

The "Screen Search" utility in Customer Frontline™ is a database query used by sales and marketing managers to find and count customers based on combinations of data. The results of a query provide quantified answers to a sales management question. For example, a screen search can be organized to count sales opportunities for grand pianos, or alto saxophone rental conversion prospects at a certain school, etc. The screen search can also be used to audit and count selling initiatives and activities grouped by sales associate, by store location, etc.

A description of how the Customer Frontline screen search works begins on this page. Some examples of how the screen search can provide data driven answers to a manager's questions are found on pages 4 - 6.

- Click "Screen Search" in the left toolbar of any customer record. A blank screen, as shown below on the right, will appear. The data fields on the tabs of a blank customer record are displayed with a command box on the left. A data command menu list appears when a command box is clicked. The selected command controls how the Customer Frontline search engine will consider the data in the commanded field. Screen searches can be organized by any combination of fields and commands. A data field is activated for a search when a command from the drop down menu is turned on and data is entered into the blank data field from either a field drop down menu or manually entered from the keyboard.

Command Box

Data Commands

BUYER

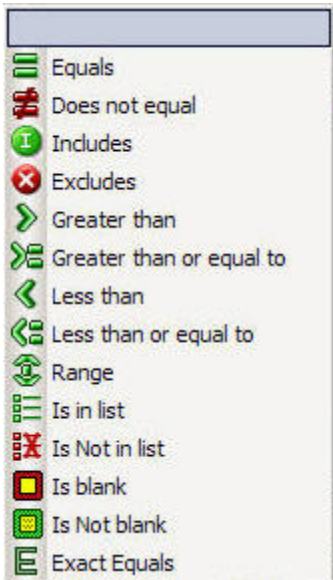
PLAYER

60374 Contacts

Note: a screen search can be directed to query Primary (Buyer) or Additional (Player) customer records or both. See the B&O and Combo User Guides for definitions of Buyer and Player customer records. Verify that these options are properly set for the query that you are about to launch.

Search command definitions

A selected data command controls how the data (alpha or numeric) in the commanded field are evaluated when a screen search is launched in Customer Frontline. See definitions below.



A search is “launched” by clicking the Start button in the upper right corner of the screen after all data qualifications have been entered in the search fields.

*Equals: considers the first and subsequent letters or numbers of data in the selected field. The letter “P” will find customer records with either Prospect or Partner in the field; customer records with either of these entries will be included in the search result. However, an Equals command with the letters “PR” would include Prospect but not Partner because the first two letters of Partner are not PR.

*Does not equal: excludes customer records per the example above.

*Includes: customer records with field entries that contain the entered search data, regardless of sequence, will be included in the search result. Example: “ap” in the city field would include customer records with Appleton and Wisconsin Rapids in the city data field because both names include the letters a and p.

*Excludes: excludes customer records per the example above.

Greater than: includes customer records with an alpha or numeric value that is greater than the value entered into the field.

Greater than or equal to: same as above, but will include customer records with the entered search value as part of the result.

Less than and Less than or equal to: the opposite of the previous two definitions.

Range: commonly used to search on date fields. The data entry must be formatted in an exact way. Example: find customers with a Next Contact date from October 1, 2010 to October 12, 2010. Format: 10/01/2010 to 10/12/2010. Press the Enter key after the formatted date range is entered.

Is in list: multiple data qualifiers can be entered with this command. Example: find all customers in three specified cities. The city names must be spelled correctly and separated by a comma: Wheaton,Aurora,Naperville will include customers from these three cities. Press the Enter key after entering a list of data.

Is not in list: excludes customers with a comma separated list of data as described above.

Is blank: finds customers with no data in a selected field.

Is not blank: finds customers with a data entry in a selected field.

*Exact equals: finds customers with data in the selected field that is an exact match to the search data entry. This is a more refined command as compared to the Equals and Includes commands above. Example: the letter P is entered as the search criteria. Only those customers with “P” will be included, not ap, pr, etc.

* see drop down menu explanation on page 3.

A screen search can be organized using any combination of fields from one or more tabs of the customer record: Customer, Profile 1, Profile 2. The AIMsi and Personal tabs can also be used for Customer Frontline systems linked to the AIMsi system. Using the screen search as a sales management tool requires that questions be “triaged” into data categories by description and qualification. Example: who are the customers assigned to salesperson ASLI? This question *describes* the salesperson data field and it is to be *qualified* for the search with the entry: ASLI.

There is one fact of life to be reviewed before we look at some management audit examples. The results of a screen search are determined by the accuracy and timeliness of the data entered into the customer records. Customer Frontline is a database program. Answers to sales and marketing management questions can only be generated from the data contents entered into customer records.

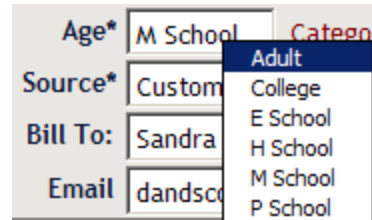
Some helpful hints when building a screen search with data field entries...

Always remember that a database is organized on simple logic. Customer Frontline will not find what you are *thinking* when setting up a screen search but only what is exactly entered into a data field. In other words, if you want to find customers for green widgets, but enter green wdgets, no customers will be found. It is for this reason that most data field names in a customer record are designated with an asterisk (*) or a down arrow. Either icon indicates that the data field has a drop down menu. Spelling mistakes like the widget example are minimized by using drop down menus to populate data fields when building a screen search.

Turn on the Screen Search utility (page 1):

A drop down menu for a data field with an asterisk or down arrow is displayed by left clicking the mouse into the data field, followed by a right click of the mouse. Highlight the appropriate menu item and left click the mouse to populate the data field, or press Enter on the keyboard.

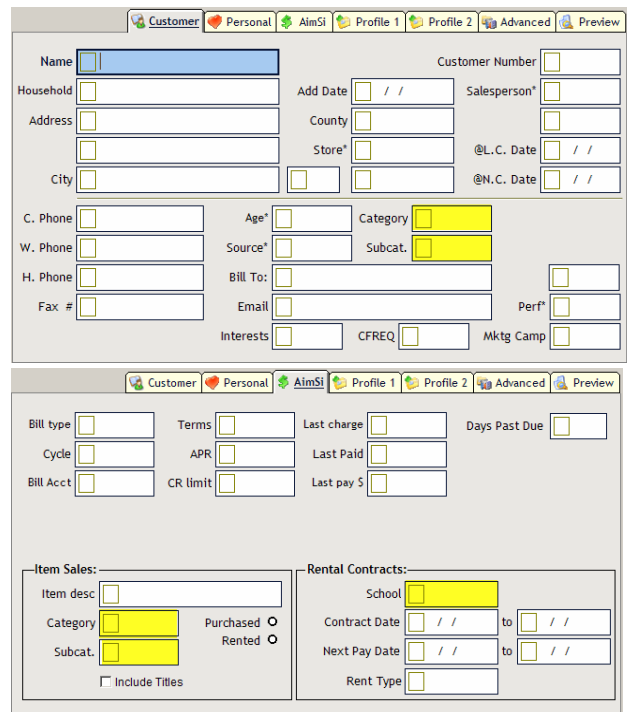
Note: using a drop down menu when selecting any of the five search commands on page 2 that are designated with an asterisk (*) will significantly increase the accuracy of your data search results.



For Customer Frontline systems linked to AIMSI

Notice the five fields in the search screens to the right that are highlighted in yellow. Customer Frontline searches these fields through the AIMSI system. Each of these fields has a list box that is populated by the defaults entered in your AIMSI system.

The AIMSI list box is displayed in the same manner as explained above: left mouse click followed by a right click. "Equals" and "Does not equal" are the two operative commands on these AIMSI fields.



There is no limit to the combination of data fields that can be included to build a screen search. Learning to identify and search for the data implied in a management question is necessary. The following scenarios explain the methodologies used to search customer data for answers to management questions.

Piano Dept. Scenario: we need to reduce our mid priced grand piano inventory before the end of the month. Management Question: who are the most qualified prospects to buy a grand piano in the 10,000–15,000 dollar price range assigned to sales person XADS at the EAS store that are past due for a follow up contact?

Finding a database answer to a management question requires a “trriage” approach. The data elements within the management question need to be identified and then qualified. There are seven data elements, underlined, in the sample question above. Here is the triage of the management question:

<u>Data Field</u>	<u>Data Qualifier</u>	<u>Data Content</u>
1. Rating	=	4P
2. Category	=	Piano Acoustic
3. Subcat.	=	Grand
4. Price Range	=	H) 10,000–15,000
5. Salesperson	=	XADS
6. Store	=	EAS
7. Next Contact Date	<	10/01/2010 (date of question)

The seven data fields are displayed below with the appropriate data qualifiers and data contents. The results of this search will provide the sales manager with a quantified answer to the question. With these results the manager can review the sales potential of each prospect with XADS in the EAS store and discuss closing strategies on an individual customer basis. The grand piano inventory can only be reduced one retail sale at a time!

Customer Frontline search form with the following filters highlighted in yellow:

- Price Range: H) 10,001-15,000
- Category: 10 Piano Acoustic
- Subcat.: 10 Grand
- Rating: 4P
- Store: EAS
- Salesperson: XADS
- Next Contact Date: 10/01/2010

Customer Frontline search form with the following filters highlighted in yellow:

- Price Range: H) 10,001-15,000
- Category: 10 Piano Acoustic
- Subcat.: 10 Grand
- Rating: 4P
- Store: EAS
- Salesperson: XADS
- Next Contact Date: 10/01/2010

Four Piano Prospects have been located through the Customer Frontline screen search that answer the seven part sales management question.

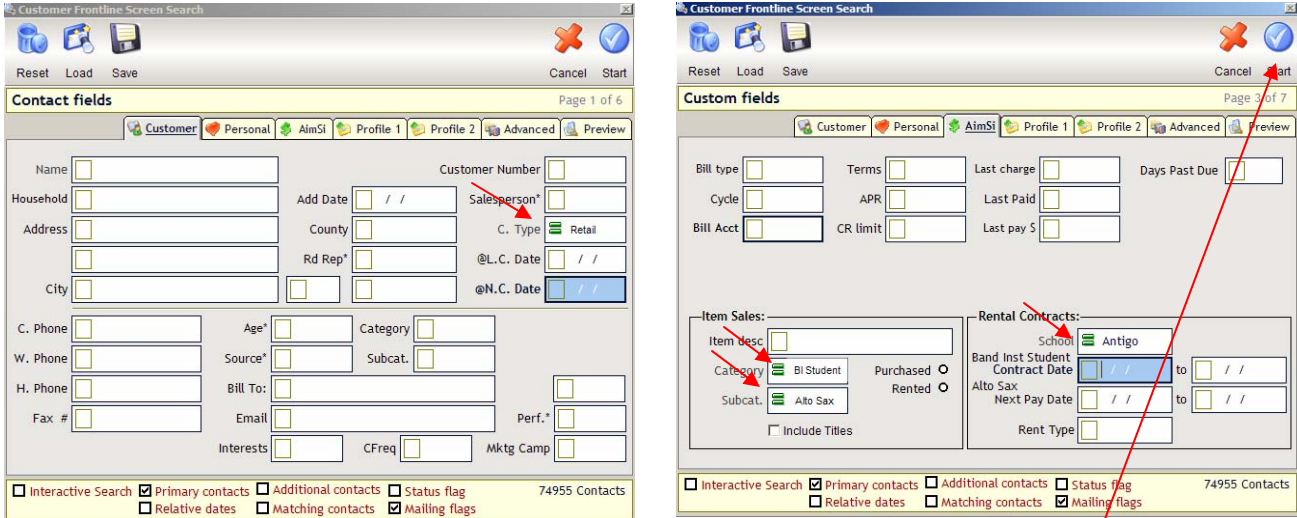
This is an example of what database management is all about. It’s not about managing a database, it’s about finding sales opportunities based on data. Data serves as the basis for discussions and decisions between sales managers and sales staff.

Customer Frontline search results showing 4 records. The first record is highlighted:

- Name: Fred O. Glsnevich
- Household: 123 Main St, Las Vegas, NV 89123
- County: CLARK
- Store: EAS
- City: Las Vegas
- Zip: 89123
- Category: Piano Acoustic
- Subcat.: Grand
- Rating: 4P
- Salesperson: XADS
- Next Contact Date: 09/21/2010

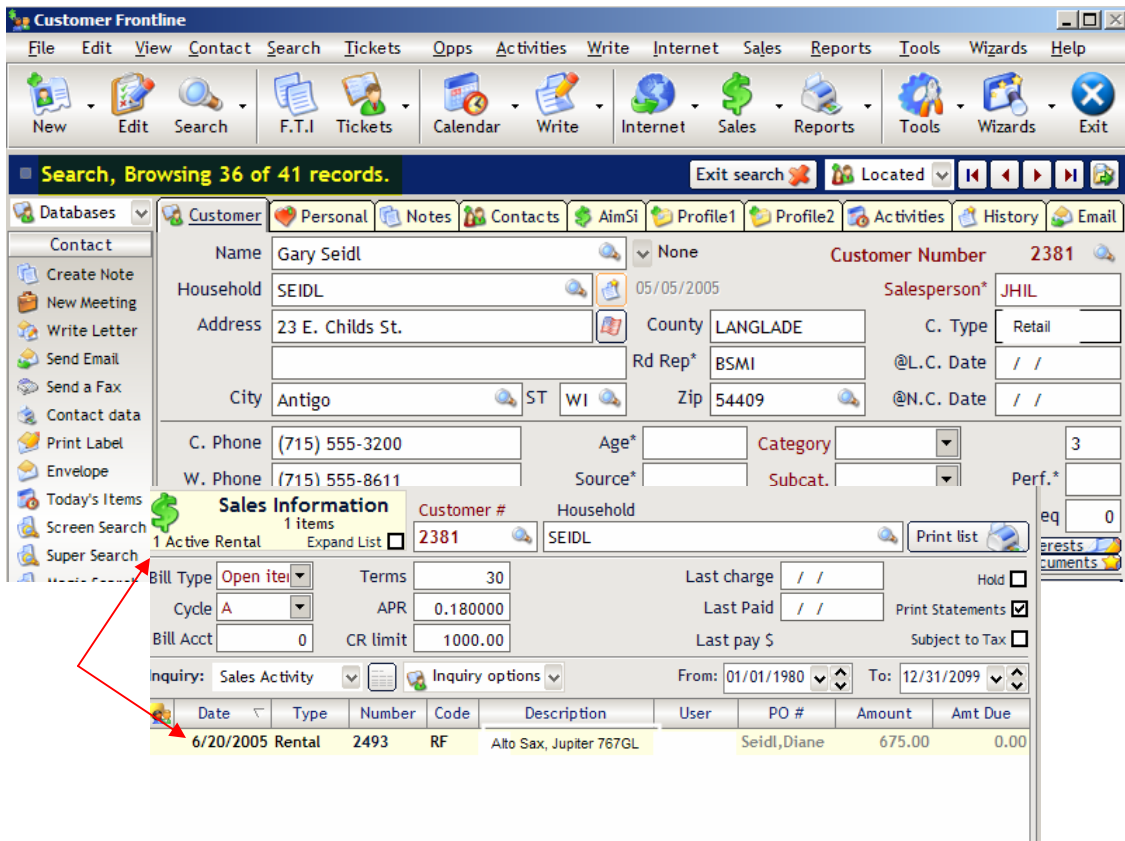
Each of the departmental databases in Customer Frontline system are designed with unique data fields and field drop down menus to answer management questions that are specific to that department. The scenario and management question above is unique to the Piano Dept. Scenarios and questions for the B&O and Combo Gear Departments are outlined on the next two pages.

B&O Dept. Scenario: we want to conduct an Alto Sax display for rental customers at Antigo School. Management Question: who is renting an Alto Sax that attends Antigo? Notice that this question has four data elements required for the screen search: Customer Type, Product Category, Product Sub-category and School. All four data fields are qualified with an Equal sign as shown below:



Click the "Start" button in the upper right corner to launch a screen search.

See the screens below, notice that there are 41 rental customers who match the search criteria specified above. The rental instrument is listed in the transaction history displayed on the AIMsi tab of the customer record. With this screen search in place these 41 customers can be invited to attend the display event by using Customer Frontline to merge form letters and envelopes or to send an invitation by email. Emails are automatically sent one by one to each customer when deployed from a screen search.



Combo Dept. Scenario: we want to invite qualified beginning guitarists to a workshop so that we can demonstrate and offer a special price on an electric guitar and amp package. Management question: who are the beginner guitar players that shop at the SOU store who are prospects for either their first electric guitar or a step-up electric guitar? The screen search to answer this marketing question will require three data qualifiers: store location, the performance level of the guitarist and product qualification. Notice that the "Guitar Elec" data field in the right hand screen is qualified with the *Is in list* search command (see page2). With "Prospect,Step up" entered into this field Customer Frontline will identify guitarists that have yet to buy their first electric guitar or should be solicited to buy a step up electric guitar.

Customer Frontline interface showing a customer profile form. The 'Store' field is set to 'SOU'. The 'Guitar Elec' field is highlighted in yellow with the value 'Step up'.

Customer Frontline interface showing a list of guitar products. The 'Guitar Elec' field is highlighted in yellow with the value 'prospect,step up'. A red arrow points to the 'Guitar Elec' field.

Customer Frontline search results for David Gisnevich. The 'Guitar Elec' field is highlighted in yellow with the value 'Step up'.

Customer Frontline search results for Billy Young. The 'Guitar Elec' field is highlighted in yellow with the value 'Prospect'.

As shown above, this screen search located 15 customers from the Customer Frontline database. Notice that guitarists identified as step up and first time electric guitar players are included in the search, as specified by the list of qualifiers that was entered into the "Guitar Elec" data field, two examples above.

Once a screen search is completed the customers can be contacted via email, post office mail, etc. See other Customer Frontline user guides for more details to do email and letter merges:

<http://www.customerfrontline.com/customerfrontlineguides.html>

Peter Drucker coined the management mantra: *"Nothing can be managed before it is first measured"*. A database like Customer Frontline is designed to be a measuring device of selling opportunities. The Customer Frontline screen search utility puts the ruler into the hands of the sales and marketing manager!