

# ClientBase

## REPORT OF THE MONTH

**"INFORMATION IS THE SEED FOR AN IDEA, AND  
ONLY GROWS WHEN IT'S WATERED."**

*- Heinz V. Bergen*

*Data, data, and more data! If there's one thing we have in ClientBase, it's data. Data alone is meaningless. Knowledge on the other hand is power. So how are you turning your data into knowledge? In this bi-monthly email series, we want to help you do just that!*

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### **ClientBase Profile Analysis Dashboard Report**

Everyone wants to elevate their marketing. Mediocre marketing is a direct result of mediocre client data. Good marketing is a direct result of good client data. Great marketing is a direct result of great client data. I understand this and feel dedicated to creating great client data, but then I lose my focus. I come to work, get pulled in too many directions by everyday activities, and tell myself we will start again next week. I need an easy to access visual cue of the progress we are making with our client details, EVERY DAY!

Here's your solution: [Profile Quality Analysis Dashboard](#)

The "Profile Quality Analysis Dashboard" was created to provide key visual data indicators on the value and quality of the profiles in your database. Are your agents collecting email addresses? Do you have marketing codes in your profiles? Answers to these questions can be displayed in a quick easy to read format. We are confident that, once you start using it, you will help us find new uses for it as well.

The Report can be run for the agency, branch or agent and can be further filtered by a data range. The below data will be visually summarized:

- **Total Client Profiles** - Count of client profiles that are currently active.
- **With E-mails** - Percentage of total client profiles that are currently active with e-

mail addresses.

- **E-mails with Marketing Permission** - Percentage of client profiles that are currently active that have emails addresses with marketing permissions.
- **With Marketing Codes** - Percentage of client profiles that are currently active with marketing codes.
- **With Complete Address** - Percentage of client profiles that are currently active with complete addresses.
- **With Travel History** - Percentage of client profiles that are currently active with invoices that have not been voided.
- **With ResCards** - Percentage of client profiles that are currently active with rescards that have not been cancelled.
- **With Mailers last 30 Days** - Percentage of client profiles that are currently active with mailer sent out in the last 30 days.

No need to download this report from our Crystal Report Library. It's easily available from the Dashboard tab within ClientBase Windows only by selecting Profile Quality Analysis from the dashboard drop down. If you would like more information on our Dashboard Reports [click here](#).

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If you have questions regarding this or any other report, please email [support@trams.com](mailto:support@trams.com) or call 310-641-8726.

Kind Regards,  
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