



# Project Truman and the Evolution of Clipper Customer Service

# Why is this important?

- ▶ As a CEA, you may hear terms and information that relate to our old customer service model and how we got to where we are today.
- ▶ Having a basic knowledge of this information will help you relate to and understand your teammates and sales reps who have been with Clipper through the years.



# Account Services Coordinator (ASC)

- ▶ Title used for our customer service role prior to the Customer Engagement Associate (CEA).
- ▶ There will likely be some members of your team who were ASCs before they transitioned into the CEA position.

ASC (old role)	CEA (your role)
<ul style="list-style-type: none"><li>• Worked in collaborative groups with a shared workload</li><li>• Sales reps were the primary contact with clients</li><li>• Mostly worked in DPS to move ads through production</li><li>• Depended on the sales rep's timeframe with minimal agency to work ahead</li><li>• Was a liaison between sales and production</li><li>• Relied on sales to spend lots of time collecting copy/corrections/approval</li></ul>	<ul style="list-style-type: none"><li>• Each CEA has an individual workload</li><li>• CEA is the primary contact with clients</li><li>• Mostly works in ATOL to relay information obtained from clients</li><li>• Works autonomously with clients to work ahead of deadline</li><li>• Is a liaison between clients and production</li><li>• Responsible for collecting copy/corrections/approval to allow sales to spend more time generating revenue.</li></ul>

# Project Truman



- ▶ Project Truman was the name given to the project aimed toward changing how we support sales.
- ▶ It is responsible for the transition from ASC to CEA.
- ▶ It was named after President Truman, famous for “The Buck Stops Here”
- ▶ The goal of the project was to align specialties, reduce overlap of responsibilities and allow reps more time to sell.
- ▶ You may hear team members refer to “Truman ads”, “Truman team” or “Truman process”. These just mean that they are ads handled by a CEA, a team of CEAs, or a workflow developed to suit the CEA role.

# Sales Assistants and Business Developers

- ▶ Like the ASC to CEA change, our pre-sale department had a similar change with Project Truman.
- ▶ The Sales Assistant position helped with any task requested by the sales rep, whether it was related to pre-sale or post-sale. Some sales reps had assistants while others did not.
- ▶ This sales assistant role was transitioned to the Business Development role (BD). BDs work only on pre-sale activities to help the reps make sales. All sales reps have a BD.
- ▶ Together the BD and CEA support the reps with the complete sales process.



**MISSION:  
ACCOMPLISHED**

