



Shiraz

Product Release
September 2019

 **Practifi**



“Syrah (or Shiraz as us Australians like to call it) is a type of red grape originally from France’s Rhône Valley region. Due to its popularity and versatility, it’s since been planted and harvested all around the world to create a wide variety of bold, varietal flavours derived from blackberry, black pepper, and vanilla accents.

Shiraz is a popular favourite here in Australia, and while it’s a perfect pairing with red meats, barbeque and dark chocolates, we find it easy and delightful to enjoy during any occasion. Likewise, our Shiraz release has a variety of product enhancements that will surely add some delightful improvements to your day-to-day.”

Glenn Elliott

CEO, Practifi



Key Enhancements

Each of these features is a critical element of what makes Practifi work, so we've pushed ourselves as a team to examine each one closely and find ways to make it even better.

Processes

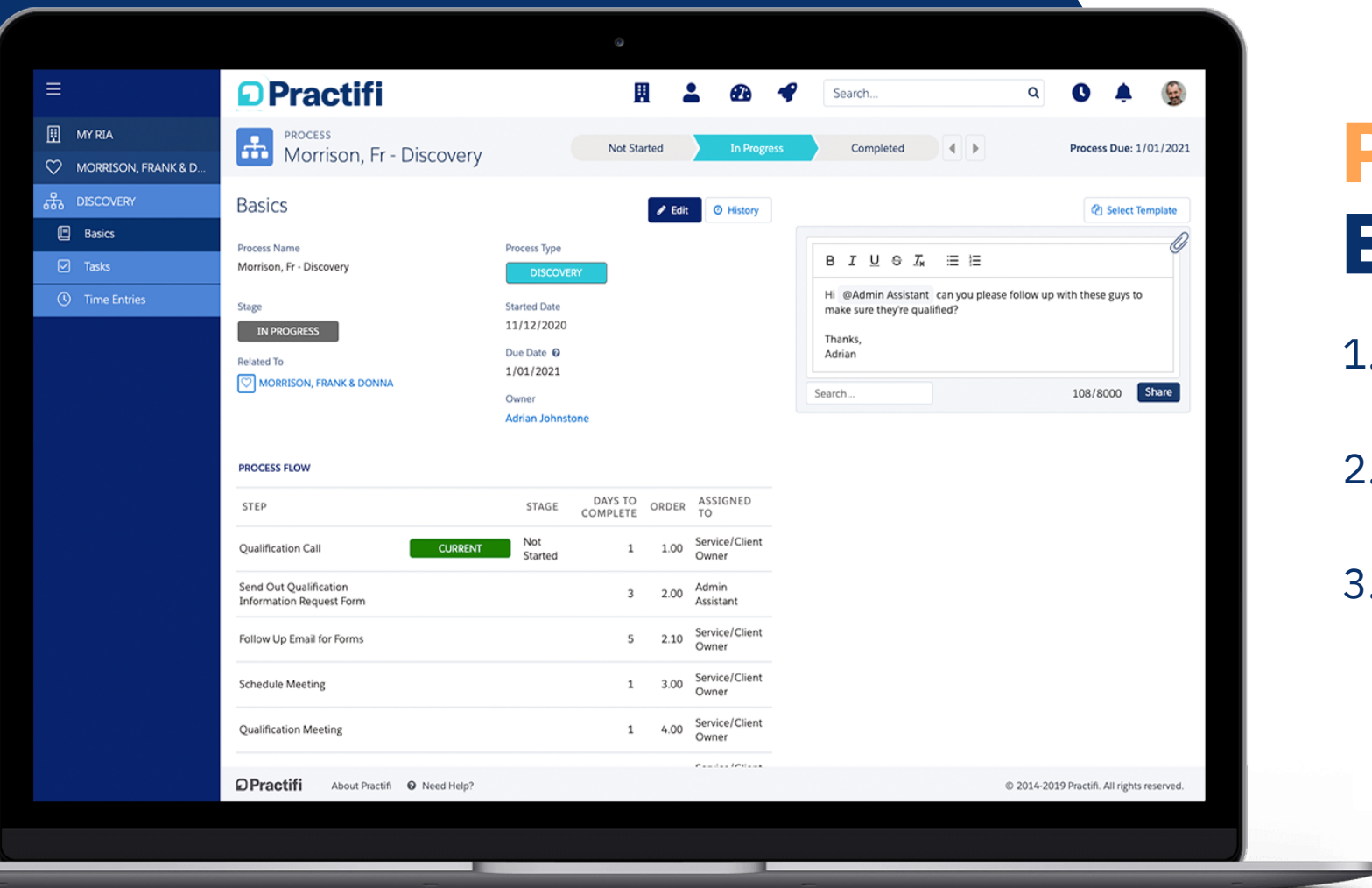
Several new features have been added to our process automation engine to **supercharge your business workflows** and make it easier than ever to **keep track of progress** between process stages.

Prospects

After a round of feedback following Sangiovese Late Harvest, we've delivered multiple enhancements that enable **comprehensive data capture**, sales management and performance analysis of **revenue opportunities**.

Practifi Mobile

In this release, you'll discover updates to app navigation, pages, layout and branding, meaning you can access the same **client insights** and **industry expertise** on mobile as you can from your desktop.



Process Enhancements

1. Ensure dependencies are met step-by-step with Predecessors
2. Put your process into context with the Progress Indicator
3. Use Process Type Steps to make your workflows fit for purpose

Process Step

Subject: Follow Up Email for Forms Stage: Not Started

Code: PSDISC2.1 Group Code: --None-- Task Group: --None-- Order: 2.10

Priority: Normal Due Date Interval: 5 Suppress At Launch: ☒ Active: ☒

Conga Parameters:

Description: Send a customer a follow up Email to request Form

Assignment Type: Assign to Service/Client Owner

ESTIMATED EFFORT

Days: --None-- Hours: --None-- Minutes: --None--

Predecessors

STEP	OUTCOME	GROUP
Send Out Qualification Information Request Form	Not Received	
Follow Up Email for Forms	Not Received	

Showing Rows 1-2 of 2

Outcomes

OUTCOME	ORDER
Received	
Not Received	

Showing Rows 1-2 of 2

Actions

SELECTED OUTCOME	ACTION TYPE	ACTION
Received	Create New Step in this Process	Qualification Call

Flowchart:

```
graph TD; 1[1] --> 2[2]; 1 --> 3[3]; 1 --> 4[4]; 2 --> 5[5]; 3 --> 5; 4 --> 5; 5 --> 6[6]; 5 --> 7[7]; 5 --> 8[8]; 6 --> 9[9]; 7 --> 9; 8 --> 10[10]; 9 --> 10
```

Ensure dependencies are met step-by-step with **Predecessors**

Now you can further streamline your workflows by enabling predecessor steps.

Set steps that need to be completed before another step begins. Define the action required to enroll in each step, and the desired outcome of each step to achieve your goals.

This can be set up in your Practifi settings.



Put your process into context with the Progress Indicator

With the new visual Progress Indicator, now you can easily see what stages your prospects, clients, and other contacts are in, in alignment with their respective processes.

The number of steps shown will depend on how many steps are in the process they're enrolled in.

Just jump in the Wizard and get started!

The screenshot shows the Practifi interface for a process named 'Jassi Gill h - Discovery'. At the top, a progress indicator shows three stages: 'Not Started' (highlighted in teal), 'In Progress' (grey), and 'Completed' (grey). Below this, the 'Basics' section shows the process name, type, stage, and related contacts. The 'PROCESS FLOW' table lists the steps in the process, with the current stage highlighted in green.

STEP	STAGE	DAYS TO COMPLETE	ORDER	ASSIGNED TO
Qualification Call	Not Started	1	1.00	Service/Client Owner
Send Out Qualification Information Request Form		3	2.00	Admin Assistant
Follow Up Email for Forms		5	2.10	Service/Client Owner
Schedule Meeting		1	3.00	Service/Client Owner

Use **Process Type Steps** to make your workflows fit for purpose

Now you can define your process steps directly within Practifi. This will make it easier for you to see how your prospects, clients and other contacts are progressing through your processes.

You can also assign a stage to each step, so these changes appear in the new visual indicator.

PROCESS

Jassi Gill h - Discovery

Not Started In Progress Completed

Total Tasks: 1
Process Due: 1/10/2019

Basics

Process Name
Jassi Gill h - Discovery

Process Type
DISCOVERY

Stage
NOT STARTED

Started Date

Due Date
1/10/2019

Owner
Adrian Johnstone

Related To
JASSI GILL HOUSE
JASSI GILL

Description
Process used to qualify prospects

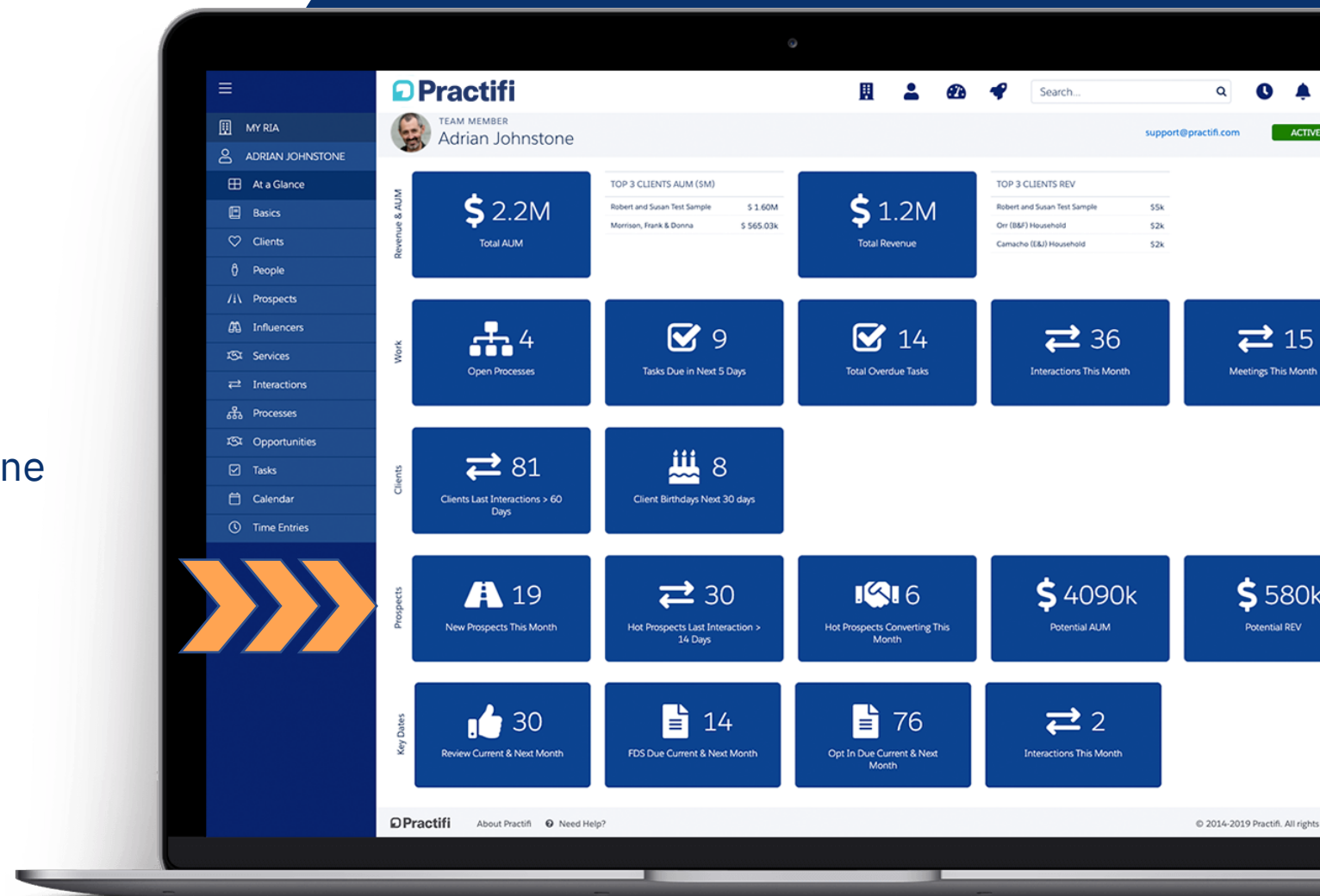
PROCESS FLOW

STEP	STAGE	DAYS TO COMPLETE	ORDER	ASSIGNED TO
Qualification Call	Not Started	1	1.00	Service/Client Owner
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Follow Up Email for Forms		5	2.10	Service/Client Owner
Schedule Meeting		1	3.00	Service/Client Owner

PROCESS FLOW					
STEP		STAGE	DAYS TO COMPLETE	ORDER	ASSIGNED TO
Qualification Call	CURRENT	Not Started	1	1.00	Service/Client Owner
Send Out Qualification Information Request Form			3	2.00	Admin Assistant
Follow Up Email for Forms			5	2.10	Service/Client Owner
Schedule Meeting			1	3.00	Service/Client Owner

Improvements to Prospects

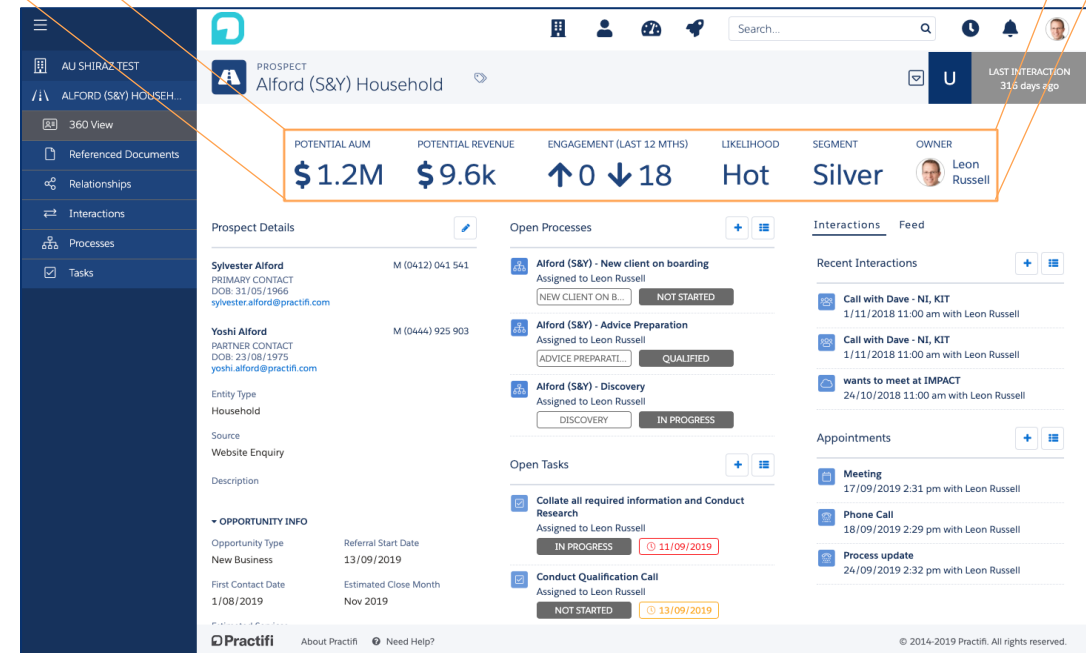
1. Enhanced Prospect 360 page completes the picture of your pipeline
2. New At A Glance tiles put insight at your fingertips
3. Use Pipeline Analytics to deep-dive into sales performance



Enhanced Prospect 360 page

The Prospect 360 page now contains more information about potential value, key dates, estimates and likelihood to convert, making it easy to plan for future revenue opportunities.

POTENTIAL AUM	POTENTIAL REVENUE	ENGAGEMENT (LAST 12 MTHS)	LIKELIHOOD	SEGMENT	OWNER
\$1.2M	\$9.6k	↑0 ↓18	Hot	Silver	 Leon Russell



The screenshot displays the Prospect 360 page for 'Alford (S&Y) Household'. The page is divided into several sections:

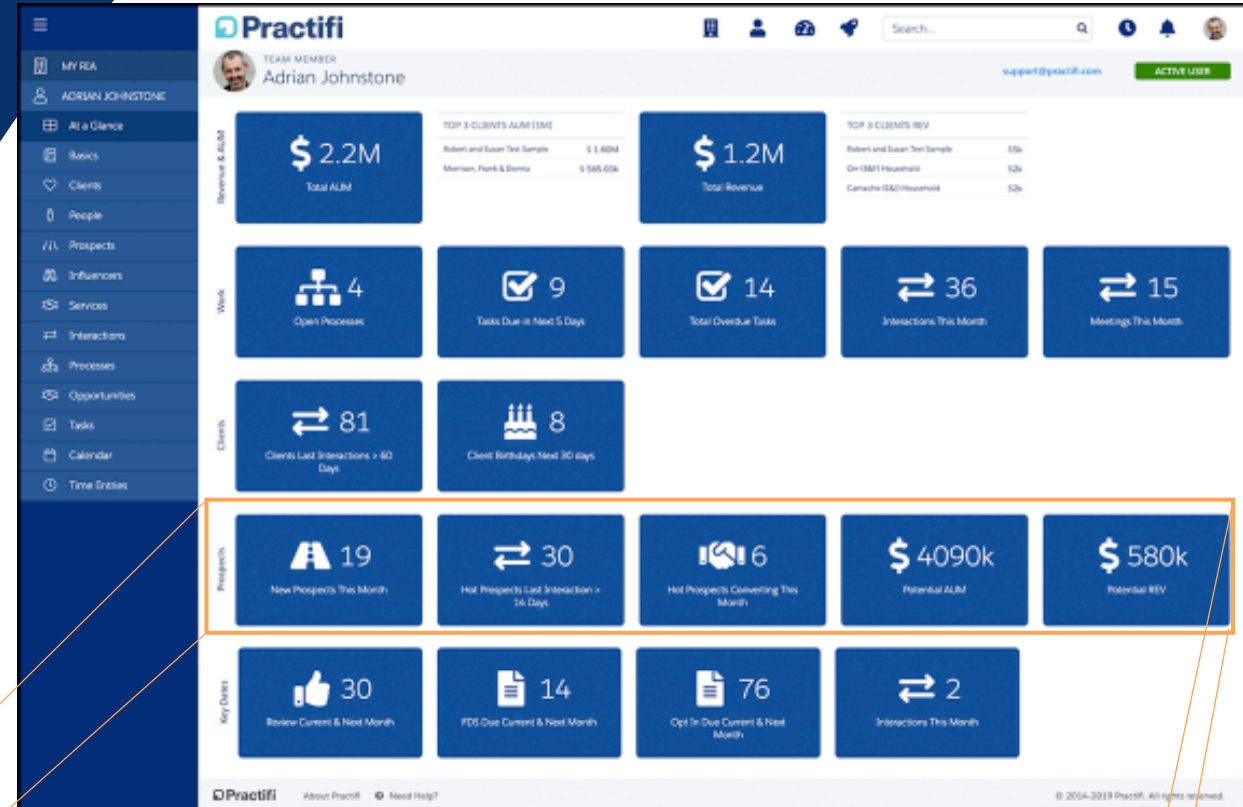
- Prospect Details:** Includes contact information for Sylvester Alford (Primary Contact) and Yoshi Alford (Partner Contact), along with entity type (Household), source (Website Enquiry), and a description.
- Open Processes:** Lists three processes: 'Alford (S&Y) - New client on boarding' (NOT STARTED), 'Alford (S&Y) - Advice Preparation' (QUALIFIED), and 'Alford (S&Y) - Discovery' (IN PROGRESS).
- Open Tasks:** Lists two tasks: 'Collate all required information and Conduct Research' (IN PROGRESS, due 11/09/2019) and 'Conduct Qualification Call' (NOT STARTED, due 13/09/2019).
- Interactions:** Shows a feed of recent interactions, including calls with Dave - NI, KIT and a meeting with Leon Russell.
- Appointments:** Lists upcoming appointments, including a meeting with Leon Russell on 17/09/2019 and a phone call on 18/09/2019.

The top of the page features a summary bar with key metrics: POTENTIAL AUM (\$1.2M), POTENTIAL REVENUE (\$9.6k), ENGAGEMENT (LAST 12 MTHS) (↑0 ↓18), LIKELIHOOD (Hot), SEGMENT (Silver), and OWNER (Leon Russell).

New **At A Glance** tiles put insight at your fingertips

You can now see real-time summary information from the At A Glance page with prospect-specific tiles.

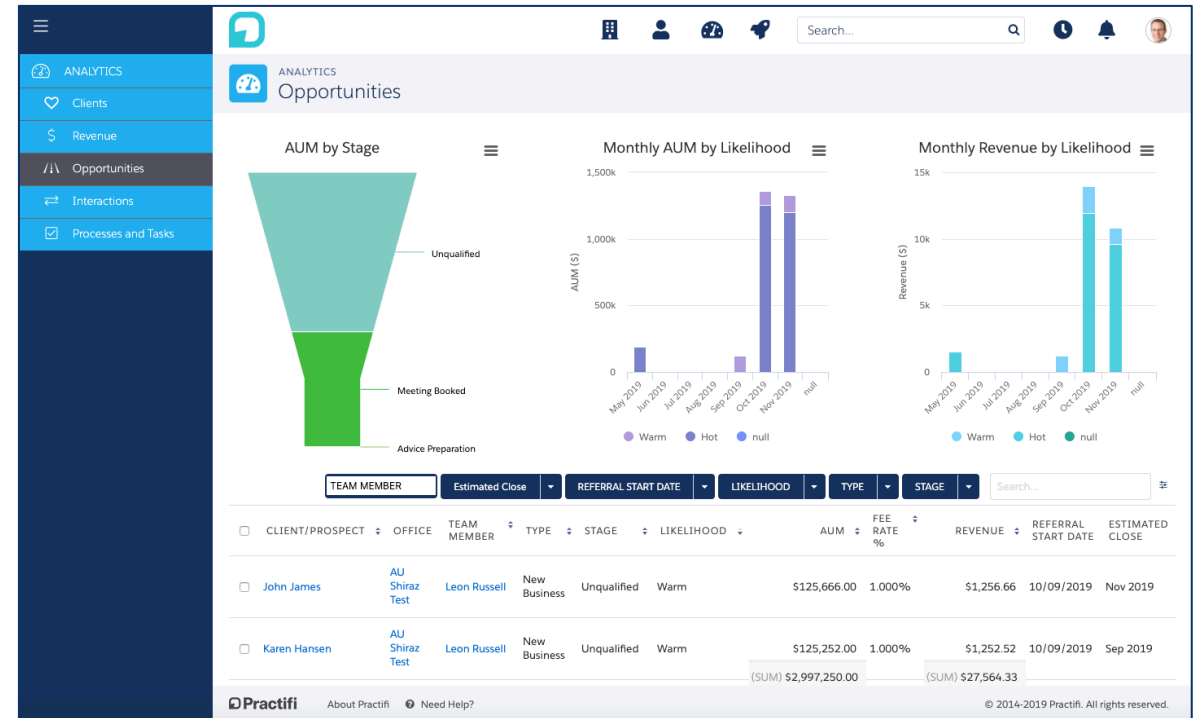
The enhancement comes with five new prospects tiles out of the box, including potential AUM and revenue, new prospects this month, conversions, and reminders to follow-up with prospects who haven't been nudged in awhile.

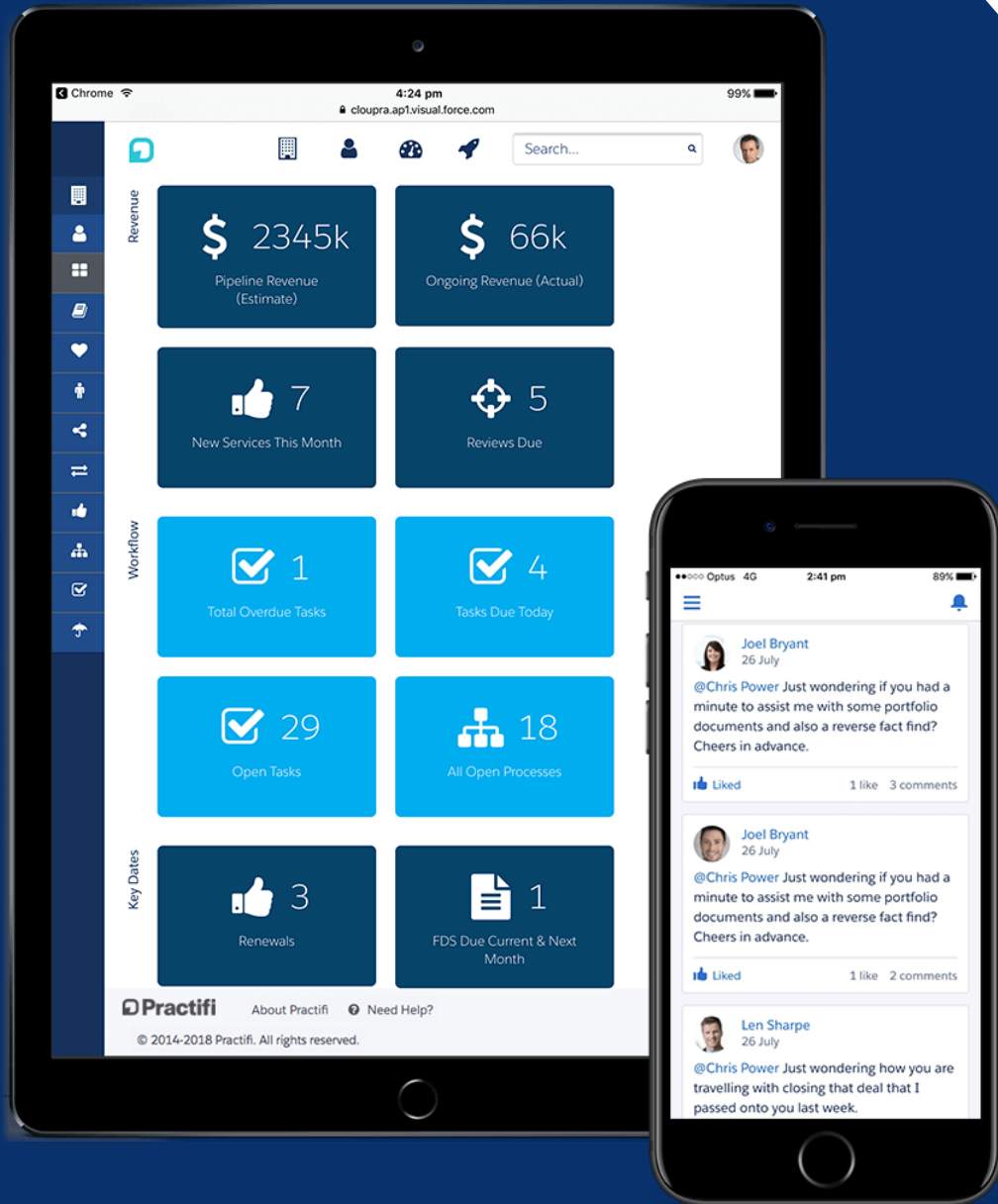


Use Pipeline Analytics to deep-dive into sales performance

New pages have been added in the Analytics section that provide segmentation by stage, estimated close date, likelihood to convert, and more.

Export your data as a spreadsheet to enable further analysis with other tools.





Practifi Mobile

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Keep an eye out for more info coming soon!



“Do you have an idea for a product feature or enhancement?”

Be sure to add your idea to our Ideas Community, which was recently created in as a part of our new Support Portal Experience launch.

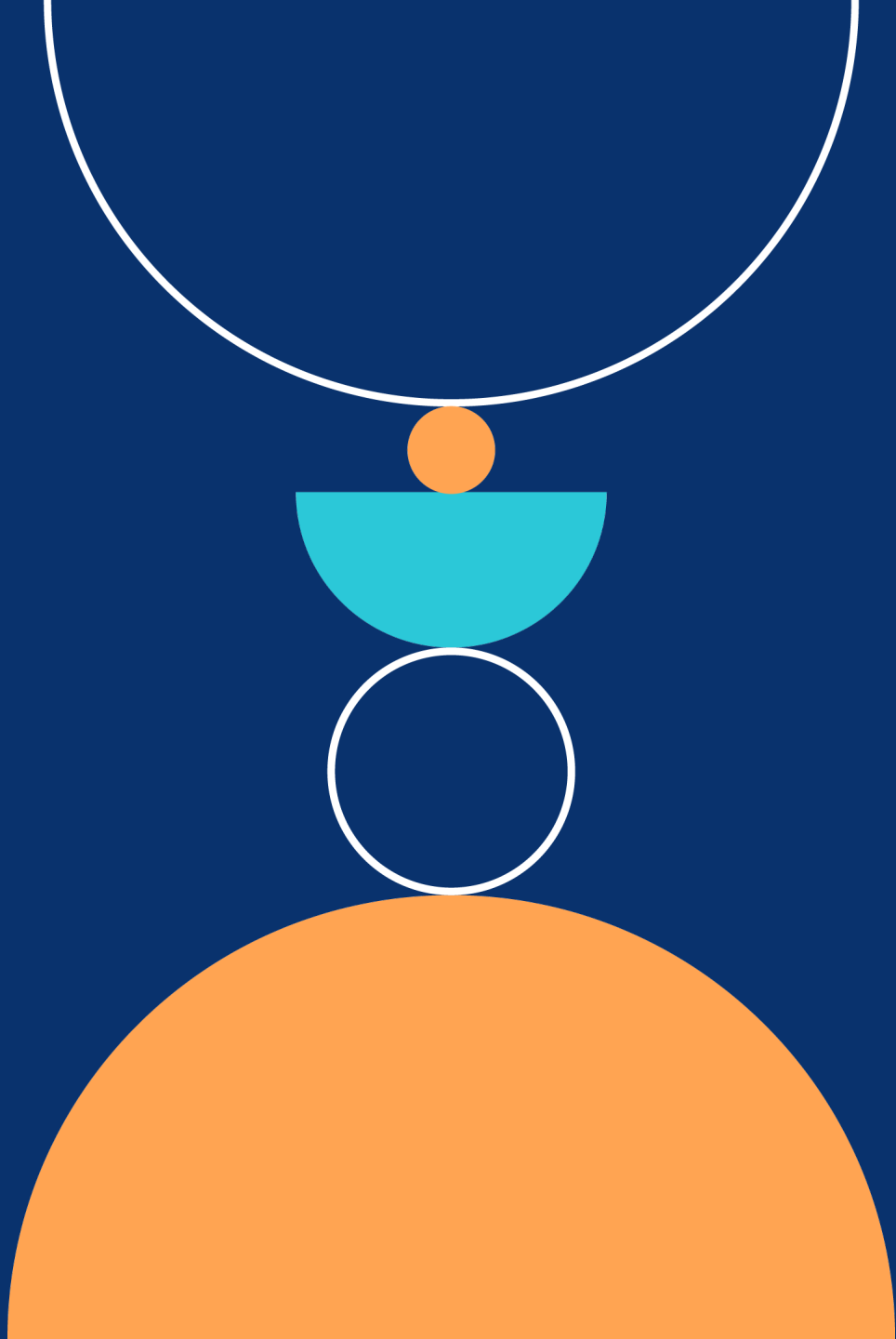
Share your own unique product enhancement requests, view other’s ideas and vote on ideas you think will make Practifi better for everyone.

Check out the [Ideas Community](#) and share your ideas today. It may even be included in our next product release!”

Lindsey Hanson

Head of Client Success, Practifi





Any questions?

Reach out to your Client
Success Manager who
will be happy to help.

We're here to help

support@practifi.com

Stay tuned

More info coming soon!