



Key Account Management

A use case for Merlin Project

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Executive Summary

ProjectWizards has been a leader in Project Management Solutions for the Apple business community over the past fourteen years. Our software, Merlin Project, is very well received by small, medium, and large organizations challenged with managing projects on the Apple Macintosh platform. About three years ago we have discovered a new approach with Merlin Project. We run in our software the Key Account Management as an integral part of the sales process in our own business. Another key component of this process, beside Merlin Project, is Evernote. This document describes how we run our sales process and how we are utilizing Merlin Project and Evernote to create the ultimate business experience.

Preface to the current version

This is actually the third version of this template. We still run the Key Account Management with this template with huge success, knowing the fact it is not a usual usage of a project management software. Nevertheless, or precisely because of this, we are very proud that more and more users are enjoying and benefiting from this template. So we have finally decided to offer this template as bookware. It comes with this documentation and all needed files for download. It will be sold for a one-time fee. In case you believe you should be entitled for a free update, please contact <sales@projectwizards.net>.

In this version, the new features of Merlin Project 5 have been adapted. You can now work comfortably in the kanban board and drag the leads from left to right as the process progresses. Of course, the familiar outline view is still available.

Our Challenge

ProjectWizards is currently selling our software, [Merlin Project](#), through the well designed and intuitive shopping cart in our application. However, there are a number of customers who cannot order online, because they are working in a larger enterprise environment with rules, regulations, and strategy specific to the organization size, requirements, and industry. The bottom line is we need a special proven sales process for these customers!

"This is quite naturally a job for a [CRM](#) system. Go get [Daylite](#) and you're done!"

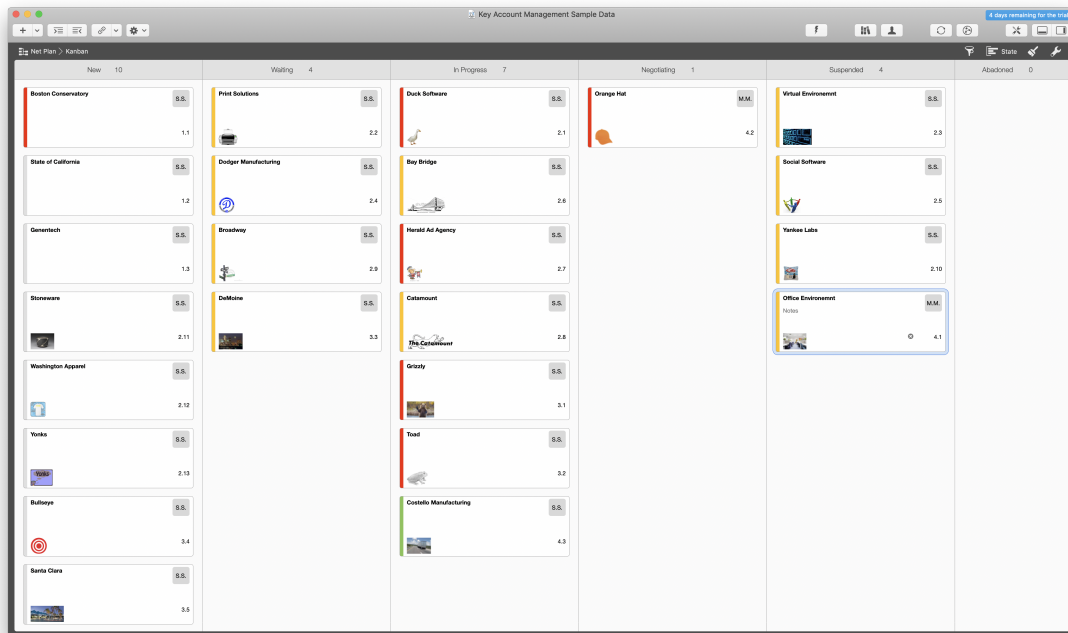
— Frank Blome, CEO ProjectWizards

Frank was right and wrong in the same time. The Daylite product – even with its fantastic quality – was way too large for our organization. We have only used about 2% of the features, but have had the load of the full application. In addition to Daylite, we tested a bunch of other CRM applications against our requirements. To keep a long story short; they all failed for us. Eventually we discovered a tool within our own product offering and relearned the golden rule: *Eat your own dog food!*

The challenge is managing our sales process over time to mirror the buying process of our enterprise customer community. It is normal for the process to take three to six months

with a lot of communication resulting in a successful business relationship. ProjectWizards has developed the Key Account Management template in an effort to meet this challenge.

Merlin Project



You know [this](#):

"If you plan complex projects, you won't get far with a simple list of tasks. Good planning raises questions about the dependencies of activities on each other, the impact of delays on the project completion date, and budget planning."

— ProjectWizards website

But, what if all you need is a simple list of tasks?

Since Merlin Project was designed with the entry level project manager in mind as well, many of the features are hidden at first glance. So it was very easy for us to customize the tool for our needs. Later in this article you will find the changes in detail and how we are doing this.

Merlin Project empowers the ability to import this data at an enterprise level, assign a financial value, and apply a proven probability by sales stage resulting in an accurate sales pipeline that we can rely on to grow our business. Merlin Project has the ability to integrate with Evernote within the interface. We can even create custom links back to the contact data within our pipeline.

Evernote

And then there is [Evernote](#) – or any other note taking app with the ability to get linked by URLs from the outside. Our team has become addicted to this platform over the past few years. All of our activities are, more or less, tracked in Evernote notebooks. We are documenting all company stages in dedicated notebooks including business strategy, development, marketing, support, as well as sales.


Sascha Schmidt - Writer Publications — Evernote Premium







Qualification click to add tags

Helvetica Neue 14 B I U A

You are editing a note that is shared with 2 people

Sascha Schmidt - Writer Publications

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Birthday:	September 28, 2015
Region:	NorthEast - USA
Vertical Market:	Manufacturing
Deal Size:	\$75,000
Merlin Project Partner:	<input type="checkbox"/> Ambassador <input type="checkbox"/> Reseller <input type="checkbox"/> Trainer

  D Insert Date	Ctrl +  + U Insert bullet point list	Ctrl +  + O Insert numbered list	  H Insert horizontal line
--	--	--	---

5 Aug 2015

- Responded Marketing Campaign
- Schedule Visit Next time in New York

Our sales team has been experimenting over the past years with how to document customer activity. It is some sort of CRM, but not in the classical sense. We don't run huge campaigns; we don't need a wide range of analytics concerning our contact data. For us, CRM means more of a key account management following a process. And therefore the discipline #1 is documentation.



In case you don't like Evernote or cannot use it for some reason, you also can utilize any other documentation application which is able to provide hyperlinks over an URL. In this case please use the word "Evernote" as a place holder in this document.

Merlin Project & Evernote Integration

As long-term users of Merlin Project, we have tested the boundaries of project management on the Mac platform. Today we have a vision of managing our customer sales process with Merlin. Merlin Project has the ability to manage tasks and activities over any given period of time. It also provides the ability to track a financial component within each of the managed tasks or activities in the sales pipeline. You may import custom images and logos into Merlin Project that makes it easy on the eyes to track sales process activities.


Features of the Key Account Management template

Here are the main columns built into our sales process and how to set them up for the perfect experience.

Activity: User-defined

Icons: Checklist, Link, List, Percentage, Menu, Edit

Tags Fields

Title	Value
City	New York, NY
Country	USA
Evernote	
Forecast	\$72.000,00
Impression	Warm
Logo	
Propability	25 %
State	Waiting
+ -	
Type	<input type="text"/>
Variant	<input type="text"/>
Unit	<input type="text"/>
Summary	<input type="text"/>

(Number)

This is an optional number field which creates an unique number for each row. This can be used for easier reference in communication.

Logo

Click in this cell and paste an image from the clipboard or drag and drop any image file into this cell. We are using this for easier identification of our prospects and clients.

Title

Give your key account a proper title. This can be the campaign or just the company name.

City & Country

Since sales is a global job today we do need the rough orientation where our clients are located. Details, like address and contacts are stored in the notebook.

Impression

An attempt to give the so called gut feeling a measurable value. We differentiate between cold, warm and hot. This is clearly a soft detail and you can use with your own meaning.

Sales

Assign your key account manager or sales person responsibility for the customer activity.

Started

Enter the starting date to identify how long the sales process will take.

Forecast

Enter the estimated revenue value of the customer activity.

Probability

We have built a percentage value by sales stage as an effort to estimate the revenue value of our customer activity in the pipeline.

- 10% - Identify
- 25% - Qualify
- 50% - Develop Relationship
- 75% - Propose
- 100% - Close Revenue

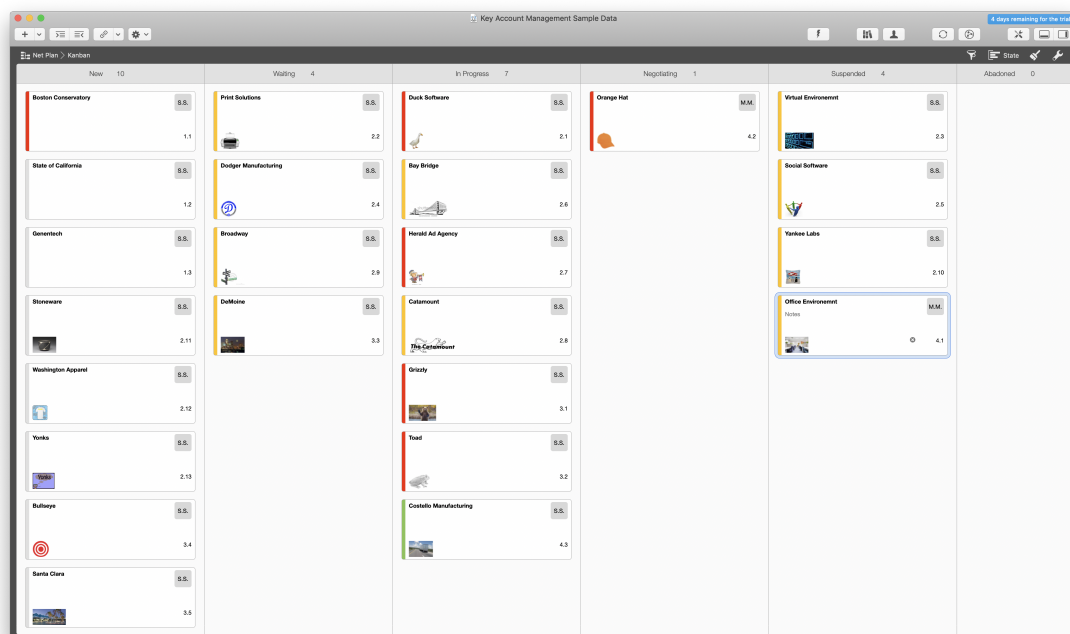
But of course, you can customize percentages and customer activity stages to your specific needs.

State

In this list we are describing the current state of the deal. Per default these values are listed:

- New
- In Progress
- Negotiating
- Waiting
- Suspended
- Abandoned
- Lost
- Won

The perfect view for the sales states is the Kanban board.



Evernote

This field takes the link from Evernote. Copy the note URL in Evernote ([see also this hint](#)) and paste it into the Merlin Project field...

The Sales Stages

The best tools are not worth using unless you have a clear strategy on how to use them. ProjectWizards has built a workflow with Evernote & Merlin to manage five distinct sales stages. These are:

- Identification
- Qualification
- Develop Relationships
- Propose Solution
- Close Business

There are many different sales models out there in the market, but we have proven this model to be effective for ProjectWizards. The perfect view for the sales stages is the Work Breakdown view.

#	Title	City	Country	Sales	Started	Forecast	Probability	State	Evernote
1	► 1. Identification			Stephen Salt					
5	▼ 2. Qualification			Stephen Salt		\$629,000	28,85 %		
6	► Duck Software	Portland, OR	USA	Stephen Salesman	31. Jul 2015	\$33,000	25 %	In Progress	
7	► Print Solutions	Inver, CA	USA	Stephen Salesman	31. Jul 2015	\$9,000	25 %	Waiting	
8	► Virtual Environment	Atlanta, GA	USA	Stephen Salesman	31. Jul 2015	\$42,000	25 %	Suspended	
9	► Dodge Manufacturing	Redwood Shore...	USA	Stephen Salesman	31. Jul 2015	\$18,000	25 %	Waiting	
10	► Social Software	Menlo Park, CA	USA	Stephen Salesman	31. Jul 2015	\$60,000	25 %	Suspended	
11	► Bay Bridge	San Francisco, CA	USA	Stephen Salesman	31. Jul 2015	\$120,000	25 %	In Progress	Frank Blume - Ba...
12	► Herald Ad Agency	New York, NY	USA	Stephen Salesman		\$110,000	25 %	Negotiating	
13	► Callamout	Burlington, VT	USA	Stephen Salesman	6. Aug 2015	\$18,000	50 %	In Progress	
14	► Broadway	New York, NY	USA	Stephen Salesman		\$72,000	25 %	Waiting	
15	► Yankee Labs	New York, NY	USA	Stephen Salesman	24. Aug 20...	\$12,000	50 %	Suspended	
16	► Stoneware	Portland, ME	USA	Stephen Salesman	1. Sep 2015	\$90,000	25 %	New	
17	► Washington Apparel	Bedford, MA	USA	Stephen Salesman	25. Sep 20...	\$15,000	25 %	New	
18	► Yonks	Inver, CA	USA	Stephen Salesman	25. Sep 20...	\$30,000	25 %	New	
19	▼ 3. Develop Relationship			Stephen Salt		\$237,000	33,33 %		
20	► Grizzly	Burlington, VT	USA	Stephen Salesman	6. Aug 2015	\$18,000	50 %	In Progress	
21	► Toad	New York, NY	USA	Stephen Salesman		\$72,000	25 %	In Progress	
22	► McMaine	New York, NY	USA	Stephen Salesman	24. Aug 20...	\$12,000	50 %	Waiting	
23	► Bulseye	Portland, ME	USA	Stephen Salesman	1. Sep 2015	\$90,000	25 %	New	
24	► Santa Clara	Bedford, MA	USA	Stephen Salesman	25. Sep 20...	\$15,000	25 %	New	
25	► White Dot	Inver, CA	USA	Stephen Salesman	25. Sep 20...	\$30,000	25 %	New	
26	▼ 4. Propose			Mike Money		\$73,216	58,33 %		
27	► Office Environment	Hamburg	Germany	Mike Money mover	5. Feb 2014	\$17,500	50 %	Suspended	
28	► Orange Hat	Hamburg	Germany	Mike Money mover	1. Jan 2015	\$40,000	75 %	Negotiating	
29	► Costello Manufacturing	New York, NY	USA	Stephen Salesman	11. Mar 20...	\$15,716	50 %	In Progress	
30	► 5. Close			Stephen Salt		\$212,856	100 %		

Of course you can modify the sales stages and adopt them to your needs.

Identification

The ProjectWizards sales team initiates the sales process by identifying prospective clients that have a need for project management software. All new business opportunities are entering our process at this stage. A new opportunity does not need a detailed description, but does require some basic information prior to the qualification stage.

- How to identify existing clients?
 - Usage Based Model

- Web Demonstration
 - Technology Update
 - Establish referral exchange based on trust!
- How to identify new prospective clients?
 - Network Events
 - Community Development
 - Technology Meetups
 - Events
 - Social Media
 - On-Line Meet-ups
 - Linkedin
 - Twitter
 - Facebook
 - News Blogs
 - Tools
 - Jigsaw
 - Email Campaigns
 - Call Campaigns
 - Time Management

Qualification

Once an opportunity is identified it needs to be more qualified. The process of qualifying an opportunity includes funding to purchase the solution, a point of contact with decision making power, a specific need described by the customer, as well as a time frame that the solution will be needed. It is imperative to understand these elements prior to defining who is a good prospect for ProjectWizards to engage. Examples of questions we ask to engage the prospective client in the Qualification process are:

- **Budget:** How will the project be funded?
- **Authority:** What is the process to purchase?
- **Need:** What problem do we solve? What happens if we don't solve the problem?
- **Timing:** When does the project need to be completed? What happens if we miss the timeline?

Develop Relationships

The correct qualification of a prospective client will result in an opportunity to develop a relationship that will result in a mutual exchange of value. This stage also offers us the opportunity to re-engage in qualification throughout the sales process.

Unfortunately, the sales process is fluid and can change quickly. It is always in our best interest to confirm information while building the relationship over time. Here are some examples of how we can confirm information are asking for the same information with a different question.

Confirm the:

- **Budget:** What does the finance team think about our solution?
- **Authority:** Can you sign this NDA to provide a Technology Update?
- **Need:** Does our value proposition make sense? If not, Why?
- **Timing:** Has anything changed since we last presented? Why can't we place the product/service on order today?

Propose Solution

We can not propose to purchase a solution until we have confirmed the budget, authority, need, and timing of an opportunity. In fact, if we do propose prior to the prospective client being ready, we will be wasting our time and potentially giving away an unnecessary discount. It is important to propose only opportunities that have been qualified. It also helps to foster a relationship that will generate a positive reference with long term business opportunity. We base this relationship on a consultative approach. We need to build our solutions based on value that solve a compelling problem. If we propose our solutions based on true compelling value to the prospective client they will be more than happy to pay full price.

Rule One:

- Consultative Approach
- Tie all proposals back to Qualification & Development.

Rule Two:

- Build Compelling Value
- Custom Proposal built for business specific need.

Rule Three:

- Promotional Discounting Events
- Work Smart. Only propose discount when value is confirmed.

Rule Four:

- Use Your Resources
- Executive Leadership, Training, Sales Support.

Close Business

The closing stage of our sales process should be the easiest part of our process. If we have identified the correct point of contact, taken the time and skill to qualify the compelling need, built a relationship, and finally proposed a solution based on this qualification the deal will close itself. The closing process becomes easy by targeting the correct points of contact with funding and a problem to solve.

Rule One:

- Strong Value Proposition
- Confirm the reason why the client is buying.

Rule Two:

- Process
- Confirm process with detailed time line.
- Who will order? When do they plan to purchase?
- Follow Up

Rule Three:

- Build a Referencable Client
- Ask for reference at the time of purchase:-)

Usage in Evernote

Based on an idea of our fellow partner [Falk Schmidt](#) we have created a template for Evernote, which can be easily integrated in your personal Evernote. But again, every other tool which offers URL links to certain notes will work too.

Share

Helvetica Neue 14 B I U

First and Last Name
Company
Position & Role

Phone

Mobile

Email

Web

Address

Region

Vertical Market

Information

Options
☐ Newsletter ☐ Decision Maker ☐ more...

Insert Date Ctrl + ⌘ + B Ctrl + ⌘ + O ⌘ + H
Bulletpoint-Liste Numbered Liste Horizontal Linie

26 October 2015

- First note...
- Second note...

Beside of the visible fields and options we are using a few additional features in Evernote:

Tag

We use the “Tag” feature to track those activities over time with the key words that are important to our organization.

Reminders

Reminders are built into the activities to manage tasks associated with any daily event.

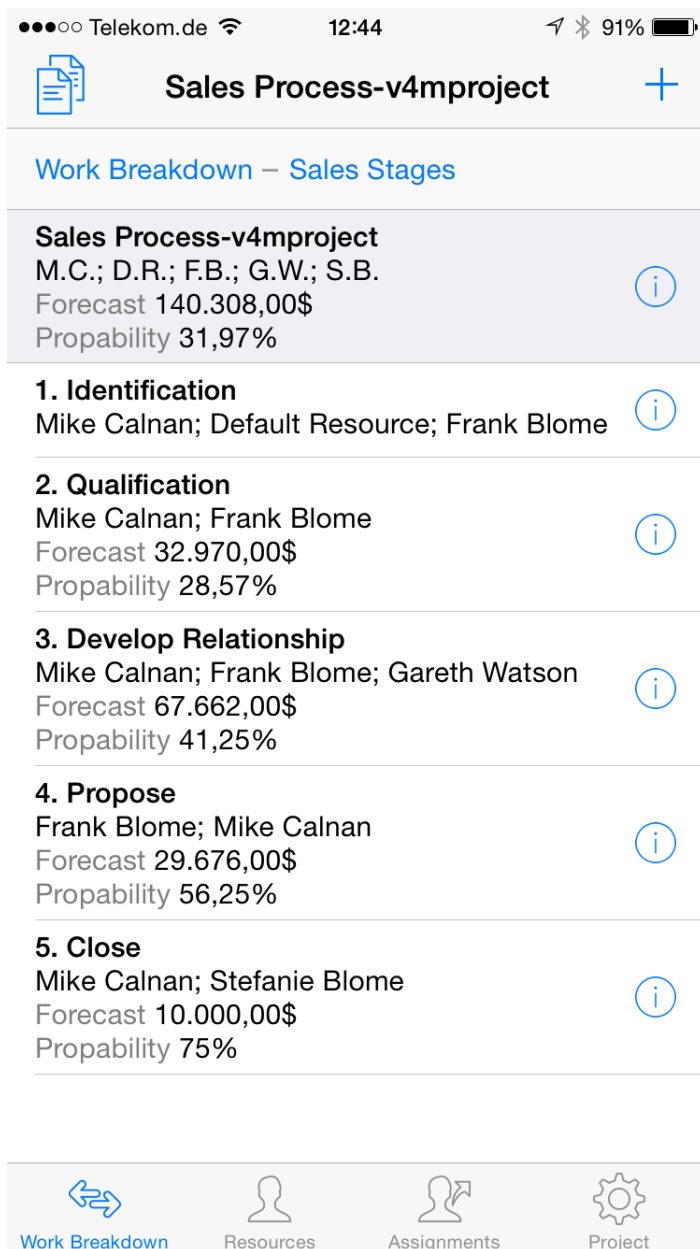
Photos

We have even standardized on using photos as a key component of our contact data. This is a psychological trick: It helps the sales person very much to focus on a customer. But be aware; there is something like a General Data Protection Regulation (GDPR) to respect.

The future

ProjectWizards will soon release a new iOS solution [Merlin Project Go](#) – specialized for the

iPad. Then you can use this template as well on your iPhone and iPad.



As soon as the iOS app is available in the App Store you will get a free update of this document and - if needed - of the Merlin template.

Conclusion

The Apple business community has enjoyed managing projects with Merlin since 2004. We welcome the opportunity to service your sales process with the Merlin Project Key Account Management template.

Some of you might have different opinions about how your organization manages a sales process. This is quite normal. It is a matter of fact that there is more than one way to success. We welcome any questions or feedback in response to managing an enterprise sales process with Merlin!



If you need help for the standard usage of Merlin Project please refer to the documentation, which is available from within the Merlin Project "Help" menu and [online as well](#).