Daylite Implementation Guide

(Valid for Daylite 4.x & 5.x, Last edited: June 26, 2014)

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Objective

The purpose of this document is to guide you through the process of implementing Daylite in a business.

Audience

This document is intended for partners, consultants, business analysts, and other IT professionals who wish to create industry-specific databases and customize Daylite; however, anyone can use it to implement Daylite in a business.

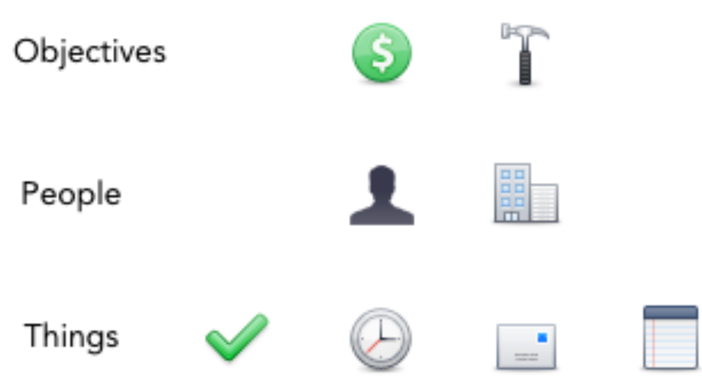
Overview

Daylite is customizable and can work in many industries. With just a little bit of thought and guidance, Daylite can do wonders for your business. From lawyers to photographers to real estate professionals to designers to anyone running a business, Daylite helps you get things done. Since Daylite is very flexible, it doesn't handcuff you into one way of working. This makes it possible to implement Daylite in a wide range of industries. Implementing Daylite in your business requires that you work in the following stages.

Before you start, you should become familiar with certain Daylite concepts including People, Companies, projects, opportunities, and many others. A good place to learn about them is in the first couple of sections in the Daylite User Guide.

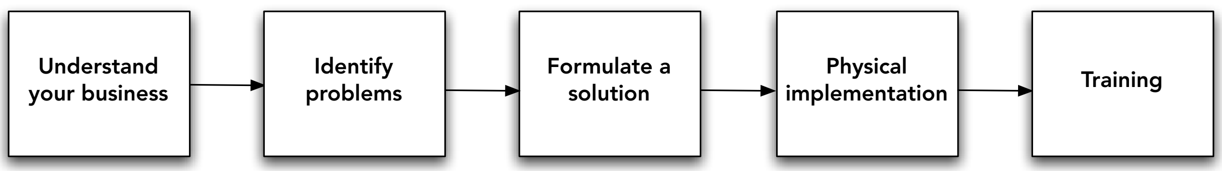
A new way of looking at your business

Daylite is built on 3 layers. At the top is the **Objectives** layer to help you to concentrate on the big rocks which move things forward in your business. The middle layer is the **People** layer. At some point, whether internal or external, you could start out as a single user with very few business contacts, but as you grow, you'll need to start tracking what your staff is doing and what you want them to do. The bottom layer is the **Things** layer. Daylite enables you to look at your business in a **top-down approach**, so you can focus more on your business objectives.



Understand your business

Before you implement Daylite, it is very important to thoroughly understand how your business currently operates. Keep in mind that this doesn't mean understanding your field. For example, we're not telling a lawyer that he/she should understand law, or a photographer that he/she should understand photography. What we're saying is that the individual who is implementing Daylite needs to understand how the business is currently operating. This enables you to link your requirements with what Daylite can offer and formulate a solution.



The interview process

It is recommended you conduct interviews and ask questions to understand the current workflow. Keep in mind the following objectives before you interview.

- To gain a deep insight into the business workflow.
- To identify pains and needs.
- To understand and set expectations.
- To find the best match between requirements and what Daylite offers.

Asking the right questions is very important in understanding what your company does on a day-to-day basis. You would not want to ask the same set of questions to all the people. For example, a manager would have a different set of needs compared to an employee. You should ask questions keeping in mind who you are interviewing and what they wish to accomplish.

Tips for interview questions

- Remember to ask questions that are relevant to your industry.
- Understand the organization chart including who reports to who and who is in charge of what functions.
- Pick a few people to interview, not just 1.
- Allocate about 2 hours per interview (reducing as you go down).
- Start with the top most person you have access to—preferably the owner/CEO, then work your way down.
- Repeat the process with every person using questions relevant to their role.

- You will get conflicting information.
- Meet again with the right folks to clear any conflicts.
- Keep in mind that a majority of people don't care about technical details. They want a solution for their business problems and not their IT problems. They assume that the IT issues will be handled.
- Use the lingo that is prevalent in the company, if possible.
- Asking the wrong questions or asking them in the wrong way can lead to failure.
- Ask questions about general business objectives, the current process as how they see it, the current pains, and what they would like to get out of the system.
- Ask questions about how they do reporting and what tools they use.

Opportunities	How do you get new business? Do you go after it or does it come to you (i.e., from marketing)? [Opportunity Type] How would you classify together how new business comes in? [Category] What descriptive words or phrases would you use for a more detailed classification of how new business comes in? [Keyword] Are you required to collect a specific set of data or have a specific set of questions to ask this prospect? If so, what would that data or questions be? [Form] What products or services do you offer? [Product/Service] What major steps do you take to come to an agreement with a prospective client? [Pipeline] At what point do you consider a new business deal to be won? When the prospect signs the deal? When the money is received? [State] Why you would win or lose new business? [Reason] Do you have different products? Do they require a different set of steps to come to an agreement? Would you like to track the progress of each one? [Pipeline] Do different people or companies play a part in the process of obtaining new business? If so, what specific functions or responsibilities do they play? [Role] Do you send out letters or emails using the same format? If so, what would they look like? What information is required for them? [Letter Template] Do you use a specific format for envelopes when sending a letter by mail? If so, what would that be? [Envelope Template] Do you use a specific format for creating labels? If so, what would that be? [Label Template] What kind of information about prospective business would you wish to view? Or, do you require any specific reports related to opportunities? [Report]

Projects	How would you classify together the major components of your work? [Category] What descriptive words or phrases would you use for a more detailed classification of the work you do? [Keyword] Are you required to collect a specific set of data or have a set of questions related to the projects? If so, what would that data or questions be? [Form] How would you break down the major stages of your workflow during the project period? [Pipeline Stages] Do different people or companies play a part in these projects? If so, what specific functions or responsibilities do they have? [Role] Do you send out letters or emails using the same format? If so, what would they look like? What information is required for them? [Letter Template] Do you use a specific format for envelopes when sending a letter by mail? If so, what would that be? [Envelope Template] Do you use a specific format for creating labels? If so, what would that be? [Label Template] What kind of information about projects would you wish to view? Or, do you require any specific reports related to projects? [Report]

People	How would you classify together the different kinds of people you deal with? [Category] What descriptive words or phrases would you use for a more detailed classification of the people you deal with? [Keyword] How would you define the two-way connection between one person and another? [Relationship] Are you required to collect a specific set of data or have a set of questions to ask the people you are dealing with? If so, what would that data or questions be? [Form] Do individuals play a part in the company? If so, what specific functions or responsibilities do they have? [Role] Do you send out letters or emails using the same format? If so, what would they look like? What information is required for them? [Letter Template] Do you use a specific format for envelopes when sending a letter by mail? If so, what would that be? [Envelope Template] Do you use a specific format for creating labels? If so, what would that be? [Label Template] What kind of information about your contacts would you wish to view? Or, do you require any specific reports related to contacts? [Report] **Note:** People and Companies are separate items in Daylite. Review the Contacts section of the Daylite User Guide for more information.

Companies	How would you classify together the various companies you deal with? [Category] What descriptive words or phrases would you use for a more detailed classification of the companies you deal with? [Keyword] Does your company have a specific function/responsibility in certain projects? If so, what specific functions do they have? [Role] How would you define the two-way connection between one company and another? [Relationship] Are you required to collect a specific set of data or have a set of questions to ask the companies you deal with? If so, what would that data be? [Form] What kind of companies do you deal with (in relation to their product)? [Company Industries] How would you geographically segment the companies you deal with? [Company Regions] What type of companies do you deal with? For instance, educational institution, incorporation, charity, etc. [Company Types] Do you send out letters or emails frequently using the same format? If so, what do they look like? What information is required for them? [Letter Template] Do you use a specific format for envelopes when sending a letter by mail? If so, what would that be? [Envelope Template] Do you use a specific format for creating labels? If so, what would that be? [Label Template] What kind of information about companies would you wish to view? Or, do you require any specific reports related to companies? [Reports]

Groups	How would you classify together groups having certain common characteristics? [Category] What descriptive words or phrases would you use for a more detailed classification of your groups? [Keyword] Are you required to collect a specific set of data or have a set of questions related to the group? If so, what would that data or questions be? [Form] Do you send out letters or emails using the same format? If so, what would they look like? What information is required for them? [Letter Template] Do you use a specific format for envelopes when sending a letter by mail? If so, what would that be? [Envelope Template] What information about groups would you wish to view? Or, do you require any specific reports related to groups? [Report]
Tasks	How would you classify together the different tasks you have to complete? [Category] Do you delegate work? [Users] What kind of information about tasks would you wish to view? Or, do you require any specific reports related to tasks? [Report]
Appointments	How would you like to classify together the different appointments you make? [Category] What information about appointments do you wish to view? Or, do you require any specific reports related to appointments? [Report]
Notes	How would you classify together the different pieces of information you keep? [Category] What information about notes would you wish to view? Or, do you require any specific reports related to notes? [Report]
Forms	Are there any bits of data you would like to collect in a form? These can be related to other objects or just data collection independent of any other activity. How would you categories these? Any key search words you would want to apply?

Activity Sets	Do you perform a repetitive set of actions that have a set amount of time between each action and are done in the same order each time? [Activity Set] If so, what would they be? [Activity] Are they based on the start date or the due date? [Activity Set Type]

More sample questions...

Describe your business to me (assume you're looking for a business solution and I'm offering one, but I don't know anything about XYZ corp or it's employees).

How do you obtain customers?

Do you cold call?

Do you wait for calls & emails?

Do you do presentations?

Do you get referrals?

Do you get RFI's and RFP's?

What do you have to offer to prospective customers?

Once you have an interested person, what steps do you take to make them a customer?

What is the duration of each step?

Are these steps different for different offerings?

Do you send them anything?

When and how do you follow up?

Do your customers shop around?

How intense is the competition?

What tells you that you've got the business?

What tells you that you've lost the business?

What are the reasons you would win new business?

What are the reasons you would lose business?

When going after a new business opportunity, who do you involve?

When you've won some business, what happens next?

How do you classify the people/companies that interact with your business?

How do you schedule your time?

How do you schedule meetings?

How do you manage your to-do’s?

Do you classify notes—if so, how?

What kind of data do you review on a daily, weekly, monthly basis?

What kinds of letters do you send out?

What about labels and envelopes?

Do you use the term ‘project’?

How do you classify your projects?

What stages do your projects go through?

When is a project done?

These are just a few examples. You can also probe about how things are currently being done, how they wish to do it in future, and what they expect from the new solution. Keep in mind to ask more open-ended questions. Record the responses.

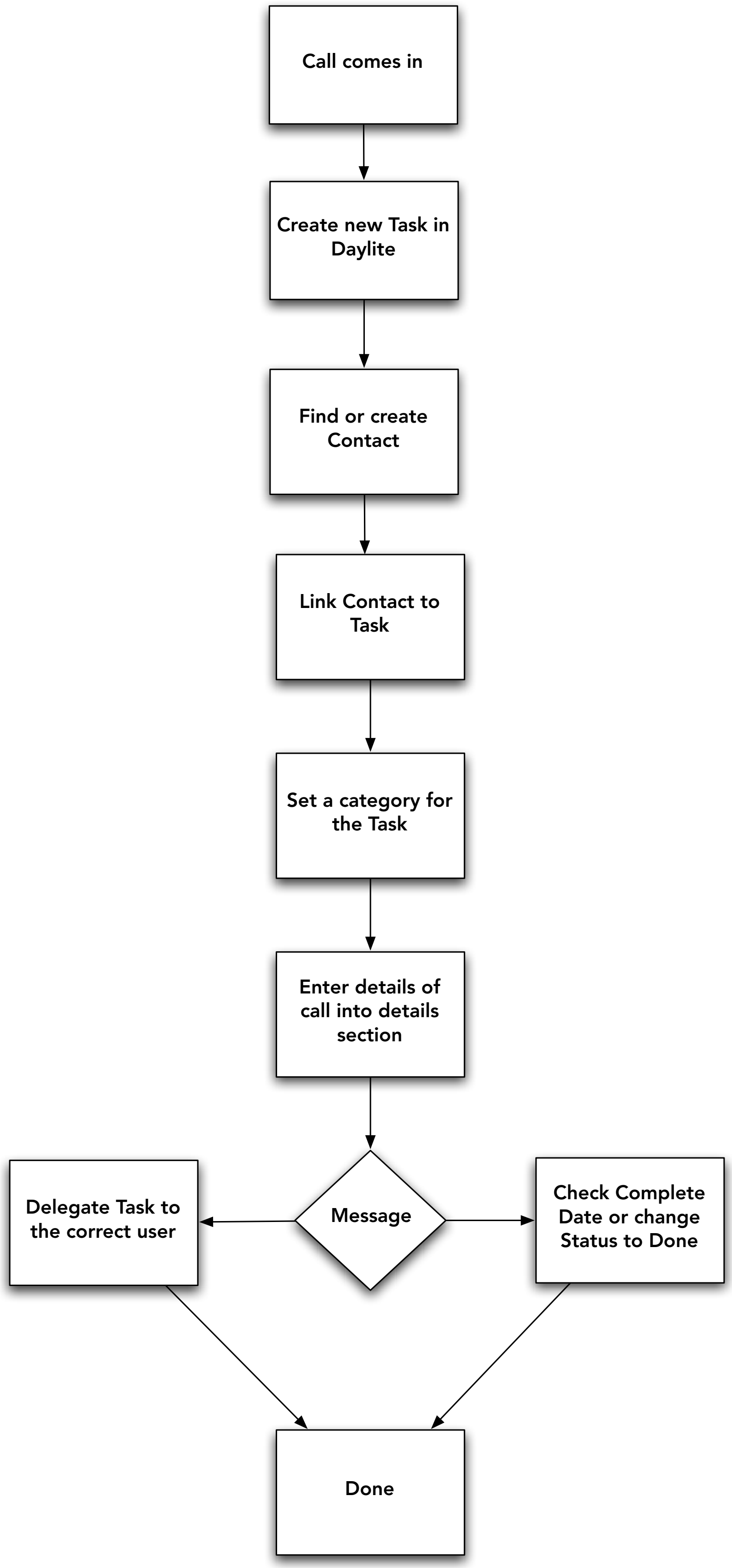
Identify problems

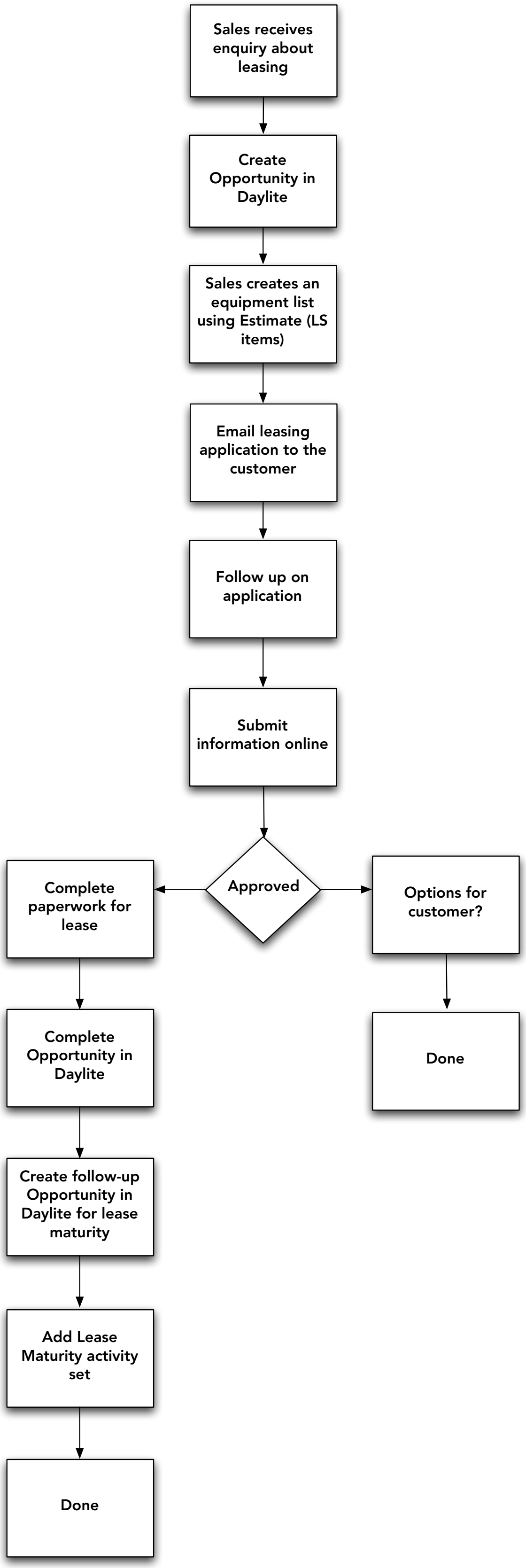
As you probe and record responses, identify areas of problems and how you can solve them using Daylite. At times, you will be getting conflicting information. Not everyone in the company will see eye to eye. What one person perceives as a problem, another person may not consider it as an issue. You will also discover that there are areas in the workflow that severely hinder productivity. For example, taking notes on paper or using post its to pass messages along. This brings out the differences, so you can formulate a new workflow that deals with all the problems.

Formulate a solution

a. Understanding the workflow

Paint a picture of how the business is currently being run. Think about how you can translate the existing workflow or a new workflow you have designed into Daylite. For instance, consider a **call log** and a **lease application** process which can be translated into Daylite as shown.


Call comes in
Create new Task in Daylite
Find or create Contact
Link Contact to Task
Set a category for the Task
Enter details of call into details section
Message
Delegate Task to the correct user
Check Complete Date or change Status to Done
Done


Sales receives enquiry about leasing
Create Opportunity in Daylite
Sales creates an equipment list using Estimate (LS items)
Email leasing application to the customer
Follow up on application
Submit information online
Approved
Complete paperwork for lease
Options for customer?
Complete Opportunity in Daylite
Done
Create follow-up Opportunity in Daylite for lease maturity
Add Lease Maturity activity set
Done

These are just 2 examples. Depending on the industry and nature of business, there could be a different workflow. At each stage, you should analyze who is involved, the responsibilities of that individual, the industry-specific terminologies used, and many other aspects of the business. This information becomes handy when you start setting up a Daylite database.

b. Customizing the Preferences

Create a new blank database and customize the current database preferences in Daylite. Doing this will ensure that you have set up all the pre-requisites for providing more relevance to your Daylite data. Use the results from the interview to guide your entries here.

Preferences	How to customize...
Classifications	Set up categories and keywords for grouping items in your database. For example, contacts in the photography industry may have categories such as **Client**, **Personal**, **Prospect**, and keywords such as **Portrait**, **Mailing Address**, **Wedding**, etc.
Roles & Relationships	Describe the kind of work or function that someone has in a company or project using roles. For example, Mary is an **engineer** in project A and an **advisor** in project B. Describe the connection between people and/or businesses using relationships. For example, Mary **is a colleague of** John, Andrew **was referred by** Tom. **Note:** Be careful not to put Job Title's as Roles.
Forms & Fields	Create forms for collecting and recording information. For example, a law firm can use forms for recording information about new clients, or for asking questions and recording responses of those clients. Set up extra fields for recording additional specialized information about an item.
Companies	Set up the various company types (such as government, education, corporation), industries (such as banking, advertising) and regions (such as Asia, Africa, Europe) your company deals with in their day-to-day business.

Opportunities	Use opportunity types to describe the source of new business. For instance, referral, cold call, inbound sales call, trade-show, sales, etc. This information becomes useful to identify from where most of your new business is coming in, so you can work on other areas as well to maximize results. Set up reasons to identify how and why you win or lose an opportunity. Tracking reasons accurately is very important. Daylite comes with many useful reports that help you to analyze why you win/lose new business; thereby, you can focus and work in the right direction.
Letter templates	Set up letter templates that you wish to use for correspondence with your contacts. For example, your sales team can use Daylite to merge contact information with letter templates and send personalized letters to customers informing them about new products. Daylite enables you to create letters for single or multiple people that you can send by email, print, or save as PDF.
Activity Sets	Create activity sets for any repeatable pattern of activity or something you do constantly as part of your workflow. For example, sales is repetitive in many ways. Although each customer is different, successful professionals work from a well-defined set of actions to convert an opportunity into real business. These action steps can be recorded as the activities in an activity set consisting of tasks and appointments.
Pipelines	Create pipelines to visually track how a project or opportunity is organized. Pipelines describe your workflow evolution from start to end, as well as progress in achieving tasks and objectives. For example, a web design project could have the following stages from start to completion: planning architecture, wire-framing, visual design, implementation, inspection, final fixes. So, a pipeline for the web design project will have each one of them as the individual pipeline stage.
Labels	Customize labels for phone numbers, addresses, and electronic addresses.

Physical implementation

For information on how to install and setup Daylite, please review the Daylite User Guide found (link below)

Training Resources

There are a number of resources available to help you to learn more about Daylite and provide answers when you have questions.

- **Daylite Experts:** Our certified experts can help you craft Daylite to your specific needs https://www.marketcircle.com/help/experts/

- Daylite Tutorials, please visit https://www.marketcircle.com/help/training/

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