affinity

A PRODUCT GUIDE FOR CONSULTING FIRMS

Secure client engagements more quickly with Affinity Analytics

Visualize, evaluate, and optimize your project pipeline

Turn your contacts into projects

Are you using your CRM data to build new client relationships and expand your relationship with existing connections?

Affinity Analytics is the Affinity CRM's interactive, automated reporting tool. It is available to all Affinity Premium customers. By providing easy-to-understand visualizations of complex data, Affinity Analytics enables your consulting firm to:

- Turn your raw data into insights your team can use to improve project and relationship management
- Improve project pipelines by monitoring your team's KPIs and deal trends
- Uncork bottlenecks to improve business development workflows
- Gauge deal flow over time
- Nurture your most important business relationships

This guide highlights some of the many ways consultants use Affinity Analytics to make their prospecting and pipeline management more efficient and close more business.

Fill your pipeline with high-quality deals

Every client journey begins with a new connection, and making quality introductions and communicating with them at exactly the right time ensures you're able to turn contacts into contracts.

The Affinity CRM platform automatically captures relevant contact and deal information, including source of introduction and frequency of communication.

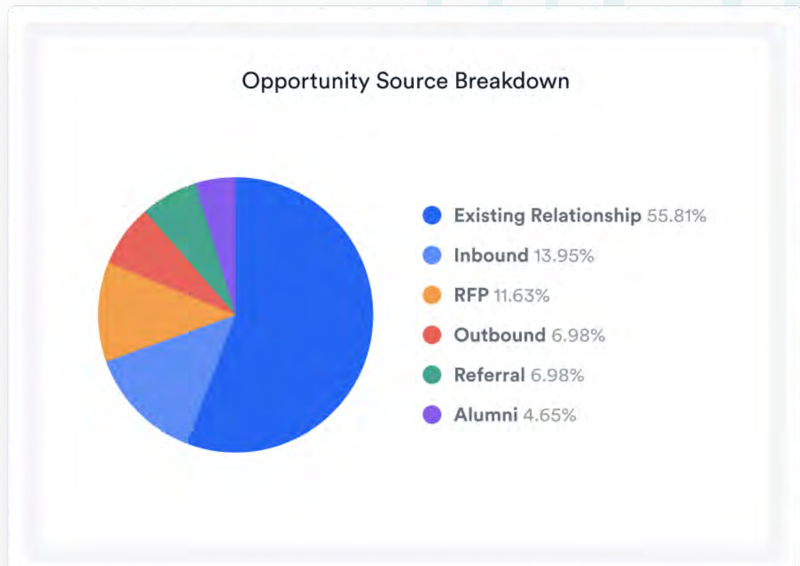
You can use this data to get a bird's-eye view of which internal and external partners are making the highest-quality introductions by reviewing referral source data alongside opportunities created by your deal team.

Diving a little deeper, you can then determine how long those deals have been in your funnel and how many emails or meetings it typically takes to close a new project.

Evaluate your team's prospecting to ensure your project pipeline is healthy, and find new tactics for improving top-of-funnel opps generation.

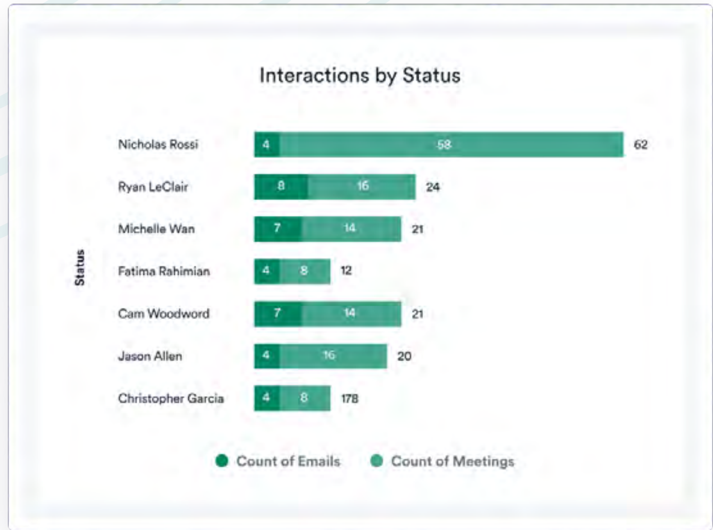

Source of Company Introductions

	Source of Introduction	Count of Organizations
1	Nicholas Rossi	280
2	Ryan LeClair	242
3	Michelle Wan	221
4	Fatima Rahimian	197
5	Cam Woodword	190
6	Jason Allen	183
7	Christopher Garcia	178
8	Christine Choi	156
9	Samantha Logan	147
10	Noelle Barry	135
11	Matthew Ortego	74



Meeting Occurred (To Discuss) > 7 Days

	External Participant	Count of Meetings
1	Heidi Tao	18
2	Cheryl Morrison	12
3	Jameson Roy	12
4	Sam Webber	8
5	Patrick Colson	6
6	Gene Kelley	6
7	Leonardo Biagio	6
8	Gary Reed	6
9	Sabrina Chang	5

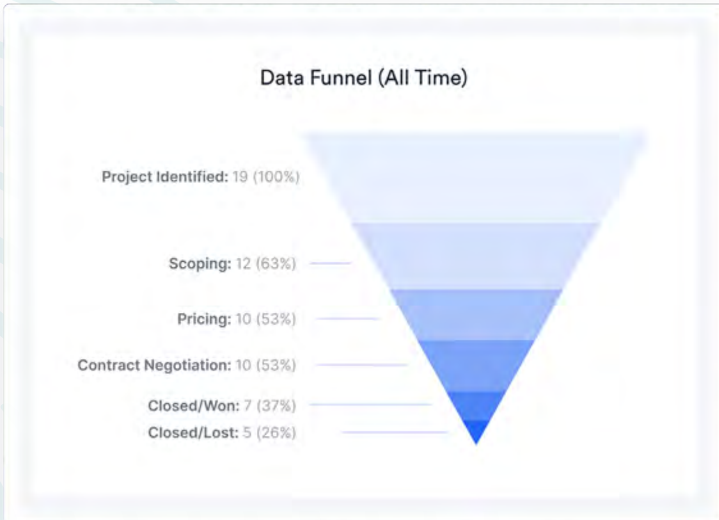


Nurture your most important business

A quality opportunity doesn’t always mean a new deal. Consistently following up with your top prospects and clients to nurture those relationships can improve your likelihood of closing more business or growing revenues from an existing client.

With data on meeting volume, total emails sent, and the date of your previous touchpoint, you can visualize the complete story of your engagement with a contact. Set Affinity Analytics Alerts to notify you if a priority contact has gone too long without a check-in.

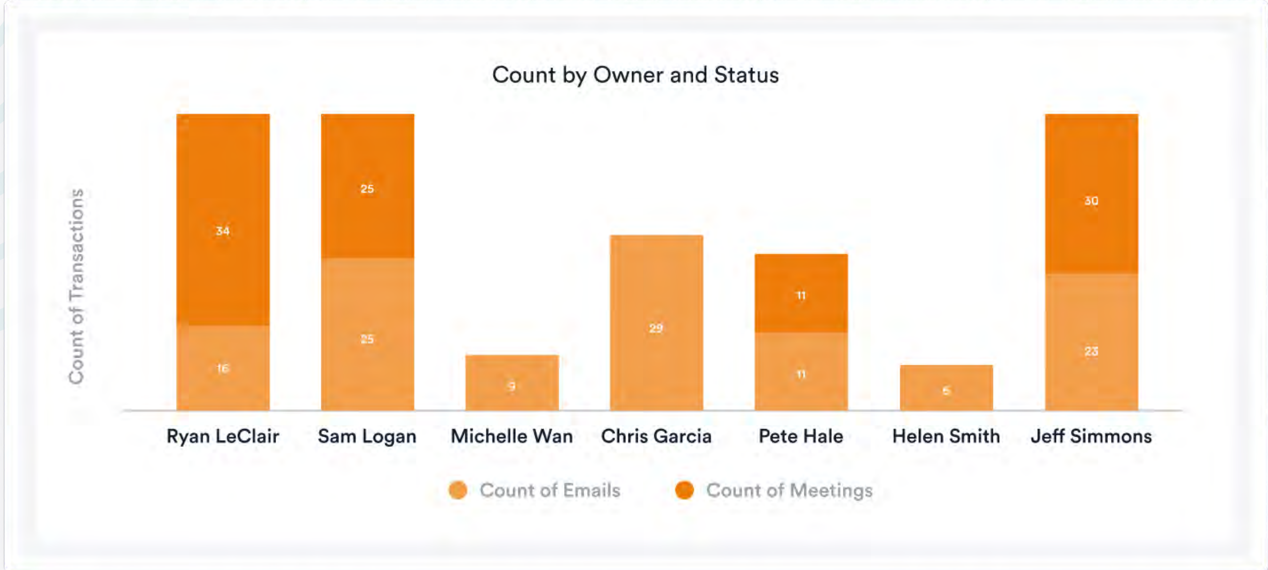
Reviewing whom you’ve spoken with, and where in the funnel an opportunity sits, tells you when to reach out and how to move the deal forward.



Make process improvements to effectively meet your goals

With an influx of inbound prospects and dozens of relationships to manage, it can be easy to lose focus on your team-wide or company-wide KPIs. Identify where opportunities are getting lost in your project pipelines and which types of opportunities are more likely to close. Set Alerts to automatically notify you when goals aren't being met.

Dive into the details of each "won" or "lost" deal to better understand your ideal customer profile and adjust future prospecting accordingly.



Visualize team operations to help them focus their efforts

The engagements in your project pipeline are only as successful as the team managing that pipeline. Deal data doesn't end with prospecting details and win/lose ratios, it includes tracking and evaluating team performance.

Learn how team bandwidth changes over time, who on the team is doing the most prospecting, and who is closing the most deals so you can allocate resources accordingly.

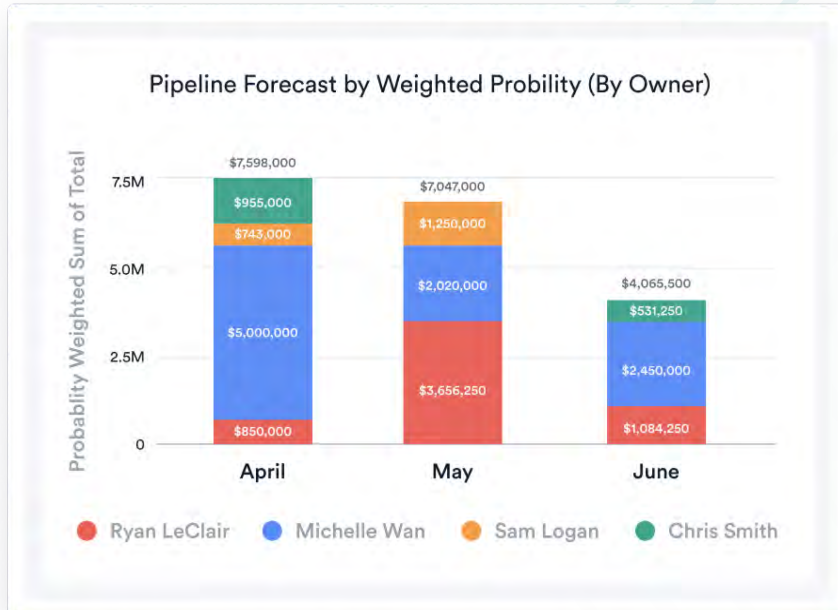
Measuring progress and wins for each team member lets you understand and share what's working and what isn't.

Forecast revenue more accurately

Combine data gathered on team activity and past deal performance to make better projections about your project pipeline, then anticipate and solve problems that may occur.

Look back on your average deal size and your contact volume to see if you're spending the right amount of time with your biggest opportunities. Get answers to questions like: do we need to source more deals, focus on existing clients, are deals getting stuck for too long at a single stage?

Using project close dates in combination with funnel activity provides a clear sense of where pipeline improvements should be made.



These are just some of the many ways consulting firms are already using the Affinity relationship intelligence CRM and Affinity Analytics to make more efficient use of their team's resources, keep track of their business network, and source and pursue more valuable deals more quickly. Affinity can help your firm do the same.

Contact a customer success manager at info@affinity.co to:

- Learn how to customize Affinity Analytics to best support your analytics requirements.
- Upgrade to Affinity Premium to get access to Affinity Analytics—now with Team Activity data that further enhances the scope of its reporting.
- Upgrade customer support to Enhanced Support to access additional customization assistance.

Affinity: The relationship intelligence CRM designed specifically for consulting firms.

Learn more →