



A Guide to Using



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SIGNING UP

As part of the sign up process to CIS Self Build you pre-select the counties which you want included in your subscription. Only information from these counties will be available to you although this can be amended at any time in line with your subscription.

Select your counties

Select the counties that you are interested in subscribing to.

Each county has a different weighting according to planning volumes (displayed in brackets). Pricing is determined by the number of counties you choose and their respective weighting. Please view [self build pricing page](#).

Leinster

- Co. Carlow (1)
- Co. Kildare (3)
- Co. Kilkenny (1)
- Co. Laois (1)
- Co. Louth (2)
- Co. Meath (3)
- Co. Offaly (1)
- Co. Westmeath (1)
- Co. Wexford (3)
- Co. Wicklow (3)
- Co. Longford (1)
- Co. Dublin (17)

Munster

- Co. Clare (2)
- Co. Cork (9)
- Co. Kerry (2)
- Co. Limerick (3)
- Co. Tipperary (2)
- Co. Waterford (2)

Connaught

- Co. Galway (5)
- Co. Leitrim (1)
- Co. Mayo (2)
- Co. Roscommon (1)
- Co. Sligo (1)

Ulster (ROI)

- Co. Cavan (1)
- Co. Donegal (4)
- Co. Monaghan (1)

Northern Ireland

- Co. Antrim (10)
- Co. Armagh (2)
- Co. Down (6)
- Co. Fermanagh (2)
- Co. Londonderry (4)
- Co. Tyrone (3)

The **self build profile** which you initially choose when registering determines what information is displayed each time you log in. This profile can be changed at any time.

Create your project profile

Please select the types of projects that are most relevant to your company.

Each week we will send you an email alert of projects directly matching your profile. Your email alert profile can be changed at any stage. The CIS support team are always on hand to help you set up the searches and alerts that will work best for you.

Type

- Single Dwelling
- Residential Extension

Location

Select options

Status

- Projects Commencing
- Plans Decided
- Approved
- Refused
- Withdrawn
- New Planning

Save My Profile

LOGGING IN FOR THE FIRST TIME

When you log into the Self Build system you will be presented with a list of applications that match your subscription profile i.e. the counties you choose when subscribing and the criteria you specified at registration

There are three elements to the main screen:

- The search panel where you can filter the projects you wish to look at
- The results showing projects matching the search criteria
- "Actions" which details the options you have for reporting, tracking and changing default settings

Keywords

Type

Single Dwelling
 Residential Extension

Location

[Co. Laois](#) [Co. Louth](#)

[Co. Meath](#) [Co. Dublin](#)

[Co. Leitrim](#) [Co. Cavan](#)

[Co. Donegal](#) [Co. Monaghan](#)

[Co. Antrim](#) [Co. Armagh](#)

[Co. Down](#) [Co. Fermanagh](#)

SELF BUILD Search Results 292 projects found

				Actions
Co. Donegal : 1650152				
PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE	
Residential extension	Plans granted	05 Apr 2016	Decision on 24 March 2016	
DESCRIPTION				
Construction of a new dining room to the side elevation of existing dwelling				
Co. Antrim : LA02/2015/0630/LDE				
PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE	
Single dwelling	Plans granted	05 Apr 2016	Decision on 31 March 2016	
DESCRIPTION				
Domestic Dwelling and Garage				
Co. Dublin : F10B/0321/E1				
PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE	
Residential extension	Plans granted	04 Apr 2016	Decision on 22 March 2016	
DESCRIPTION				
Permission for a single storey extension to the rear of the house, new porch entrance to the front of the house and associated site works.				
Co. Dublin : 2157/16				
PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE	
Residential extension	Plans granted	01 Apr 2016	Decision on 24 March 2016	
DESCRIPTION				
Protected structure: the development will consist of (i) internal alterations to remove a self-contained dwelling unit at basement level and conversion of the property back to its original form as a single o...				
Co. Dublin : 2167/16				
PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE	
Residential extension	Plans granted	01 Apr 2016	Decision on 29 March 2016	
DESCRIPTION				
Permission to construct a single storey bedroom extension to the east side of existing two storey end of terrace dwelling & all associated site development works.				
Co. Dublin : WEB1033/16				
PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE	
Residential extension	Plans granted	01 Apr 2016	Decision on 30 March 2016	
DESCRIPTION				
The development will consist of replacing the existing flat roof of rear garden shed, increasing the wall levels and construction of a new pitched roof with two south facing roof-lights, alterations to the e...				

Q Search

Clear the search form

2

THE SEARCH PANEL

The search panel allows you to filter the self build projects to display on those that are of immediate interest. The count or resulting matches is displayed above the result set.

SELF BUILD Search Results 2291 projects found

KEYWORDS

Enter one or many keywords to search for specific self build projects. You can also enter a planning reference although you should be careful of the format of the reference in some cases.

TYPE

Type gives you the choice to display either Single Dwellings only or Residential Extensions only. If neither is chosen all types will be displayed.

LOCATION

When you click into the location search box you can pick from the list of Counties and Provinces displayed or simply free type the county or province you require. Multiple sections can be made.

CURRENT STATUS

The "Current Status" of the project allows you to filter the projects according to their current stage within the self build cycle. The stages are:

ON SITE

These are projects that have already started based on the official commencement notice issue to the planning authority.

COMMENCEMENT RECEIVED

These are projects which have an official future commencement date for building¹

PLANS DECIDED

These are self build planning applications for which a decision has been made on whether to grant the application or not. Options here are Approved, Refused, Withdrawn

NEW PLANNING

Choosing this option will include new self build planning applications submitted.

Keywords

Enter Keywords or Planning Ref

Type

- Single Dwelling
- Residential Extension

Location

Select options

Current Status

- On Site
- Commencement Received
- Plans Decided
 - Approved
 - Refused
 - Withdrawn
- New Planning

Date

From: 09 Mar 2016

To:

Search

Clear the search form

¹ A Commencement Notice is a notification to a Building Control Authority that a person intends to carry out either works or a Material Change of Use to which the Building Regulations apply. The notice must be given to the authority not more than 28 days and not less than 14 days before the commencement of works or the change of use. Once validated by the building control authority, works must commence on site within the 28 day period.

DATE

This option allows you to filter projects based on the date they have been updated on the system. The **Start Date** is tied to your subscription. (If you wish to see older projects you can amend your subscription to make these available)

SEARCH RESULTS

The search results reflect the criteria specified in the search panel.

SELF BUILD Search Results 20 projects found

Co. Dublin : F15A/0256

PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE
Single dwelling	On site	29 Mar 2016	Started on 09 March 2016
DESCRIPTION			

Dwelling house, detached domestic garage, wastewater treatment unit and percolation area in a rural cluster.

Co. Dublin : F14A/0230

PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE
Single dwelling	On site	29 Mar 2016	Started on 11 March 2016
DESCRIPTION			

Demolition of existing single storey garage to front/side and construction of new two storey detached 3 bedroom dwelling with single storey elements to front/side and rear. works will also include new vehicu...

Co. Dublin : F15A/0035

PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE
Single dwelling	On site	29 Mar 2016	Started on 18 March 2016
DESCRIPTION			

Dwelling, garage store and waste water treatment system in rural cluster.

Co. Dublin : FW15A/0003

PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE
Single dwelling	On site	29 Mar 2016	Started on 18 March 2016
DESCRIPTION			

Permission for a detached 2 storey plus dormer 3 bedroom dwelling in the side garden of existing dwelling together with car parking and all associated site development works.

Co. Dublin : D15A/0130

PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE
Single dwelling	On site	29 Mar 2016	Started on 23 February 2016
DESCRIPTION			

Permission for: a. the replacement of all upvc windows with traditional up and down sash windows throughout the house. b. the re-roofing of the main house and existing return in natural slate and all associa...

The information in the list displays brief details of the self build project including the **County, Planning Reference, Project Type, Current Stage, Date Last Updated and the current status**.

To view more details on any project click the project title as shown by the County and Planning Reference.

PROJECT DISPLAY SCREEN

Project Description and Location

Navigate back to main screen

Track Project to record notes and correspondence and receive alerts when updated

Navigate between search results

Generate report of the Project

Link to the planning documents and maps online

Show location of project on a map

Key project details

Display company details and other self-build projects the chosen company is involved in

SELF BUILD Project Details

Planning Ref 12446 | Type Single Dwelling | Status On site | Track Project

PROJECT DESCRIPTION
Constructing a two storey house, detached garage, EPS Bison treatment system and all associated ancillary site- works.

Longwood North, Prosperous , Co. Kildare

CONTACTS

PROMOTER
Stewart Gleeson

AGENT
Brian Connolly and Associates

CONTACT	Mr. Derek Malone	PHONE	+35345892211
ADDRESS	The Studio, Woodsway, Clane, Co. Kildare	FAX	+35345892420
		EMAIL	bcassoc@eircom.net

MAIN CONTRACTOR
College Rise Developments

CONTACT	Mr. Liam Johnson
ADDRESS	19 College Rise, Termonfeckin, Drogheda, Co. Louth

PROJECT HISTORY

28/05/2012	Application Submitted
23/10/2012	Plans Granted
05/03/2016	On Site

THE "ACTIONS" OPTIONS

The **Actions** button provide the following options:

- Export to MS Excel
- Export to PDF
- Save as My Profile
- Load Profile Search
- Tracked Projects
- Modify Alert Settings
- View as Grid
- View as List

Keywords

Type
 Single Dwelling
 Residential Extension
SELF BUILD Search Results 4 projects found
Actions

Location

Co. Cavan : 1553

PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE
Single dwelling	On site	07 Apr 2016	Started on 03 March 2016
DESCRIPTION			
To carry out alterations to previously approved planning permissions, ref. 04/2604 and 10/42, alterations to include for:- (a) alterations to site layout and service road (b) omit 8 no. semi-detached houses ...			

Co. Kildare : 12446

PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE
Single dwelling	On site	07 Apr 2016	Started on 05 March 2016
DESCRIPTION			
Constructing a two storey house, detached garage, EPS Bison treatment system and all associated ancillary site- works.			

Co. Kildare : 141105

PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE
Single dwelling	On site	07 Apr 2016	Started on 08 March 2016
DESCRIPTION			
For dormer bungalow, recessed entrance, effluent treatment plant and all associated site development works on previously approved site PL.Ref.No. 10/764.			

Co. Kildare : 15606

PROJECT TYPE	STAGE	LAST UPDATED	LAST UPDATE
Single dwelling	On site	07 Apr 2016	Started on 07 March 2016
DESCRIPTION			
(a) Erection of storey and a half type dwelling. (b) Erection of garage/fuel store for domestic use. (c) Installation of proprietary waste water treatment system and percolation area.			

EXPORTING PROJECTS

Projects can be exported to a report or data file

EXPORT TO MS EXCEL

The results of any search criteria you specify can be exported to an Excel data file for further analysis or processing. The Excel file will have two workbooks – one with the project details and another with associated companies i.e. Architects, Builders, Certifiers

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EXPORT TO PDF

This option allows you to generate a report of displayed projects

CIS construction information services

Single dwelling

1553	To carry out alterations to previously approved planning permission, ref: D4/2004. (a) omit 1 no. garage; alterations to include (c) alterations to site layout and building height (b) omit 8 no. semi-detached houses and erect 1 no. detached house (c) install sewer	Co. Cavan	On site
	Site: Creighan Manor, Creighan & Burgess Acre, Cavan, Co. Cavan		Started on 03 March 2016
	Applicant: Galrane Developments Limited (C/O Agent)	Authority	Cavan County Council
	Agent: Michael Fitzpatrick Architects Limited, Main Street, Butlersbridge, Co. Cavan ph: +353949365800, w:www.mfarchitects.ie	Updated	07 Apr 2016
	Builder: DB Construction, Carrickane, Co. Cavan contact:Desmond Brady	Plan Type	Single dwelling
	Certifier: Michael Fitzpatrick Architects Limited, Main Street, Butlersbridge, Co. Cavan ph: +353949365800, e:info@mfarchitects.ie contact:Michael Fitzpatrick		

12446	Constructing a two storey house, detached garage, EPS Bison treatment system and all associated ancillary site-works.	Co. Kildare	On site
	Site: Longwood North, Prosperous, Co. Kildare		Started on 05 March 2016
	Applicant: Stewart Gleeson	Authority	Kildare County Council
	Agent: Brian Connolly and Associates, The Studio, Woodsway, Clane, Co. Kildare ph: +3534592211, e:bcassociates@eircom.net contact:Derek Malone	Updated	07 Apr 2016
	Builder: College Rise Developments, 19 College Rise, Termonfeckin, Drogheda, Co. Louth contact:Liam Johnson	Plan Type	Single dwelling

SELF BUILD PROFILE

Your **SELF BUILD PROFILE** is essentially the search criteria you specify to identify the projects you are most interested in. This profile is set when you first sign up but can be changed any time. The profile determines:

1. Projects that will be displayed when you log into the self build application
2. The content of an optional weekly email you will receive of self build projects matching your profile.

SAVE MY PROFILE

To change your **Profile** simply specify the search criteria you want to use and choose **Save as My Profile** from the **Actions** menu.

Keywords

Type
 Single Dwelling
 Residential Extension

Location
 Northern Ireland

Current Status
 On Site
 Commencement Received
 Plans Decided
 Approved
 Refused
 Withdrawn
 New Planning

Date
From:
To:

Actions

- Export to MS Excel
- Export to PDF
- Save as my profile
- Load profile search
- Tracked Projects
- Modify alert settings
- View as grid
- View as list

In the example shown the new **Profile** for this user will be set to:

- Northern Ireland
- Single Dwellings
- Plans Approved

LOAD MY PROFILE

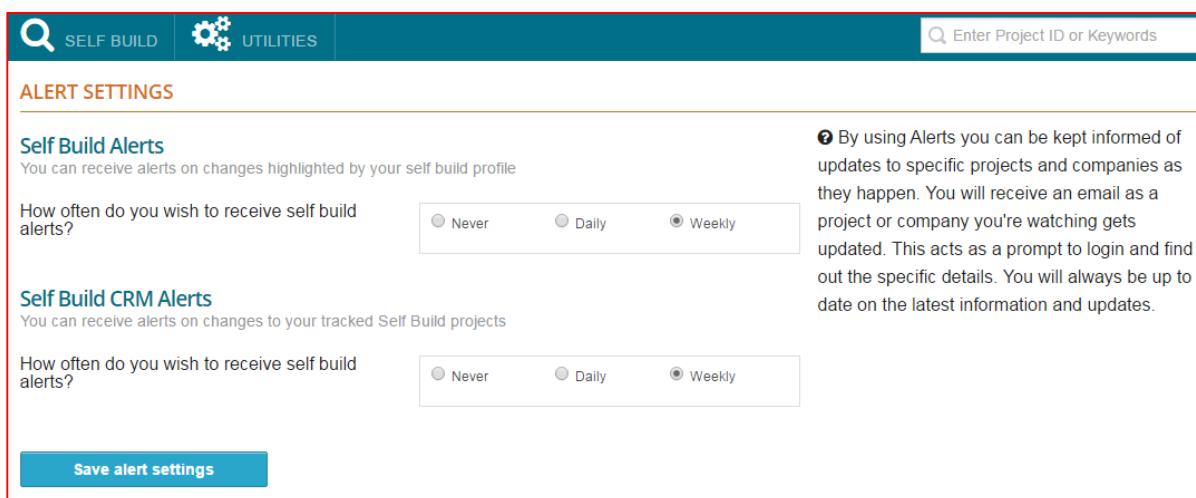
This option will load the search criteria as currently specified for your Self build Profile.

TRACKED PROJECTS

This displays a list of all projects you are tracking. See latter section in this guide **Tracking Self Build Projects**.

MODIFY ALERT SETTINGS

By default the CIS Self-Build application will send you alerts.



ALERT SETTINGS

Self Build Alerts
You can receive alerts on changes highlighted by your self build profile

How often do you wish to receive self build alerts?

Never Daily Weekly

Self Build CRM Alerts
You can receive alerts on changes to your tracked Self Build projects

How often do you wish to receive self build alerts?

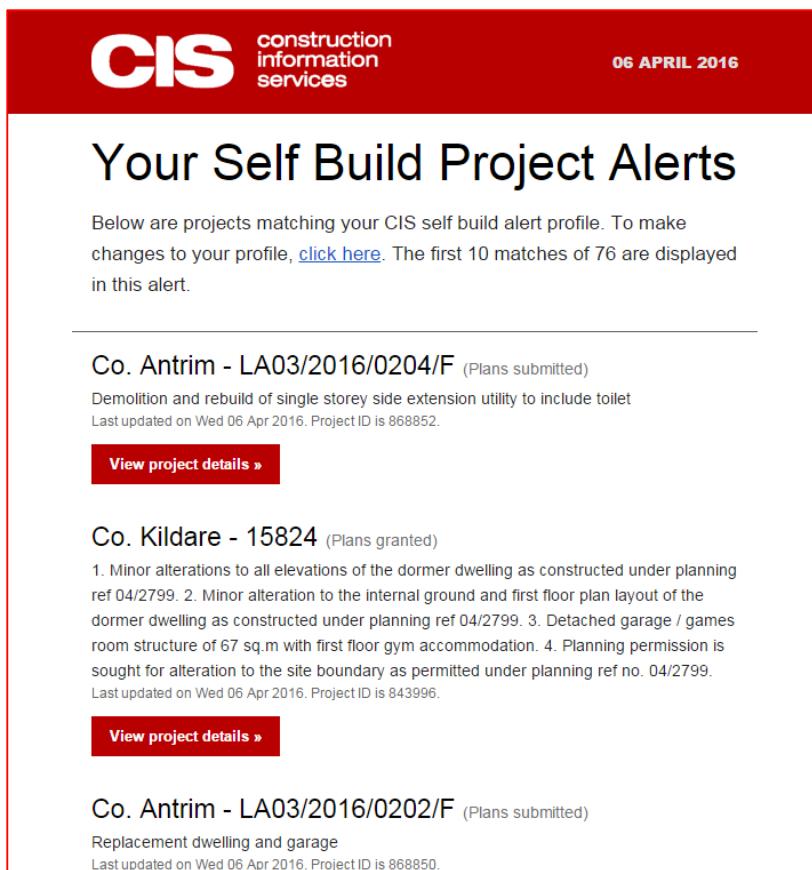
Never Daily Weekly

Save alert settings

By using Alerts you can be kept informed of updates to specific projects and companies as they happen. You will receive an email as a project or company you're watching gets updated. This acts as a prompt to login and find out the specific details. You will always be up to date on the latest information and updates.

SELF BUILD ALERTS

By default you will receive a weekly email alert of projects matching your **SELF BUILD PROFILE**. This email alert lets you know of new and updated projects published in the last week which match your default **Profile**. You can change the alert frequency to daily or stop it completely.



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Your Self Build Project Alerts

Below are projects matching your CIS self build alert profile. To make changes to your profile, [click here](#). The first 10 matches of 76 are displayed in this alert.

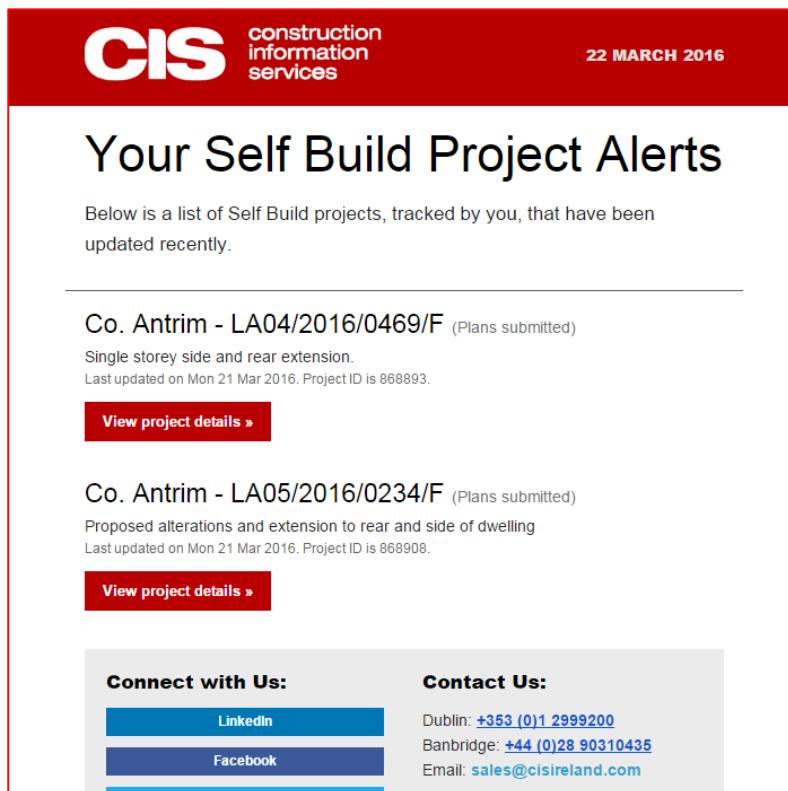
Co. Antrim - LA03/2016/0204/F (Plans submitted)
Demolition and rebuild of single storey side extension utility to include toilet
Last updated on Wed 06 Apr 2016. Project ID is 868852.
[View project details >](#)

Co. Kildare - 15824 (Plans granted)
1. Minor alterations to all elevations of the dormer dwelling as constructed under planning ref 04/2799. 2. Minor alteration to the internal ground and first floor plan layout of the dormer dwelling as constructed under planning ref 04/2799. 3. Detached garage / games room structure of 67 sq.m with first floor gym accommodation. 4. Planning permission is sought for alteration to the site boundary as permitted under planning ref no. 04/2799.
Last updated on Wed 06 Apr 2016. Project ID is 843996.
[View project details >](#)

Co. Antrim - LA03/2016/0202/F (Plans submitted)
Replacement dwelling and garage
Last updated on Wed 06 Apr 2016. Project ID is 868850.

SELF BUILD CRM ALERTS

If you **Track** projects within the Self Build application then by default you will receive alerts when any of the projects you are tracking get updated e.g. Plans Granted, Building Commences. As with your Self Build Profile alerts you can change the alert frequency to daily or stop it completely.



Your Self Build Project Alerts

Below is a list of Self Build projects, tracked by you, that have been updated recently.

Co. Antrim - LA04/2016/0469/F ([Plans submitted](#))
 Single storey side and rear extension.
 Last updated on Mon 21 Mar 2016. Project ID is 868893.

[View project details »](#)

Co. Antrim - LA05/2016/0234/F ([Plans submitted](#))
 Proposed alterations and extension to rear and side of dwelling
 Last updated on Mon 21 Mar 2016. Project ID is 868908.

[View project details »](#)

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VIEW SETTINGS

You can change how you want the results of your searches displayed by choosing between **View As List (Default)** or **View as Grid**.

If using the self build application on a tablet or mobile device then the default view, **View as List**, will work best.

- Export to MS Excel
- Export to PDF Max of 2000 projects per file
- Save as my profile
- Load profile search
- Tracked Projects
- Modify alert settings
- View as grid
- View as list

TRACKING AND ASSIGNING PROJECTS

When you track a project:

- The project is assigned a recall date which will remain in effect until you stop tracking the project
- You will receive alerts each time the project is updated
- You have the ability to record notes and keep track of activities around the project

When you have identified an opportunity that you want to keep track of simply click into the project details and click the **Track Project** button. If there are multiple people in your company using the self build system then you will have the option to assign the project to others. (NB. You must be assigned as an administrator to be able to do this; see later section on adding and managing additional users).

Tracking a project

SELF BUILD Project Details

PLANNING REF: 12446 | TYPE: Single Dwelling | STATUS: On site

PROJECT DESCRIPTION
Constructing a two storey house, detached garage, EPS Bison treatment system and all associated ancillary site- works.

Longwood North, Prosperous, Co. Kildare

CONTACTS

PROMOTER: Stewart Gleeson

AGENT
Brian Connolly and Associates

CONTACT	Mr. Derek Malone	PHONE	+35345892211
ADDRESS	The Studio, Woodsway, Clane, Co. Kildare	FAX	+35345892420
		EMAIL	bassoc@eircom.net

MAIN CONTRACTOR
College Rise Developments

CONTACT	Mr. Liam Johnson
ADDRESS	19 College Rise, Termonfeckin, Drogheda, Co. Louth

PROJECT HISTORY

28/05/2012	Application Submitted
23/10/2012	Plans Granted
05/03/2016	On Site

RECORDING YOU OWN PROJECT NOTES

The screenshot shows the 'SELF BUILD Project Details' page for Project 684913. The top header includes a search bar and the project ID. The main content area is divided into several sections:

- SELF BUILD Project Details:** Includes fields for Planning Ref (12446), Type (Single Dwelling), and Status (On site). A 'Stop tracking' button is also present.
- MY PROJECT DETAILS:** Contains fields for Assigned To (Hannah Frey), Known As, Recall Date (8/4/2016), and My Value (Currency Convert - €). A note input field says 'Add a note to My Project Activity...' and a 'Save' button is at the bottom right.
- PROJECT DESCRIPTION:** Describes the project as 'Constructing a two storey house, detached garage, EPS Bison treatment system and all associated ancillary site- works.' It also lists the location as 'Longwood North, Prosperous, Co. Kildare'.
- CONTACTS:** Shows the Promoter as 'Stewart Gleeson'.
- AGENT:** Shows the Agent as 'Brian Connolly and Associates'.
- PROJECT NAVIGATION:** Includes 'Previous' and 'Next' buttons.
- MY PROJECT ACTIVITY:** Shows a tracked assignment to 'Pat McGrath' on 8 April 2016 at 12:46 pm. A 'View all activity' link is provided.
- CRM ACTIONS:** Includes links to add to Outlook calendar, email a colleague, and detailed CRM user guide.
- ACTIONS & LINKS:** Includes links to download as PDF document, planning documents, and view on map.
- KEY PROJECT DETAILS:** Lists key details such as Planning Authority (Kildare County Council), Project ID (684913), Commencement Notice (CN0014455KE), Commencement Type (Commencement Notice), and Start Date (05 Mar 2016).

- Assigned To:** Shows who the project is assigned to. If you have administration privileges you can change this assignment to another member of your team.
- Known As:** You can give the project a meaningful name which will be used throughout the site instead of the CIS project name. *e.g. a good choice here is the applicants name and the site location – this will help you identify the project in future.*
- My Project Notes:** Here you can record your own project notes which will be available for anyone in your company to see. Use this section to share information which will be useful to you and your colleagues. *E.g. any special notes about the project which you might want available when you next get in touch*
- Recall Date:** When you are tracking a project you are required to have a **Recall Date** which is the date you next want to take and follow up action on the project.
- My Value:** Here you can enter the project value in terms of the financial opportunity to your business.

SETTING RECALL DATES

Setting recall dates on projects is central and essential to tracking and managing your pipeline of opportunities. Deciding to track a project means that it represents an opportunity. To progress that opportunity you will need to take some action on it. It may be a phone call to an architect or contractor initially. Based on the feedback you get and the intelligence you gather you will need to set a future recall date for further actions.

Many projects have very long timeframes and it can be difficult to remember your conversations and actions for projects you have not been working on for several months. By keeping this intelligence within CIS CRM you and your colleagues are up to date and can quickly get up to speed on pursuing the opportunity.

By recording your notes on past and future actions and setting recall dates for your projects you will easily manage your pipeline of opportunities using CIS CRM.



The key to success in this regard is spending a little time each day on your pipeline. Leaving it even a week or two can render it unmanageable or at least require several hours of valuable time to get it back in shape. Again we cannot stress enough the importance of having a good profile to begin with so that your choice from the available leads is manageable.

RECORDING NOTES AND ACTIONS

There are two areas in which you can record notes in CIS CRM.

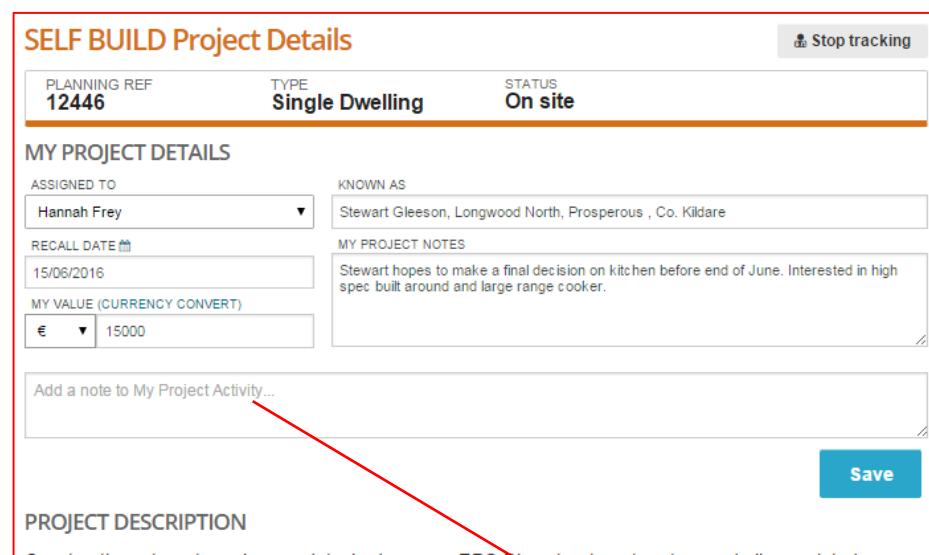
MY PROJECT NOTES

My Project Notes allows you to record general information about a project. This can be an ‘at-a-glance’ overview or other useful information about the project. If you are working as part of a team this sort of shared information can be very useful. For the company it means that the value of the knowledge and experience of individual users can be shared by everyone.

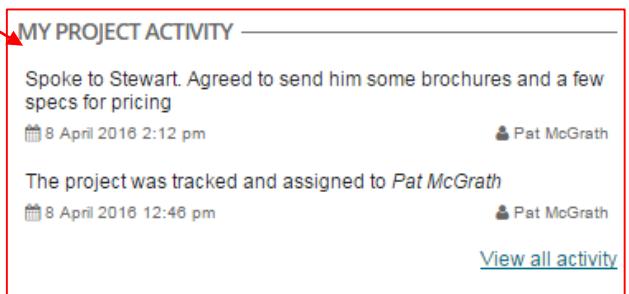
MY PROJECT ACTIVITY

Recording a note in **My Project Activity** keeps a chronological record of all your actions and interactions in your pursuit of a project opportunity. This allows you to quickly see what the latest action you (or a colleague) has taken on a project and an indication of what needs to be done next.

To see the complete list of project activity click **View All Activity**.



The screenshot shows the 'SELF BUILD Project Details' page. At the top, there are fields for 'PLANNING REF' (12446), 'TYPE' (Single Dwelling), and 'STATUS' (On site). Below these are sections for 'MY PROJECT DETAILS' and 'PROJECT DESCRIPTION'. In the 'MY PROJECT DETAILS' section, there are fields for 'ASSIGNED TO' (Hannah Frey), 'KNOWN AS' (Stewart Gleeson, Longwood North, Prosperous, Co. Kildare), 'RECALL DATE' (15/06/2016), and 'MY VALUE (CURRENCY CONVERT)' (€ 15000). A note in the 'MY PROJECT NOTES' field states: 'Stewart hopes to make a final decision on kitchen before end of June. Interested in high spec built around and large range cooker.' A red arrow points from this note down to the 'MY PROJECT ACTIVITY' section in the sidebar.



The sidebar shows the 'MY PROJECT ACTIVITY' section. It contains two entries: 'Spoke to Stewart. Agreed to send him some brochures and a few specs for pricing' (8 April 2016 2:12 pm, Pat McGrath) and 'The project was tracked and assigned to Pat McGrath' (8 April 2016 12:46 pm, Pat McGrath). A link 'View all activity' is at the bottom.

SETTING PROJECT OUTCOMES

At some stage during your pursuit of a project lead a point in time will arrive when you will know whether you have won the contract or not.

WINNING AN OPPORTUNITY

When you win an opportunity you may still want to use CIS CRM to continue to track the project so you can use the system to fulfil the obligations of the contract. However for analysis purposes it is still useful to record that the contract has been won.

The screenshot shows the 'SELF BUILD Project Details' page. At the top right, there is a 'Stop tracking' button with a red arrow pointing to a modal dialog box. The modal dialog box is titled 'Please specify Project Outcome'. It contains fields for 'Project Outcome' (set to 'Won'), 'Outcome Notes' (containing a note about winning a contract), 'Outcome Date' (set to '09/06/2015'), and 'Stop Tracking Project' (with radio buttons for 'Yes' and 'No'). Below the modal are 'Cancel' and 'Save' buttons.

To do this click the **Stop Tracking** button and record the relevant details:

Project Outcome: Options are Won, Lost and Other. If the contract is not won or lost then use 'Other' to specify your reason for no longer tracking the project

Outcome Notes: Record any relevant notes based on the outcome of the project. This can provide useful information when analysing all of your project outcomes.

Outcome Date: The date you won, lost or stopped tracking the project.

Stop Tracking: If you have won the project you may wish to continue to track it for the purposes of fulfilling the contract. In all other cases you will stop tracking the project to remove it from your pipeline.

LOSING AN OPPORTUNITY

Even the loss of an opportunity to a competitor can still provide useful information for you and your colleagues. By analysing outcomes you can often discern trends that provide useful information when pursuing future contracts. e.g. Do your lost contracts seem to be in a particular region? Are they with a particular developer, contractor or architect? Are you consistently losing contracts to the same competitor?

OTHER REASONS TO STOP TRACKING A PROJECT

Besides winning or losing a contract there can be many other reasons why you no longer need to track a project lead:

- Project has been cancelled
- Not the opportunity you first perceived it to be
- Specifications are locked
- Too costly to pursue

WORKING WITH YOUR PIPELINE

The pipeline of self build projects that are being tracked is accessible from the main screen through the **Actions Menu**. Navigate back to the main page as shown below and click the Actions button

Tracked self build projects

User:	Hannah Frey	Status:	Active
Page 1 of 1	Records per page:	20	
Blackrock Extension			
ID	860144	VALUE	€1,000
ASSIGNED TO	Hannah Frey	RECALL DATE	25 March 2016 Overdue
<input type="button" value="Add recall date to Outlook"/>			
Sinead Ni Argain Virginia Cottage, Lower Rd, Shankill , Co. Dublin			
ID	850163	VALUE	
ASSIGNED TO	Hannah Frey	RECALL DATE	08 April 2016 Due in next week
<input type="button" value="Add recall date to Outlook"/>			
Brian O'Neill, 1 Northbrook Road Dublin 6			
ID	863085	VALUE	
ASSIGNED TO	Hannah Frey	RECALL DATE	21 April 2016 Due after next week
<input type="button" value="Add recall date to Outlook"/>			
Stewart Gleeson, Longwood North, Prosperous , Co. Kildare			
ID	684913	VALUE	€15,000
ASSIGNED TO	Hannah Frey	RECALL DATE	15 June 2016 Due after next week
<input type="button" value="Add recall date to Outlook"/>			

Page 1 of 1

At a glance this will tell you the number of projects you are currently tracking and the status of these. By default the list of projects you are currently tracking is displayed in chronological order of Recall Date. If you do not have Administrative privileges you can only see the projects you are tracking. Administrative users can view the pipeline of all users collectively or any individual user.

Projects are displayed in Recall Date order meaning those projects which are due for recall next appear at the top of your list. If a project is past the date assigned for recall it will be highlighted as **Overdue**.

To action a project in your list simply click the Project Title to view the full project details including your own project notes and actions. To return to your projects click **Tracked Self Build Projects** as shown.

Tracked Self Build Projects > Project 860144

SELF BUILD Project Details

FILTERING YOUR PIPELINE

You can filter your tracked projects to look at projects you are tracking (Active) or to look at projects you are no longer tracking (Inactive): The choices for the **Status** by which you can filter projects are:

- Active Projects:** These are projects you are still actively tracking.
- Inactive Projects:** These are the projects you are no longer tracking
- With Outcome:** These are all of the projects which have an outcome (whether you are still tracking them or not). You may want to use this list to get an overview of all the projects won and lost.
- All:** To view all the projects in your pipeline

Tracked self build projects

User: Hannah Frey Status: Active

Page 1 of 1 Records per page: 20

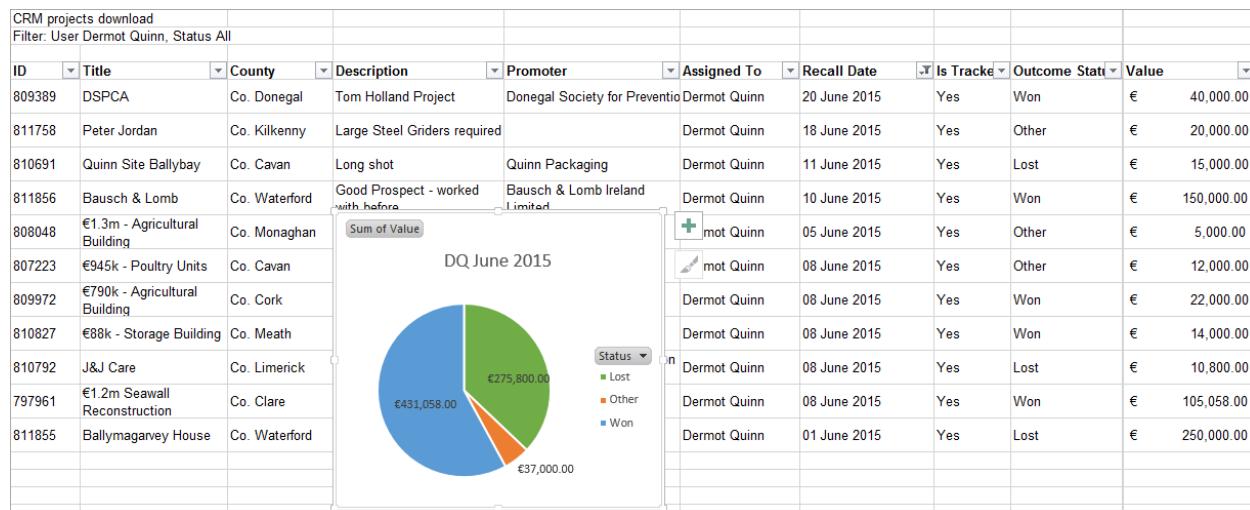
Blackrock Extension

REPORTING AND ANALYSIS

You can export your tracked self build projects to an excel file for checking or analysis

Export tracked self build projects

[Export self build projects to Excel](#)



The full benefit of CRM is realised when it is shared by many users. Sales Managers, Directors and others can quickly get an overview of how the company is doing by viewing the open opportunities across the company. They can also check individual key projects to see how they are progressing and analyse projects won and lost. This strategic view of the company allows managers and owners to plan for future contracts and adjust strategy and procedures with the full knowledge of the company's current and past activity.

USING CIS CRM EFFECTIVELY

In 2015 there were over 20,000 planning applications for Single Dwellings or Residential Extensions across Ireland. Given these volumes and the nature of the self build market it is important that you have a means to effectively track and manage your self build project leads.

YOUR SEARCH PROFILE

The journey from turning opportunities into new business begins with your search profile – setting out clearly what self build projects your company are interested in. It is important to define and prioritise your profile in terms of the counties, types and stage of project lifecycle that present you with the best opportunities. By doing this you will be able to streamline the large volume of self build projects available into a manageable set of candidates for your business. **Having a search profile that is too wide in scope will yield too many leads and quickly become unmanageable.**

The other important element of making CIS CRM work efficiently for you is time. You need to set aside time each day or week to keep your pipeline up to date and manageable.



Getting your profile right and spending a little time each week on your prospects will make CIS CRM an effective tool in generating new business opportunities. The CIS team are always on hand to help you define your profile.

THE CIS SALES CYCLE

Once you have defined your profile and are receiving regular details of relevant projects through your saved search profile then by following these steps you can be sure that your pipeline is up to date in terms of yielding you the best quality opportunities.

TRACK PROJECTS AND SET A RECALL DATE

Look at new leads presented by your profile and track those that you feel offer an opportunity. Decide what action you are going to take on these opportunities and set a recall date for that action or for any future action.

Given the volumes in the self build market it may be best to track projects once you have receive a response from your marketing activities rather than tracking every potential lead. You can quickly identify respondents using the keyword search for the applicant's name

ACTION ALERTS FROM CIS

Once you track a project CIS will monitor it and send you an alert if anything significant changes. For example if the project gets planning approval or building works begin. When you receive these alerts you can look at the tracked project and decide if the change in the project's status warrants any action on your part. As this is a tracked project you will already have a future recall date set and actions to take and it may be that these are sufficient regardless of the change in project status.

ACTION PROJECTS DUE FOR RECALL

From your tracked project list you will quickly see which projects are due for recall. By examining your project notes you can take the appropriate actions. After making notes on your latest actions you can then set a future recall date for the project or, if it no longer represents an opportunity, you can stop tracking the project and record an outcome i.e. Contract Won, Contract Lost or whatever reason you have for no longer tracking it.

THE SELF BUILD MARKET IN IRELAND

The self build market consists of those people, usually private individuals, who are building or extending their own home. At present figures there are approximately 20,000 such projects across Ireland each year – about €40 million per week in terms of spend. As with all building projects they are subject to planning legislation.

With land availability at a premium within urban areas the majority of the new single dwelling projects are in rural areas. Residential extensions can apply to any home and as such can be rural or urban but are concentrated in urban areas where the majority of homes are.

From a marketing perspective there are four key decisions to be made in terms of targeting this market:

- Who to target
- When to target
- Where to target
- How to target

WHO TO TARGET

Self build projects are very personal in nature and the home owner is the major influencer in terms of making decisions especially with regard to the more aesthetic aspects of the home e.g. kitchens, windows, doors, heating, flooring etc. For the structural and build aspects the architect or the builder may be the key influencers but even with these aspects the homeowner can be involved in the decision making.

WHEN TO TARGET

PLANS SUBMITTED

Self build projects do not follow a consistent build pattern. Some project begin as soon as plans are granted while other may take up to a year to begin. The key to good marketing in this regard is to try to reach the correct influencer when the buying decision is being made.

By the time application is submitted homeowners have already made decisions about certain aspects of their home and some of these will be reflected in the plans as designed in conjunction with an architect. Non-design elements such as kitchens, flooring and even furniture will also have been considered. At this stage nothing is built so there is still time to try to influence buying decisions either through the home owner or architect.

PLANS GRANTED

When planning has been granted things generally start to move. The major obstacle to progress at this stage is finance. Presuming the build is going to go forward after grant of planning then buying decisions are now going to be turned into a reality especially for the structural elements. A self build can take up to one year to complete so, depending on your product, there is still time to influence buying decisions depending on where they fall within the construction cycle. At this stage the key influencers are still the homeowner but also the builder if they are in place. The builder will generally be looking for value to save costs so if you have a higher end product homeowner is the person to target to convince them of the value of your product or service.

COMMENCEMENT

Legislation now requires that all building projects in the Republic of Ireland require a notice of commencement indicating when building works will begin. At this stage the builder is in place and any other contractors. Again this is a key stage to influence as you now have a firm indication that works are beginning.

WHERE TO TARGET

The nature of your product will determine the regional scope of your marketing activities. Local builders, contractors and suppliers will generally tend to operate within a short radius of their operation whereas national suppliers and chains will often target the whole market.

HOW TO TARGET

Data protection laws in the Republic of Ireland make it very difficult to target home owners directly. Such laws are less stringent in Northern Ireland and for about 60% of these applicants full address details are available. Given data protection legislation there are various options available:

- Target self builders through their site address. For residential extensions this is generally the homeowners address. For single dwellings many customers have had success targeting the site address.
- Write to the homeowner care of the architect or if the product is specified you might target the architect directly
- When the commencement notice is issued you can target the builder directly

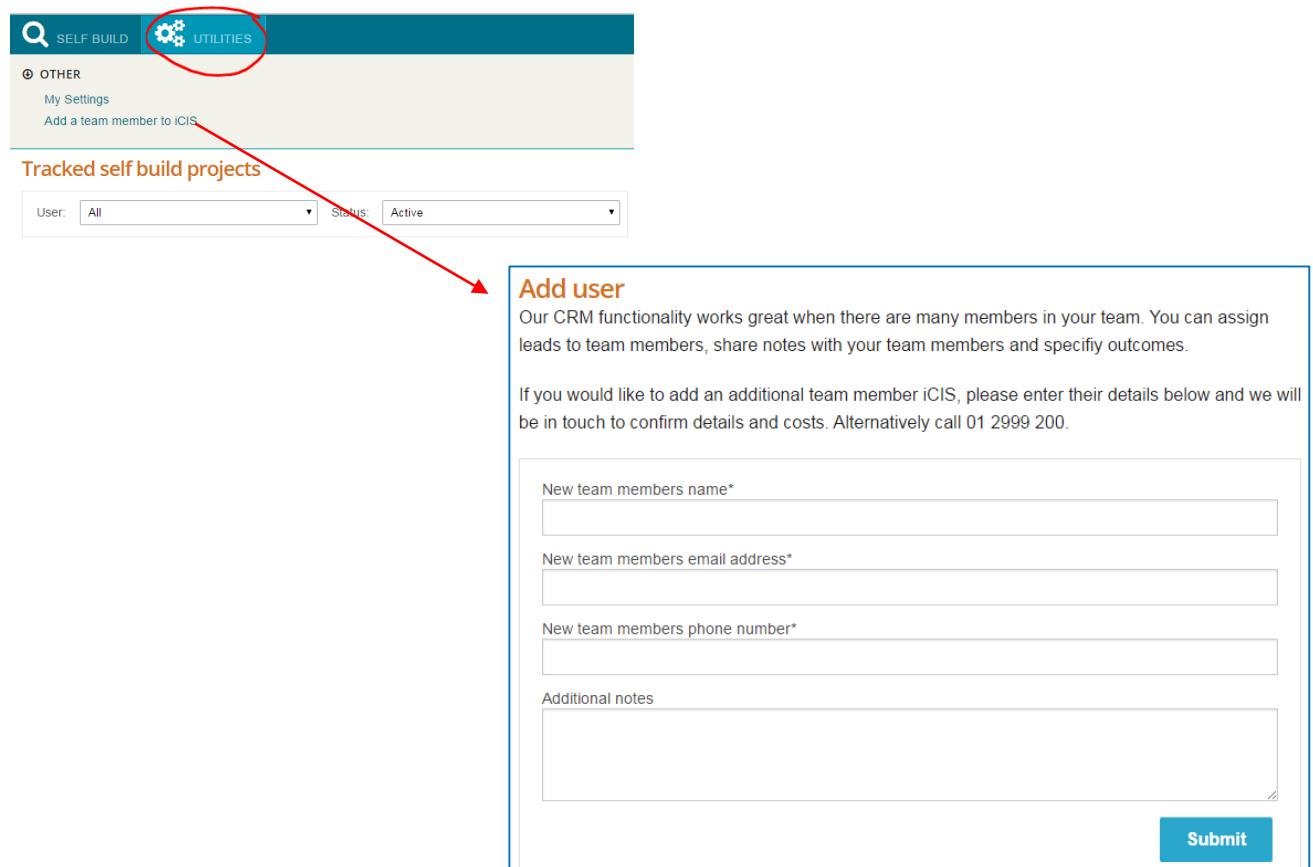
The general approach to the self build market given its diverse regional spread is to send a letter or marketing literature. If your company has reps on the road then site visits may be an option.

In many cases companies selling to this market target homeowners at many stages to keep their message fresh in the mind of decision makers.

MANAGING AND ADDING USERS

ADDING NEW USERS

Adding new users to CIS CRM can only be done by users who have administrative privileges. To add a new user to your team click **Add a Team Member** which can be found under the **Utilities** menu available from the Tracked Project pages .



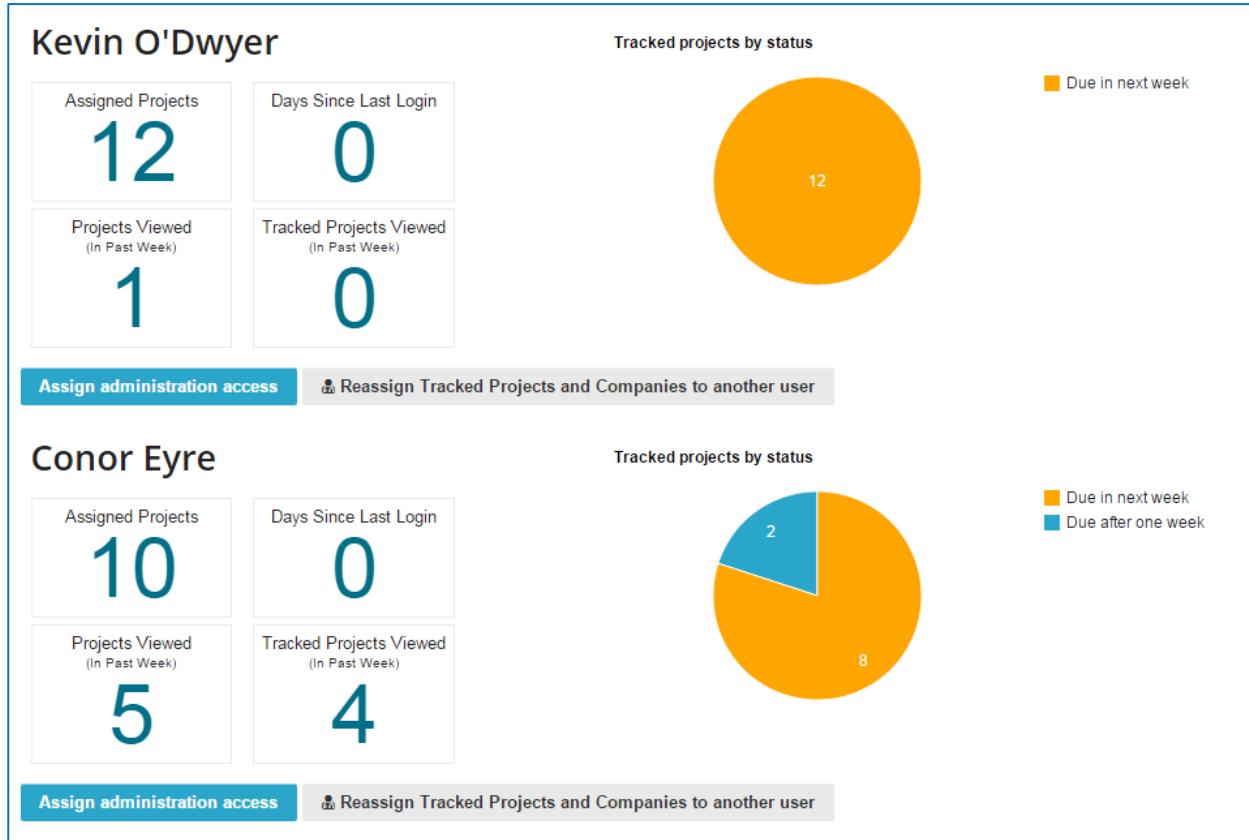
The screenshot shows the CIS Self Build interface. At the top, there is a navigation bar with a search icon, the text "SELF BUILD", and a gear icon labeled "UTILITIES". A red circle highlights the "UTILITIES" link. Below the navigation bar, there is a section titled "Tracked self build projects" with filters for "User: All" and "Status: Active". A red arrow points from the "UTILITIES" link down to an "Add user" form. The "Add user" form has the following fields:

- New team members name*
- New team members email address*
- New team members phone number*
- Additional notes

At the bottom right of the form is a blue "Submit" button.

TEAM ADMINISTRATION

The actions related to team administration are accessible from the Tracked Project Page – **Administer my team**.



From this page you can get an overview of each of your users in relation to CRM activity.

ASSIGN ADMINISTRATIVE ACCESS

This options allows you to assign a user with administrative privileges. Users with such privileges can track and assign projects to other users and can see the activity and status of all users on the team.

REASSIGN TRACKED PROJECTS AND COMPANIES TO ANOTHER USER

When a user leaves or is no longer a part of the team you can reassign all of their tracked projects and companies, including notes and actions, to another user. That way none of the active prospects and associated intelligence is lost and can be easily picked up and progressed by the replacement user.