affinity

AFFINITY 101

How consulting firms can make the best use of the Affinity relationship intelligence CRM

Key features

Business Development with Relationship Intelligence →

Consolidate your outbound marketing efforts and enable your business development teams to harness relationship intelligence—insights into your team's collective business connections and client interactions that help you find, manage, and close more projects. Affinity's relationship intelligence gets the right person on your team connected to the right lead.

Relationship Management →

Turn your firm's collective business network into new opportunities by managing relationships, not just contacts. Automated, real-time data capture, synced from your email and calendar, means you'll have confidence in the accuracy of you contact information and save time by eliminating manual contact data entry.

Pipeline Management →

Visualize and customize your opportunity pipelines to build repeatable, successful business development systems and run meetings more effectively.

Business Intelligence →

Analyze your project trends with built-in, customizable reporting and analytics dashboards that can be easily shared with your team, senior management, and external partners.

Cloud-Based Access →

Access your project and contact data anywhere, any time, with the Affinity browser-based and mobile applications, so you can show up smarter to every meeting.

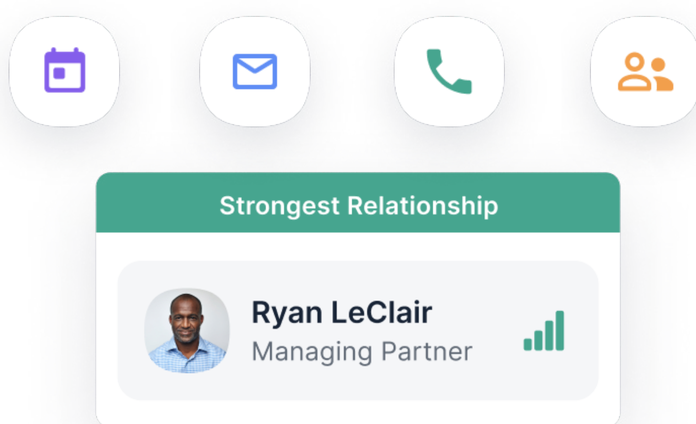
Business Development

Tap your organization's collective network and find the best path to introduction

Affinity is a relationship intelligence CRM that helps you monitor and nurture your firm's collective network: your coworkers, other teams in the organization, and C-suite executives all have valuable professional connections; now you have a platform that brings all those connections together. Save time in identifying the right introduction paths with **Relationship Strength**. Affinity computes a **Relationship Score** based on your team's interactions with every contact, so you can find the strongest paths of introduction to a prospect.

Surface relationship insights directly in your browser

View your **Relationship Scores** at any time right in your CRM, while browsing LinkedIn, or as you explore your prospects' websites. Use Affinity's **Pathfinder Chrome extension** to augment LinkedIn profiles and company websites so you always have the most complete picture of any company you're reviewing. See the true strength of your team's relationships and easily add prospects to an Affinity list—custom, spreadsheet-like contact lists—as you browse.



Proactively nurture your leads and keep your most important connections top of mind

Create an **Organization List** to track your top-of-funnel prospects and leverage **Reminder Triggers** to consistently nurture leads. Take action on an account sooner to ensure your most lucrative opportunities progress smoothly through your funnel, and use **Team Activity Reporting** to track your team's prospecting efforts as they work.

Identify targets for strategic outreach

Create a list of your (or your clients') target organizations or people by attribute and characteristics. You can narrow down your firm's collective network into targeted subgroups using Affinity's collaborative lists that update in real time.

Centralize guest contact management for event planning

Build lists of potential invitees, identify the strongest relationships to those invitees, and survey using **Relationship Scoring** to find the best person to send an invite. Track the RSVPs and attendance and easily update your team on progress toward attendance goals.

Save time and templatize email outreach

Easily execute personalized emails—both for individual emails and bulk communications—that automatically populate fields using information from your CRM.

Integrate with your email provider

Affinity's **Gmail Extension** and **Outlook add-in** allow you to see who on your team has had communication with a contact before you respond by automatically capturing inbound communications. You can also add the lead to your prospecting list, and set a reminder to follow up, all from the convenience of your inbox.

Work more collaboratively without overlapping

Activity Timelines provide an at-a-glance overview of a contact or opportunity's complete history with your team. A contact's **Profile View** will also surface relevant **connections** to your team, manually logged **notes**, and enriched datasets to expand your team's knowledge of a contact beyond your own network.

Integrate your tech stack

Connect your most important software tools to your CRM. Notes taken in Affinity can be shared via email or your team's messenger app. Sync email marketing tools like Mailchimp, automate file uploading with cloud storage apps, connect Affinity to other CRM tools like Salesforce and Hubspot, and more.

Relationship Management

Automatically capture contact data

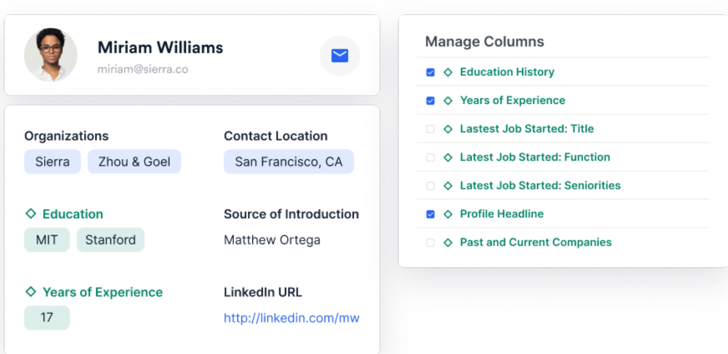
Keep your team focused on the relationships and projects in their network by automating contact and organization-related data capture. Affinity records your team's "data exhaust"—details pulled from emails, calendar invites, and meetings such as names, roles, industries, and sources of introduction—in your CRM so your team can spend time on people, not data.

Expand your access to industry data

Make better-informed decisions and ask more pertinent questions by enriching your team's data with **Affinity Data**—proprietary datasets that help reduce the cost of third-party data providers and the time your team spends on research. This data is incorporated into your **Activity Timeline**, **People Lists**, and **Organization Lists**, so you can spend more time focusing on building your relationships instead of manually searching for information. Email **support@affinity.co** to learn more about Affinity Data add-ons today to increase your data coverage.

Eliminate data silos

Take action on accurate relationship data no matter when it was uploaded. Affinity automatically extracts your historical contact information—dating back to the start of your inbox—at deployment, and you can import data at any time. Affinity also **removes duplicates**, so your data is always clean and accurate.



Pipeline Management

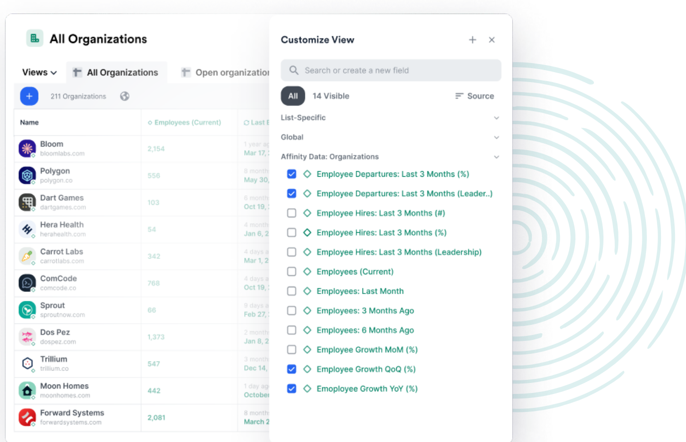
Build workflows that match how you prefer to work

Utilize **Opportunity Lists** to automate pipeline management; as changes are made to the list, other views and reporting dashboards are updated automatically. This includes custom data columns that can be used for anything your team needs to track, including estimated revenue, close date, or priority. Additional data points are enriched through our **Affinity data integrations**, further eliminating the need for manual data entry.

By building workflows that match your team's preferences on a user-oriented platform, you can make it easy to find the information they need and encourage adoption across teams. You can also easily customize lists and views to match the non-linear way in which potential projects move through the pipeline.

Enforce process integrity

Customize **Status columns** to fit your pipeline stages, use **Owners columns** to indicate which team members are involved with the deal, and build **Status Triggers** to ensure information stays up-to-date and members of your team know when they need to act. If an opportunity is set to the Lost stage, you can notify the **Owner** that they need to indicate a **Lost Reason**.



Simplify opportunity creation

Convert prospects on **Organization Lists** or **People Lists** into opportunities. Set **Opportunity Triggers** that notify your team to create an opportunity based on activity in **Lists**; this activity includes specific status changes or field updates that indicate a lead is moving through your pipeline.

Visualize your pipeline

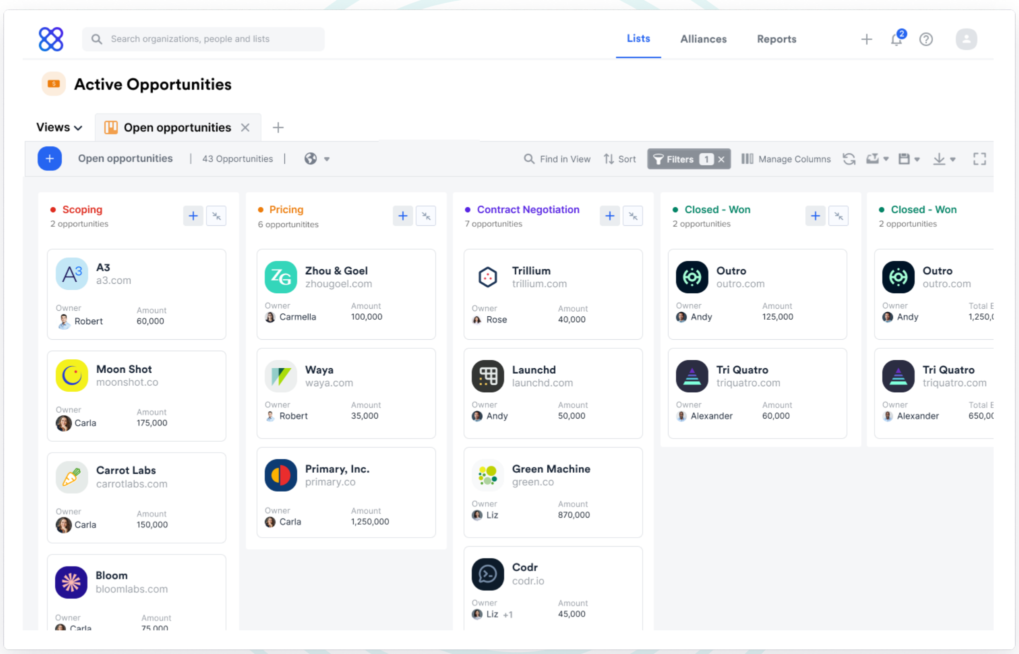
Make your data more accessible by visualizing your **List Views** in a **Board View**. Kanban-style boards turn cells of data into an easily presentable and shareable graphical layout that you can share with colleagues and senior team members to report on progress during your team meetings.

Sort and organize your data your way

Access the information that's most important to your workflows instantly. Filter your data, sort columns as needed, and save your unique configurations as **Views**. Each **View** has a unique URL that can be shared with a colleague or added to a team meeting agenda.

Consolidate file management

Keep all of your most frequently used pitch decks, contracts, and more directly in Affinity. Attach documents to contacts and organizations in your CRM and use **Affinity's Integrations** to sync your file storage software with your CRM.



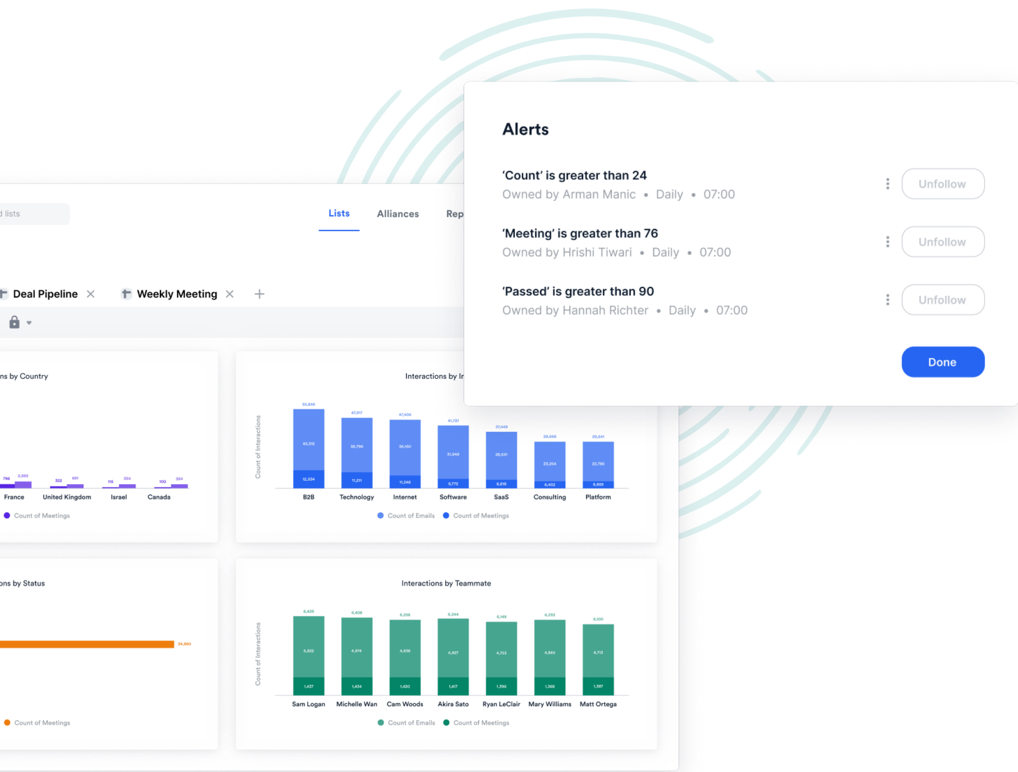
Business Intelligence

Report on and analyze your data

Turn your raw data into insights your team can use to improve project and relationship management. Create customized and automated reports on any dimensions of the data in your CRM with **Affinity Analytics**. Use this deeper understanding of your data trends to shape the future of your business.

Track, manage, and monitor KPIs

Improve your project pipeline by monitoring your team's performance goals. Identify where opportunities are being lost in your project pipelines, which types of opportunities are more likely to close, and set **Alerts** that automatically notify you when goals aren't being met.

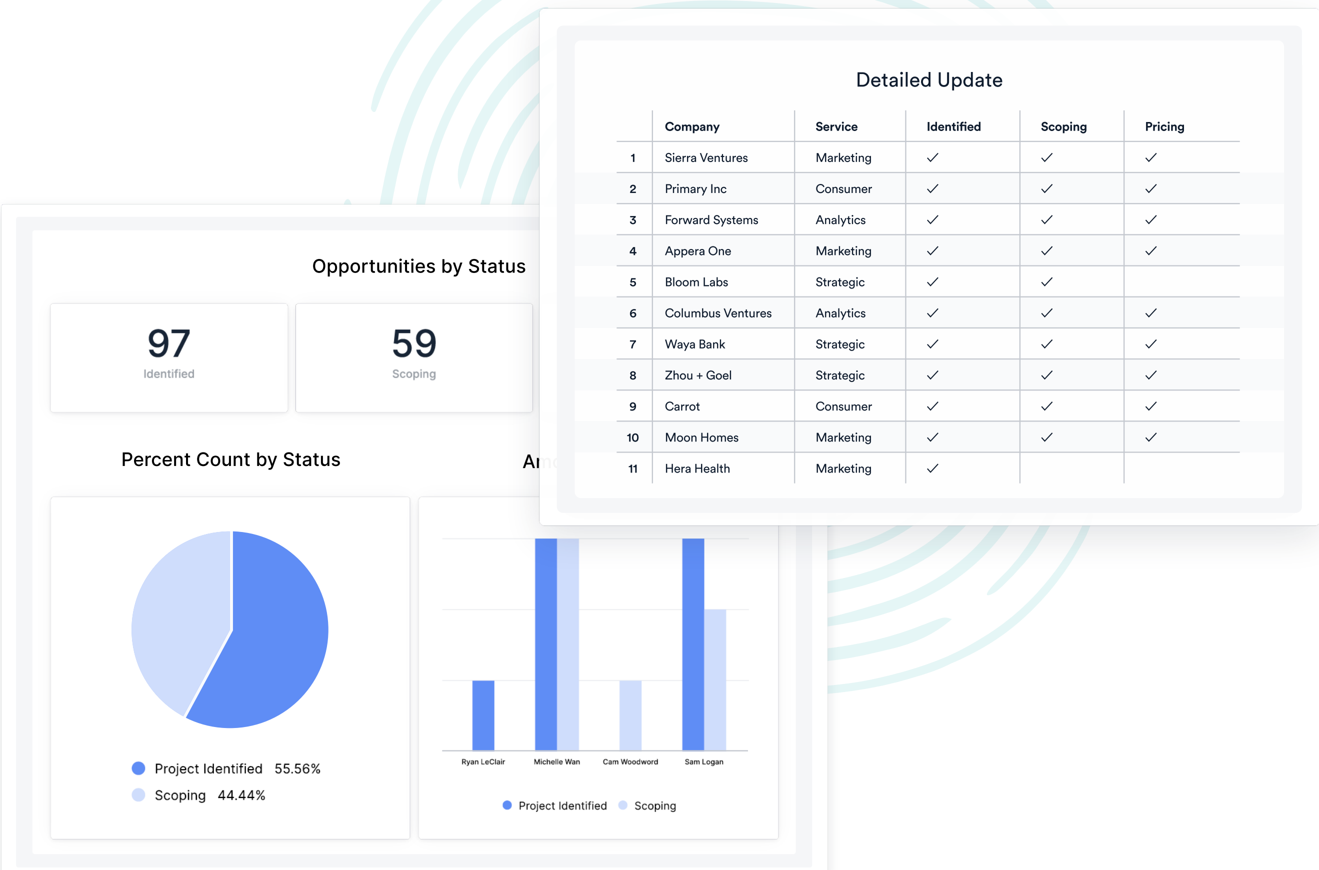


Use analytics to tell your story

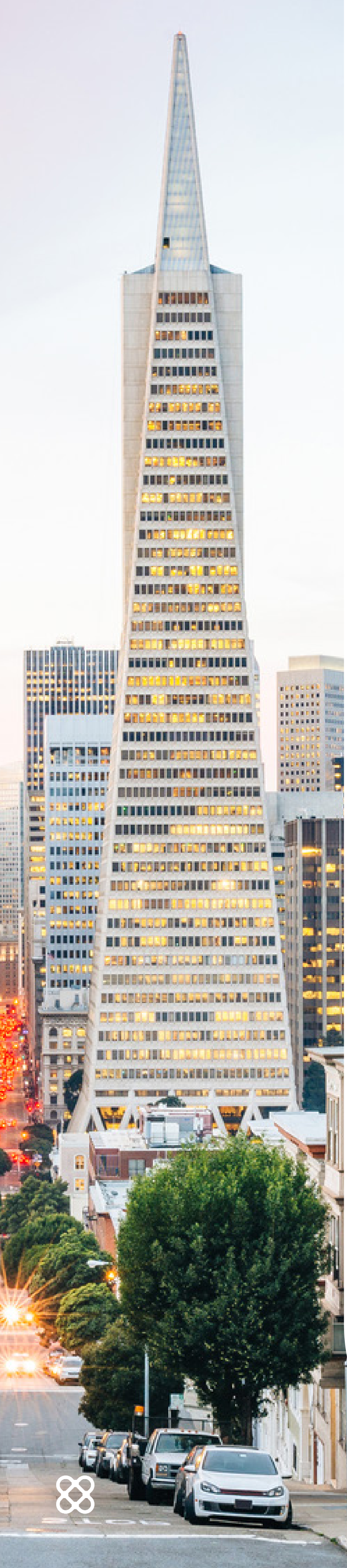
Demonstrate to prospects that they can trust your team to manage their project. Head into your next client meeting with an easy-to-understand dashboard of your history with similar companies and past performance.

Forecast your project pipeline

Combine data on team activity and past performance to make better projections about your project pipeline, so you can find a solution by anticipating where problems may occur.



	Company	Service	Identified	Scoping	Pricing
1	Sierra Ventures	Marketing	✓	✓	✓
2	Primary Inc	Consumer	✓	✓	✓
3	Forward Systems	Analytics	✓	✓	✓
4	Appera One	Marketing	✓	✓	✓
5	Bloom Labs	Strategic	✓	✓	
6	Columbus Ventures	Analytics	✓	✓	✓
7	Waya Bank	Strategic	✓	✓	✓
8	Zhou + Goel	Strategic	✓	✓	✓
9	Carrot	Consumer	✓	✓	✓
10	Moon Homes	Marketing	✓	✓	✓
11	Hera Health	Marketing	✓		



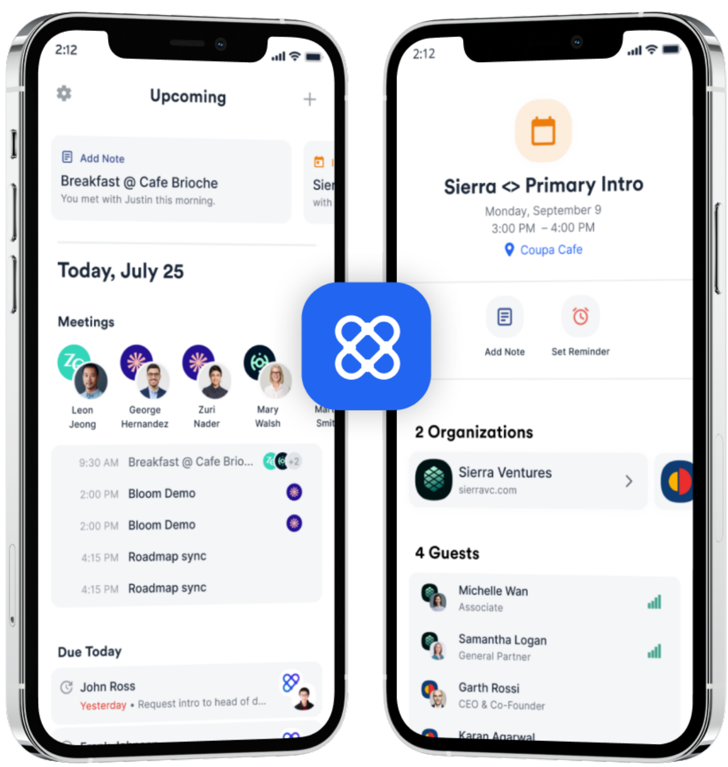
Cloud-Based Access

Show up smarter

Keep your data at your fingertips and access Affinity from your desktop or mobile devices, so you're always informed.

Access up-to-date data anytime, anywhere

Review your day's meetings and prep based on your **Notes** and **Activity Timeline** whether you're on the go, in the office, or at home.



Visit our Help Center for more tips and tutorials, reach out to your Customer Success Manager, or email support@affinity.co at any time.