

Develop Your Data Collection & Maintenance Program – No CRM Needed

START UP GUIDE

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DATE

Dear **FIRST NAME**:

Overview

Welcome to FIRM. As a new employee, we need to obtain the following items from you:

- Resume (with any additional pertinent information)
- Photograph
- Mailing list

Resume

As part of the new hire process, marketing creates your resume in our corporate database, Deltek Vision. The information is used in bids, proposals and other documents. We need to receive your resume, along with any supplemental information by **DATE (ONE WEEK FROM HIRE)** in order to get this information into the database as soon as possible. You can email or give your resume and information directly to **INSERT COORDINATOR NAME AND CONTACT INFORMATION HERE.**

For your resume, please make sure to include the following:

- **Years of Experience** – this usually starts with the year you graduated from college
- **Education** – list all degrees and certifications
- **Professional Registration** – please provide a copy of your license
- **Organizations** – list any professional organizations in which you are currently a member
- **Publications** – list any papers you have published or presentations you have given
- **Computer Fluency** – list the computer programs in which you are fluent
- **Foreign Language** – list the languages, other than English, in which you are fluent
- **Awards** – list any awards you have received
- **Professional Experience** – this is a general paragraph about your past experience
- **Project Experience** – provide project name, client name, location, brief summary of project and your role in the project, construction value, and dates complete (design and construction) for each project

Photograph

Please make arrangements with NAME, Graphics Manager, (EMAIL [ADDRESS](#)) to schedule an appointment to take your company photograph. Please make arrangements to get your photograph taken by DATE (TWO WEEKS FROM HIRE).

For your photography session, business attire is required (suit jacket, shirt, and tie for men; business wear or other suitable dress for women).

Mailing List

Our database will hold a mailing list for you. This list should have any contacts you have that you would want to receive mailings from FIRM. For each contact we need the following information:

- **Name**
- **Title**
- **Company Name**
- **Address**
- **Phone**
- **Fax**
- **Email**
- **Sector Code for Clients**
- **Types of Mailings to be received**

We can receive this list from you in several ways.

- If you already have a contact list electronically, print out a copy, code it as explained below and give **MARKETING COORDINATOR NAME** the hard copy. You should also e-mail the electronic file.
- You can make copies of business cards and code them as explained below and give the hard copy to **MARKETING COORDINATOR NAME**.
- You can hand write or type and code your mailing list.

Whatever way is easiest for you, do that!

We have several types of mailings: the *Yearlook* magazine, email newsletters, technical mailings, and the annual holiday card. You will be able to choose which of these mailings should go to each of your contacts.

The *Yearlook* magazine should only go to high-level contacts. Technical mailings should go to the technical staff that is on your list. Next to each contact make a notation as to what mailings you would like them to receive. Use the following as a guide.

- Y for *Yearlook*
- N for Newsletters
- T for Technical Mailings
- HC for Holiday Card
- HGS for Holiday Gift Standard
- HGP for Holiday Gift Premium

You also need to code each of your contacts according to the sector code list that is attached. Choose the best category for each company and write it next to the contact name. This is very important! Mailings are determined by the sector codes. To ensure that your contacts are receiving the correct mailings, you must mark a sector code. **If there is no sector code, they will receive no mailings.**

Thank you for your cooperation and prompt attention, as this will speed up the process. Please contact me with any questions.

Sincerely,

NAME
TITLE

Team Member Experience Worksheet

GENERAL INFORMATION

Team Member: _____

Education: _____

Work Phone: _____

FIRM Cell Phone: _____

Software: _____ Skill Level: Expert Competent Knowledgeable

Software: _____ Skill Level: Expert Competent Knowledgeable

Software: _____ Skill Level: Expert Competent Knowledgeable

Language: _____ Skill Level: Conversational Fluent

Language: _____ Skill Level: Conversational Fluent

EXPERIENCE DETAILS

This information section applies keywords to your professional experience, allowing marketing to conduct easier and more accurate searches. Please select the key words for each area of expertise, if they are applicable to your experience.

Planning: Master Planning Environmental Impact Studies Zoning; Land Use Studies

Project Management Proposal Preparation Contracts/Language Managing Outside Consultants Client Management/Business Development
 Financial Management/Earned Value Scheduling Risk Management

Civil Engineering Pump Station Design Hydrology Roadway Design (Plan/Profile) Irrigation, Drainage Coastal Engineering Parking Lots
 Drainage/Stormwater Rail/Transit Guideways Sewage Treatment Water Supply; Treatment and Distribution Technical Writing

Architecture: Programming Master Planning Anti-Terrorism/Force Protection Planning/Charrettes Space Planning Design Development
 Visualization Construction Admin Construction Documents Business Development Technical Writing BIM Design Thinking
 Project Execution Plan (PXP) Quality Control

Structural Engineering: Cast-in-place Concrete Steel Drilled Shaft Foundations Pile Foundations Cranes Long Span Trusses High Wind
 Seismic Design & Studies (Category D, E, F) Launch Infrastructure Technical Writing Equipment Foundations Timber
 Post-Tension Concrete CMU Multi-Story Buildings Underground Structures

Mechanical Engineering: Cold Storage, Refrigeration Systems Hydraulics & Pneumatics Product, Machine Equipment Design Process Piping
 Chiller Plants Technical Writing Boiler Systems

Industrial Engineering: Plant Design Tank Storage Automation, Controls & Instrumentation Technical Writing

Electrical Engineering: Communications Systems Lighting-Interior Theater Lighting Lighting-Exterior Street Lighting Athletic Field Lighting
 Power Generation, Transmission, Distribution Design Technical Writing

Interiors: Planning/Charrettes Programming Space Planning Design Development Move Management Interior Renderings
 Furniture, Fixtures & Equipment Comprehensive/Structural Interior Design Construction Admin Construction Documents
 Business Development Branding Design Thinking/Visioning AV Integration

PROJECT TYPE EXPERIENCE

This information section applies keywords to projects. Please select the key words for each type of project you have experience.

Aviation: Airside Landside MRO Hangar FBO Terminals Runways Aprons/Taxiways Master Planning Airport Lighting
 NAVAIDS Aircraft Fueling Airfield Paving Concessions Boeing Embraer Northrop Grumman Gulfstream

Manufacturing: Clean Rooms Composite Facilities Autoclaves Warehouses Chemical Plants Wind Tunnels Paint Facilities
 Tooling Automation

General Facilities: Refrigeration Facilities Food Storage Facilities Corporate Campus Healthcare Retail Medical Labs
 Auditoriums & Theaters Churches Field Houses; Gyms; Stadiums Hotels/Motels Research Facilities Data Centers

Energy Projects: Central Plant Chillers Distribution Systems Energy Master Plan Energy Audits Cryogenic Facilities Biofuel Refineries
 Wind Plants Solar Plants

Team Member Experience Worksheet

Government/ Institutional Facilities:

- Barracks; Dormitories Childcare Development Facilities Corrosion Control; Cathodic Protection Desalination Facilities
- Dining Halls Embassies and Chanceries Fallout Shelters; Blast-Resistant Design Libraries; Museums; Galleries
- Nuclear Facilities Prisons & Correctional Facilities Judicial/Court Facilities Public Safety Facilities Readiness Center
- Community Center Warriors in Transition Battalion Headquarters Missile Facilities

Education Projects:

- Charter Schools Private Schools Higher Education 21st-Century Learning CPTED STEM Facilities Student Centers
- Workforce Training Clean Rooms Life-Safety Planning Laboratories Research Centers Security

Entertainment Projects:

- Crowd Control Queue Lines Load/Unloading Theming Material Constructability Life Safety Vehicle and Track Design
- Project Rooms Catwalks Specialty Lighting Wind Tunnels Theme Park Master Plan Theme Zone Plan and Theming
- Bluesky Creative Development Concept Creative Development Storyline Development Ride Creative Development
- Storyboards Attraction and Theater/Live Show Creative Development Disney Sea World Universal Studios Other

Aerospace Projects:

- Launch Facilities Ground Support Equipment Clean Rooms Processing Facilities Launch Vehicle Manufacturing
- Fueling and Storage Facilities Environmental Control Systems Blue Origin Spacecraft Integration Facility

Interiors Projects:

- Retail Roll Out/Multi Location Law Firm Restaurant Call Center Student Housing Corporate office

SUBJECT MATTER EXPERT LIST

Please include a brief bullet style list of up to 5 items you consider yourself as an expert on in the A/E/C field. Then include the same style list with up to 5 items outside of the A/E/C field where you have expertise. The second list acknowledges that our employees' outside interests are also helpful with our designs and proposals. For example, NAME's knowledge of firing ranges helped land the XXXX project, and NAME's skills with skydiving helped to win the skydiving attraction.

Expertise / skills in A/E/C Field:

- 1.
- 2.
- 3.
- 4.
- 5.

Expertise / skills outside of industry:

- 1.
- 2.
- 3.
- 4.
- 5.

memo

[Company name]

To: [Recipient names]
From: your name
CC: [Recipient names]
Date: [Pick the date]
Subject: Resume Update

ANNUAL UPDATE BLURB:

Another great year has passed at [FIRM NAME]. As part of this great year, we would like you to review your professional resume on file in the marketing database. It is imperative that it reflects all of your great accomplishments for use in proposals and qualifications to obtain new work.

Attached is your current resume from our current marketing files. Please take few moments to look at the following areas on your resume. Mark any edits or changes and return it to marketing no later than **Wednesday, April 25th 2018.**

WORK ANNIVERSARY BLURB:

Happy Work Anniversary! As part of celebrating another year with [FIRM NAME], we would like you to review your professional resume on file in the marketing database. It is imperative that it reflects all of your great accomplishments for use in proposals and qualifications to obtain new work.

Attached is your current resume from our current marketing files. Please take few moments to look at the following areas on your resume. Mark any edits or changes and return it to marketing no later than **Wednesday, April 25th 2018.**

Name and title – Is your name spelled correctly? Is your professional registration designation correct (i.e.: PE, EI, ASLA, AIA, etc.)? Is your job title correct?

Employee Bio – This can be a general paragraph about your past experience or a specific description of one of your specialties (manufacturing design, mechanical expertise, experience with FDOT, etc.). Refer what is currently showing for accuracy. Let marketing know if a specific one needs to be developed. ***Please note I've attached a document to help with information for your bio.**

Years of Experience – This usually starts with the year you graduated from college. Please tell us your years of total experience and years with [FIRM NAME].

Education – If you are missing any degrees, please provide the marketing department a copy of your diploma.

Professional Registration – If any of your registrations are missing, please provide a copy of your license.

Organizations – List any professional organizations in which you are currently a member. If you are no longer a member of one listed on your resume, please mark through it.

Publications & Presentations – List any papers you have published or presentations you have given at conferences. Include publication/organization, title and description.

Computer Fluency – List the computer programs in which you are fluent.

Foreign Language – List the languages, other than English, in which you fluent.

Awards – List any awards you have received and date received (DD/MM/YYYY).

memo

Firm Projects Currently Showing on Resume – Please take a few moments and write what your role was on each project listed (example: Mechanical Designer, Architectural Project Lead). Also please add a sentence or two about **your** specific job duties on the project (example: Mr. Traylor was responsible for coordinating with team members to determine LEED credits and preparing LEED documentation to register and certify the project with USGBC).

Non-Firm Projects – These are projects you worked on before coming to [FIRM NAME]. Please fill in any of the missing data such as project name, your role and a brief description of your specific duties related to that project.

*If you have any questions, please contact me.
Don't forget, the deadline to return your resume to me is **April 25th, 2018***

Resume Bio Introduction

Your resume bio introduction introduces your qualifications quickly and effectively to a prospective client. This is often the first item read, so get to the point – why are you the best person for this role?

The statement should communicate what you can bring to the table for the proposed project. Highlight your most relevant strengths, skills and core competencies, versus a trait or skill that's an industry or professional standard (i.e. "problem-solver" or "team-player").

What to Include in your Bio

The Summary statement should be approximately 4-6 lines and speak to your professional background only.

- Core strengths and skill sets most relevant
- Past relevant experience with key functions
- Notable accomplishments

Questions to Help You Write Your Bio

1. What are you known for professionally? What do you have a knack for?
2. What's the one problem you are best at solving for your clients? What do your ideal clients say about you?
3. What types of client have you worked with in the past? And what have you done for them?
4. What are you most passionate about professionally? What most excites you about your work & the contribution you can make?
5. How long have you been doing what you do?

PROJECT INFORMATION WORKSHEET

Distributed To: _____

Due By: _____

Return To: _____

BASIC PROJECT INFORMATION

This is the basic information needed for each project and is used as the starting place for choosing projects for resumes, proposals, SOQs, presentations, the firm website, etc. If the project is not of marketing importance, please fill in this basic information and check the corresponding box at the end of this section.

Project Name: _____

Project Number: _____ Confidential (verify): _____

Project Address: _____ City, State, Zip: _____

Project Manager: _____

Firm Role: _____ Project Size: _____

Service Dates: _____ to _____ Construction Dates: _____ to _____

Service Fees: _____ Est. Construction Cost: _____

Marketing Importance: Very Important Somewhat Important Not at this time

Professional Photography Needed: Yes No

Project Milestones (for follow-up):

CLIENT/OWNER/REFERENCE INFORMATION

The client is the entity that pays our invoices and is not always the entity that ultimately owns the project (for example, when we are a subconsultant). The reference is a person who is associated with the project who will serve as our references for the work we perform.

Client Company: _____

Client Contact: _____ Title: _____

Client Address: _____ City, State, Zip: _____

Client Phone: _____ Client Email: _____

Owner Company: _____

Owner Contact: _____ Title: _____

Owner Address: _____ City, State, Zip: _____

Owner Phone: _____ Owner Email: _____

Reference Company:

Reference Contact: _____ Title: _____

Reference Address: _____ City, State, Zip: _____

Reference Phone: _____ Reference Email: _____

PROJECT INFORMATION WORKSHEET (PAGE 2)

SHORT DESCRIPTION

The short description is the initial default description for the project and our resumes. Provide a 3-4 sentence description that includes, at a minimum, all services we are providing and something that indicates the size and scope of project (i.e., acreage, miles, cost, square footage).

Description:

Long Description Needed: Yes No Don't Know

List of Services:

PROJECT TEAM INFORMATION

List any subconsultants, their role, and disadvantaged status, if applicable (DBE, ESB, SDVOB, etc.).

Subconsultant Name:	Role:	Status:
Subconsultant Name:	Role:	Status:
Subconsultant Name:	Role:	Status:
DBE/ESB Goal (%)		

KEY PERSONNEL

FIRM employees are automatically attached to projects through TIMESHEET SOFTWARE when that person has charged 15+ hours to the project number. Please indicate the employee's role on the project (not their FIRM job title).

Employee:	Role:
Employee:	Role:
Employee:	Role:
Employee:	Role:
Employee:	Role:
Employee:	Role:
Employee:	Role:
Employee:	Role:
Employee:	Role:

MARKETING USE ONLY

Received by:	Date:
Data into Insider:	Follow-up Needed: