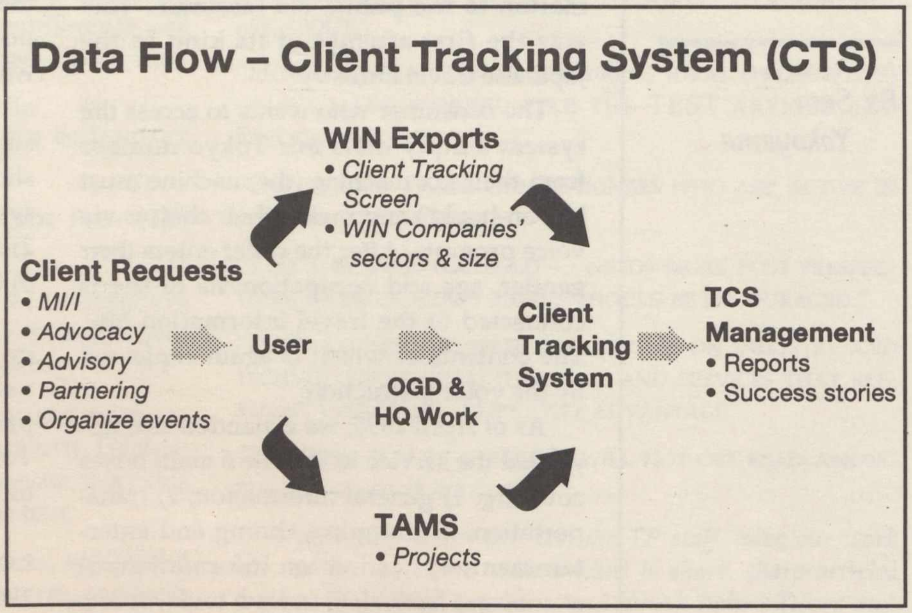
THE CLIENT TRACKING SYSTEM

By Bill Skinner

We recently introduced you to the new *Mission Planning System* which we developed with many of you. As you will recall it has more of a client focus. The planning system is a simple and effective way of outlining what you plan to do in your post. It also provides important base line data for your clients.

We would now like to introduce the *Client Tracking System*. The system will replace the current Trade Tracking System and will become a means by which you can better manage client service. It will allow you to prioritize and manage your work in a targeted fashion. You will be able to work more effectively at your post. It will generate data to help you in future planning. The client tracking system is meant to serve as a tool for measuring your success in servicing clients.



The system uses existing data bases and merges them. We are sticking to our pledge of one time data entry. The Client Tracking System works together with the Mission Planning System, WIN and TAMS. The system will run on a Windows-type software with lots of default functions to capture data once.

The current plan is to run a client tracking pilot in the fall and bring the system fully on board by 1996. This system will be client and performance driven — both at post and in DFAIT Headquarters. The proposed Client Tracking System design is the product of extensive consultation with the users over the past year. As in the case of the planning system we welcome your ongoing input and advice.

Client Tracking Sheet

SERVICES
1. MI/I
2. Advocacy
3. Advisory
4. Partner
5. Organize

BUSINESS AREA
1. Trade
2. Investment
3. S&T
4. Tourism

SECTOR

BUSINESS SIZE
1. Small
2. Medium
3. Large

BUSINESS CONTACT
1. Visitor
2. Inquiry
3. Outcall

The above figure describes the data flow. The client tracking sheet to the left shows the type of information that will be entered in and extracted from the tracking screen in WIN Exports. We will be sending out helpful guides for using the system. We hope the degree to which we will build on existing systems becomes evident.

For more information, please contact TPP-Anne Argyris at 613-996-1907.