Strategy Mapper Planning Guide

Table of Contents

Introduction

Strategy Mapper is designed in such a way that allows each organization the ability to configure it in the way that best meets its requirements. Though you can use Strategy Mapper with very little configuration, it's highly recommended that you take the time to go through this document and plan the configuration. The amount of time required will vary from organization to organization, but on average, most will get through the initial configuration in a matter of a couple of hours. As Strategy Mapper evolves in the organization, further configuration can be done to refine its use.

Add Pick List Values

The Pick List Values allows you to provide Strategy Mapper users preconfigured dropdown lists to select from in Account Mapper, Opportunity Mapper and Meeting Mapper. Currently there are 21 Objects. Not all the objects listed here require configuration. In addition, some of the Objects have multiple Fields to configure. You can enter in your configuration in the last column, then cut and paste into corresponding object and fields in "Add Picklist Values" in the application.

NOTE – Items in red should not be modified. Items lined through are not used in the current version and are reserved for later version.

Account Mapper Picklist Configuration			
Object	**Field**	**Default Values**	**Your Configuration**
Account Milestones	Title	Schedule an Executive Briefing Schedule 6 - 12 Roadmap Schedule Account Review Meeting Schedule a Health Check Schedule an initial meeting	
Customer Buying Process	Process	Identify the Problem Review Options Bring in top 3 vendors Pilot/Trial selected vendor Sign contracts Deploy Solution	
Customer Initiatives	Initiative	Sales Enablement Platform BI/Analytics Cloud Mobile Digitization/Marketing Automation Infrastructure/Data Center ERP Security Business Critical Application CRM	

		Networking/Voice/Data Communications Sales team retention Customer Support Customer Satisfaction Create a Loyalty Program Security and Compliance in the Cloud Encryption Key Management	
	Time Frame	Current FY - Q1 Current FY - Q2 Current FY - Q3 Current FY - Q4 Next FY – Q1 Next FY – Q2 Next FY – Q3 Next FY - Q4	
Challenge	Challenge	Difficult to get access to Decision Makers. Their legal process is very difficult and takes normally 30 - 45 days. They are very geographically distributed so getting to each corporate location does take time and planning New Challenge	

Opportunity Mapper Picklist Configuration			
Object	**Field**	**Default Values**	**Your Configuration**
Customer Buying Process for Opportunity	Process	Identify the Problem Review Options Bring in top 3 vendors Pilot/Trial selected vendor Sign contracts	
Challenge for Opportunity	Challenge	Difficult to get access to Decision Makers. Their legal process is very difficult and takes normally 30 - 45 days. They are very geographically distributed so getting to each corporate location does take time and planning	

Meeting Mapper Picklist Configuration			
Object	**Field**	**Default Values**	**Your Configuration**
Actionable Intelligence	Actions	Produce test template Secure Sign off for contracts	

		Complete Product RFI/RFP General Interest Install in Production Send Proposal Schedule a Demo	
	Budgeted Project	Yes No Not Determined Next FQ Next FY	
	Decisions	Determine Pilot site Move forward Not to move forward Evaluate other vendors Do nothing	
	Customer Reference	Yes No Contact after deployment	
Meeting Attendee Event	Type	Action Item Next Step Schedule Meeting Phone Send Pricing Send Contracts Schedule Dinner Schedule Lunch Schedule Outing	
Meeting Attendee	Define Against	Did not meet requirements Is Champion for competitor Said will not support Shows no interest Indicated No Support	
	Level of Participation	Non-Interactive Confrontational Distracted Interactive Very Interactive	
	Define Champion	Gave me competitive information Will take a call anytime Gives me frequent updates Got 1 - on - 1 meeting with Executives Brought us into account	
	Role	Account Executive Board Member	

		Buyer Candidate Chairman of the Board Champion Consultant Decision Maker Director Economic Buyer Employee Evaluator Executive Sponsor Facilitator Finance Gatekeeper Human Resources Instructor Interviewer Legal Manager Marketing Mentor/Coach Moderator Participant Proxy Partner Presenter Product Marketing Product Manager Project Owner Purchasing Agent System/Sales Engineer Technical Buyer Trusted Advisor Unknown Vendor(Supplier) Influencer	
	Define For	Said will buy Leading with our solution Executive Sponsor in account Recommending our solution Will sign off on PO	
	Stance	Against For Neutral No Show Participant Undecided	

Customer Requirement	Product Type	Recently Products Search Product Not Listed	
	Our Solution	Partner Product/Solution Meets Requirement Partially meets requirement On roadmap Does not meeting requirement(s)	
Competitor	Competitor		
Follow Up	Follow Up	Send Thank You email Send Follow up Hand Written Note Schedule next meeting	
	How Long	Hours Days	
Meeting Prerequisites	Meeting Prerequisites Name	Pre-Demo Contact Project Charter Send invites to project members Verify Contracts RainKing Check Hoovers LinkedIn Ensure you have current PowerPoint	
Meeting	Conference Type	GoToMeeting Hangouts Other UberConference WebEx Skype Join.Me None	
	Add Objectives	1	
	Repeat	Daily Weekly Monthly Yearly Every Two Weeks Every Quarter Every Six Months	
	~~Score Meeting~~	~~5~~ ~~4~~ ~~3~~	Not used in current version – replaced with slider on meeting page.

		~~2~~ ~~1~~	
	Stage	Prospecting Qualification Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Quote Negotiation/Review Closed Won Closed Lost	Meeting Mapper – Do not modify here, this list is prepopulated from Salesforce.
	Table Shape	Cloud Circle Oval Rectangle No Table	
	Type	Remote On-Site Corporate Headquarters Conference Executive Briefing Center Outside Sales Set Referral Upcall Cold Call	
	Object	Not Used in this version	
Objections	Objections to Overcome	Not a priority Don't see a need at this time Not funded (no budget) No resources	
Obstacles	Obstacles to Overcome	Not a priority Don't see a need at this time Not funded (no budget) No resources	
Pain Points	Pain Points	Not a priority Don't see a need at this time Not funded (no budget) No resources	
Strengths	Our Strengths	Incumbent Reference Customer Relationships at the C-Level 5 Star rated on AppExchange Configurable solution Support	
Weakness	Our Weakness	Not Incumbent	

		Reference customer for competition No support for Android Small company	
Why Buys	Why Buys	Pressure from executive team Increase sales by 10% Reduce cost of sales by 15%	

Strategy Mapper Templates

Templates are used so you can configure the three components in Strategy Mapper, Account Mapper, Opportunity Mapper and Meeting Mapper. For example, you may create templates for Account and Opportunity Mapper to follow the segmentation of your customer base by having templates for larger accounts and smaller accounts. You can then create templates for the types of meetings you have with each of these accounts like discovery meeting or contract meeting. The following sections describe the available configuration for each of these templates.

Account Mapper

There is one section, comprising seven items to configure for an Account Mapper template (see figure 1). They are:

Account Mapper Template Name – provide a descriptive title, so users select the correct template based on the account. For example; Retail Accounts, this template would be used to build strategic plans for accounts in the retail space.

6 Month Plan – provide a narrative of the short term account plan. This is a rich text field and can include things like standard activities to accomplish, links to useful information, standard account team members, etc.

12 Month Plan – provide a narrative of the longer term account plan. This is a rich text field and can include things like standard activities to accomplish, links to useful information, standard account team members, etc.

Value Proposition – provide the user the stated value proposition your company and products/solutions provide the customer. Here is also a great place to include any customer quotes.

Marketing – provides the user a location to include any upcoming marketing events or other marketing information.

Business Development – provides the user a location to include business development activates.

Active – once you have completed the template and want to make it available to your users, click on Active.

NOTE – There is no limit to the number of templates you can create.

NOTE – Challenges are no longer supported in the template but are now a picklist value – this provides structure data for challenges for reporting purposes.

NOTE – when changes are made to a template, account plans already using the template will not be affected. The change will only affect new plans.

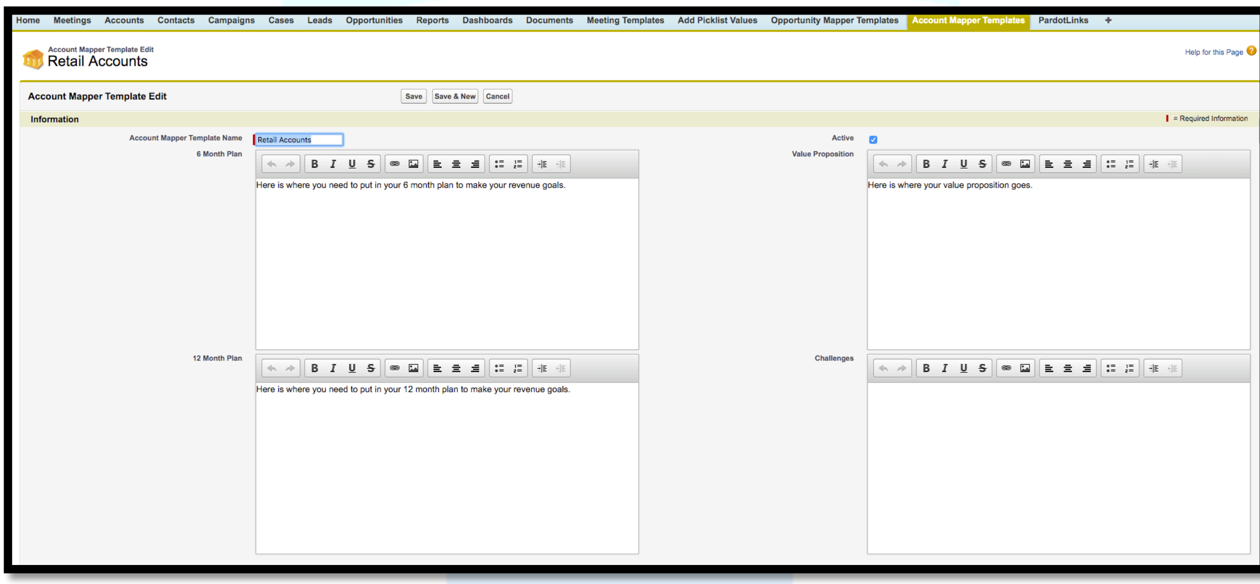


Figure 1

Opportunity Mapper

There are 3 sections comprising an Opportunity Mapper Template. They are:

1. Opportunity Mapper Template Details (see figure 2).
2. Stages (see figure 3).
3. Opportunity Milestones (see figure 3).

NOTE – when changes are made to a template, opportunity plans already using the template will not be affected. The change will only affect new plans.

NOTE – These is no limit to the number of templates you can create.

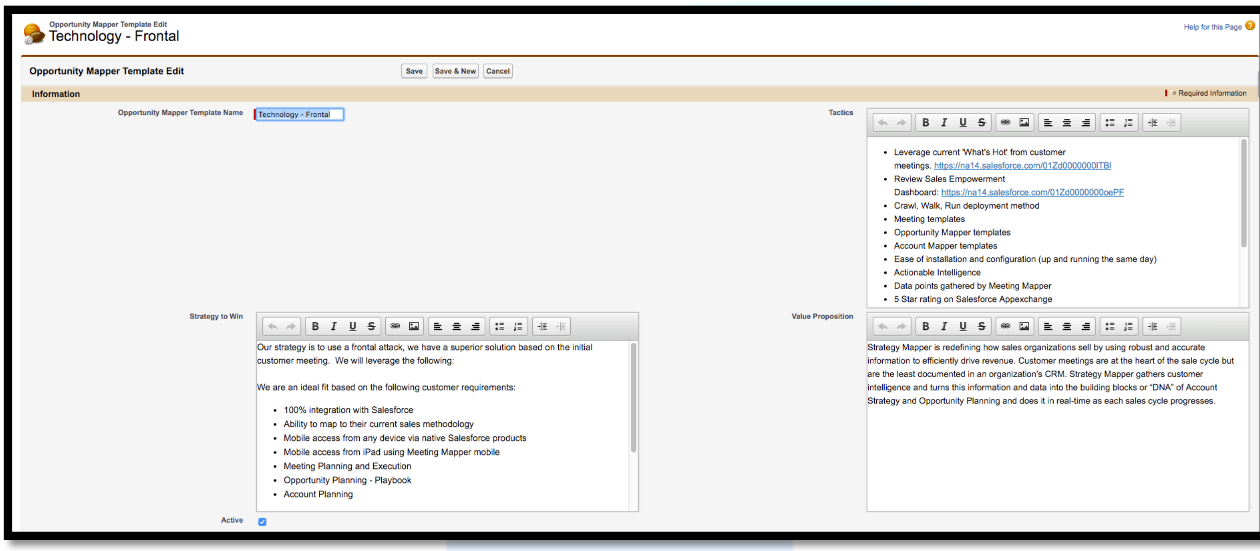


Figure 2

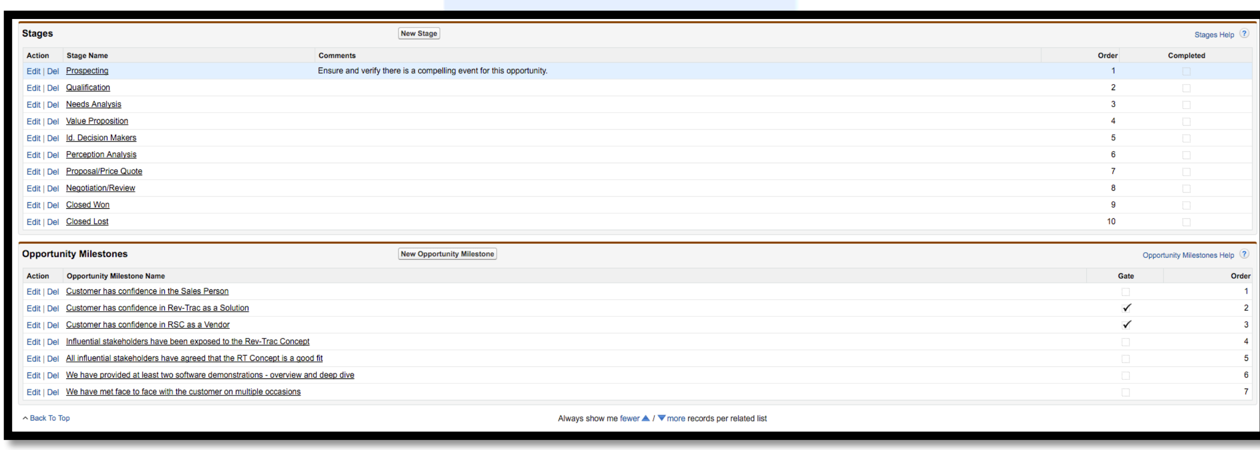


Figure 3

Opportunity Mapper Template Details has 5 items to configure:

Opportunity Mapper Template Name – provide a descriptive title, so users select the correct template based on the opportunity. For example; Technology Frontal, this template would be used to build strategic plans for opportunities that are in the technology space where the strategy is Frontal (frontals are used when you have a far superior product, you are the incumbent).

Strategy to Win – provide stated strategy to win in this type of opportunity.

Tactics – provide the tactics used to win this opportunity based on the strategy.

Value Proposition – provide the user the stated value proposition your company and products/solutions provide the customer. Here is also a great place to include any customer quotes.

Active – once you have completed the template and want to make it available to your users, click on Active.

Stages

By default, Strategy Mapper pulls the stages defined in Salesforce (see figure 4). Comments can be added per stage. It is critical that you put the stages in the proper order, if this is not completed the stages will be viewed in the Opportunity Plan in alphabetical order (see figure 5).

Stages New Stage Stages Help

Action	Stage Name	Comments	Order	Completed
Edit | Del	Prospecting	Ensure and verify there is a compelling event for this opportunity.	1	
Edit | Del	Qualification		2	
Edit | Del	Needs Analysis		3	
Edit | Del	Value Proposition		4	
Edit | Del	Id. Decision Makers		5	
Edit | Del	Perception Analysis		6	
Edit | Del	Proposal/Price Quote		7	
Edit | Del	Negotiation/Review		8	
Edit | Del	Closed Won		9	
Edit | Del	Closed Lost		10	

Figure 4

Best Practice – Point N Time Software includes information in each of the stage's comments section that can assist the user in moving the deal along. For example, in the Prospecting stage you might want to include questions to ask the customer, add links to video or other material that may be useful to the user.

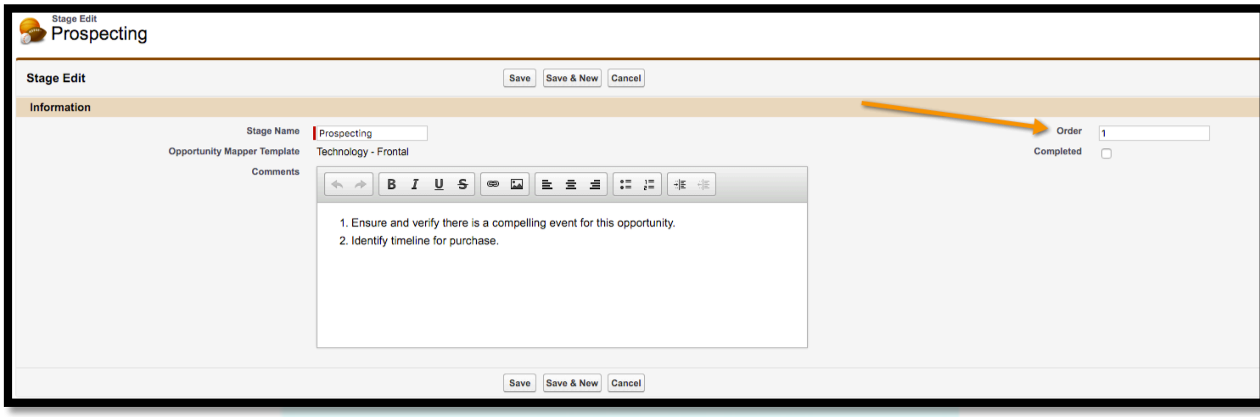


Figure 5

Opportunity Milestones

Opportunity Milestones allow you to build out a sales process in a template. You can also specify that a milestone is a "Gate". A gate is a critical milestone that must be completed before moving to the next milestone in the opportunity.

Opportunity Milestones are not required and the Opportunity Milestone tab will not be displayed, in the event there are no Opportunity Milestones created (see figure 6).

NOTE – Milestones that are configured as a gate will be in bold text in the Opportunity Milestone tab in the opportunity plan. If a milestone gate is marked in red (not completed) the Opportunity Milestone tab will be colored Red, signifying this gate as not been met or completed.

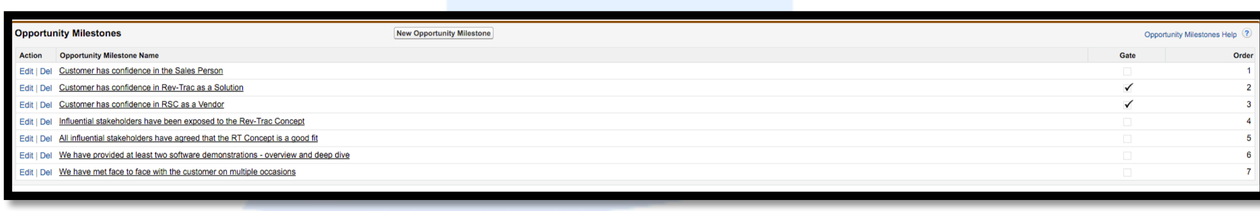


Figure 6

There are 4 sections in the Opportunity Milestone Edit. They are:

1. Opportunity Milestone Name – The name of the milestone.
2. Gate – select if this milestone is gate.
3. Opportunity Mapper Template – no configuration needed.
4. Order – order in which the milestone is displayed in the Opportunity Milestones tab in the opportunity plan. <u>It is critical that you put the milestones in the proper order, if this is not completed, the stages will be viewed in the Opportunity Plan in alphabetical order (see figure 7).</u>

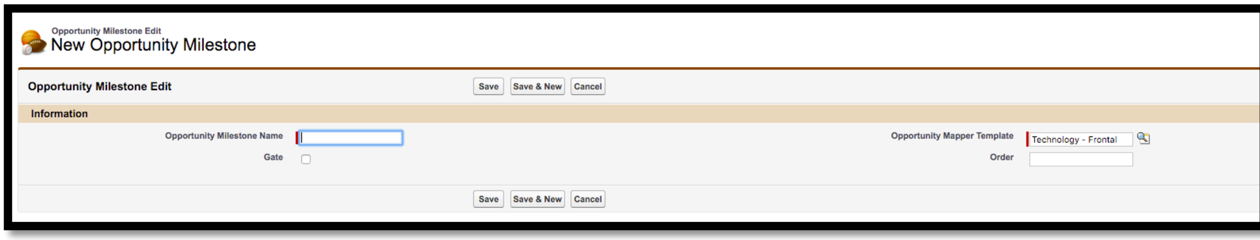

Opportunity Milestone Edit
New Opportunity Milestone
Opportunity Milestone Edit
Save
Save & New
Cancel
Information
Opportunity Milestone Name
Gate
Opportunity Mapper Template
Technology - Frontal
Order
Save
Save & New
Cancel

Figure 7

Meeting Mapper Templates

Meeting Mapper templates are used to configure the meeting page display and functionality. The meeting template is comprised of the following sections (see figure 8):

Meeting Template Details – this section is comprised of 9 sections. They are:

NOTE – The only required sections to be completed is Meeting Template Name.

Meeting Template Name – descriptive name for the template that will help ensure users select the proper template for the meeting.

Meeting Prefix - typically a 2-character prefix used as categorization in report generation.

Goal – this is the stated goal of the meeting.

Related Object – if selected, you can specify what fields from the selected object to display in the meeting page allowing updates to that object's fields. For example you can specify "Opportunity" and display "Stage" so it can be updated directly from the meeting page.

NOTE – If an object is not selected the user cannot select fields to update in the meeting page and will require the user to navigate back to the Salesforce object (e.g. Opportunity) to update fields.

Is Mobile Template – specifies this template is used for syncing with the Meeting Mapper mobile app - Only one template can per object (Account, Opportunity, etc) can have this selected.

Call Plan – the text entered here will pre-populate the "call plan" for every meeting using this template. This text will be displayed in a window when a meeting is created using this template

Internal Notes – text entered in the field will pre-populate the internal notes section of every meeting using this template.

Best Practice – Include any questions you want the user to ask in Internal Notes, this is a great place to add any additional information, best practices or other information useful for the user during the meeting.

Active – once you have completed the template and want to make it available to your users, click on Active.

Is a Quick Meeting - any template can have this designation - This allows users to quickly create a meeting. This quickly creates a meeting using the current time and a user specified meeting template.

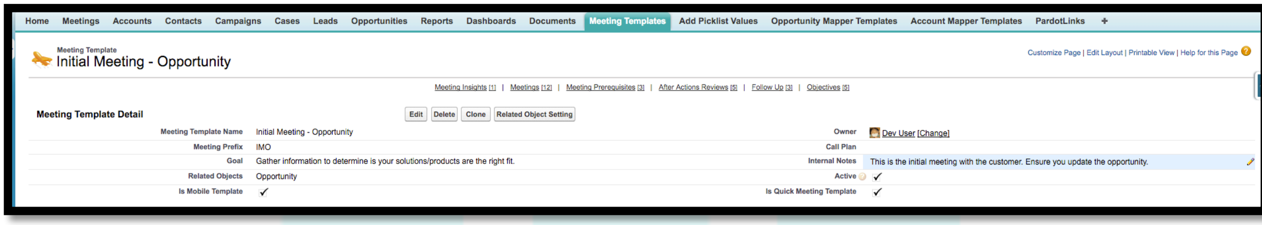


Figure 8

NOTE – These is no limit to the number of templates you can create.

NOTE – Users can change the Goal and Objectives in the meeting, this will not affect the template.

Meeting Button Configuration

This section allows you to specify which buttons and therefore functionality is available in each meeting created with this template. There are 23 buttons available buttons, 22 of which can be displayed on the meeting page. The “Sync Attendee Events” will prompt the user when a meeting is created asking if attendee events should be synced from a previous meeting. By default there are 17 buttons displayed along with Sync Attendee Events (see figure 9).

Best Practice – When Strategy Mapper is initially deployed, it’s best to limit the functionality. This can help with user adoption. As the organization evolves the use of Strategy Mapper, additional buttons (functionality) can be added to the existing templates. The additional buttons will be displayed on all meetings using this template including past meetings.

Best Practice – When you have a template that is configured correctly, clone it to build additional templates.

Figure 9

Back (default) - Takes you back to the associated Salesforce object (e.g. Opportunity)

Save (default) - Saves the current meeting information.

Notes (default) - Allows you to take meeting notes and view notes from previous meetings associated with this object (e.g. Opportunity).

Tasks (default) - Allows you to assign tasks to meeting attendees. These are standard Salesforce tasks.

Clone (default) - Allows you to create a new meeting clone of the current meeting. Ensure you change the name of the new meeting, buy default it will have the same title.

Political Map/Org Map (default) - Gives the ability to display and manipulate the organizational hierarchy of the customer/partner organizations

Score Meeting (default) – No longer used in Meeting Mapper.

Object (default) – Reserved for future use.

Meeting Insights - Allows you to specify from a list of items what resonated in a meeting.

Opportunity Mapper - Takes the user to the associated Opportunity Mapper page.

Related Opportunity - Allows the user to update an additional opportunity in a meeting.

NOTE – If you make edits to the fields selected, they will not affect current meetings using the template, only new meetings.

Table – Allows you to specify the table displayed on the meeting page, by default no table is displayed on the meeting page.

Add Attendee (default) - Add an attendee to the meeting, both contacts (customer team) and users (account team).

Send Invites (default) - Allows you the ability to send meeting invitations and include meeting agendas.

Individual Take Away (default) - Allows you to specify "take aways" for each meeting attendee.

Actionable Intelligence (default) - Allows the user to collect information about the Opportunity, Account, etc.

Export Report (default) - Allows you to export a public and internal meeting report.

Schedule New (default) - Allows you to create and schedule a new meeting.

Related Object Settings (default) - Allows the ability to populate fields.

Sync Attendee Events (default) - This pulls forward tasks from previous meetings that have not been completed.

Attachments (default) - Allows you to attach items as part of the meeting record.

After Actions Review (default) - Allows you to specify and describe a follow up item after the meeting.

Account Mapper - Takes the user to the Account Mapper page associated with the meeting.

Meeting Template Button Configuration Examples

Here are some button configuration Point N Time Software use in their meeting templates.

Leads (see figure 10)

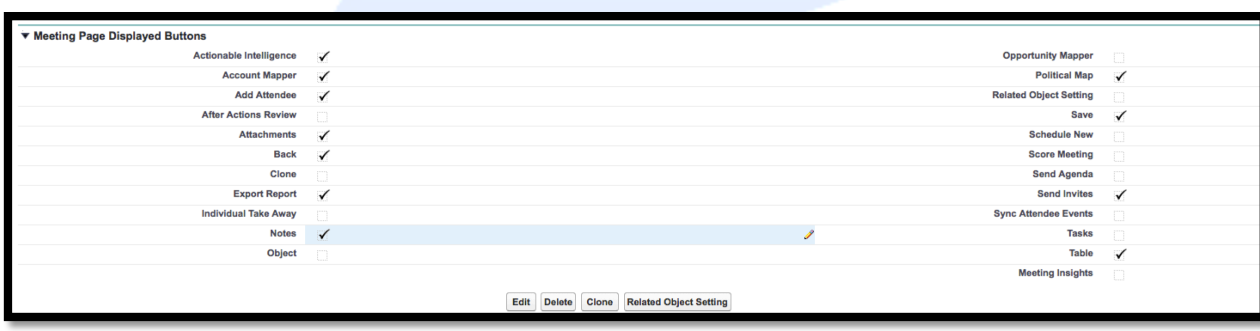

Meeting Page Displayed Buttons

Actionable Intelligence	✓	Opportunity Mapper	
Account Mapper		Political Map	
Add Attendee	✓	Related Object Setting	
After Actions Review		Save	✓
Attachments		Schedule New	
Back	✓	Score Meeting	
Clone		Send Agenda	
Export Report	✓	Send Invites	
Individual Take Away		Sync Attendee Events	
Notes	✓	Tasks	✓
Object		Table	
		Meeting Insights	

Edit | Delete | Clone | Related Object Setting

Figure 10

Accounts (see figure 11)


Meeting Page Displayed Buttons

Actionable Intelligence	✓	Opportunity Mapper	
Account Mapper	✓	Political Map	✓
Add Attendee	✓	Related Object Setting	
After Actions Review		Save	✓
Attachments	✓	Schedule New	
Back	✓	Score Meeting	
Clone		Send Agenda	
Export Report	✓	Send Invites	✓
Individual Take Away		Sync Attendee Events	
Notes	✓	Tasks	
Object		Table	✓
		Meeting Insights	

Edit | Delete | Clone | Related Object Setting

Figure 11

Opportunities (see figure 12)

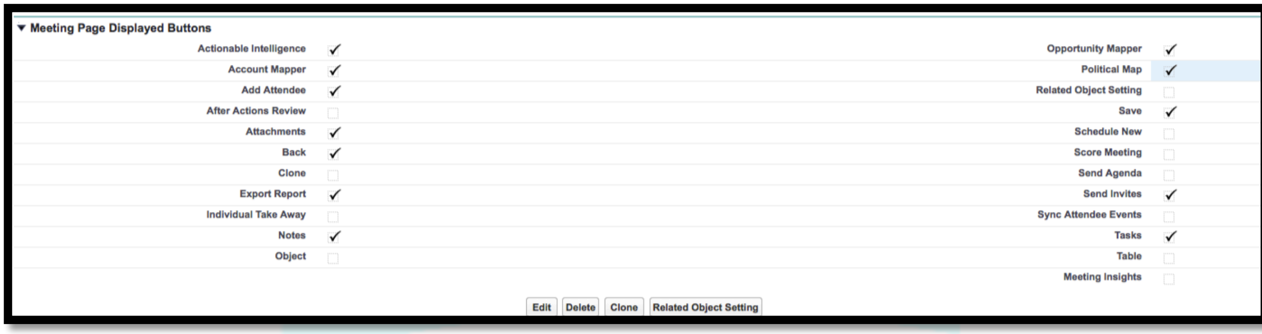


Figure 12

Cases (see figure 13)

Figure 13

Campaigns (see figure 14)

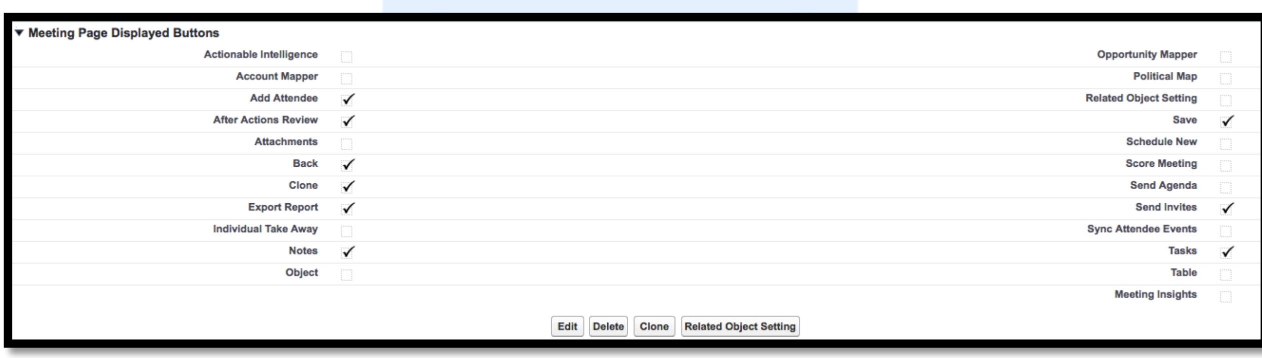


Figure 14

Meeting Insights

Meeting Insights is a great way to capture what is resonating in customer meetings. Meeting Insights are linked to individual templates and there is a maximum of ten that can be linked to a template (see figure 15).

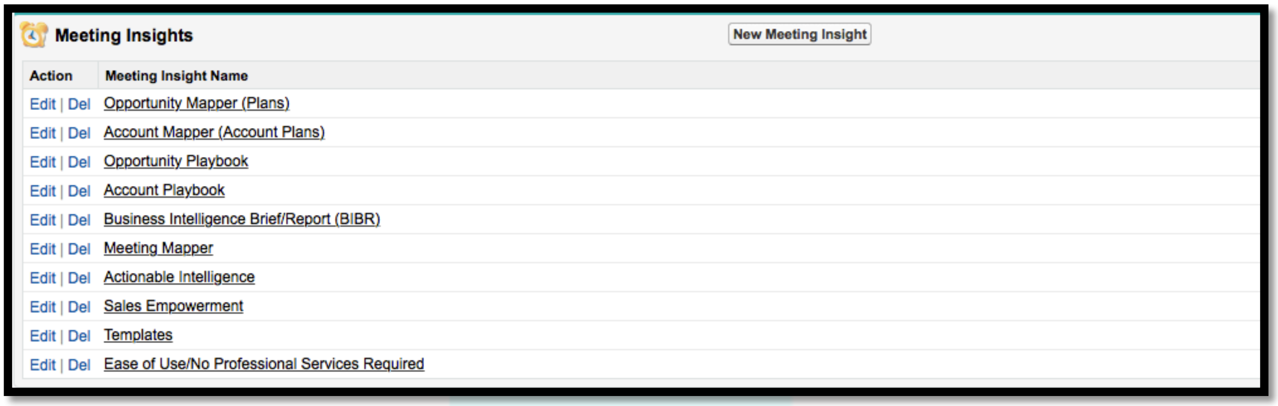


Figure 15

Only Meeting Insight Name must be completed for each Meeting Insight (see figure 16).

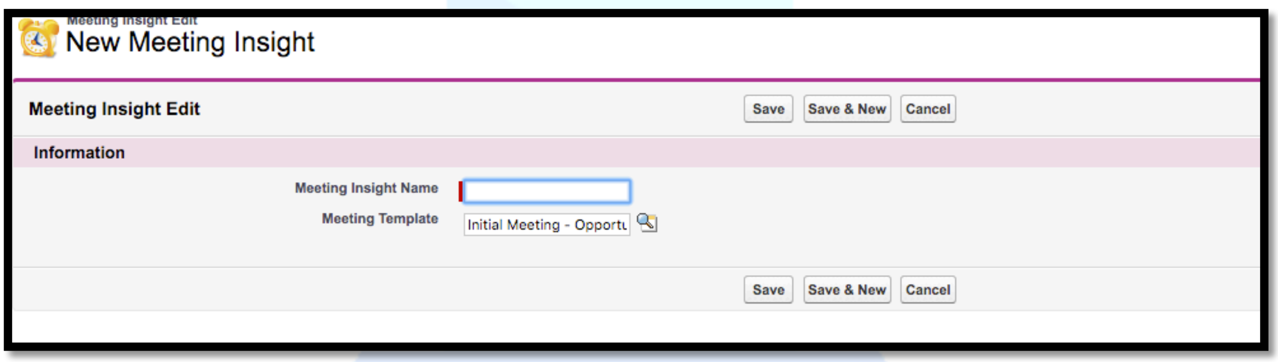


Figure 16

Meeting Prerequisites

Meeting Prerequisites allow you to specify task(s) or information that must be performed before the meeting (see figure 17).

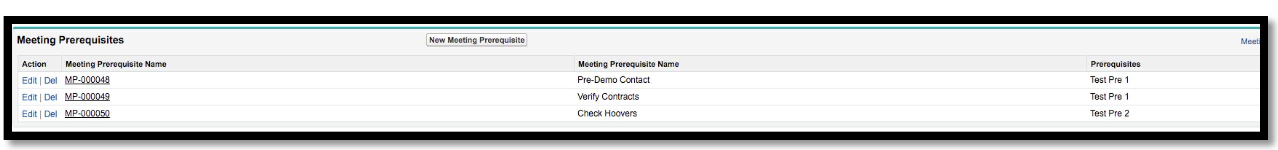


Figure 17

There are two fields that must be completed.

Meeting Prerequisites Name – select from the dropdown.

Prerequisites – additional information regarding the meeting prerequisite (see figure 18).

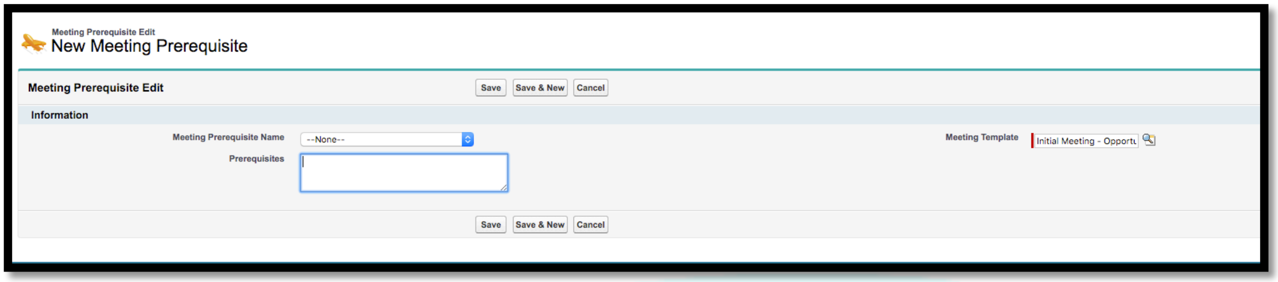
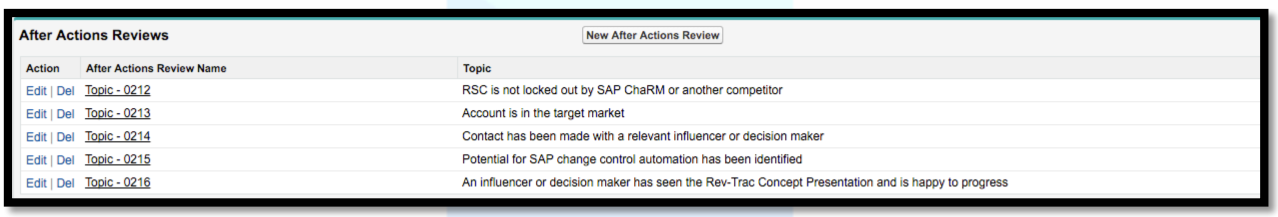


Figure 18

After Actions Review

After Actions Review allows you to discuss critical items after an opportunity has closed (see figure 19). The review will be linked to the opportunity.



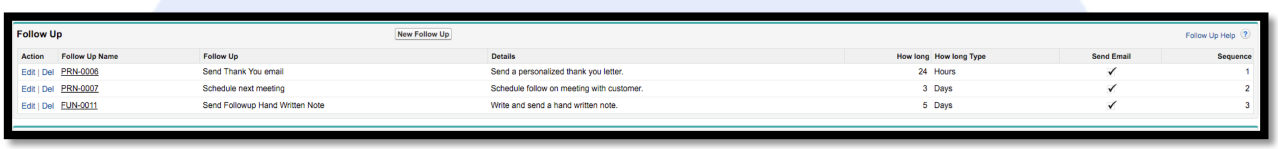
After Actions Reviews — New After Actions Review

Action	After Actions Review Name	Topic
Edit | Del	Topic - 0212	RSC is not locked out by SAP ChaRM or another competitor
Edit | Del	Topic - 0213	Account is in the target market
Edit | Del	Topic - 0214	Contact has been made with a relevant influencer or decision maker
Edit | Del	Topic - 0215	Potential for SAP change control automation has been identified
Edit | Del	Topic - 0216	An influencer or decision maker has seen the Rev-Trac Concept Presentation and is happy to progress

Figure 19

Follow Up

Follow Up allows you to configure tasks that are required after a meeting is completed. This ensures teams are following up with prospects and customers after meetings (see figure 20). Follow Up also creates an event/task in Salesforce and is placed on the users Salesforce calendar.



Follow Up — New Follow Up — Follow Up Help

Action	Follow Up Name	Follow Up	Details	How long	How long Type	Send Email	Sequence
Edit | Del	PRN-0006	Send Thank You email	Send a personalized thank you letter.	24	Hours	✓	1
Edit | Del	PRN-0007	Schedule next meeting	Schedule follow on meeting with customer.	3	Days	✓	2
Edit | Del	FUN-0011	Send Followup Hand Written Note	Write and send a hand written note.	5	Days	✓	3

Figure 20

There are 7 fields with 6 needing completed for each Follow Up (see figure 21). They are:

Sequence – indicate numerically the order Follow Up must be completed.

Follow Up – select the follow up from the picklist.

Details – included any additional details to the user

Meeting Template – prepopulated

How Long – indicated numerically how long after the meeting is complete the Follow Up must be completed by the user.

How Long Type – select either hours or days. This works in conjunction with How Long. For example; you select 1 in How Long and day in How Long Type. This Follow Up would be put on the users calendar with a completion date of one day after the meeting is completed (see figure 21).

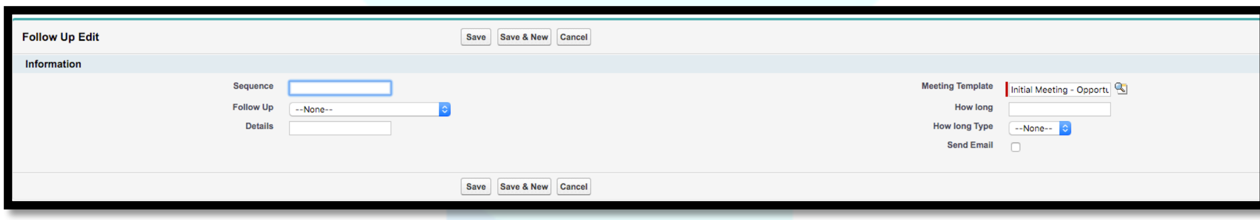
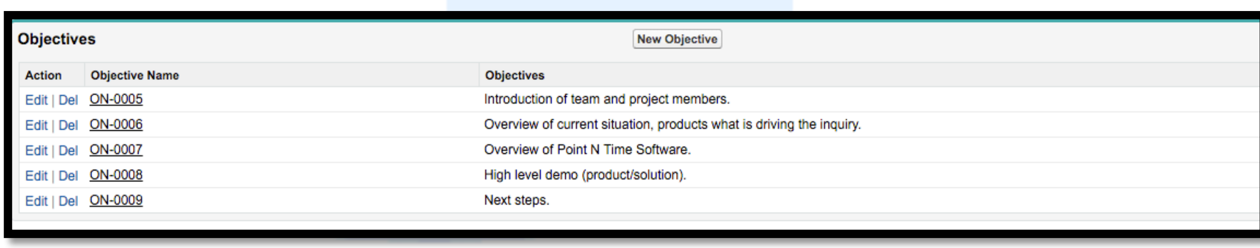


Figure 21

Objectives

"Objectives" allows you to prepopulate the objectives of the meeting for the user (see figure 22).



Objectives New Objective

Action	Objective Name	Objectives
Edit | Del	ON-0005	Introduction of team and project members.
Edit | Del	ON-0006	Overview of current situation, products what is driving the inquiry.
Edit | Del	ON-0007	Overview of Point N Time Software.
Edit | Del	ON-0008	High level demo (product/solution).
Edit | Del	ON-0009	Next steps.

Figure 22

There is only one field required for an Objective. This should be a detailed description of the objective (see figure 23).

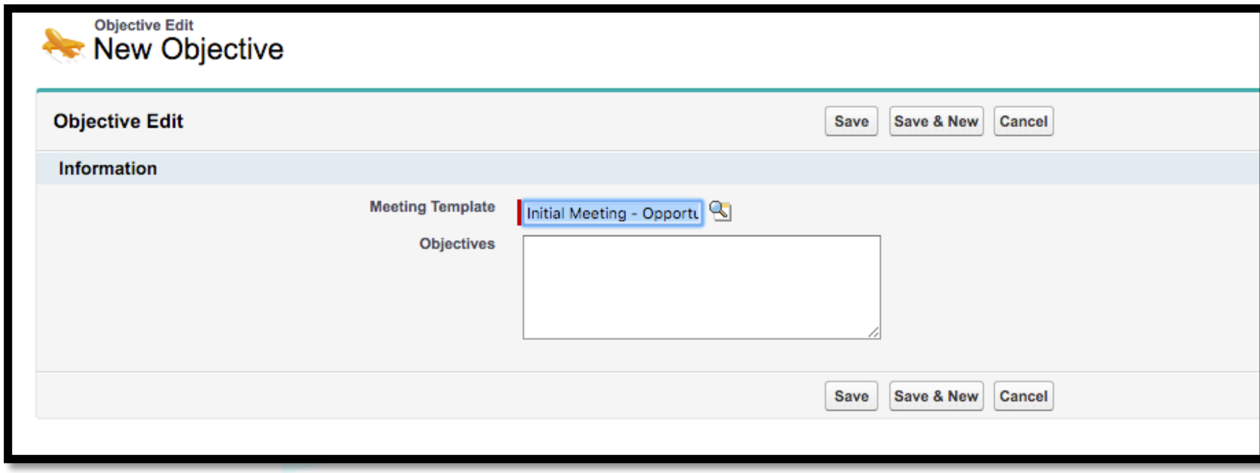

Objective Edit
New Objective
Objective Edit
Save
Save & New
Cancel
Information
Meeting Template
Initial Meeting - Opportu
Objectives
Save
Save & New
Cancel

Figure 23