

Reasons To Associate Events To Accounts & Contacts

As has been discussed in other articles, PlayMaker uses the term "ACE" to describe the relationship between Accounts, Contacts, and Events. The core concept is simply that any sales or marketing activity that you perform includes 1) a person at 2) a place on 3) a specific date or time.

There are rare circumstances (eg. cold calls) where you do not know the person(s) or have complete information about the facility before performing the visit or activity. However, most activities are to meet with known people at known places and thus documenting each component ensures PlayMaker is used to the fullest extent.

Importance of Following ACE

Relationship History

The most important reason to follow ACE is to ensure that the full history of your interactions with a referral source or referral facility is centrally tracked. By adding an account and contact(s) to your events, any notes you make after the event will be stored with your Account and Contact in addition to the event itself. Over time you can see a full history of your relationship and conversations.

If you do not have an associated Account or Contact, such as when you set the event type to Cold Call, the historical note is only visible from the calendar. Unfortunately, the calendar is not searchable, thus making it very difficult to track down notes.

For any event or event series that was created without an Account or Contact, the event or series can be edited to add that information and ensure future notes are centrally stored.

Relationship Visit Frequency

The *Daily Visit Report* and the *Advanced AE Summary Report* (both found on the *Reporting* page) are both often used to see which accounts are being called upon, as well as which accounts have not had activity in the past 30 days or ever.

If events are not associated to accounts, the accounts will not show any activity. So, while a user may have a full calendar with completed events (along with call/visit notes), the accounts themselves will be seen as untouched. This makes the *Advanced AE Summary* report difficult to use,

as it is a tool to help users see which accounts may have fallen off the radar. These reports may also be used by management and administrators to ensure that sales reps are in touch with all of their accounts.

Comparing Two Events

In [this article](#) (part our [Marketer Quick Start Guide](#)), the first video provides a live demonstration by comparing two events. In the video, we can see the details available on an event that is not associated to an account or contact, and the details available on an event that is associated to an account and contact.