315,000

Status: Repeat

Status: New

Status: New

First, on the Marketing Info subtab, enter information verifying the players for the project and other information, as needed.

Second, enter the importance of the project to your firm and your chance of winning the project.

The Status field indicates if you worked with these people in the past.

Third, enter the costs and fees that you will use for your marketing materials.

Stages

Status	Stage	Due Date	Start Date	
Not Started	NBD			
Not Started	Lead			
Not Started	RFQ			
In Progress	RFP	08/19/11	07/19/11	Client site meeting required. ...
Not Started	Proposal			
Not Started	Interview			
Open	Final Disposition			

Final disposition:

Awarded to:

On the Stages subtab, begin tracking the status of your BD efforts.

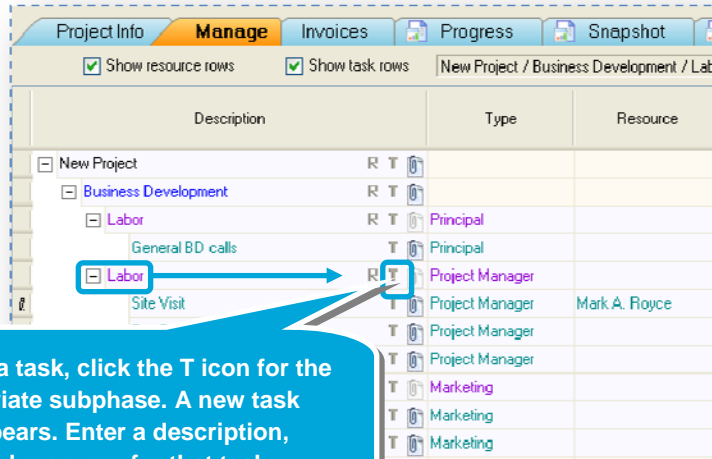
For example, you received an RFP. Change the status to In Progress and enter the start and due dates and any notes about the RFP.

On the Contacts subtab, you would enter the main contacts for the project.

On the Notes subtab, you would enter any general notes, either now or as you work on this BD effort.

Step 4: Fill in rest of the BD phase

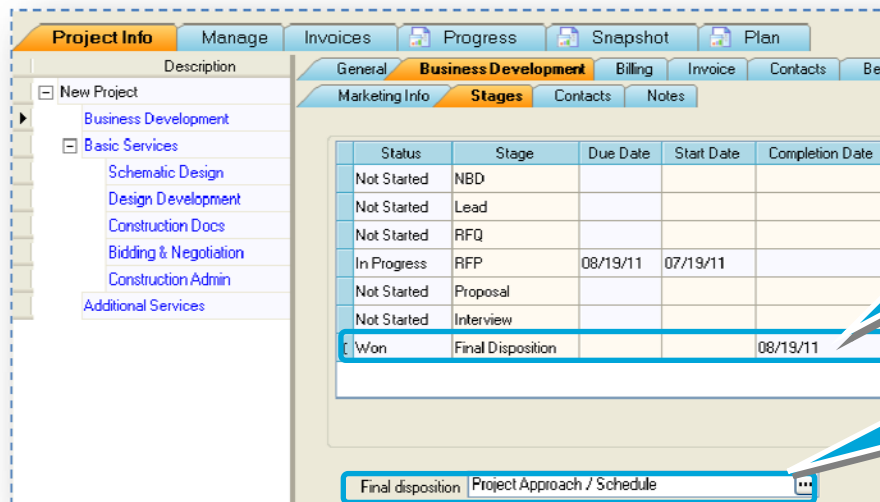
If you want to identify a task for the BD phase that is not part of the template, use the Manage tab.



Step 5: You've won!

Later on, you find out that your firm has won the project because of its fast-track schedule! Congratulations!

1. Click **Project Info** tab > **Business Development** subtab > **Stages** subtab.
2. Update the status of your BD effort so it appears on your project reports.



Change the status of the Final Disposition stage to Won and enter the date you won it.

In the Final Disposition field, enter the reason for the status. In this case, you won because of your schedule.

Step 6: Change the project status

On the Project Info > General tab, you can now change the project status to **Active** to indicate it is billable.

The screenshot shows the 'Project Info' window with the 'General' tab selected. The 'Status' dropdown menu is open, and the 'Active' option is highlighted. The callout box explains that changing the status to Active affects production phases but not the BD phase.

When you change the project status to Active, the status of all the production phases changes to Active.

The status of the BD phase remains Marketing.

Now that the project is billable, you can complete the detail for the project, such as budgeting and scheduling.

As you continue entering your BD efforts and projects in the Project Command Center, you are building the information you need to track wins and losses and to analyze your firm's BD efforts over time.

Summary

This lesson has shown you how to use a BD template to quickly start a project and to track your marketing efforts.