

YEM

Your Enquiry Manager

Work Flow,
how to use YEM's VPA
Your "Virtual Personal Assistant"

Your Enquiry Manager

"CONNECTING PEOPLE"

YEM

- Your Enquiry Manager is now your interface with your enquiries. YEM is responding to your enquiries from your web site, phone and walk in enquiries and storing the data from those enquiries
- YEM is giving your clients the immediate gratification of an instant response
- And saving you time through the response automation and elimination of data transcription
- Now you you need to decide how you want to blend your YEM enquiry information with your business work flow

- Up till now you have received an email when an enquiry comes from your website, then you have had to reply
- But when you get an email notification from your YEM page YEM has already sent your response with the usual attachments - a very personal, professional first response
- If the request is just about your packages, then your response has already been sent by YEM
- Requests for more specific details or availability will need you to phone or email further information to add to the information they have already received

- What you do next in your business is up to you - do you want to communicate with the enquirer any further? Offer a site visit or ask what other information they would like to assist them in their event planning? What do you want to do with their enquiry data?
- At least some of your enquiries are going to need further handling
- How do you want to follow and manage these enquiries after the automated first response?
- Perhaps you are totally happy with your current system
- Perhaps you might like to use YEM's VPA to assist with follow up

VPA

YOUR VIRTUAL PERSONAL ASSISTANT

- VPA is YEM's tracker system
- It holds your enquiry data
- And generates your statistical analysis
- But it also has functionality for following up of your enquiries - with customised reminders and task allocation
- And a calendar - that you can use for follow up appointments or to track the client through to their event

HOW TO USE YEM

- Each business is different. Integrate your YEM enquiry data into your management system in a way that optimises your work flow
- You have 2 choices:
 - You can stay with the same system you used before YEM - follow up using the email notifications and reminders that YEM sends you; you do not have to open YEM's VPA
 - You can log in to YEM's VPA - find your enquiries and use the VPA as much or as little as you choose - simply check your enquiries, use the clients file for follow up by adding notes and tasks, use the calendar for appointments

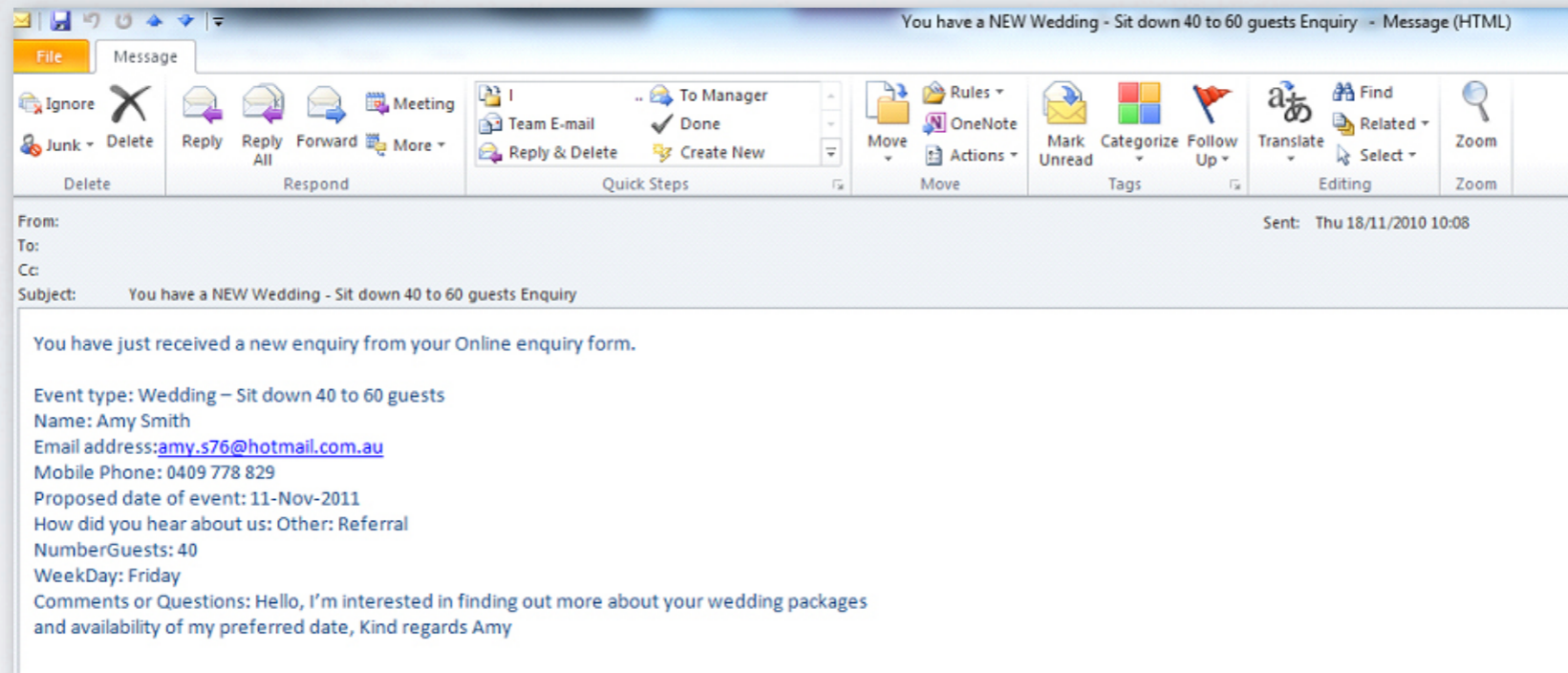
WORKING FROM EMAILS

- If you and your team want to stay with an existing calendar system that you are using now then “*working from your emails*” is probably your best option
- But you may like to look at VPA’s personal and team calendar options

The screenshot displays the 'Your Enquiry Manager' web application. At the top, there is a navigation bar with icons for Home, Calendar, Clients, Reports, Enquiries, and Setup. The main content area is divided into two panels: 'Common Tasks' on the left and 'Calendar' on the right. The 'Common Tasks' panel includes sections for 'Events' (with links for 'New enquiry', 'Search', 'Search clients', 'Search venues'), 'Calendar' (with links for 'View calendar', 'View team calendar', 'Add general task'), and 'Tasks'. The 'Calendar' panel features a 'Team Calendar' section, which is circled in red. Below this section is a table with columns for 'User', 'Role', and time slots from 08:00 to 02:00. The table lists three users: Functions Manager (Account Administrator), Kylie Dyson (Account Administrator), and Marie-Louise Fuery (Account Administrator). A smaller inset window on the left shows a similar 'Common Tasks' panel, also with a red circle around the 'Calendar' section. The bottom of the screen shows a copyright notice: 'Copyright (c) 2008 Studio Web Online Pty Ltd'.

WORKING FROM EMAILS

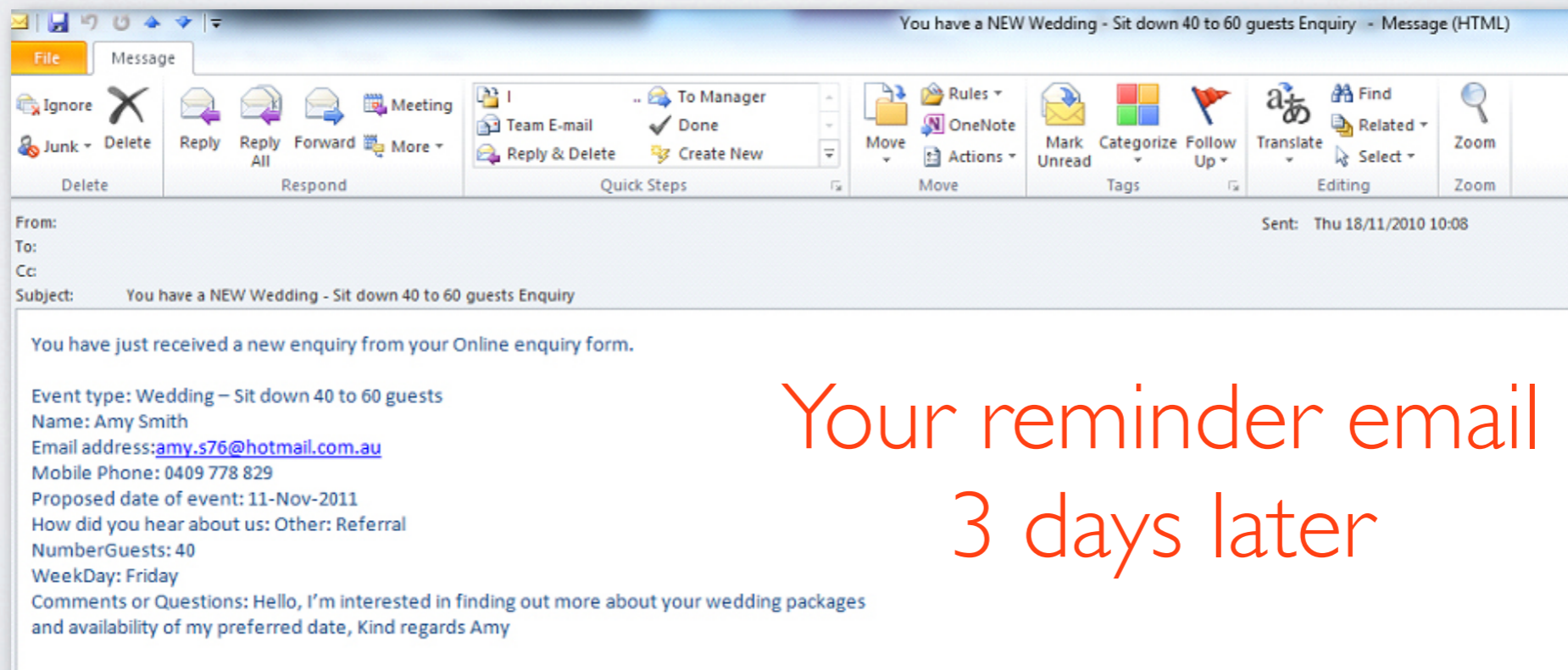
- Each time a client completes your YEM enquiry page, you will receive an email notification just as you always have



- And the client information will be loaded automatically into your online database management system
- When a client makes a tentative booking for their function you can simply enter them into your current Event Management System from your emails

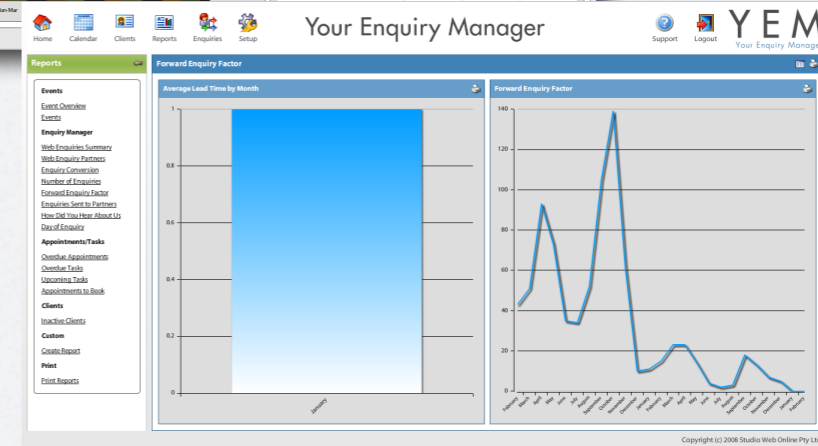
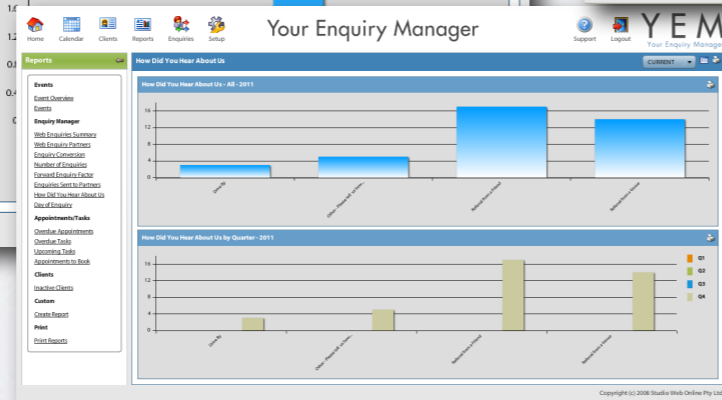
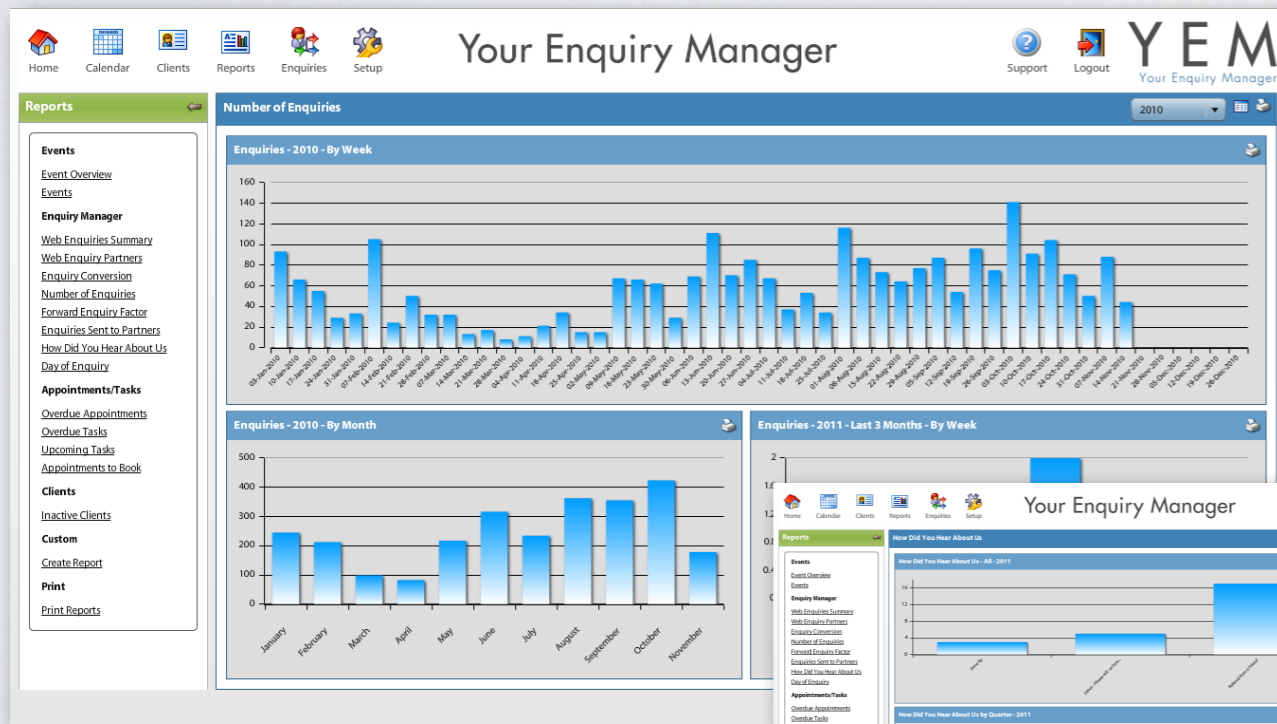
WORKING FROM EMAIL

- YEM can also be programmed to send you a reminder email, let's say 3 days later, to follow up this enquiry
- With notifications and reminders arriving as emails - you don't have to Log in to YEM's VPA for everyday enquiry handling - you can continue to work with your current system



WORKING FROM EMAILS

- But you will need to enter YEM's VPA if you want to gain statistics or reports
- And to export your enquiries in bulk into your event management system



USING VPA'S TASKS

- If you choose to use *tasks* to help with following up your enquiries you will need to log in to VPA regularly
- The home page screen displays your overdue and upcoming tasks

Your Enquiry Manager

Home Calendar Clients Reports Enquiries Setup Support Logout YEM Your Enquiry Manager

Common Tasks

Events
[New enquiry](#)

Search
[Search clients](#)
[Search venues](#)

Calendar
[View calendar](#)
[View team calendar](#)
[Add general task](#)

Home

Upcoming Appointments

Appointment	Time

Pending Enquiries

Host	Date entered	Event type	Client

Upcoming tasks

Task	
Tuesday 14 June 2011	
Sanctuary Cove Golf & Country Club (Northern Gold Coast) :: Follow up	✓
Links Hope Island (North Gold Coast) :: Book 1st Meeting	✓
Lakelands Golf Club (Gold Coast Region) :: Book 1st Meeting	✓
SkyPoint Observation Deck (Gold Coast) :: Book 1st Meeting	✓
Q1 Resort & Spa (Gold Coast) :: Book 1st Meeting	✓
Crown Plaza Surfers Paradise (Gold Coast) :: Book 1st Meeting	✓

Overdue tasks

Task	
Sunday 12 June 2011	
Hyatt Regency SC... (Gold Coast Region) :: Book 1st Meeting	✓
Yulia Shabanova :: Book 1st Meeting	✓

USING VPA'S TASKS

- *Tasks* are jobs that follow on from set, date specific events e.g. a person has enquired on 3rd February - the task of *follow up phone call*, to check if there is anything else you can do for them, is set for 3 days post enquiry - it will appear in your pending tasks pane on the 6th February

The screenshot displays two task management panes. The 'Upcoming Tasks' pane on the left is titled 'Tuesday 14 June 2011' and contains a list of tasks, each with a red calendar icon and a yellow checkmark in the right margin. The 'Overdue Tasks' pane on the right is titled 'Sunday 12 June 2011' and contains two tasks, each with a red calendar icon and a yellow checkmark in the right margin.

Upcoming Tasks	
Task	
▼ Tuesday 14 June 2011	
Sanctuary Cove Golf & Country Club (Northern Gold Coast) :: Follow l	✓
Links Hope Island (North Gold Coast) :: Book 1st Meeting	✓
Lakelands Golf Club (Gold Coast Region) :: Book 1st Meeting	✓
SkyPoint Ovservation Deck (Gold Coast) :: Book 1st Meeting	✓
Q1 Resort & Spa (Gold Coast) :: Book 1st Meeting	✓
...	...

Overdue Tasks	
Task	
▼ Sunday 12 June 2011	
Hyatt Regency SC... (Gold Coast Region) :: Book 1st Meeting	✓
Yulia Shabanova :: Book 1st Meeting	✓

USING VPA'S TASKS

- There are default tasks preset for each event type
- You can customise the tasks by going to Setup/Administration/Your event types

Your Enquiry Manager

Home Calendar Clients Reports Enquiries Setup Support Logout YEM Your Enquiry Manager

Administration

Account Details
Events
 Your Event Steps
Your Web Enquiry Page
 Enquiry Page
 Reportable Fields
 Automatic Enquiry Response
Import Data
 Clients
Export Data
 Clients

Administration

Event Types List Active Events Only +

Event type
YEM Module Zero
YEM Host Presentation
YEM Host Draft Enquiry Page
Host Draft Wedding
SR4 - Sponsor Presentation
Test YEM Host Review
General
Wedding
Portrait
Commercial
Reception Venue
Ceremony Location
Retailer
Supplier
Become a Host (Manual)
Become a Partner

Steps List this event's active steps only ↑ +

Step	Parent Step	Time Frame Amount	Time Frame Name
Enquiry Date			
Enquiry Follow Up	Enquiry Date	3	Day
Booking Confirmed			
Event Shoot			
Post Shoot File Preparation	Event Shoot	2	Day
Order Taken			
Order Follow Up	Order Taken	5	Day
Event Complete			

USING VPA'S TASKS

- There are default tasks preset for each event type
- You can customise the tasks by going to Setup/Administration/Your event types

Event Types List Active Events Only

Event type
YEM Module Zero
YEM Host Presentation
YEM Host Draft Enquiry Page
Host Draft Wedding
SR4 - Sponsor Presentation
Test YEM Host Review
General
Wedding
Portrait
Commercial
Reception Venue
Ceremony Location
Retailer
Supplier
Become a Host (Manual)
Become a Partner

Steps List this event's active steps only

Step	Parent Step	Time Frame Amount	Time Frame Name
Enquiry Date			
Enquiry Follow Up	Enquiry Date	3	Day
Booking Confirmed			
Event Shoot			
Post Shoot File Preparati	Event Shoot	2	Day
Order Taken			
Order Follow Up	Order Taken	5	Day
Event Complete			

These are the default steps for handling a general photography event

USING VPA'S TASKS

- Within VPA you will also have an individual *Client Page* for each enquiry where you can add client specific notes, conversations, emails and requests from each client to help track their progress

The screenshot displays the 'Client' page for Vernell Hill. The interface is divided into several sections:

- Client Details:** Contains contact information for Vernell Hill, including phone numbers (0404375432), a mobile number (Unknown), and an email address (nellybelly_bubblegumfairy@hotmail.com).
- Associated Clients:** A section for related clients, currently empty.
- Notes & Activities:** A table with columns for Date, Origin, Type, Details, and User. It contains two entries:

Date	Origin	Type	Details	User
08-Mar-2011	Wedding	Note	EVENT VENUE(S) : HOW DID YOU HEAR ABOUT US : Advertisement:Advertisement COMMENTS OR QUESTIONS ...	Kylie Dyson
06-Mar-2011	Client	Email (Outgoing)	Web enquiry auto response sent	

USING VPA'S TASKS

- Automatic and added follow up tasks for all clients will show in your task pane for the day the task is required
- Or you can choose to receive tasks as email reminders so the follow up of the task can be done without having to log into YEM
- However logging into YEM and working from the client screen will track when each task is completed and keep a history of the current event and the client
- This is particularly useful when team members are away or change as you can take over their tasks and/or calendar

USING VPA'S TASKS

- Once the client has booked you for their event, you can export that single client and import them into your event management system - carrying their notes and requests over simultaneously.

USING THE VPA CALENDAR

- YEM's VPA has both individual and team calendars
- Each team member can switch between team member's calendars and make bookings and appointments for each other
- Using the YEM calendar also puts each appointment that you have had with each client in their history

The screenshot displays the YEM VPA interface. At the top, the date 'Wednesday 25-May-2011' is circled in red. The main calendar view shows a grid of appointments. One appointment, 'Jane Black :: Wedding Interview', is circled in red. To the right, the 'Client Details' panel shows information for 'Jane Black', including phone number, email, and associated clients. Below this, the 'Steps' panel for a 'Wedding - Booked - 14-Apr-2012' event is shown. The 'Steps' table includes columns for step name, status, date, and assigned staff. Two rows in the 'Completed Steps' section are circled in red: 'Enquiry Date' (13-May-2011) and 'Wedding Interview' (25-May-2011).

Steps	Status	Date	Assigned Staff	✓	✗
Book Timing Plan Appointment	Confirmed	16-Dec-2011	Mellissa Kelland	✓	✗
Timing Plan	To Be Booked		Chris Hall	✓	✗
Confirm Running Sheet	Confirmed	04-Apr-2012	Mellissa Kelland	✓	✗
Event Shoot	Booked	14-Apr-2012	Chris Hall	✓	✗
Post Shoot File Preparation	Confirmed	16-Apr-2012	Chris Hall	✓	✗
Album Design	To Be Booked		Chris Hall	✓	✗
Order Taken	To Be Booked		Chris Hall	✓	✗
Event Complete	To Be Booked		Chris Hall	✓	✗
wedding enquiry follow up	Confirmed	17-May-2011	Chris Hall	✓	✗
Enquiry Date	Complete	13-May-2011	Mellissa Kelland	✓	✗
Wedding Interview	Complete	25-May-2011	Chris Hall, Mellissa Kelland	✓	✗
Wedding interview Follow Up	Complete	27-May-2011	Chris Hall	✓	✗
Booking Confirmed	Complete	27-May-2011	Chris Hall, Mellissa Kelland	✓	✗

USING YEM FOR EVENT MANAGEMENT

- You can actually use YEM to run right up to the event and although YEM is not yet a full event management system it can track all of the details and create an event order
- YEM for event management is increasing monthly and because it is online will be accessible from anywhere

Event
Wedding
Clients
Albany Symes Ph: 0409637500, W: , M: , Addr:
Guests - Party
Guests - Wife
Guests - Both
Venues
Event Notations

CLIENT INTERFACE

- YEM is developing a client interface, so your clients will be able to add needed information directly into your client account
- Details like the MC, suppliers, confirmed numbers, food requirements and confirmations
- This part of the communication portal will be an enormous time saver for the banqueting team, especially with the hard to reach clients

Event Clients	Proposed Dates	Venues	Guests	Notes	Referrers	Client Web Page
Albany Symes	0409637500					madam_cheeky@hotmail.co.uk

YOU CAN CHOOSE

- So you can choose the level that you would like to use YEM to help you manage your enquiries
- And how you want to integrate YEM with your event management

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