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

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**.

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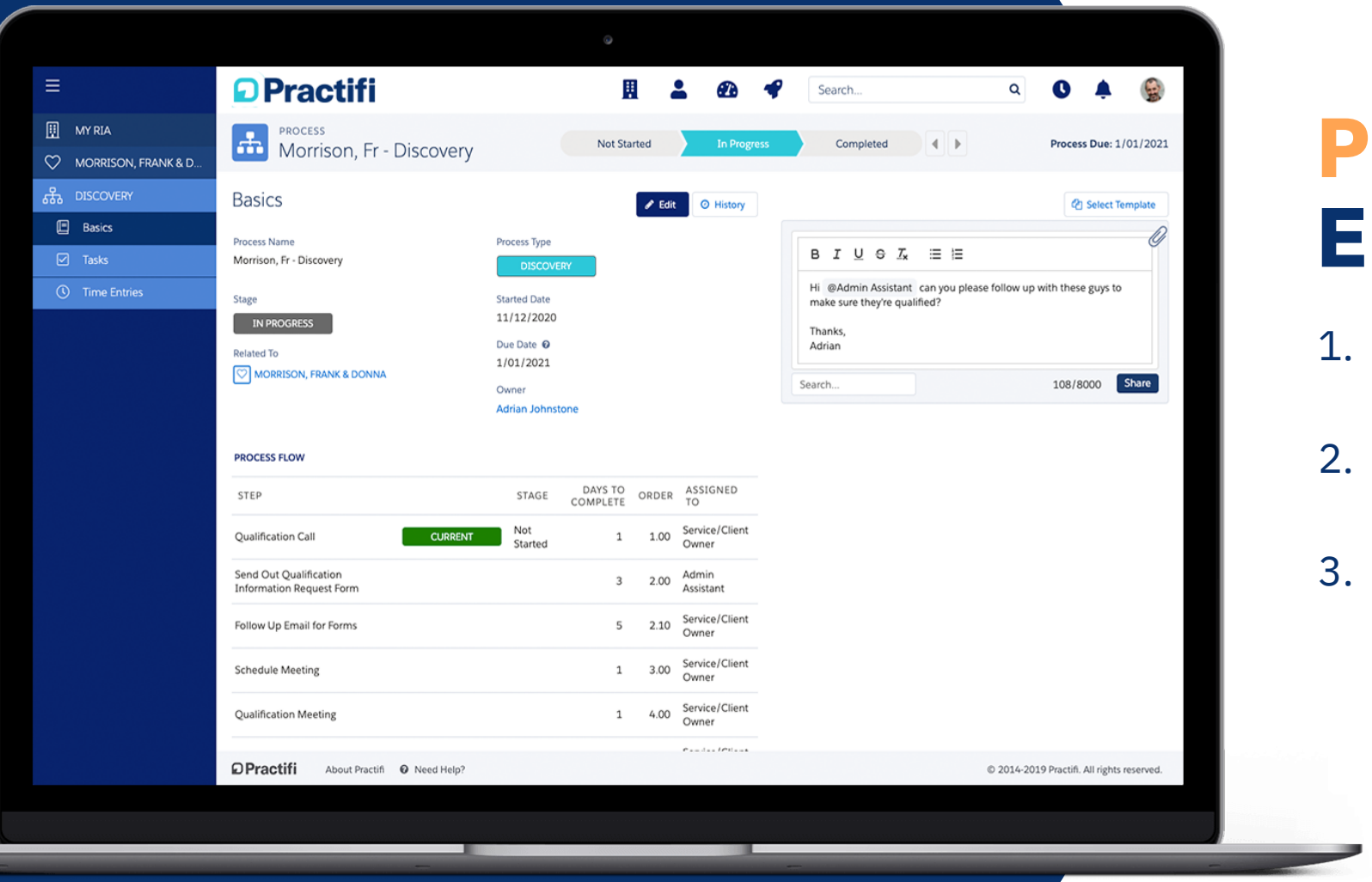

Process Enhancements

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

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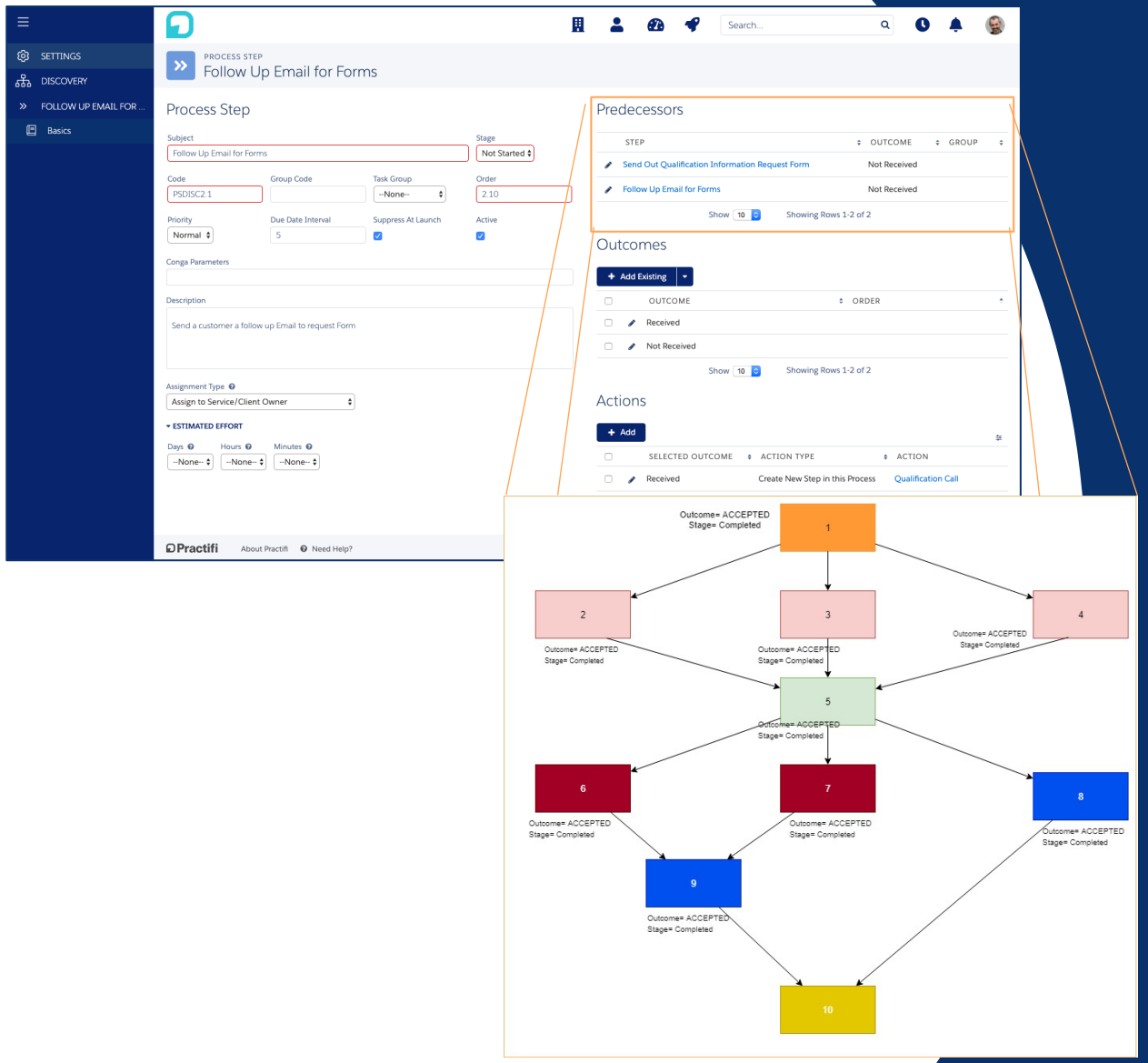

Ensure dependencies are met step-by-step with Predecessors

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.

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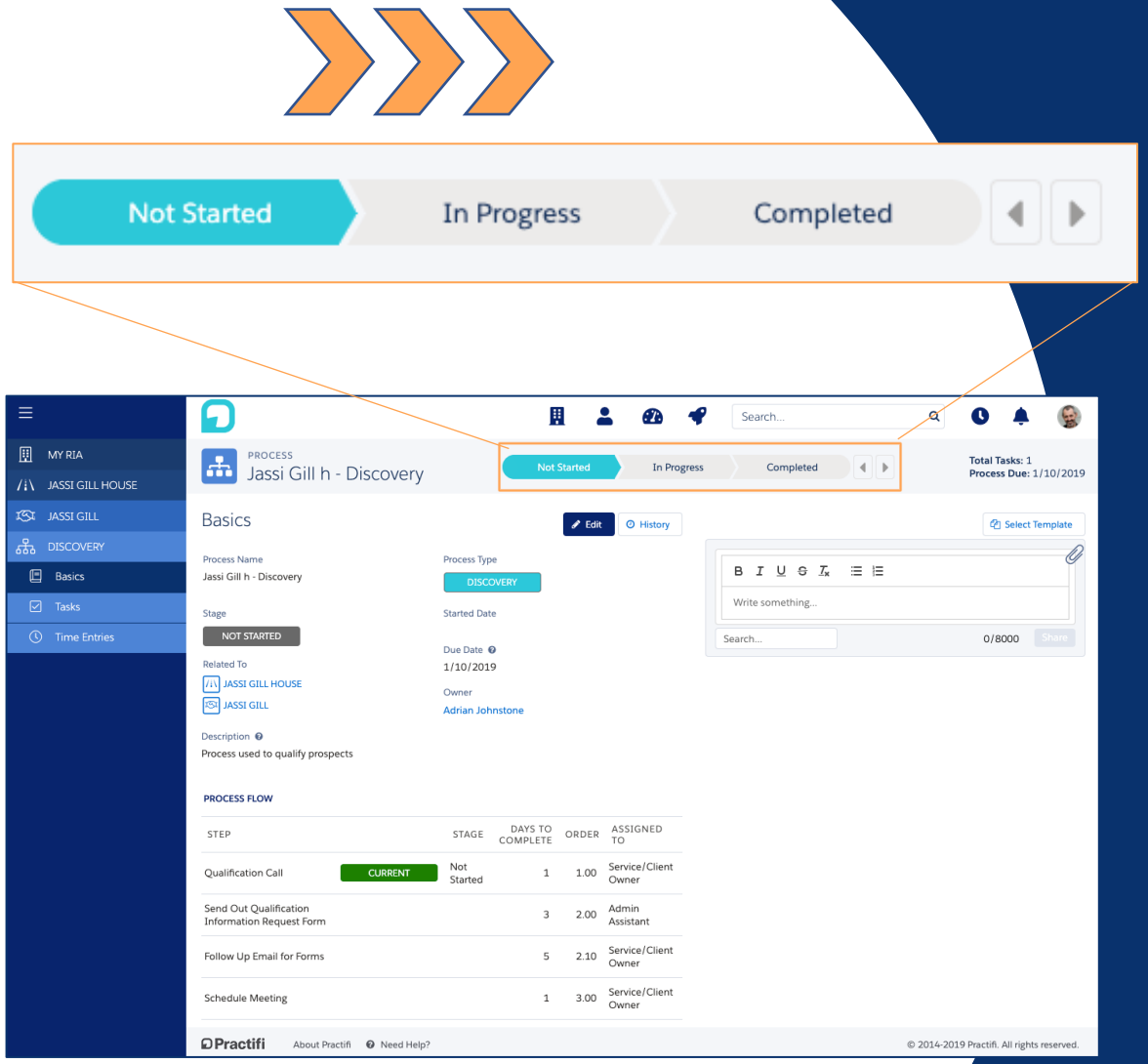

Put your process into context with the Progress Indicator

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!

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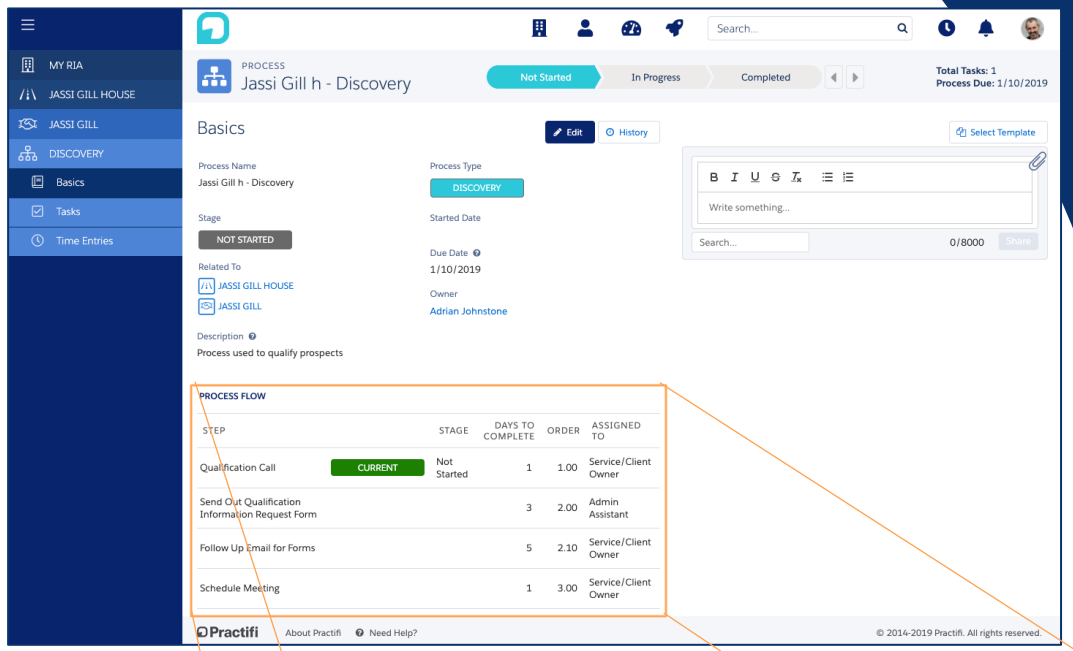

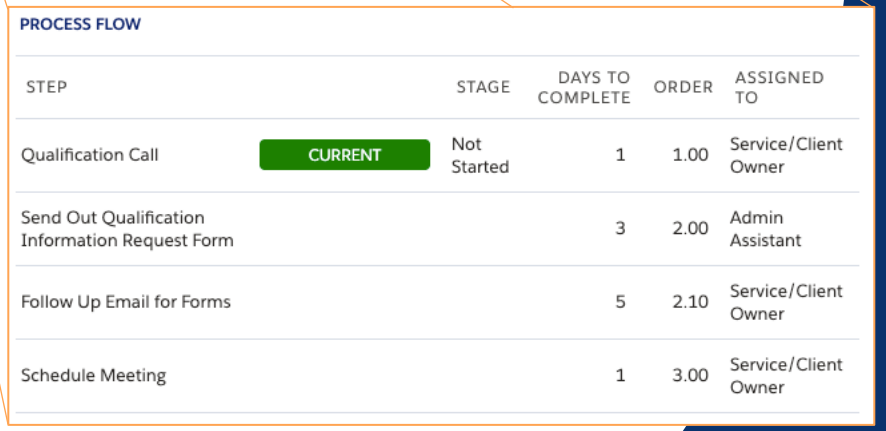

Use Process Type Steps to make your workflows fit for purpose

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.

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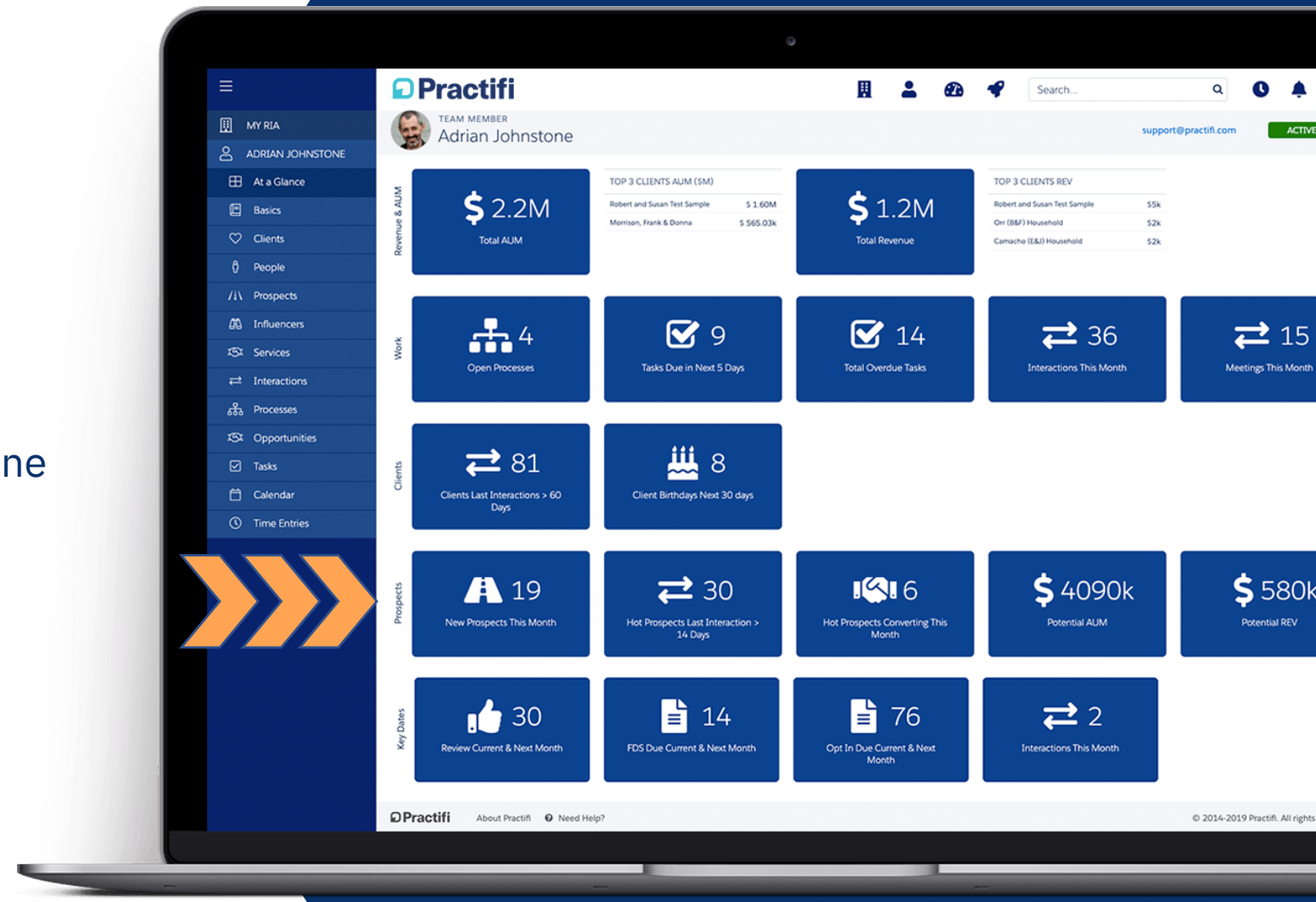
Improvements to Prospects

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



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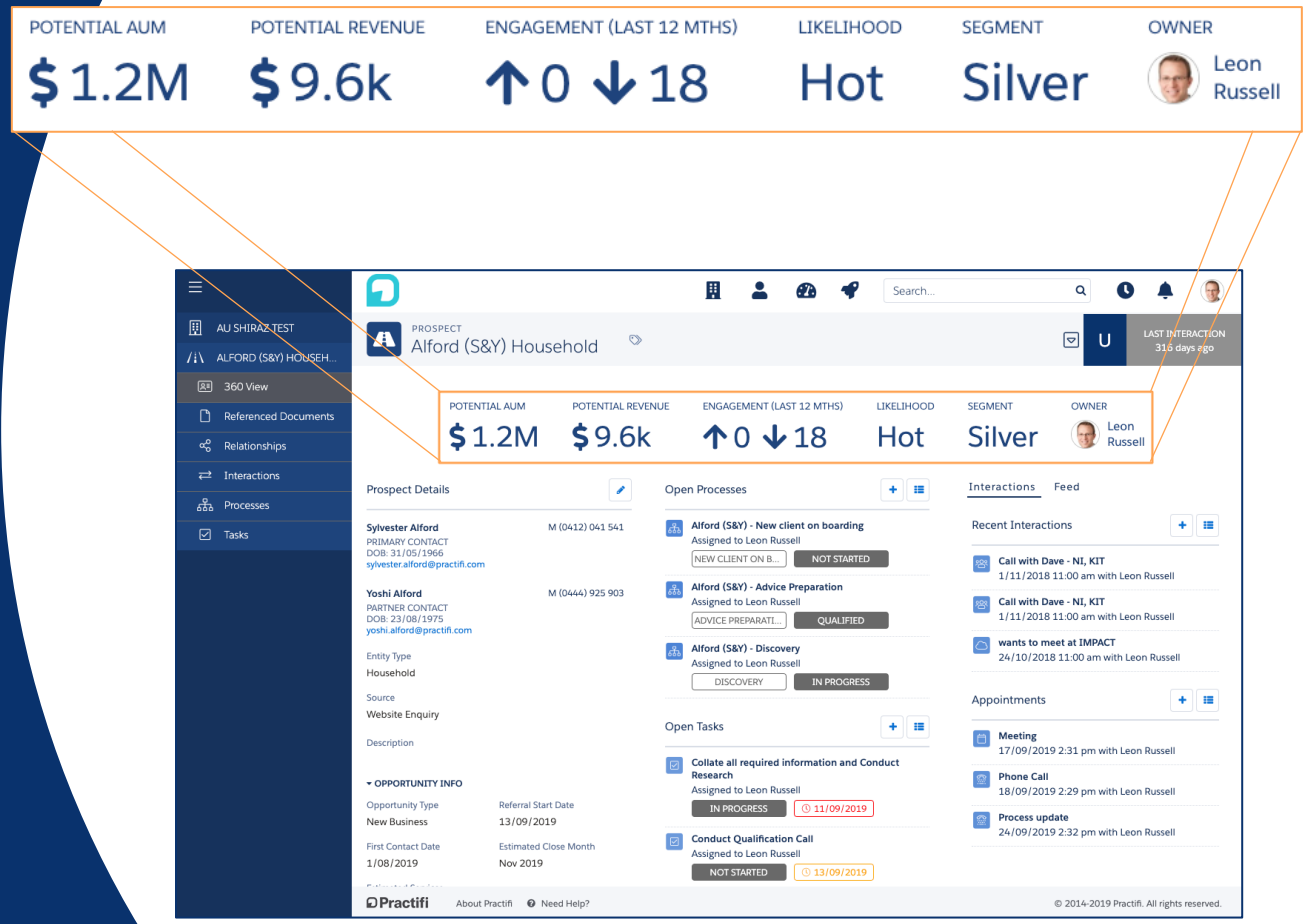
Enhanced Prospect 360 page

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.



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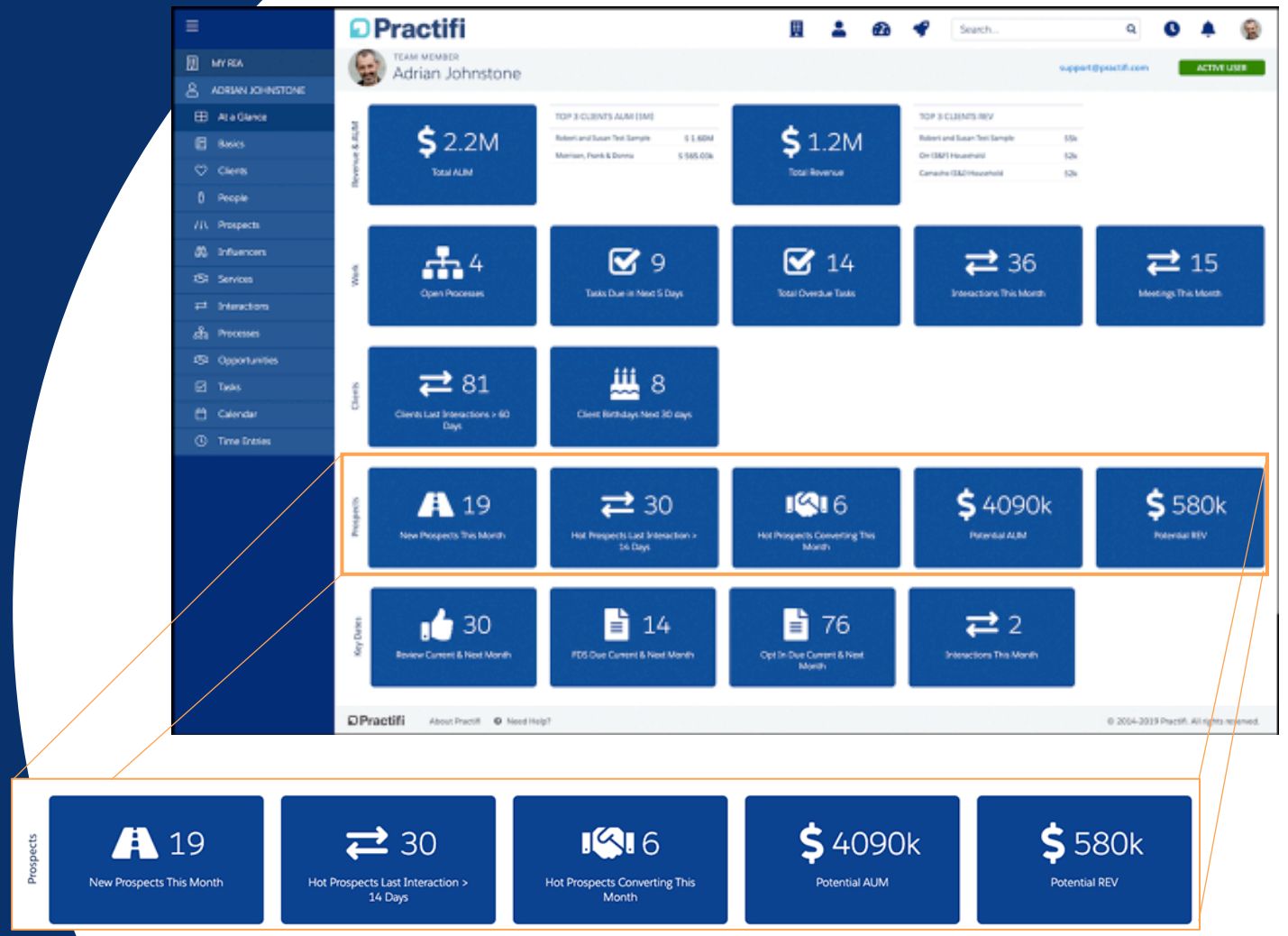
New At A Glance tiles put insight at your fingertips

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.



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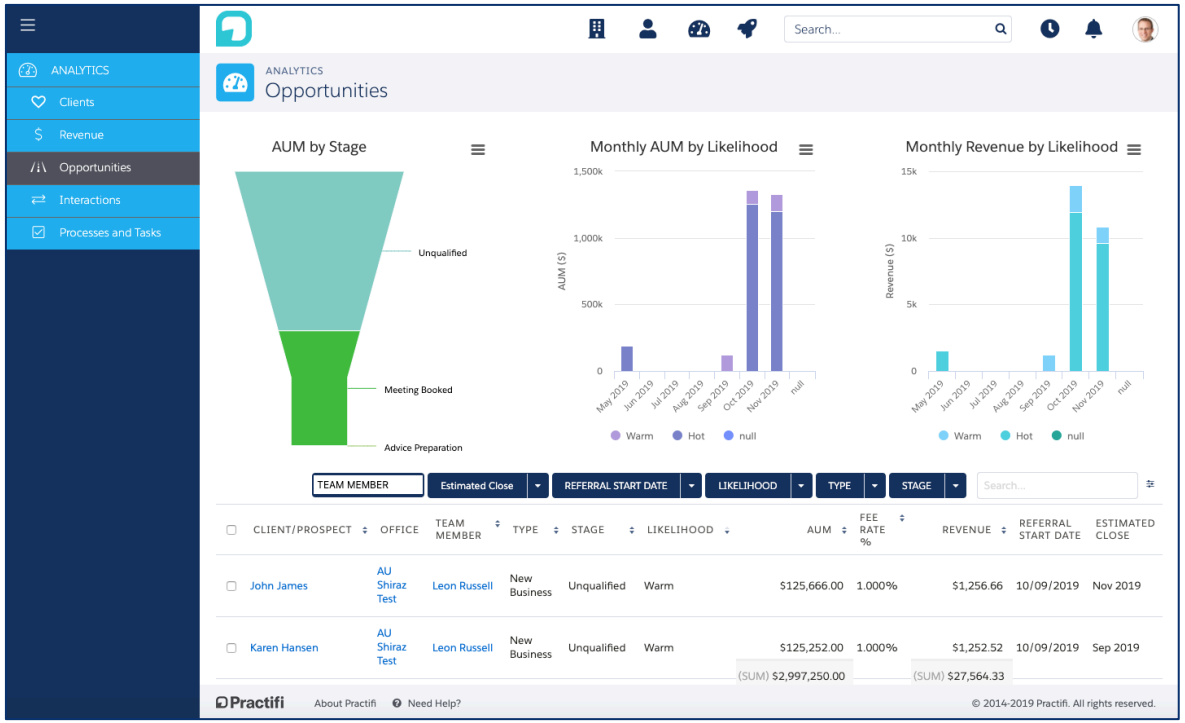
Use Pipeline Analytics to deep-dive into sales performance

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.



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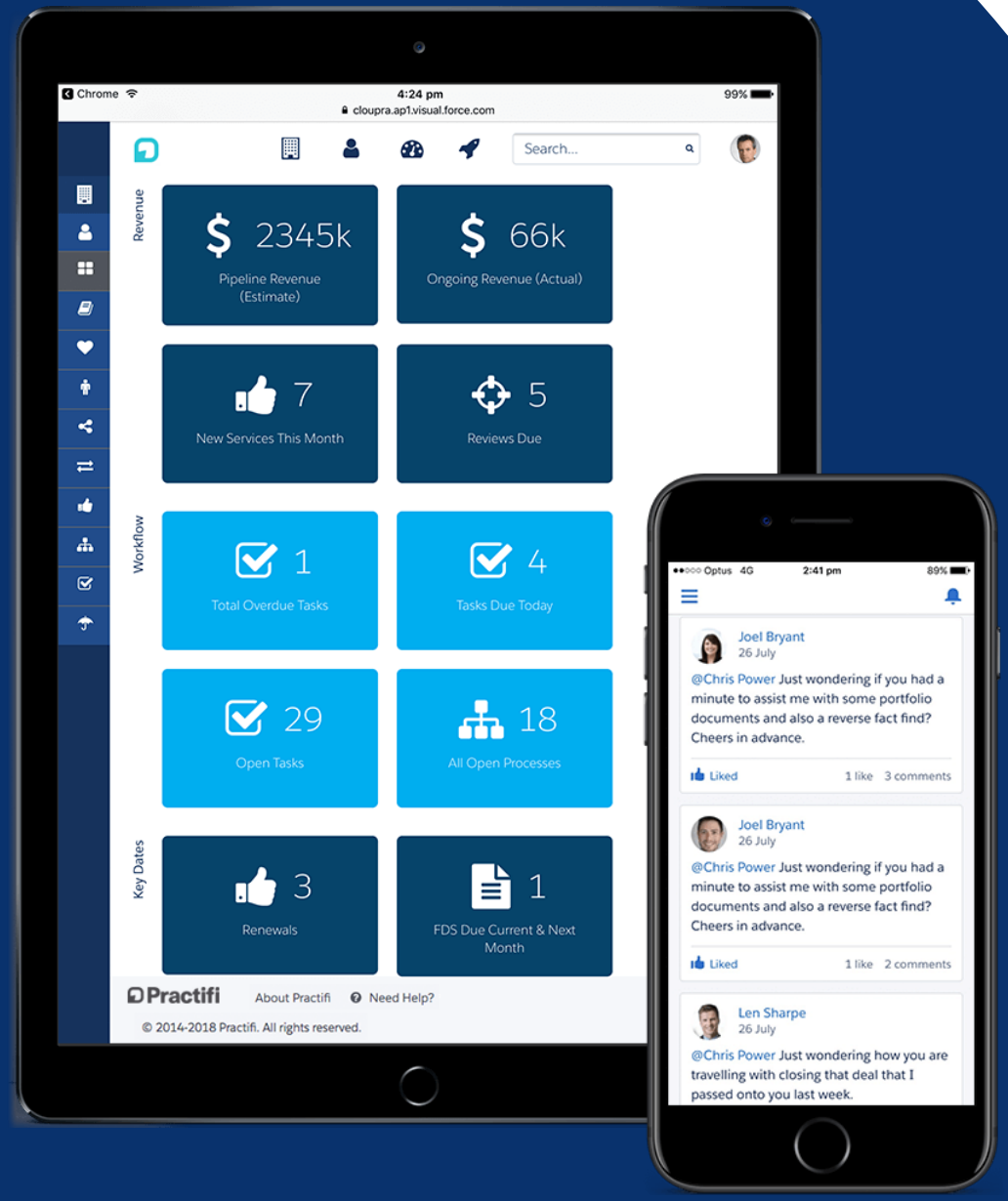

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Keep an eye out for more info coming soon!

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“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

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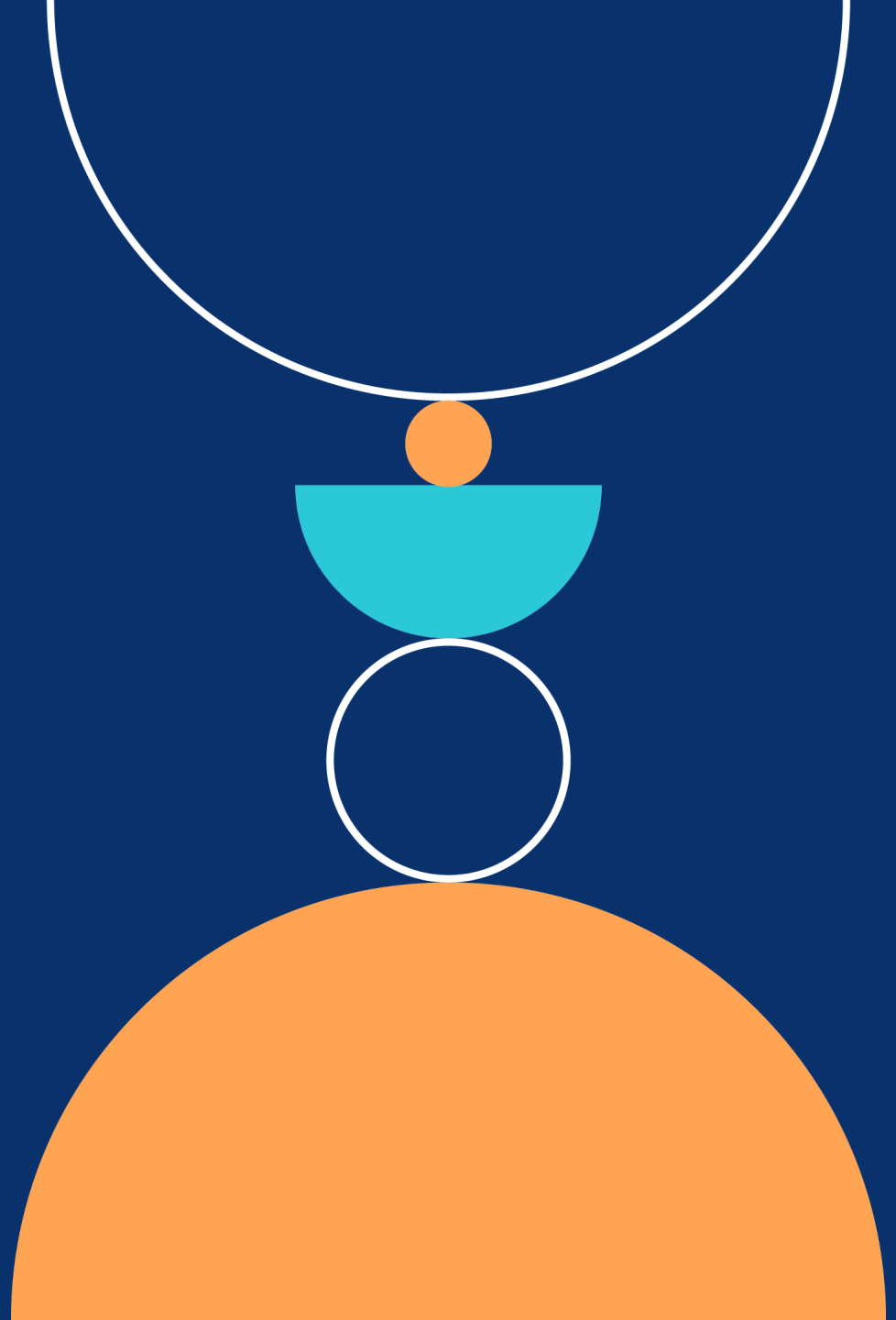

Any questions?

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!