

# MATRIX IN YOUR WORK DAY

For Account Executives

*Matrix is your resource for Pipeline, Account, and Activity management; providing a clear view of your book of business. Follow these practices to incorporate Matrix into your work day.*

## DAILY

1. In the Morning
  - a. Check your [Alerts](#)<sup>1\*</sup>. Address alerts in *Critical* & *Non-Critical* before they reach your manager.
  - b. Review your [Espresso Shot](#) email to see what needs to be addressed today.
  - c. Win or Zero-out Remaining Pending on the **Bird's Eye View's** [Recently Imported](#).
2. Throughout the day (at your desk or on the road with [Mobile](#)!)
  - a. Complete the [Activities](#) you've scheduled for today via the [Activity List](#) or [Calendar](#). Update the Notes, change Status to Completed. Create a new activity outlining next steps.
  - b. Add (via [Quick Deal](#) or [Full Deal](#)) & [Update Deals](#) as you have new info.
    - i. **Time Saver**: Always have a plan for the next piece of business. When you close a deal create the next deal for that account and the first activity for that deal, even if it's a year out.
  - c. [Add Lead/Prospect Accounts](#). Submit leads for approval to your manager.
  - d. BCC [Matrix Activity](#) when emailing your customers to automatically copy the email to Matrix.
  - e. [Add](#) / [Update](#) **Contacts**.
3. At the end of the day
  - a. Review the **Activity List** and the **Activity Calendar**.
    - i. Reschedule any incomplete or overdue activities.
    - ii. Review and address emails sent to Matrix showing as Incomplete.
      1. On the activity, add contact and account and change status to complete.

## WEEKLY

1. On the day your manager specifies, update your forecast, and check the number on your [Bird's Eye View](#).
2. On a day of your choosing, review all of your open deals on the [Deals List](#).
3. Be sure everything is up to date for your one on one.

## MONTHLY

1. Review your [Account List](#) for dead accounts, duplicates, and accounts without an open Deal \$.

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<sup>1</sup> Items with an asterisk indicate features available in Matrix Premium. Have your manager contact Success Management [SuccessManagers@MatrixforMedia.com](mailto:SuccessManagers@MatrixforMedia.com) to turbo charge your work day with Matrix Premium!