ClientWorks
How to Use the Segmentation Tool

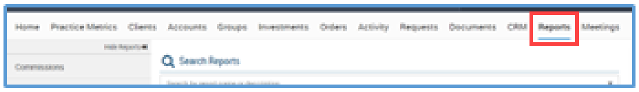
The Segmentation Tool makes segmenting your clients easier! The tool provides an in-depth assessment of a Book of Business to understand current state and potential opportunities.

Key Benefits

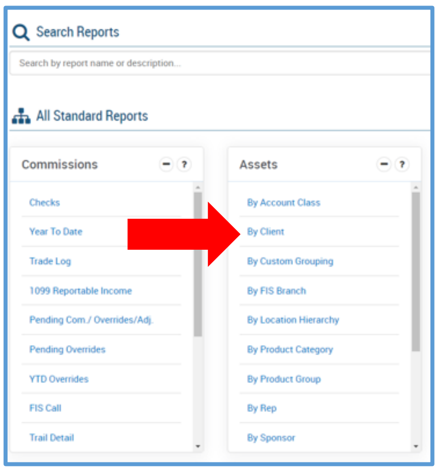
- Provides analysis to Identify and leverage existing relationships and to uncover new business
- Customized Service Matrix – helps you develop a tailored service framework to meet the unique needs of different client segments
- Capacity Management - optimize resources to ensure efficient and effective service delivery
- Implement strategies to reduce risk through partial book sales and diversification.

Locating the Assets by Client Report

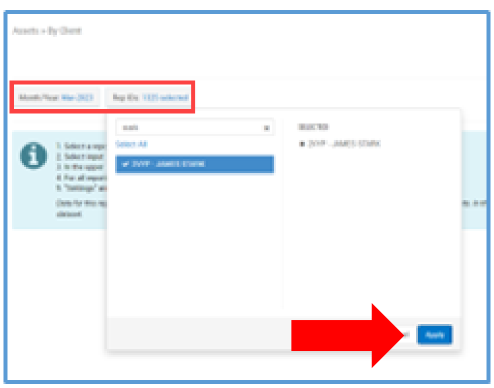
1. From the **Client Management** homepage, click on the **Reports Tab**:



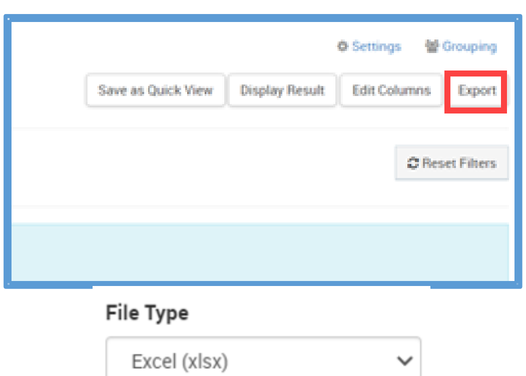
2. On Reports page, select **"By Client"** in **Assets** box:



3. Choose the **Month** and **Rep ID** filters to use for the report and click **Apply**:

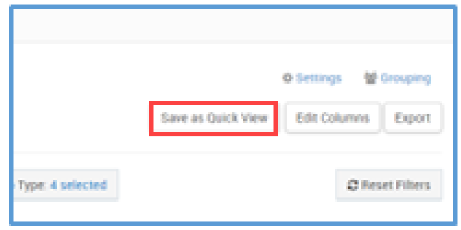


4. Click **Export** button & choose **Excel** as the File Type:

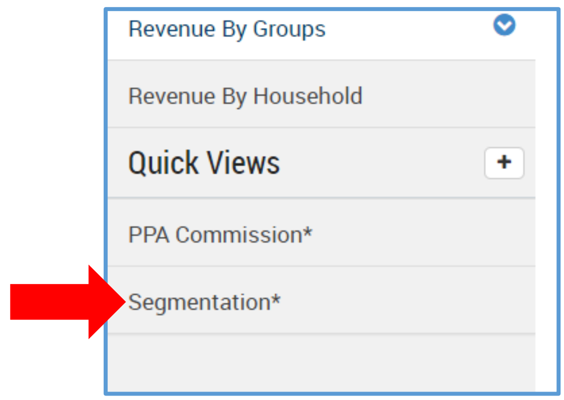


Save the Quick View

1. Click **Save as Quick View** button and choose a name (like "Segmentation"):

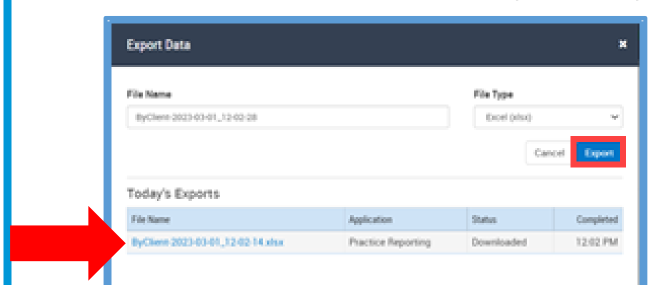


2. Once saved, it will show in **Quick Views**. Click to open:

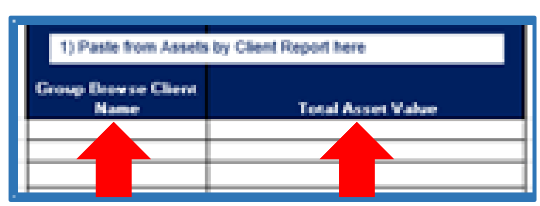


Copy Data to Segmentation Tool

1. When the report is complete, it will be in your **Export Data** box. Click to download & then open the report:



2. With the **Assets by Client** report open, copy the **Group Browse Client Name** & **Total Asset Value** to the corresponding columns on Segmentation Tool:

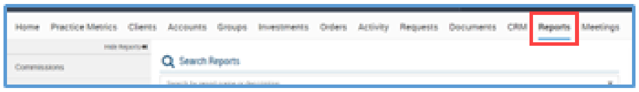


3. **Save** original report for future reference.

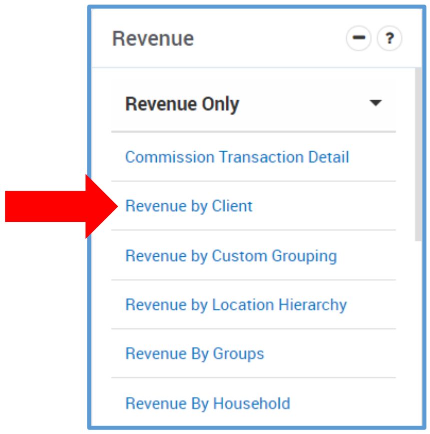
ClientWorks
Segmentation Tool

Locating the Revenue by Client Report

1. From the **Client Management** homepage, click on the **Reports Tab**:

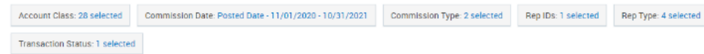


2. On Reports page, in **Revenue** box under **"Revenue Only"**, choose **Revenue by Client**:



*Proceed to **Step 3** at top right of this page >>>*

3. Adjust the **Filters** shown below in the report by clicking on each box and adjusting the data. Format as follows:

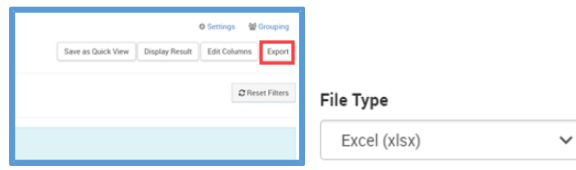


- **Account Class** – Leave as is
- **Commission Date** – Change to the last 12 months *(For example, 6/1/2023 – 5/31/2024)*
- **Commission Type** – Make sure Commissions and Include Trails are the only checked boxes
- **Rep ID** – Make sure all of your Rep IDs are included
- **Rep Type** – Leave as is
- **Transaction Status** – Make sure only "Paid" is checked

Save the Quick View

***Save** your Quick View to save these settings. Going forward, you will only need to change Date or Rep ID fields*.

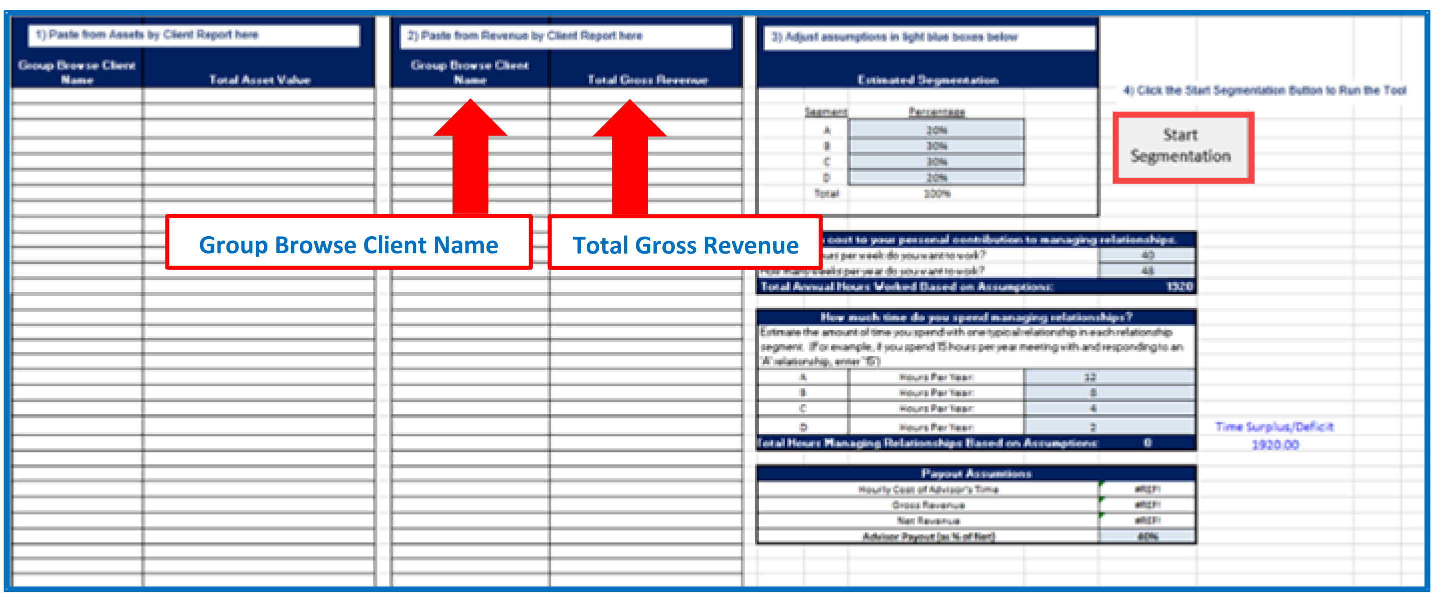
1. Click **Export** button & choose **Excel** as the File Type:



Copy & Paste into Segmentation Tool Template

1. With the **Revenue by Client** report open, copy the following data columns to the corresponding columns in the Segmentation Tool:

   - **Group Browse Client Name**
   - **Total Gross Revenue**



2. Once Data is input, click on the **"Start Segmentation"** button to run the file. **Save** original reports for future reference.