



InterAction® Engagements™ enables professional services firms to enhance their Relationship Intelligence by connecting engagements, people and companies in one central repository. Most firms today do not have a way to consolidate and track the unique information about the services they provide for their clients. With the ability to collect, expose and identify important details about an engagement from within the InterAction environment, professionals have a comprehensive view of client-related work, activities and contacts at their fingertips. Professionals are able to quickly get the information they need, and can leverage who knows whom and who knows what about important client engagements.

Consolidating and Centralizing Valuable Client Engagement Information

The screenshot displays the 'Engagement Overview' page for a specific engagement. The engagement is titled 'Demand Chain Planning & Execution' with ID '01435/04015' and is associated with 'Crawford Industries'. The status is 'Open'. The page is managed by 'Toby Adamson' and is part of the 'Corporate' practice group. It includes a list of actions such as 'Add Activity', 'Go to Distribution Lists', and 'Find External Contacts With Similar Experience'. The 'Engagement Details' section shows 'General Facts' including dates (Open: 02/20/2004, Est. Start: 03/01/2004, Est. Close: 07/30/2004, Close: 07/30/2004), an external reference number 'CR1002', and a main engagement status of 'No'. The 'Engagement Contacts' table lists Toby Adamson as 'Managed By' and Robert George Jr. as 'Administrator', both associated with 'Hessling, Beres and Lamb'.

InterAction Engagements Overview Page: The Engagements overview page contains a complete view of the engagement and its related people and companies.

Building an Experience and Expertise Knowledgebase

There is no one system available today that provides professional services firms with the ability to collect information about past work done in order to build an experience and expertise knowledgebase. This makes it nearly impossible to leverage these knowledge assets to enhance business development and client service initiatives. Connecting a record of the work performed by the organization with the people and companies involved in the delivery of the service provides professionals with the ability to respond quickly to client and prospect needs.

Streamlining New Business Initiatives

With the ability to mine information about an engagement and the people associated with that engagement, firms can easily present a new business prospect with the best-qualified and most skilled professionals to staff a project, which enhances their new client development and cross-selling initiatives. InterAction Engagements provides the tools for firms to formalize their business development processes with the ability to track important information about referrals, competitors and referenceable work.

Engagement Related Search

[Engagements](#) | [Experience of Firm Personnel](#) | [External People's Involvement on Engagements](#)

General Searches

[Basic](#)

Advanced

Engagement Type Searches

[Core Process Redesign](#)

[Cost & Capital Management](#)

[Customer & Product Management](#)

[Full Potential Programs](#)

[Information Technology](#)

[Mergers & Acquisitions](#)

[Organizational Consulting](#)

[Private Equity](#)

[Strategic Consulting](#)

[Supply Chain Management](#)

Advanced Search

Client: [Find Contact...](#)

Client Industry:

Client Number:

Engagement Number:

Type:

Managed By: [Find Contact...](#)

Practice Group:

Client Executive: [Find Contact...](#)

Engagement Source:

Referred By: [Find Contact...](#)

Status:

Engagement Size:

Est. Fees:

Other Search Resources: | [SEC Filings on Yahoo!](#) | [Mergers on Yahoo!](#) | [IPOs on Yahoo!](#) | [TheDeal.com](#) | [Yahoo! Finance](#)

Engagement Related Searches: The ability to easily search on internal engagement information allows professionals to respond quickly to client and prospect needs.

Capturing and Exposing Relationships for a Competitive Edge

Identifying critical connections between people, companies and their engagements is a vital component in helping win new business. By capturing all the contacts associated with an engagement and their respective roles in that project, professionals are able to track, monitor and leverage important relationships, building upon the firm's collection of Relationship Intelligence.

Easily Manage and Maintain Distribution Lists

InterAction Engagements supports distribution list management and maintenance, providing firms with the ability to streamline day-to-day communications and reduce embarrass-

ing errors and miscommunications. Communications to all professionals staffed on an engagement can be done quickly and easily, ensuring that all involved are informed of the latest status of the project.

Leverage Your Firm's Relationship Intelligence

With InterAction Engagements, project teams have a single place to go for up-to-date, relevant and valuable engagement information and can easily leverage the collective experience, expertise and Relationship Intelligence of the firm for enhanced client service and improved business development.

Call us today at 630.572.1400, or visit our Web site at www.interaction.com for more information.



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