

There is More To Meetings Than Taking Notes!

Release Notes Meeting Mapper Winter '15



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Table of Contents

Table of Contents	2
Configuring Meeting Page	3
Related Fields on Meeting Page	5
Account Address	5
Meeting Insights	6
Reviewing Previous Meeting Notes	6
Notification to Ensure Goal and Objectives are Correct	7
Actionable Intelligence (AI)	8
Configurable Actionable Intelligence	8
Recent Side Bar	10
Brand Meeting Mapper to Your Organization	10
Undo Button in Political Org Chart	11
Configure Color and Font Size in Report Exports and Agendas	11
Meeting Invitations	11
Other items	11

There is More To Meetings Than Taking Notes!

What's New in Meeting Mapper

Meeting Mapper is a best of breed cloud solution that allows you to easily capture, store and report on the critical meeting information that is all too often lost. This information along with the Meeting Mapper application allows you to better manage your sales and project processes. The Winter '15 release is the culmination of the prior feature set along with powerful new features based on Meeting Mapper customer requests. The major enhancements and features are documented in these release notes. With Meeting Mapper you Plan, Execute and Follow-up your meetings. Leaving nothing undone!

Configuring Meeting Page

Two driving tenets of this release are ease of use and a flexibility that allows Meeting Mapper to conform to your sales and product methodologies.

The navigation bar buttons on the meeting page can now be configured on a per-meeting template basis. This ability allows you to deploy the actions you want the end user to accomplish in their meetings. For example you may only want the user to complete the most basic tasks in a meeting so a meeting template can be configured to only display the following buttons: Save, Add Attendee, Notes and Export Reports (*Figure 1*).

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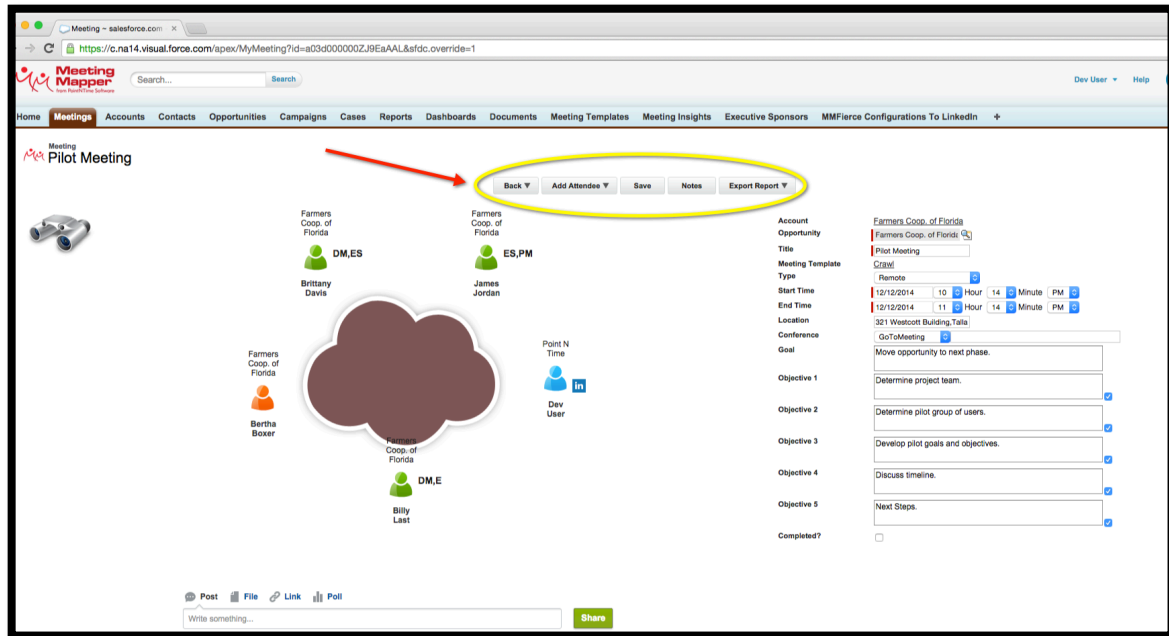


Figure 1

You can modify the templates at anytime to include more features based on your needs (Figure 2).

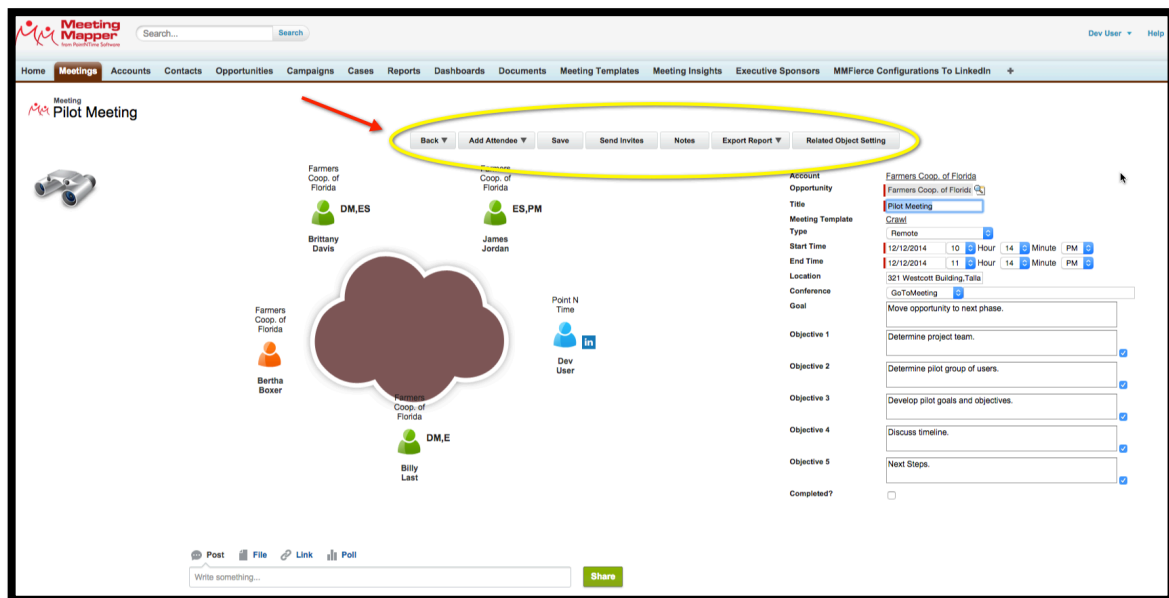


Figure 2

NOTE: The ability to modify templates is very powerful feature. You can use the Crawl, Walk, Run approach to deploy Meeting Mapper. This will help ensure you do not overwhelm users with features. As the adoption and use of

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Meeting Mapper grows you can edit the template to add features and functions. You can also use templates to customize Meeting Mapper use between organizations or in any way that suits your needs.

Related Fields on Meeting Page

You can now add any related (default or custom) field in a Salesforce object (Account, Campaign, Case, Contact, Lead or Opportunity) in the meeting page (*Figure 3*).

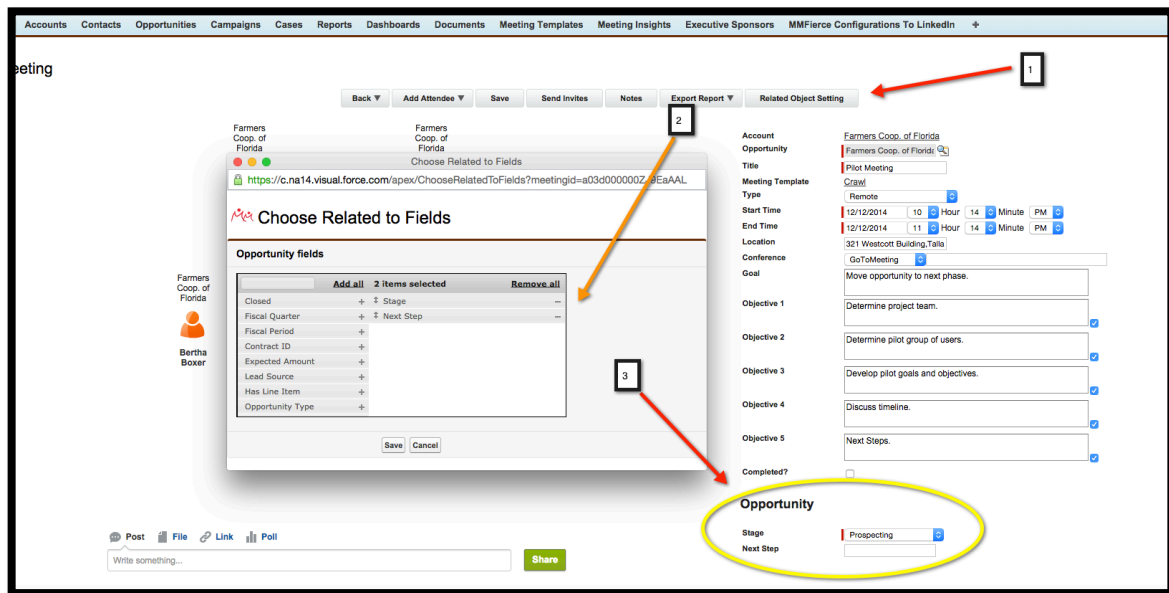


Figure 3

Account Address

When a meeting is created, Meeting Mapper will pull the Account address and populate the Location field in Meeting Mapper. You can also add a customer location. For example add a dial in number or other address for the meeting location (*Figure 4*).

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The screenshot shows the 'Meeting Mapper' interface for creating a new meeting. The top navigation bar includes links for Home, Meetings, Accounts, Contacts, Opportunities, Campaigns, Cases, Reports, Dashboards, Documents, Meeting Templates, Meeting Insights, and Executive Sp. The main form is titled 'New Meeting' and is divided into sections. The 'Meeting Information' section contains the following fields:

- Title: A text input field with a red vertical bar on the left.
- Meeting Template: A dropdown menu with 'Crawl' selected.
- Location: A dropdown menu with 'Billing Address' selected.
- Billing Address: A dropdown menu with '321 Westcott Building, Tallahassee, FL, 32306, USA' selected.
- Related To: A dropdown menu with 'Opportunity' selected and 'Farmers Coop. of Florida' as the selected value.

A yellow oval highlights the 'Location' and 'Billing Address' fields. A red arrow points to the 'Billing Address' dropdown menu. Below the 'Meeting Information' section is the 'Linked Meeting Prerequisites and Meeting Insights' section, which includes a checkbox for 'Meeting Template Internal Notes' and a link to 'Ask these questions.' At the bottom of the form are 'Save' and 'Cancel' buttons. The footer of the page reads 'Copyright © 2000-2014 salesforce.com, Inc. All rights reserved. | Privacy Statement | Sec'.

Figure 4

Meeting Insights

If no Meeting Insights are linked to a Meeting Template, the user will not be presented the Choose Meeting Insights when the meeting completed check box is checked.

Reviewing Previous Meeting Notes

Any public and internal notes from previous meetings will be displayed in the Notes window. This allows the user to review notes without having to leave the meeting page (Figure 5).

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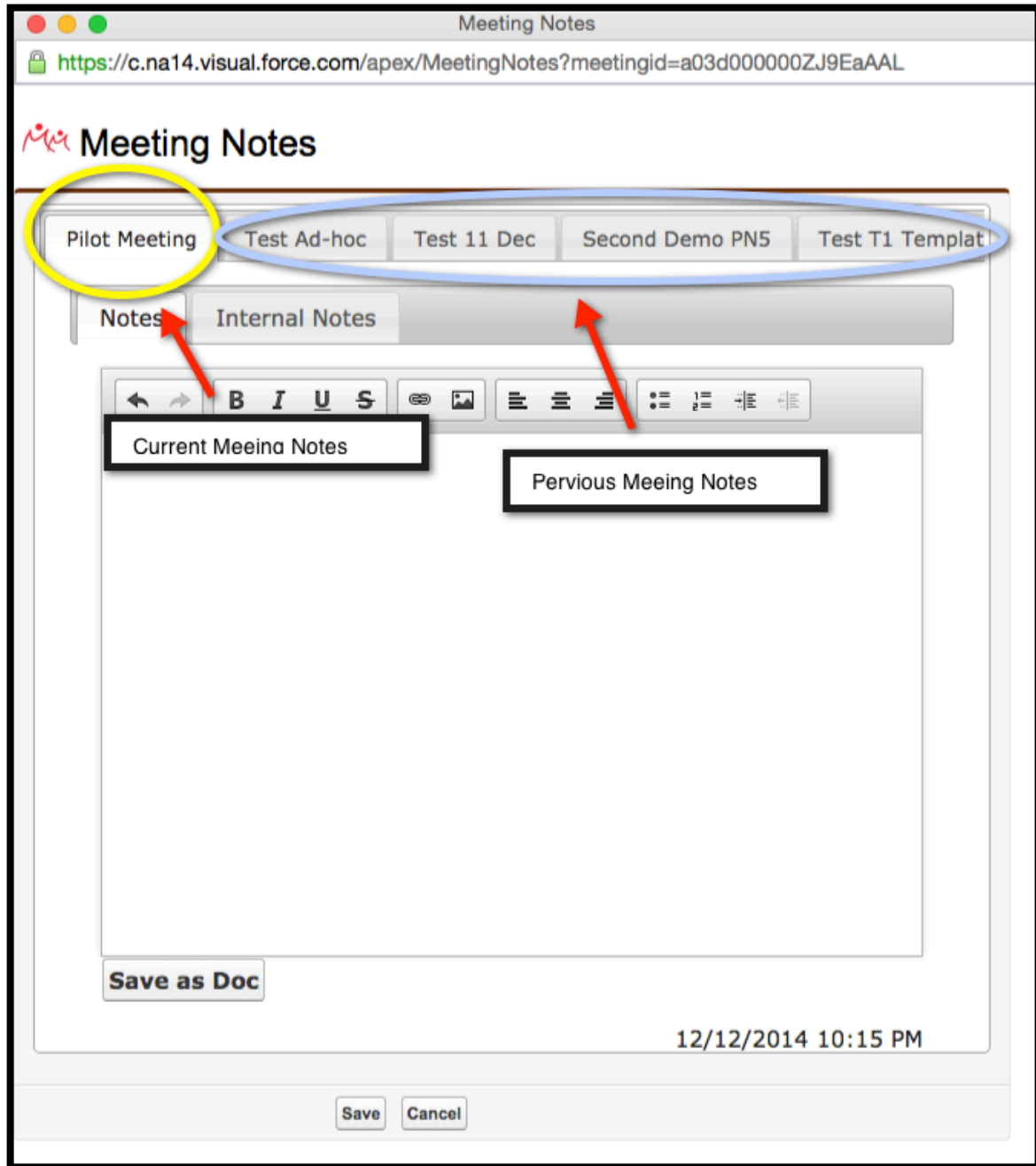


Figure 5

Notification to Ensure Goal and Objectives are Correct

You can modify the Goal and Objectives for a meeting before you Save the meeting. When the Save button is clicked a popup window will appear with a warning message to ensure your Goal and Objectives are correct. Once a meeting is saved

There is More To Meetings Than Taking Notes!

you cannot add any new goals or objectives. You can however modify the current Goal and Objectives after a meeting is saved.

Actionable Intelligence (AI)

Any AI you gather in meetings is carried over to subsequent meetings. For example the AI you gather in meeting 1 is carried forward and displayed in the AI display in meeting 2. You can still modify AI in meeting 2. Any modifications will then be carried to meeting 3. This ensures the user does have to duplicate data entry.

Configurable Actionable Intelligence

Actionable Intelligence can be configured to map to your sales/project methodology. Both the tab names and field labels can be changed (*Figure 6 and 7*).

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Edit Actionable Intelligence Configuration

Save Save & New Cancel

Actionable Intelligence Configuration Information

Default Name

Name AI Configuration

Actionable Intelligence Tab

Pain Points Tab

Strengths Tab

Weaknesses Tab

Obstacles Tab

Objections Tab

Why Buys Tab

SE Requirements (Stage)

Name Label AI Name

Decision Date Label

Budgeted Project Label

Reference Customer Label

Actions Label

Decisions Label

Open Issues Label

Business Drivers Label

Technical Requirements Label

Reference Contact Label

Competitor 1 Label

Competitor1 Strengths Label

Competitor1 Weaknesses Label

Competitor 2 Label

Competitor2 Strengths Label

Competitor2 Weaknesses Label

Competitor 3 Label

Competitor3 Strengths Label

Competitor3 Weaknesses Label

Pain Points Label

Pain Points Free Form Label

Strengths Label

Strengths Free Form Label

Weaknesses Label

Weaknesses Free Form Label

Obstacles Label

Obstacles Free Form Label

Objections Label Why Not

Objections Free Form Label Why Not

Why Buys Label

Why Buys Free Form Label

New

Figure 6

Actionable Intelligence

Actionable Intelligence Competitors Pain Points Strengths Weaknesses Obstacles Objections SE Requirements (Stage)

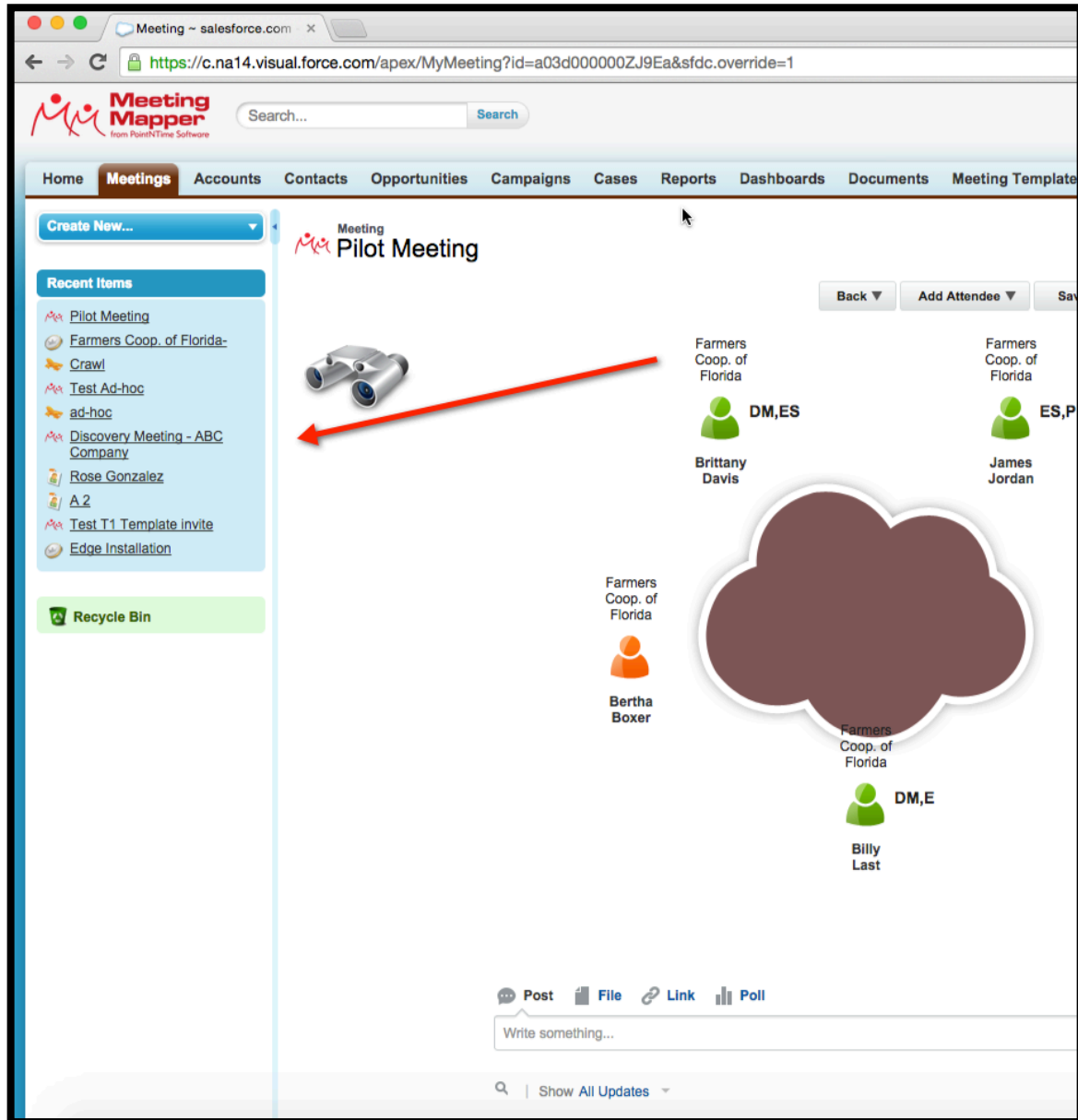
SE Requirements (Stage)

Figure 7

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Recent Side Bar

Added Recent Side Bar added to meeting page (*Figure 6*).



Brand Meeting Mapper to Your Organization

You can now brand Meeting Mapper with your company's logo. The logo can be included on the meeting page, invitations, agendas and meeting sections in objects.

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Undo Button in Political Org Chart

Undo a move in the Political Org Chart in the event the placement is incorrect.

Configure Color and Font Size in Report Exports and Agendas

You can now change the color or font size for the Report Exports and Meeting Agendas thus ensuring your branding is maintained.

Meeting Invitations

You can select which meeting attendees will receive meeting invitations. In previous versions the meeting invite was sent to all meeting attendees.

Other items

Change the placement of the Role, Agenda specifications to more closely align with the standard Salesforce.com interface.

Display Internal notes when creating a meeting.

Remove Export to CSV from Export dropdown.

Add a hyperlink in the meeting prerequisites email that points to the associated activity in Salesforce.