Mytech Activity Definitions

Execution Notes for Activities

Activities are to track your personal next steps that you need to take with a client or prospect. When the Activity is associated with an Opportunity, the Activity needs to be linked/associated with that Opportunity. Additionally, no less frequently than when you attend your one-on-one with the Branch Sales Manager, all Activities and Opportunities need to be current so that nothing is showing as past due. This does not mean that you have accomplished every task you intended, it means that you are making sure that an important Activity or action does not fall through the cracks and get missed. To properly capture and report on an activity, the activity needs to be "Closed" or "Closed+New follow up" which will record the activity, and type. All Activity execution validation is based on Activities that have been closed. Additionally, all expense entries (for the sales team) such as mileage, meals, networking event costs, parking, etc., need to be associated with Activities and a Company record.

Activity Types & Use Definitions:

Ask for Referral: This Activity Type is to be used by Business Technology Manager, Consultant or Advisor to track when they ask for a referral from a client or networking ecosystem partner.

Calls: This Activity Type is to be used by Sales Team members to track when they have a call or scheduled or call with a prospect, client, networking ecosystem partner, etc. (A Call has higher relationship value than an email, but less value than an in-person meeting)

Email: This Activity Type is to be used by Sales Team members to track when they click on the email link in ConnectWise or schedule an activity to email a prospect, client, networking ecosystem partner, etc. (An Email has less relationship, and communication value than a call or an in-person meeting but is great for confirmation/summary notes and quick questions).

First Meeting: This Activity Type is to be used by Business Development Representative to track when they have a First Meeting with a prospect only (there should only be ONE First Meeting with any given prospect).

Follow Up: This Activity Type is to be used by Sales Team members to track when they have an activity that does not fall into the call or email category – which could be an internal note to Follow Up on some item/issue.

Give a Referral: This Activity Type is to be used by Sales Team members to track when they have given a referral to a client, prospect, or network ecosystem partner.

Meeting: This Activity Type is to be used by any Sales Team member to track when they have a meeting. This applies to any meeting with a prospect, client, network ecosystem partner or internal meeting that is not a first meeting, or a networking event. (An in-person meeting has higher relationship and communication value than a phone call or email).

Need to Schedule: This Activity Type is to be used by any Sales Team member to create a reminder to schedule a meeting or call. Task or Follow up could possibly be used, however the team felt that having a separate activity type allows for better organization.

Networking Event: This Activity Type is to be used by Sales Team members to track when they engage in a networking activity – such as a networking event, meeting with a networking ecosystem partner, or conference attendance.

Make IT Easy Review/Roadmap: This Activity Type is to be used by Business Technology Manager, Consultant or Advisor to track when they conduct a quarterly Make IT Easy Review or an annual Make IT Easy Executive Roadmap Session.

Task: This Activity Type is to be used by Sales Team members to track tasks to complete that can be considered a bit of a catch-all category. This can be considered a "To Do" that does not fall into the other activity types that are currently defined.

Historical Entry: This Activity Type is used by ConnectWise for system entries, such as when an opportunity stage is changed, when a mass communication email is sent, etc. This Type should not be used by anyone but needs to be present for ConnectWise to create "historical entries" as that is how ConnectWise is designed to function.