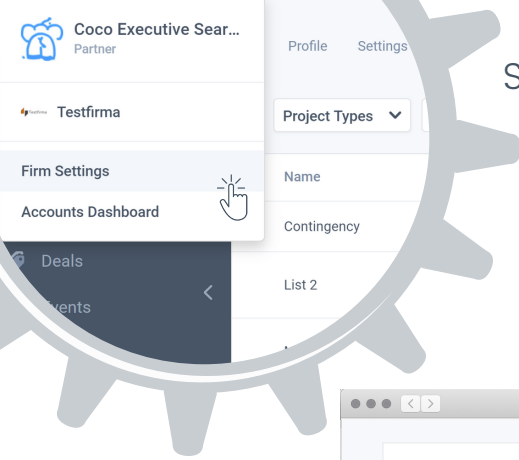


Business Development Made Easy

Leverage configurable project types to manage your Business Development pipeline in Clockwork.

Set Up a Custom Project Type

In firm settings, configure a project type with settings and statuses unique to Business Development.



Project Settings

Project Title: COO

Company: Bank of America

Type: Retained

External Ref:

Confidential:

Internal:

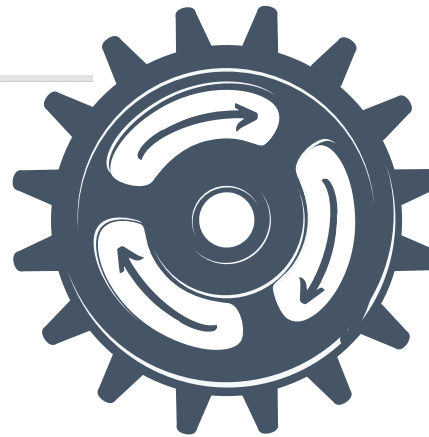
Coco Executive Search / BD - SF Bay Area

0 Selected / 20 Candidates

#	Add	Name	Status
1		Gabriel Johnson	Target
2		Beatrice Thompson	Target
3		Thomas Riley	Target

Step 1: Create a Marketing List

Add prospective clients to a marketing list project for nurturing.



Step 2: Convert to a Deal

Miranda Korbell
Head of Talent at Bank Of America

HR Client TA

Edit Tags

Contact Info Positions Files Projects Deals

Add to Deal
Bank of America / Chief Operations Officer

Add engaged prospects to existing deals as targets.

Step 4: Search Project

Once you've won the deal, turn your pitch projects into search projects.

Congratulations! Do you want to turn this Deal into a Project?

OK Cancel

COO
Bank of America

Deal Size: \$120,000

Likelihood: 70%

Deal Status: Target

Step 3: Pitch Project

Create pitch projects from the deals so you can showcase your expertise to prospects.