

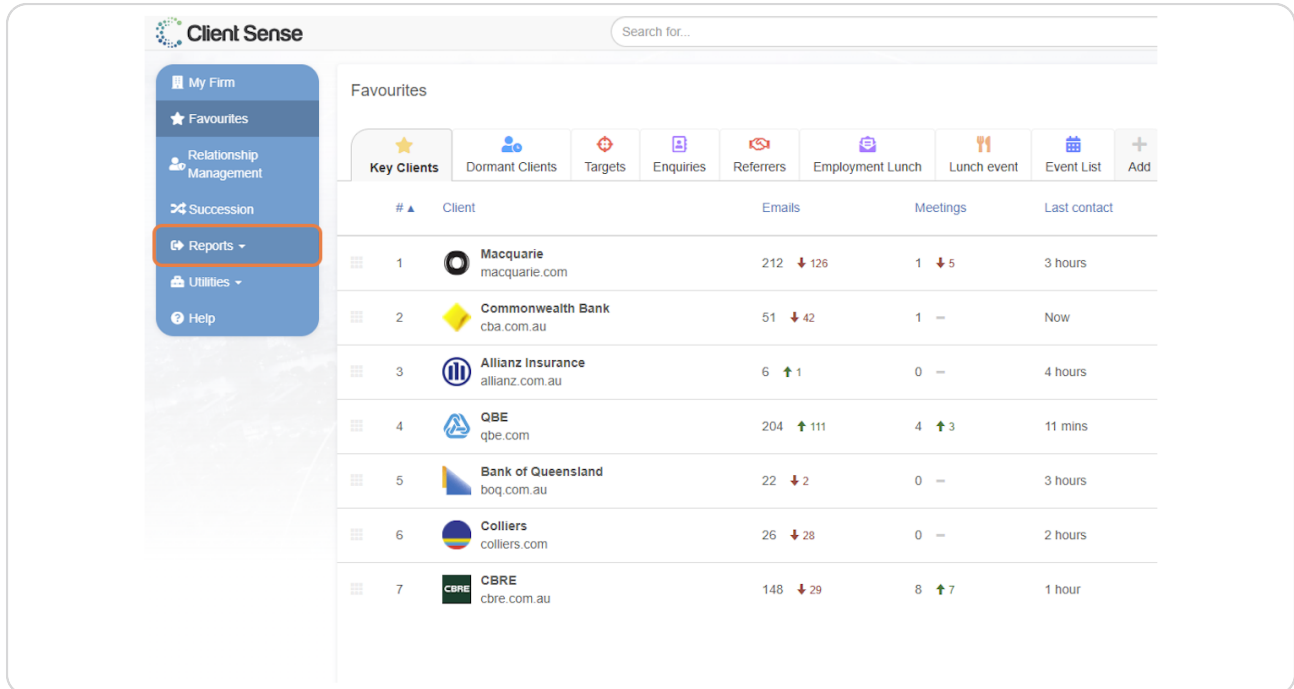
Generating a Cross-Servicing Opportunity List

8 Steps [View most recent version](#) 








Created by	Creation Date	Last Updated
Steve Tyndall	Aug 07, 2024	Aug 07, 2024

STEP 1

Click on Reports

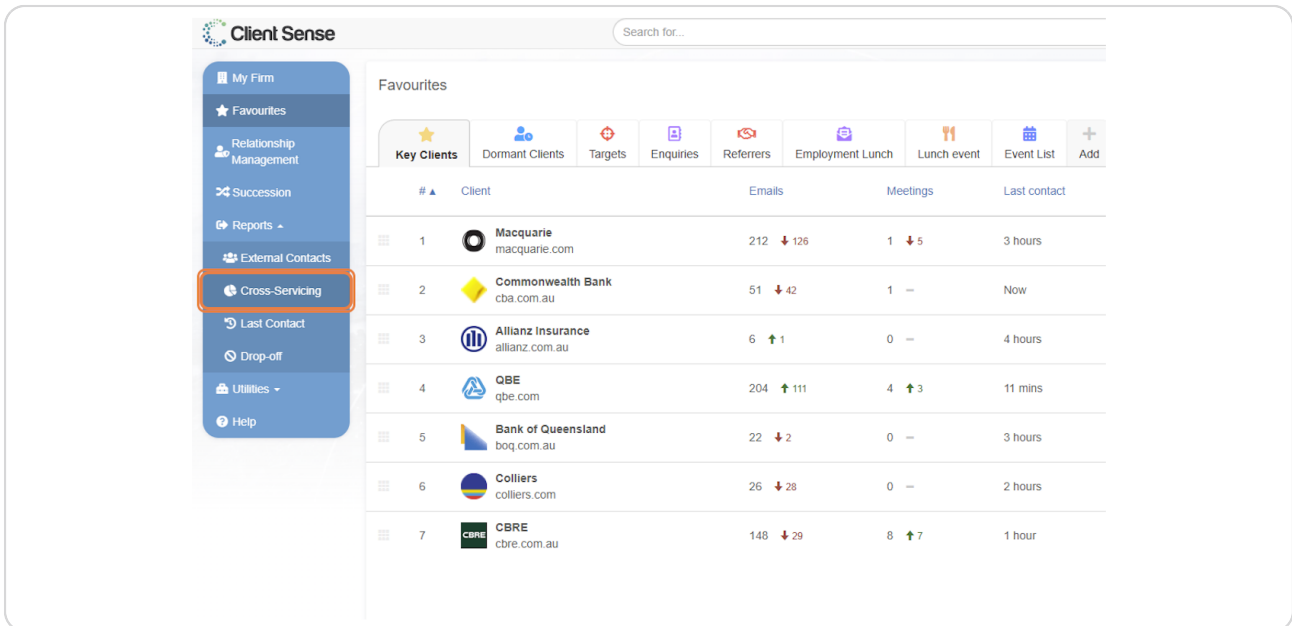


The screenshot shows the Client Sense dashboard. On the left, a blue sidebar contains a menu with the following items: My Firm, Favourites, Relationship Management, Succession, **Reports** (highlighted with an orange box), Utilities, and Help. The main area of the dashboard is titled 'Favourites' and features a table of client data. The table has columns for '#', 'Client', 'Emails', 'Meetings', and 'Last contact'. The data is sorted by the number of emails, with Macquarie at the top (212) and CBRE at the bottom (148). Each row includes a grid icon for sorting, a client logo and name, the email count with a trend indicator (up/down arrow), the meeting count with a trend indicator, and the last contact time.

#	Client	Emails	Meetings	Last contact
1	 Macquarie macquarie.com	212 ↓ 126	1 ↓ 5	3 hours
2	 Commonwealth Bank cba.com.au	51 ↓ 42	1 —	Now
3	 Allianz Insurance allianz.com.au	6 ↑ 1	0 —	4 hours
4	 QBE qbe.com	204 ↑ 111	4 ↑ 3	11 mins
5	 Bank of Queensland boq.com.au	22 ↓ 2	0 —	3 hours
6	 Colliers colliers.com	26 ↓ 28	0 —	2 hours
7	 CBRE cbre.com.au	148 ↓ 29	8 ↑ 7	1 hour

STEP 2

Click on Cross-Servicing



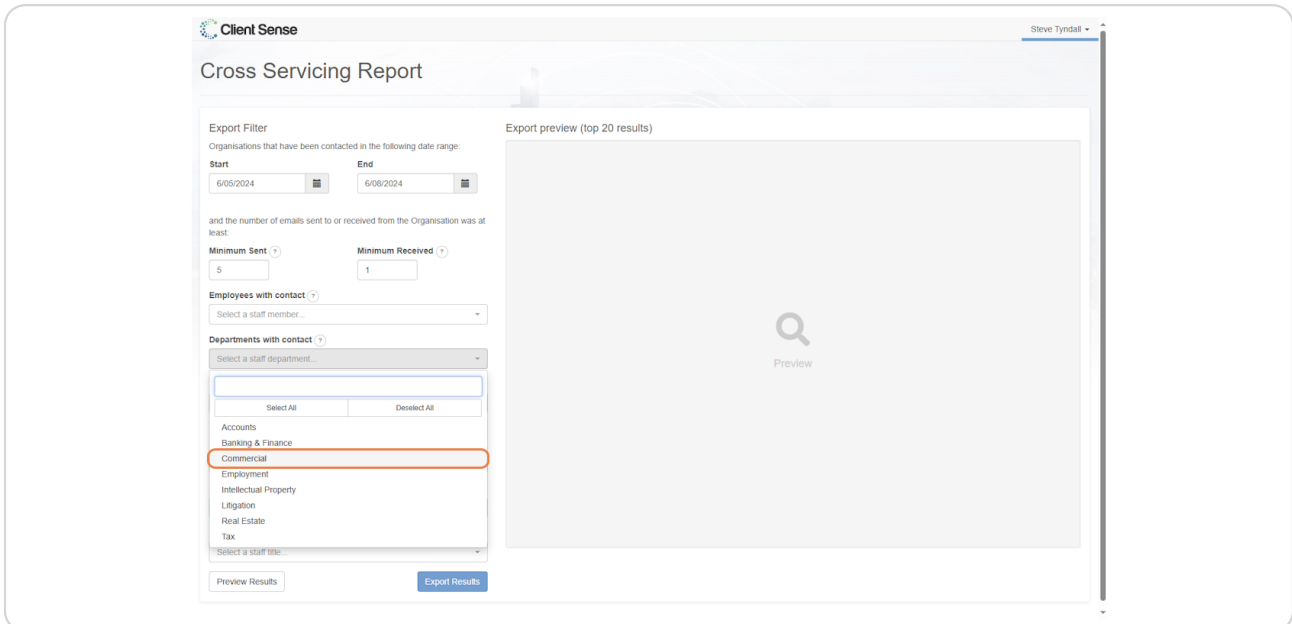
The screenshot shows the Client Sense dashboard. On the left sidebar, the 'Cross-Servicing' option is highlighted with an orange box. The main area displays a table of 'Favourites' with columns for Client, Emails, Meetings, and Last contact. The table lists seven clients: Macquarie, Commonwealth Bank, Allianz Insurance, QBE, Bank of Queensland, Colliers, and CBRE.

#	Client	Emails	Meetings	Last contact
1	Macquarie macquarie.com	212 ↓ 126	1 ↓ 5	3 hours
2	Commonwealth Bank cba.com.au	51 ↓ 42	1 —	Now
3	Allianz Insurance allianz.com.au	6 ↑ 1	0 —	4 hours
4	QBE qbe.com	204 ↑ 111	4 ↑ 3	11 mins
5	Bank of Queensland boq.com.au	22 ↓ 2	0 —	3 hours
6	Colliers colliers.com	26 ↓ 28	0 —	2 hours
7	CBRE cbre.com.au	148 ↓ 29	8 ↑ 7	1 hour

STEP 3

Firstly choose a Department with Contact

In our example we will choose Commercial, this is because I would like to understand which Companies our Commercial Team knows.

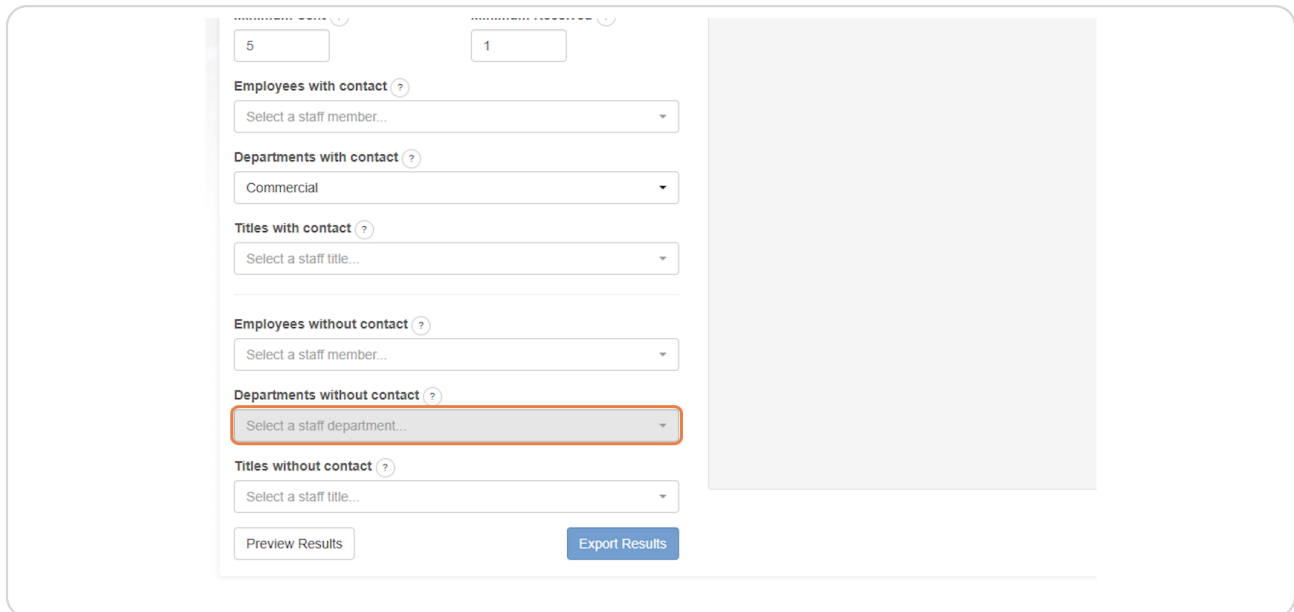


The screenshot shows the 'Cross Servicing Report' interface. The 'Export Filter' section on the left includes date range filters (Start: 6/05/2024, End: 6/08/2024), minimum email sent/received counts (5 sent, 1 received), and a dropdown for 'Departments with contact'. The 'Commercial' department is selected and highlighted with an orange box. The 'Export preview (top 20 results)' area on the right is currently empty, showing a magnifying glass icon and the word 'Preview'.

STEP 4

Secondly choose a Department without contact

I will choose Employment for the Department without Contact. This is because I am trying to understand which Companies the Commercial team has had contact with, that the Employment team has not had contact with.



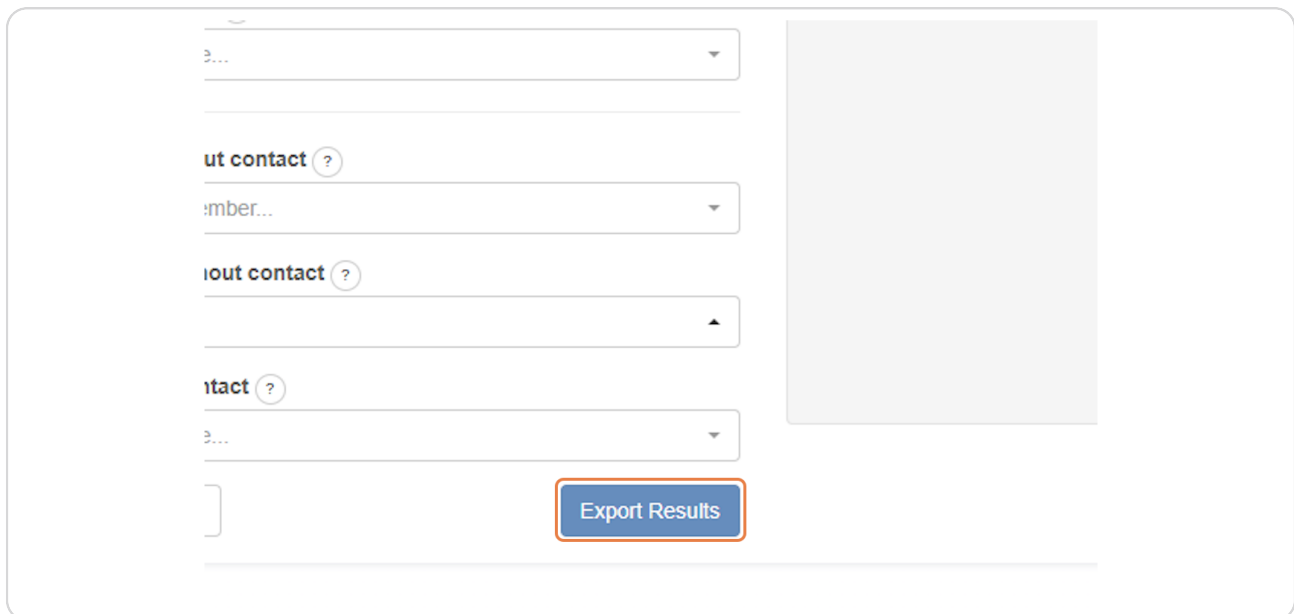
The screenshot shows a filter configuration interface. At the top, there are two input fields with values '5' and '1'. Below these are several filter sections, each with a title and a dropdown menu:

- Employees with contact** (with a help icon): Dropdown menu showing 'Select a staff member...'.
- Departments with contact** (with a help icon): Dropdown menu showing 'Commercial'.
- Titles with contact** (with a help icon): Dropdown menu showing 'Select a staff title...'.
- Employees without contact** (with a help icon): Dropdown menu showing 'Select a staff member...'.
- Departments without contact** (with a help icon): Dropdown menu showing 'Select a staff department...'. This dropdown is highlighted with an orange border.
- Titles without contact** (with a help icon): Dropdown menu showing 'Select a staff title...'.

At the bottom, there are two buttons: 'Preview Results' and 'Export Results'.

STEP 5

Click on Export Results



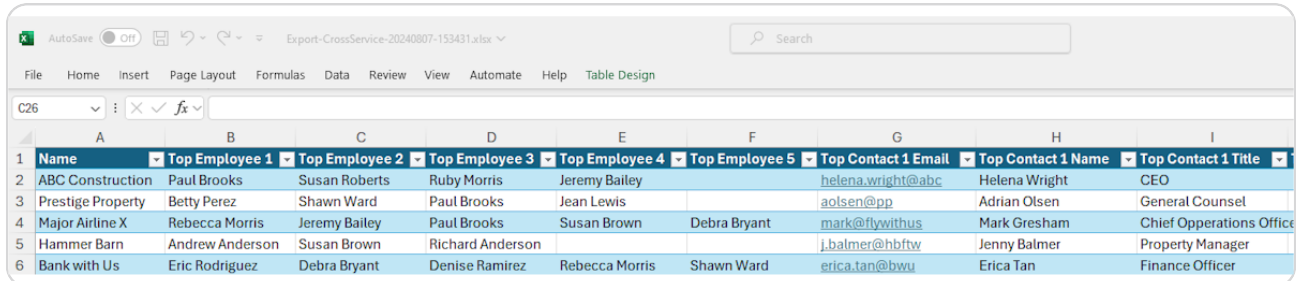
The screenshot shows the same filter configuration interface as in Step 4. The 'Export Results' button is now highlighted with an orange border, indicating it is the next step in the process.

STEP 6

Resulting Report

You can find the resulting Excel file in your Downloads.

This will provide for you a list of all Companies that have had contact with the Commercial team yet have not had contact with the Employment team in the timeframe specified in your report (which you can alter).



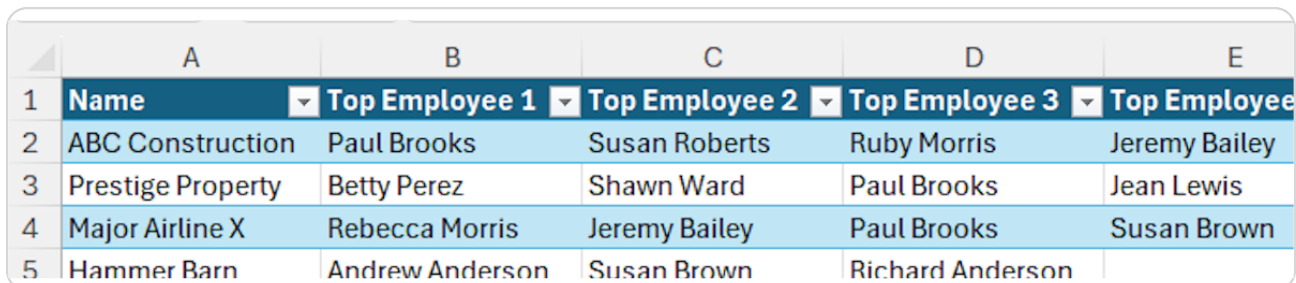
The screenshot shows an Excel spreadsheet titled 'Export-CrossService-20240807-153431.xlsx'. The spreadsheet has columns for Company Name, Top Employee 1 through 5, Top Contact 1 Email, Top Contact 1 Name, and Top Contact 1 Title. The data is as follows:

	A	B	C	D	E	F	G	H	I
	Name	Top Employee 1	Top Employee 2	Top Employee 3	Top Employee 4	Top Employee 5	Top Contact 1 Email	Top Contact 1 Name	Top Contact 1 Title
2	ABC Construction	Paul Brooks	Susan Roberts	Ruby Morris	Jeremy Bailey		helena.wright@abc	Helena Wright	CEO
3	Prestige Property	Betty Perez	Shawn Ward	Paul Brooks	Jean Lewis		aolsen@pp	Adrian Olsen	General Counsel
4	Major Airline X	Rebecca Morris	Jeremy Bailey	Paul Brooks	Susan Brown	Debra Bryant	mark@flywithus	Mark Gresham	Chief Operations Officer
5	Hammer Barn	Andrew Anderson	Susan Brown	Richard Anderson			j.balmer@hbftw	Jenny Balmer	Property Manager
6	Bank with Us	Eric Rodriguez	Debra Bryant	Denise Ramirez	Rebecca Morris	Shawn Ward	erica.tan@bwu	Erica Tan	Finance Officer

STEP 7

Top Employees

The Report lists information such as the Company Name, along with a list of the 'Top 5 Employees'. The Top Employees is an ordered list (from most communication as Top Employee 1 down to Top Employee 5) of people within the firm that might be in a position to facilitate an introduction or provide more context to our Employment team.



The screenshot shows an Excel spreadsheet with columns for Company Name, Top Employee 1, Top Employee 2, Top Employee 3, and Top Employee 4. The data is as follows:

	A	B	C	D	E
	Name	Top Employee 1	Top Employee 2	Top Employee 3	Top Employee 4
2	ABC Construction	Paul Brooks	Susan Roberts	Ruby Morris	Jeremy Bailey
3	Prestige Property	Betty Perez	Shawn Ward	Paul Brooks	Jean Lewis
4	Major Airline X	Rebecca Morris	Jeremy Bailey	Paul Brooks	Susan Brown
5	Hammer Barn	Andrew Anderson	Susan Brown	Richard Anderson	

STEP 8

Top Contacts

The Top Contacts is a list of Individuals from each of the Companies listed, also according to the amount of communication they have had with the firm. In this case, we have a list of the Top 5 Contacts, their name, email and title, so that we can decide who we might be best to try and speak to about potential Employment needs.

4 ▼	Top Employee 5 ▼	Top Contact 1 Email ▼	Top Contact 1 Name ▼	Top Contact 1 Title ▼
		helena.wright@abc	Helena Wright	CEO
		aolsen@pp	Adrian Olsen	General Counsel
	Debra Bryant	mark@flywithus	Mark Gresham	Chief Operations Office
		j.balmer@hbftw	Jenny Balmer	Property Manager
s	Shawn Ward	erica.tan@bwu	Erica Tan	Finance Officer

