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Send meeting invitations and agendas.	33
Take detailed meeting notes both public and private. Save meetings notes as Word doc.	34
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Overview

Strategy Mapper is a native Salesforce.com application that is the natural convergence of account, opportunity and meeting planning. Its intuitive interface allows your organization to easily and consistently build, maintain and communicate Account and Opportunity Plans, manage customer meetings, and capture customer intelligence.

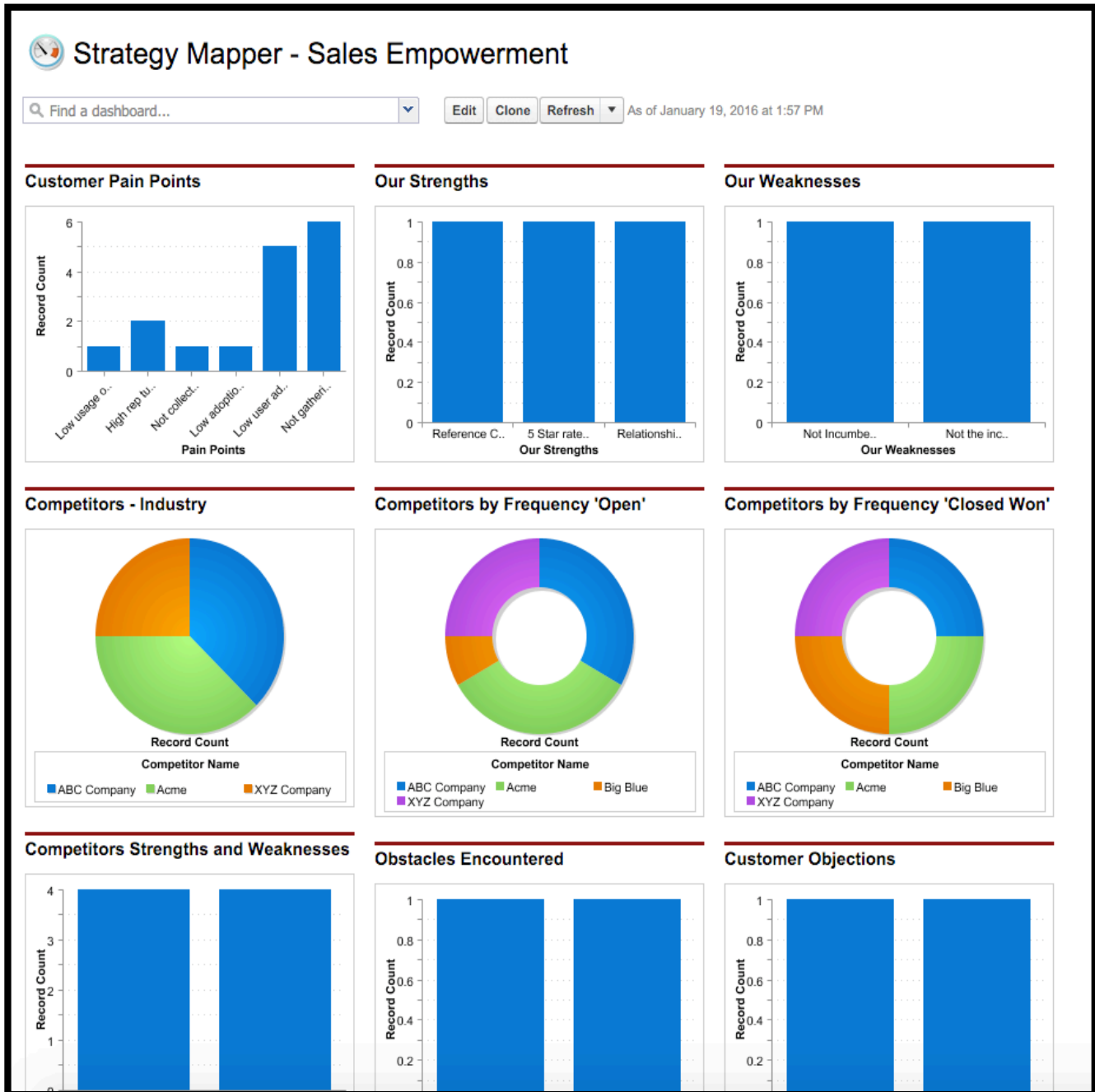
Key Features and Benefits

- Account Plans, Opportunity Plans and Meetings are based on templates defined by your organization resulting in consistency, ease of use and quick user adoption
- Meeting Management and execution that easily and consistently captures Customer Intelligence and automatically stores it in Salesforce.com
- 100% Salesforce integration so all data is stored and secured in your Salesforce org
- Out-of-the-box dashboards that provide a 360° view of your sales landscape.
- Collaboration across your entire organization on your strategic plans and selling activities
- Maps to your current sales processes and methodology



Dashboards

Strategy Mapper™ provides sales leadership real-time visibility of Account and Opportunity status so timely adjustments can be made to all aspects of your sales and marketing efforts.





Strategy Mapper

Find a dashboard...

Edit

Clone

Refresh

As of Today at 5:18 AM

Total Revenue with OM



Record Count

Opportunity Name

America Sales

Total Account Revenue with AM



Sum of Annual Revenue (Millions)

Account Name

Accounts Matter

Elite Software

Total Opportunity with OM



Record Count

Opportunity Name

Acme - 1,200 Widgets

America Sales

Meeting Mapper Fierce

Replace Help Desk

salesforce.com - 1,000 Widgets

salesforce.com - 2,000 Widgets

Service Desk Replacement

Summit Training- Strategy Mapper

Accounts with Account Mapper



Record Count

Is AM Existed

False

True

Account Mapper with CBP



Record Count

Status

-

Completed

Account Mapper Reviewed by Manager



Record Count

Manager Review

False

Account Mapper with Marketing Plan



Record Count

Account Mapper Reviewed by Team



Record Count

Accounts with AM and OM

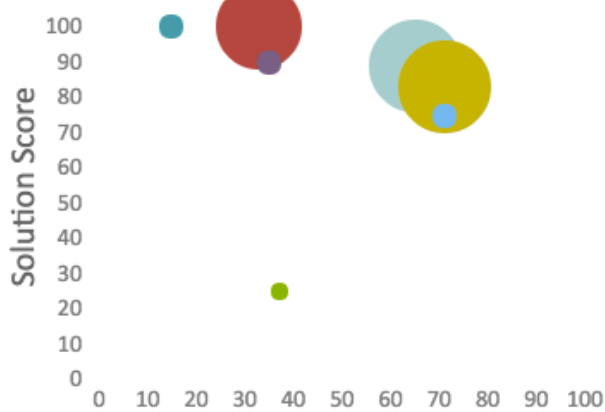




Strategy Mapper Score

[Edit](#)[Clone](#)[Refresh](#)

Actionable Intelligence - Opportunities



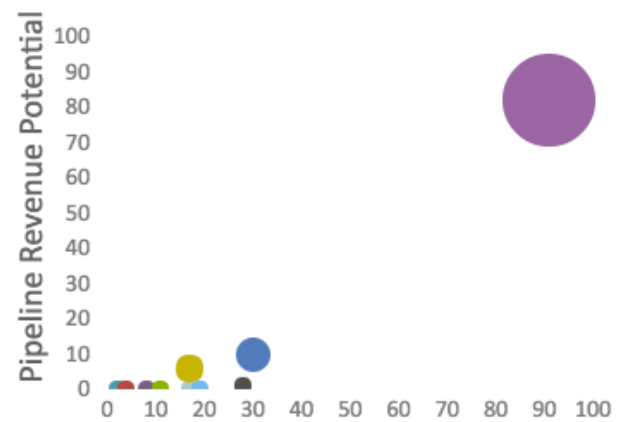
Actionable Intelligence

Score

View: My Opportunities

Time: All

Actionable Intelligence - Accounts



Actionable Intelligence

Score

View: All Accounts



Meeting Mapper 360

Find a dashboard...

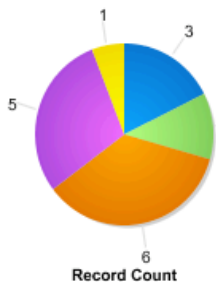
Edit

Clone

Refresh

As of Today at 9:57 AM

Meetings Per Stage of Opportunity



Opportunity: Stage



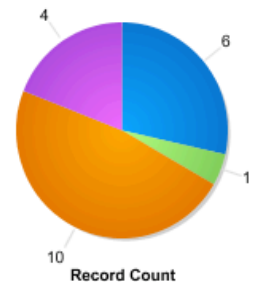
Meetings Per Opportunity



Opportunity: Opportunity Name



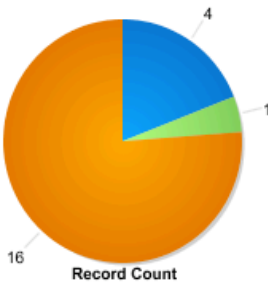
Meetings Per Account



Account: Account Name



Meetings Per State Based State



Account: Billing State/Province



Meetings Per Industry



Account: Industry



Attendee By Role(s)

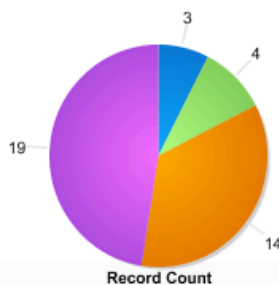


Record Count

Opportunity



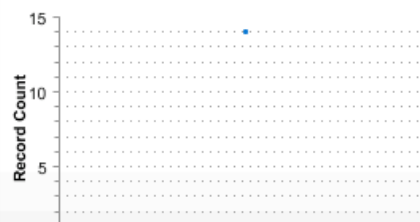
Attendee Stance (Stage of Opportunity)



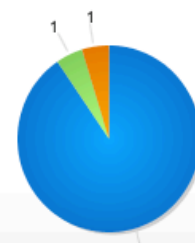
Record Count

Stance

Total Meeting Per Rep



Meeting Type (Where Was the Meeting)



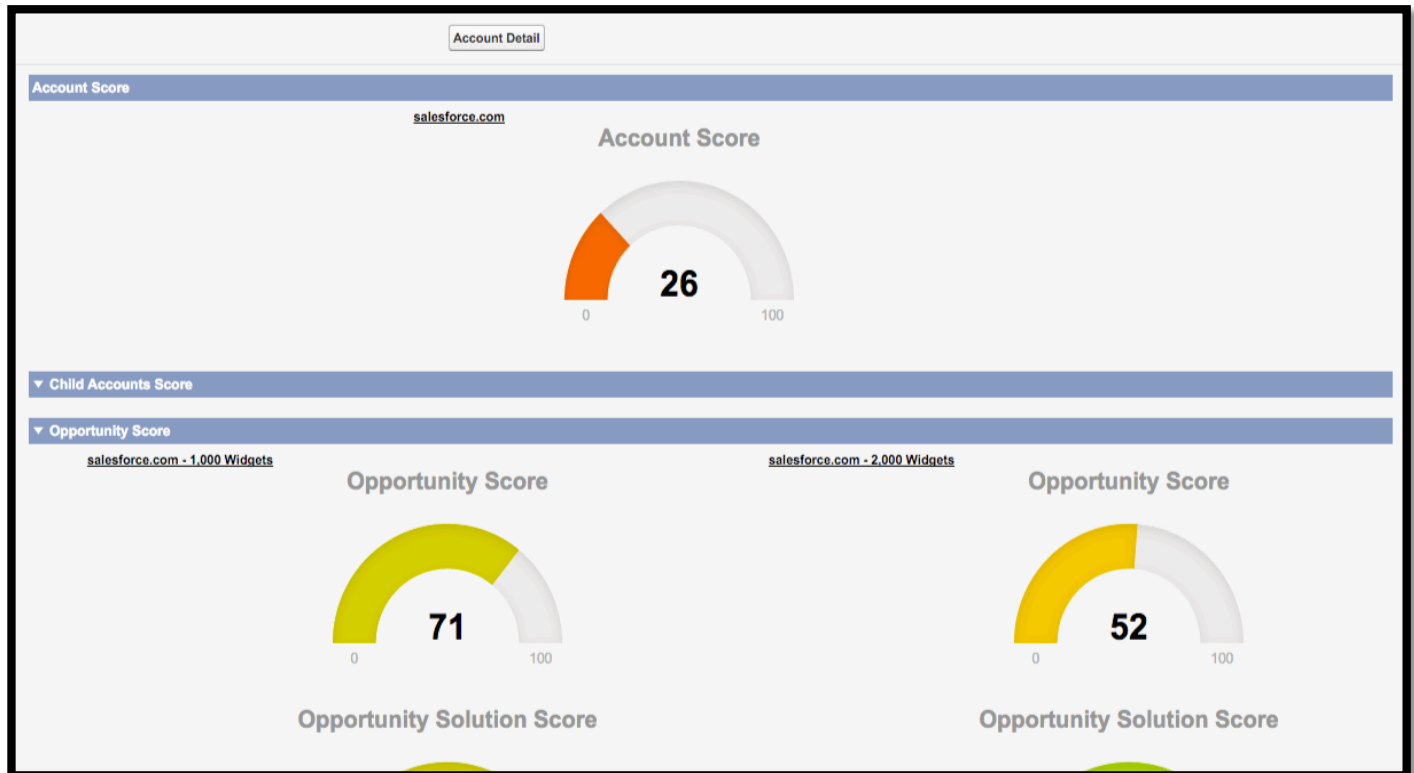


Account Mapper

Account Mapper is a planning solution that provides your sales teams an easy and consistent method to build, maintain, collaborate on, and communicate account plans.

Account and Opportunity Health

This is a snapshot view of the account, open opportunity health and solution score.

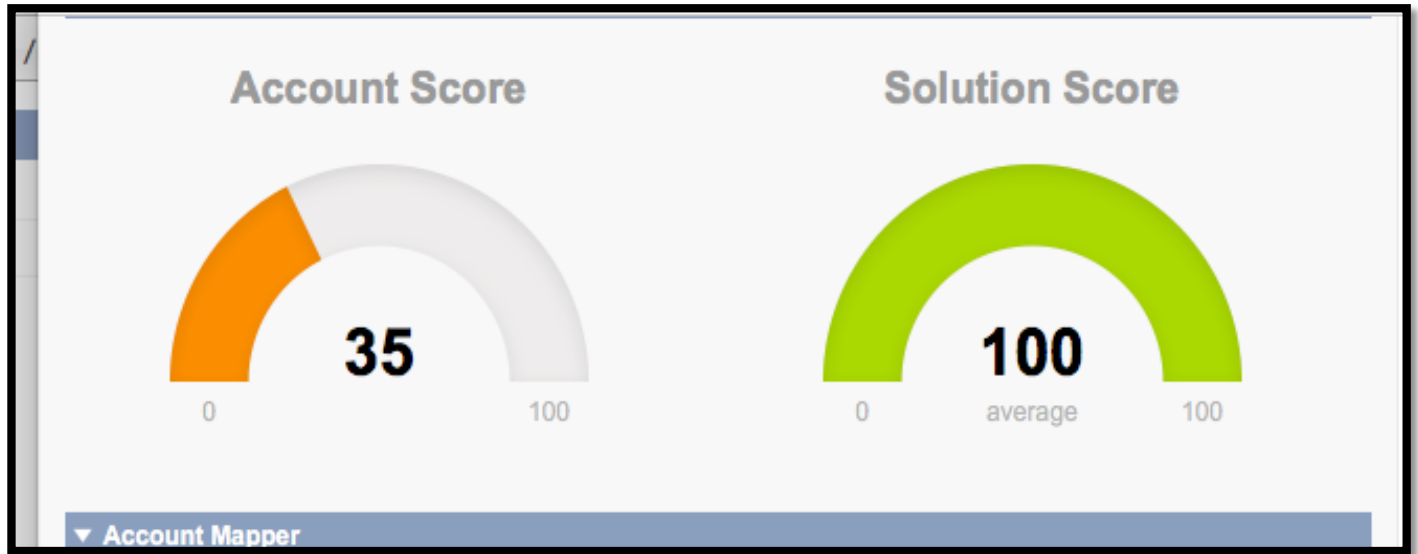




StrategyMapper

Product Overview

Account Health real-time score based on completeness of plan and interaction with customer.





StrategyMapper

Product Overview

Account Details

The account 6 and 12 month Plans and much more.

Search...

Search

Home Meetings **Accounts** Contacts Campaigns Cases Leads Opportunities Reports Dashboards Documents Meeting Templates Add Picklist Values Opportunity Mapper Templates Account Mapper

Account Mapper
Davis Sporting Goods

Back to Account Save Notify Manager Notify Team Account Score Account Playbook New Meeting Quick Meeting Org Map

Account Detail Customer Buying Processes Customer Initiatives Account Milestones Challenges Notes Competitors Meetings Opportunities Child Accounts

Account Detail

Industry	Communications	Estimated Total Revenue Potential	\$2,000,000.00
Description	Davis Sporting Goods is a new customer, they are growing at a rate of 35% per year. They are opening a new store every 45 days and looking to expand to other markets.	Total Pipeline Revenue Potential	\$2,830,000.00
Won	\$20,000.00	Account Owner	Dev User
Lost	\$106,000.00	Delta	\$850,000.00
Website		Account Mapper Template	Retail Accounts

Partners

Partner	Role	Is Primary	Op
Travis Account	Agency	<input checked="" type="checkbox"/>	Op
sForce	Consultant	<input type="checkbox"/>	Op
sForce	Consultant	<input checked="" type="checkbox"/>	Op
sForce	Consultant	<input checked="" type="checkbox"/>	Op
Aethna Home Products	Consultant	<input type="checkbox"/>	Op
Farmers Coop. of Florida	Agent	<input type="checkbox"/>	Op

6 Month Plan – 12 Month Plan – Value Proposition

6 Month Plan 12 Month Plan Value Proposition

↶ ↷ B I U S

- Conduct on-site visits on a monthly basis to corporate headquarters
- Identify a go to person in the legal department, this is currently a challenge
- Brief on our 1 and 2 year Road Map to determine how they fit into their initiatives
- Review all current support tickets on a weekly basis
- Determine if they can sponsor a user group meeting



StrategyMapper

Product Overview

Document Customer Buying Process

Document the customer's buying process, this process will be utilized in all opportunity plans created with Opportunity Mapper.

Back to AccountSaveNotify ManagerNotify TeamAccount ScoreAccount

Account DetailCustomer Buying ProcessesCustomer InitiativesAccount MilestonesChallengesNotesCompetitorsMeet

Customer Buying Processes

New0

Process

Identify the Problem

Process

Review Options

Process

Bring in top 3 vendors

Process

Pilot/Trial selected vendor

Process

Sign contracts

Process

Deploy Solution

Status

Completed

New



StrategyMapper

Product Overview

Document customer initiatives

Then create opportunities and/or account milestones to ensure every meeting is driving revenue and accountability.

Account Mapper

Davis Sporting Goods

Back to Account

Save

Notify Manager

Notify Team

Account Score

Account Playbook

New Meeting

Quick Meeting

Org Map

Account Detail

Customer Buying Processes

Customer Initiatives

Account Milestones

Challenges

Notes

Competitors

Meetings

Opportunities

Child Accounts

Customer Initiatives

New

Initiative

Digitization/Marketing Automation

Pardot?

☒

Timeframe

Current FY - Q2

Completed

☐

Initiative Information

Looking at a cloud based marketing automation platform - since we are integrated with Pardot, will see the interest in setting up a demo.

Account Milestone

Account Milestone

Opportunity

Net Op for Marketing Auto

Initiative

BI/Analytics

Pardot?

☒

Timeframe

Current FY - Q3

Completed

☐

Initiative Information

They need better BI tools to tracking customer buy habits.

Create Account Milestone

☐

Create Opportunity

☐

Initiative

Sales Enablement Platform

Pardot?

☒

Timeframe

Current FY - Q3

Completed

☐

Initiative Information

They are looking at growing their sales team by 20% in the coming year.

Create Account Milestone

☐

Create Opportunity

☐

Status

Completed



Create account milestones

To track critical ToDos, events and dates and assign them to team members. Milestones automatically create tasks in accounts.

Back to AccountSaveNotify ManagerNotify TeamAccount ScoreAccount PlaybookNew MeetingQuick MeetingOrg Map

Account DetailCustomer Buying ProcessesCustomer InitiativesAccount MilestonesChallengesNotesCompetitorsMeetingsOpportunitiesChild Accounts

Account Milestones

New

✕ TitleDigitization/Marketing AutomationDue Date5/1/20164/13/2016

Assigned To

Completed

DescriptionLooking at a cloud based marketing automation platform - since we are integrated with Pardot, will see the interest in setting up a demo.

Customer Initiative

Email Notification

✕ TitleSchedule a Health CheckDue Date3/21/20164/13/2016

Assigned ToDev UserCompleted

DescriptionSchedule a health check.

Customer Initiative

TaskTask

✕ TitleSchedule a Executive BriefingDue Date2/16/20164/13/2016

Assigned ToDev UserCompleted

Description

Customer Initiative

TaskTask

✕ TitleSchedule 6 - 12 RoadmapDue Date1/13/20164/13/2016

Assigned ToDev UserCompleted

DescriptionWork with Product Marketing and Management to schedule Roadmap presentation.

Customer Initiative

TaskTask



StrategyMapper

Product Overview

Gather account challenges

Document possible challenges, which may be encountered in the account. Challenges are sync'ed with opportunity plans created with Opportunity Mapper.

Account Mapper

Davis Sporting Goods

Back to Account

Save

Notify Manager

Notify Team

Account Score

Account Playbook

New Meeting

Quick Meeting

Org Map

Account Detail

Customer Buying Processes

Customer Initiatives

Account Milestones

Challenges

Notes

Competitors

Meetings

Opportunities

Child Accounts

Challenges

New

Challenge

They are very geographically distributed so getting to each corporate location does take time and planning

Additional Information

Challenge

Difficult to get access to Decision Makers.

Additional Information

Customer is sometime resistant to introducing the DMs. Also, we have encountered at least 3 DMs per opportunity.

Challenge

Their legal process is very difficult and takes normally 30 - 45 days.

Additional Information

Their legal department can take 45 days to complete a contract. Ensure you send over a word doc so they can markup.

Status

Completed

New



StrategyMapper

Product Overview

Notes

Add additional notes or conversations with customer. Time stamp the notes to be included in the account activity history.

Account Mapper

Davis Sporting Goods

Back to Account

Save

Notify Manager

Notify Team

Account Score

Account Playbook

New Meeting

Quick Meeting

Org Map

Account Detail

Customer Buying Processes

Customer Initiatives

Account Milestones

Challenges

Notes

Competitors

Meetings

Opportunities

Child Accounts

Notes

New

✕

Just talked to customer they are interested in getting a meeting to discuss marketing automation.

3/22/2016 12:05 AM

4/13/2016 1

New

Back to Account

Save

Notify Manager

Notify Team

Account Score

Account Playbook

New Meeting

Quick Meeting

Org Map



StrategyMapper

Product Overview

Competitors

Know what competitors have been identified in this account and their strengths and weaknesses. Competitors are populated from customer meetings using Meeting Mapper.

HomeMeetingsAccountsContactsCampaignsCasesLeadsOpportunitiesReportsDashboardsDocumentsMeeting TemplatesAdd Picklist ValuesOpportunity Mapper Templates

Account Mapper

Davis Sporting Goods

Back to AccountSaveNotify ManagerNotify TeamAccount ScoreAccount PlaybookNew MeetingQuick MeetingOrg Map

Account DetailCustomer Buying ProcessesCustomer InitiativesAccount MilestonesChallengesNotesCompetitorsMeetingsOpportunitiesChild Accounts

▼ Competitors

Competitor Name	Strengths	Weaknesses
ABC Company	Robust solution in this vertical space.	Pricing is complex.
Acme	Support all mobile devices.	Support seems to be an issue based on reviews in AppExchange.
Big Orange	Huge	Tiny
test competitor	1	1

Back to AccountSaveNotify ManagerNotify TeamAccount ScoreAccount PlaybookNew MeetingQuick MeetingOrg Map



StrategyMapper

Product Overview

Track meetings

To ensure teams are active in accounts and gathering Actionable Intelligence.

Back to AccountSaveNotify ManagerNotify TeamAccount ScoreAccount PlaybookNew MeetingQuick MeetingOrg Map

Account DetailCustomer Buying ProcessesCustomer InitiativesAccount MilestonesChallengesNotesCompetitorsMeetingsOpportunitiesChild Accounts

Meeting Detail

NameIMA - Test Meeting

Meeting TemplateInitial Meeting - Account

Start Time3/14/2016 4:08 PM

End Time3/14/2016 5:08 PM

AccountDavis Sporting Goods

What was discussed?

NotesPublic Notes

Internal NotesInternal Notes

Actionable Intelligence

Decision Date2/26/2016

Budgeted ProjectYes

Reference CustomerYes

ActionsSecure Sign off for contracts.

Decisions

Open Issues

Business Drivers

Technical Drivers

Customer Requirements

Requirementkk

Comments

Our SolutionPartially meets requirement

Our Products/SolutionGenWatt Gasoline 2000kW

Our Solution Score50

Solution Score50

Competitors

CompetitorAcme

StrengthsThey have some good products in this space.

WeaknessesVery costly, difficult to deploy.

CompetitorBig Orange

StrengthsThey have some leverage in this account.

WeaknessesSupport issues, based on Internet searches.

Pain Points

Pain PointsNo consistent/reliable data

Pain PointsHigh rep turnover - losing deals

Pain Points Free Form


Opportunity Overview

This provides easy navigation to opportunity plans, meeting recaps and an opportunity playbook.

										Back to Account Save Notify Manager Notify Team Account Score Account Playbook New Meeting Quick Meeting Org Map
Account Detail	Customer Buying Processes	Customer Initiatives	Account Milestones	Challenges	Notes	Competitors	Meetings	Opportunities	Child Accounts	
▼ Opportunities										
Name	Description	Stage	Next Step	Probability (%)	Opportunity Mapper	Meeting Recap	Opportunity Playbook			
Strategy Mapper - Salesforce	Salesforce is looking for a solution to enable their sales teams to generate Account and Opportunity plans, with the final product of a "Playback".	Closed Won	Select Trial Users	100%	Opportunity Mapper	Meeting Recap	Opportunity Playbook			
Strategy Mapper - Martina	They are looking for a sales enablement solution that is 100% native to Salesforce.	Perception Analysis	Start a Trial.	70%	Opportunity Mapper	Meeting Recap	Opportunity Playbook			
Strategy Mapper - Davis Sporting	DSG is looking for a strategic selling solution to enable their sales teams to utilize the current sale process and methodology.	Needs Analysis	Demo	20%	Opportunity Mapper	Meeting Recap	Opportunity Playbook			
A Wonderful Test		Needs Analysis		20%	Choose a template	Meeting Recap	Opportunity Playbook			
Net Op for Marketing Auto		Prospecting		10%	Choose a template	Meeting Recap	Opportunity Playbook			
BAVO	BAVO is a looking to add functionality to Salesforce to ensure their sales teams are capturing the right information and working the opportunities and accounts to generate revenue.	Prospecting		10%	Opportunity Mapper	Meeting Recap	Opportunity Playbook			
Davis Sporting Goods MM	They are looking at a way to document their meetings to ensure they are capturing information to drive revenue and beat the competition.	Closed Lost	On-Site Demo	0%	Opportunity Mapper	Meeting Recap	Opportunity Playbook			
New Years 2016	It's a new year and they are looking at improving sales and driving revenue in the new year by 20% net new logos.	Closed Lost		0%	Opportunity Mapper	Meeting Recap	Opportunity Playbook			
New Years 2016 - Update	It's a new year and they are looking at improving sales and driving revenue in the new year by 20% net new logos.	Closed Lost		0%	Opportunity Mapper	Meeting Recap	Opportunity Playbook			
										Back to Account Save Notify Manager Notify Team Account Score Account Playbook New Meeting Quick Meeting Org Map

Child Accounts

This provides easy navigation to child accounts, their playbook and Meeting Recap.



Account Mapper

Davis Sporting Goods

Back to Account
Save
Notify Manager
Notify Team
Account Score
Account Playbook
New Meeting
Quick Meeting
Org Map

Account Detail
Customer Buying Processes
Customer Initiatives
Account Milestones
Challenges
Notes
Competitors
Meetings
Opportunities
Child Accounts

Child Accounts

Name	Account Mapper	Meeting Recap
American Banking Corp.	Account Mapper	Meeting Recap
Edge Communications	Account Mapper	Meeting Recap
University of Arizona	Account Mapper	Meeting Recap
United Oil & Gas Corp.	Account Mapper	Meeting Recap
United Oil & Gas, UK	Account Mapper	Meeting Recap
Meginfo LLC	Choose a template	Meeting Recap

Back to Account
Save
Notify Manager
Notify Team
Account Score
Account Playbook
New Meeting
Quick Meeting
Org Map



StrategyMapper

Product Overview

Real-time account play book

This provides current account information and tips to increase your chances of driving revenue, and building and maintaining a strong relationship.



Account Playbook for salesforce.com

Here is the Account Playbook for **salesforce.com** as of **1/22/2016**. At the present time there are **4** opportunities with a total potential revenue of **\$225,000.00** in various stages in the sales cycle.

Account Overview

salesforce.com is a **Customer**.

Open opportunities (Red indicates opportunity past forecast date):

Name	Stage	Close Date	Amount	Owner
Salesforce Strategy Mapper	Prospecting	4/29/2016	\$30,000.00	Travis Daily
salesforce.com - 1,000 Widgets	Negotiation/Review	6/30/2016	\$100,000.00	Travis Daily
salesforce.com - 2,000 Widgets	Value Proposition	10/20/2016	\$20,000.00	Travis Daily
SEP - Strategy Mapper	Prospecting	11/30/2016	\$75,000.00	Travis Daily

Potential Revenue

Estimated Total Revenue Potential is .

We have Won **\$0.00**.

The Total Pipeline Revenue Potential is **\$225,000.00**.



StrategyMapper

Product Overview

Opportunity Mapper

Opportunity Mapper allows your sales teams the ability to easily create and maintain opportunity plans that are based your organization's strategic approach to winning deals.

Opportunity details: strategy, tactics and value prop and much more for the opportunity.

The screenshot shows the StrategyMapper web application interface. At the top is a navigation bar with the StrategyMapper logo, a search bar, and user options (Dev User, Help, Meeting Map). Below this is a secondary navigation bar with tabs: Home, Meetings, Accounts, Contacts, Campaigns, Cases, Leads, Opportunities (selected), Reports, Dashboards, Documents, Meeting Templates, Add Picklist Values, Opportunity Mapper Templates, Account Mapper Templates, and Pardot Links. The main content area is titled 'Opportunity Mapper - Martina'. It features a sub-navigation bar with tabs: Back to Opportunity, Save, Notify Manager, Notify Team, Opportunity Score, Opportunity Playbook, New Meeting, Quick Meeting, and Org Map. Below this is another set of tabs: Opportunity Detail (selected), Customer Buying Processes, Challenges, Notes, Opportunity Playbook, Customer Requirements, Stages, Competitors, Meetings, Opportunity Timeline, Customer Team, and Account Team. The 'Opportunity Detail' section is expanded, showing fields for Description, Amount, Type, Lead Source, Created Date, Account Name, Stage, Close Date, Next Step, Opportunity Owner, Last Activity, and Opportunity Mapper Template. Below this is a 'Products' section with a table listing items and their quantities. The 'Partners' section is also visible. The 'Strategy - Tactics - Value' section is expanded, showing tabs for Strategy to Win, Tactics, and Value Proposition. The 'Strategy to Win' tab is selected, displaying a text area with a rich text editor toolbar and a list of customer requirements.

StrategyMapper

Search...

Dev User Help Meeting Map

Home Meetings Accounts Contacts Campaigns Cases Leads Opportunities Reports Dashboards Documents Meeting Templates Add Picklist Values Opportunity Mapper Templates Account Mapper Templates Pardot Links

Opportunity Mapper - Martina

Back to Opportunity Save Notify Manager Notify Team Opportunity Score Opportunity Playbook New Meeting Quick Meeting Org Map

Opportunity Detail Customer Buying Processes Challenges Notes Opportunity Playbook Customer Requirements Stages Competitors Meetings Opportunity Timeline Customer Team Account Team

Opportunity Detail

Description	They are looking for a sales enablement solution that is 100% native to Salesforce.	Stage	Perception Analysis
Amount	\$1,250,000.00	Close Date	3/31/2016
Type	New Customer	Next Step	Start a Trial.
Lead Source	Web	Opportunity Owner	Dev User
Created Date	12/11/2015 8:12 PM	Last Activity	3/28/2016
Account Name	Davis Sporting Goods	Opportunity Mapper Template	Technology - Frontal

Products

Name	Quantity
Strategy Mapper - Martina GenWatt Diesel 200kW	10.00
Strategy Mapper - Martina GenWatt Diesel 1000kW	10.00

Partners

Strategy - Tactics - Value

Strategy to Win Tactics Value Proposition

Our strategy is to use a frontal attack, we have a superior solution based on the initial customer meeting. We will leverage the following:

We are an ideal fit based on the following customer requirements:

- 100% integration with Salesforce
- Ability to map to their current sales methodology
- Mobile access from any device via native Salesforce products
- Mobile access from iPad using Meeting Mapper mobile
- Meeting Planning and Execution



StrategyMapper

Product Overview

Customer buying process

Leverage the customer buying process identified in Account Mapper or create an individual customer buying process for this particular opportunity.

Opportunity Mapper

Strategy Mapper - Martina

Back to Opportunity

Save

Notify Manager

Notify Team

Opportunity Score

Opportunity Playbook

New Meeting

Quick Meeting

Org Map

Opportunity Detail

Customer Buying Processes

Challenges

Notes

Opportunity Milestones

Customer Requirements

Stages

Competitors

Meetings

Opportunity Timeline

Customer Team

Account Team

Customer Buying Processes

New

0

<input checked="" type="checkbox"/> Completed	<input type="checkbox"/>	Process	Identify the Problem
<input checked="" type="checkbox"/> Completed	<input type="checkbox"/>	Process	Review Options
<input checked="" type="checkbox"/> Completed	<input type="checkbox"/>	Process	Bring in top 3 vendors
<input checked="" type="checkbox"/> Completed	<input type="checkbox"/>	Process	Bring in top 3 vendors
<input checked="" type="checkbox"/> Completed	<input type="checkbox"/>	Process	Pilot/Trial selected vendor
<input checked="" type="checkbox"/> Completed	<input type="checkbox"/>	Process	Sign contracts

Status

Working

New



Challenges

Challenges identified in Account Mapper are integrated. Any new challenges particular to this opportunity can be added at any time.

Back to OpportunitySaveNotify ManagerNotify TeamOpportunity ScoreOpportunity PlaybookNew MeetingQuick MeetingOrg Map

Opportunity DetailCustomer Buying ProcessesChallengesNotesOpportunity RisksCustomer RequirementsStagesCompetitorsMeetingsOpportunity TimelineCustomer TeamAccount Team

Challenges

New

⊗ Currently Not a Challenge

Challenge

Additional Information

☐

Their legal process is very difficult and takes normally 30 - 45 days.

⊗ Currently Not a Challenge

Challenge

Additional Information

☒

They are very geographically distributed so getting to each corporate location does take time and planning

Their legal department can take 45 days to complete a contract. Ensure you send over a word doc so they can markup.

⊗ Currently Not a Challenge

Challenge

Additional Information

☒

Difficult to get access to Decision Makers.

Customer is sometime resistant to introducing the DMs. Also, we have encountered at least 3 DMs per opportunity.

Status

Working

New



StrategyMapper

Product Overview

Notes

Add additional notes or conversations with customer. These notes are time stamped and included in the opportunity's activity history.

The screenshot displays the StrategyMapper web application interface. At the top, a navigation bar includes links for Home, Meetings, Accounts, Contacts, Campaigns, Cases, Leads, Opportunities (highlighted), Reports, Dashboards, Documents, Meeting Templates, Add Picklist Values, Opportunity Mapper Templates, Account Mapper Templates, and PardotLinks. Below this, the page title is 'Opportunity Mapper - Martina'. A secondary navigation bar contains buttons: Back to Opportunity, Save, Notify Manager, Notify Team, Opportunity Score, Opportunity Playbook, New Meeting, Quick Meeting, and Org Map. A third navigation bar lists various tabs: Opportunity Detail, Customer Buying Processes, Challenges, Notes (highlighted), Opportunity Milestones (highlighted in red), Customer Requirements, Stages, Competitors, Meetings, Opportunity Timeline, Customer Team, and Account Team. The main content area is titled 'Notes' and features a 'New' button. A single note is visible, containing the text: 'Just met with customer, the trial is moving along very nicely. She does not see any issues with moving forward.' The note is timestamped '4/13/2016 2:06 AM' and includes a delete icon (X) in the top left corner. Another 'New' button is located at the bottom of the notes section.



StrategyMapper

Product Overview

Opportunity Milestones

Include your selling process in opportunities to track the progress of the opportunity. Create gates for certain milestones. Align milestones to stages of the opportunity and track them based on a color coded system.

Back to OpportunitySaveNotify ManagerNotify TeamOpportunity ScoreOpportunity PlaybookNew MeetingQuick MeetingOrg Map

Opportunity DetailCustomer Buying ProcessesChallengesNotesOpportunity MilestonesCustomer RequirementsStagesCompetitorsMeetingsOpportunity TimelineCustomer TeamAccount Team

Opportunity Milestones

<input checked="" type="checkbox"/> Customer has confidence in the Sales Person		<div><div>✓</div><div></div><div></div></div>	Prospecting
<input checked="" type="checkbox"/> Customer has confidence in Rev-Trac as a Solution		<div><div></div><div></div><div>✓</div></div>	Qualification
<input checked="" type="checkbox"/> Customer has confidence in RSC as a Vendor		<div><div></div><div>✓</div><div></div></div>	Needs Analysis
<input checked="" type="checkbox"/> Influential stakeholders have been exposed to the Rev-Trac Concept		<div><div>✓</div><div></div><div></div></div>	Id. Decision Makers
<input checked="" type="checkbox"/> All influential stakeholders have agreed that the RT Concept is a good fit		<div><div>✓</div><div></div><div></div></div>	Perception Analysis
<input checked="" type="checkbox"/> We have provided at least two software demonstrations - overview and deep dive		<div><div>✓</div><div></div><div></div></div>	Perception Analysis
<input checked="" type="checkbox"/> We have met face to face with the customer on multiple occasions		<div><div>✓</div><div></div><div></div></div>	Perception Analysis

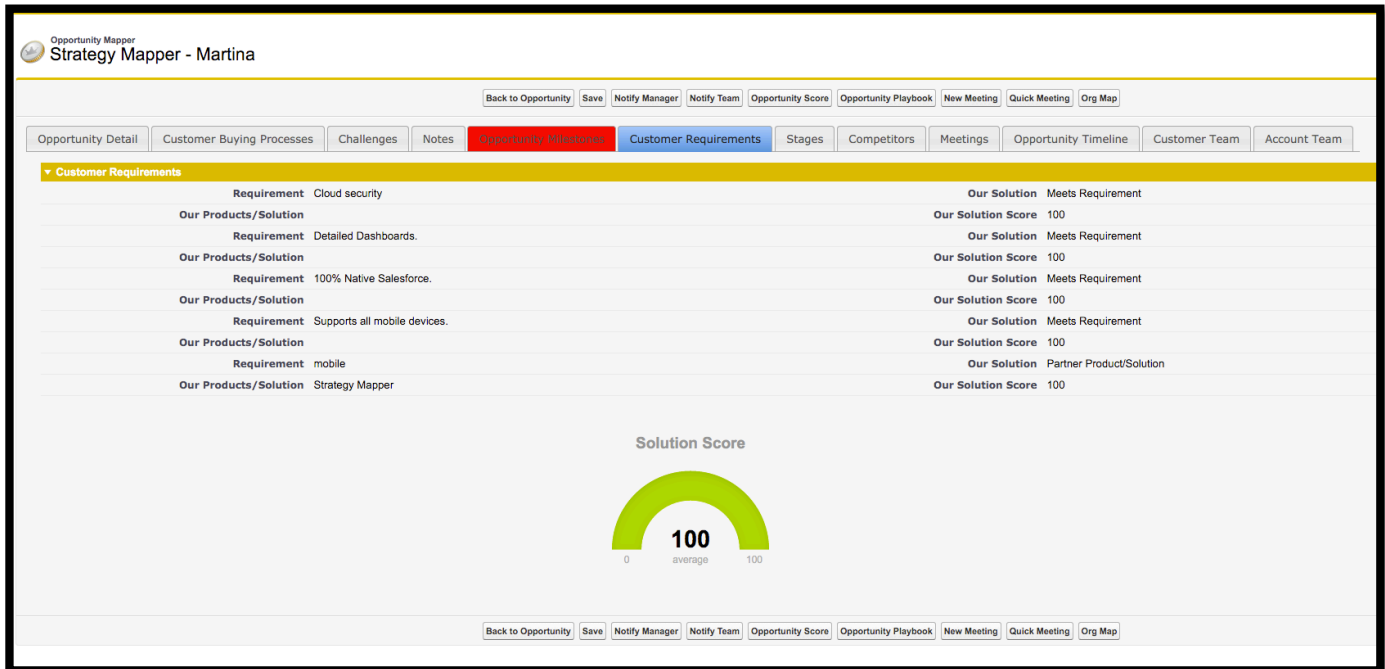


StrategyMapper

Product Overview

Customer Requirements are easily gathered in Meeting Mapper

The requirements are then integrated into the opportunity plan resulting in a “Solution Score” that quickly tells you how closely your solution maps to the customer’s requirements.





Your Salesforce.com opportunity stages are automatically included in the plan, or you can define your own stages. Create just in time Sales Enablement, give your teams key questions and links to valuable information to drive the deal to closure (a win).

	Back to Opportunity	Save	Notify Manager	Notify Team	Opportunity Score	Opportunity Playbook	New Meeting	Quick Meeting	Org Map		
Opportunity Detail	Customer Buying Processes	Challenges	Notes	Opportunity Milestones	Customer Requirements	Stages	Competitors	Meetings	Opportunity Timeline	Customer Team	Account Team

▼ Prospecting

☐

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☰ ☲ ☳
⌂ 🔍 ⚙

2. Are your sales team turn over a concern?

3. Have you lost revenue because an account member quit in the middle of an opportunity that was forecasted?

Helpful links for the prospect:

Short Strategy Mapper video: <https://youtu.be/AM-aN2Hbj8>

Disaster Recover for Sales video: https://youtu.be/8_lxLOGyt_Q

AppExchange listing: <https://appexchange.salesforce.com/listingDetail?listingId=a0N30000009vnGJEAl>

▼ Qualification

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Qualification Questions:

- Does Strategy Mapper meet the customer requirements. Is the solutions score above 75%? If not this may not be a winable opportunity.
- Do you currently have a project or initiative around account and/or opportunity planning?
- Do you have budget?

► Needs Analysis

► Value Proposition

► Id. Decision Makers



StrategyMapper

Product Overview

Competitors identified in Meeting Mapper along with their strengths and weaknesses are stored in standard Salesforce.com objects and carried to all plans, ensuring all team members know the competitive landscape. Competitors identified in opportunities will automatically be added to Account Mapper for the account the opportunity is linked to.

[Home](#) [Meetings](#) [Accounts](#) [Contacts](#) [Campaigns](#) [Cases](#) [Leads](#) **[Opportunities](#)** [Reports](#) [Dashboards](#) [Documents](#) [Meeting Templates](#) [Add Picklist Values](#) [Opportunity Mapper Templates](#) [Account Mapper Templates](#) [PardotLinks](#) [+](#)

Opportunity Mapper

Strategy Mapper - Martina

[Back to Opportunity](#) [Save](#) [Notify Manager](#) [Notify Team](#) [Opportunity Score](#) [Opportunity Playbook](#) [New Meeting](#) [Quick Meeting](#) [Org Map](#)

[Opportunity Detail](#) [Customer Buying Processes](#) [Challenges](#) [Notes](#) **[Opportunity Mapping](#)** [Customer Requirements](#) [Stages](#) **[Competitors](#)** [Meetings](#) [Opportunity Timeline](#) [Customer Team](#) [Account Team](#)

▼ Competitors

Competitor Name	Strengths	Weaknesses
ABC Company	Robust solution in this vertical space.	Pricing is complex.

[Back to Opportunity](#) [Save](#) [Notify Manager](#) [Notify Team](#) [Opportunity Score](#) [Opportunity Playbook](#) [New Meeting](#) [Quick Meeting](#) [Org Map](#)



StrategyMapper

Product Overview

Meeting Mapper meetings are automatically included in Opportunity Mapper.

Opportunity Mapper

Strategy Mapper - Martina

Back to Opportunity

Save

Notify Manager

Notify Team

Opportunity Score

Opportunity Playbook

New Meeting

Quick Meeting

Org Map

Opportunity Detail

Customer Buying Processes

Challenges

Notes

Opportunity Milestones

Customer Requirements

Stages

Competitors

Meetings

Opportunity Timeline

Customer Team

Account Team

Meeting Detail

Name

QM - 3/22/2016 1:54 PM

Meeting Template

Quick Meeting

Start Time

3/22/2016 1:54 PM

End Time

3/22/2016 2:54 PM

Account

Davis Sporting Goods

Opportunity

Strategy Mapper - Martina

What was discussed?

Notes

Public Notes

Internal Notes

Internal Notes

Actionable Intelligence

Decision Date

2/18/2016

Budgeted Project

No

Reference Customer

Yes

Actions

General Interest

Decisions

Move forward

Open Issues

Business Drivers

Technical Drivers

Customer Requirements

Requirement

Cloud security

Comments

Our Solution

Meets Requirement

Our Products/Solution

Our Solution Score

100

Requirement

Detailed Dashboards.

Comments

Our Solution

Meets Requirement

Our Products/Solution

Our Solution Score

100

Requirement

100% Native Salesforce.

Comments

Our Solution

Meets Requirement

Our Products/Solution

Our Solution Score

100

Requirement

Supports all mobile devices.

Comments

Our Solution

Meets Requirement

Our Products/Solution

Our Solution Score

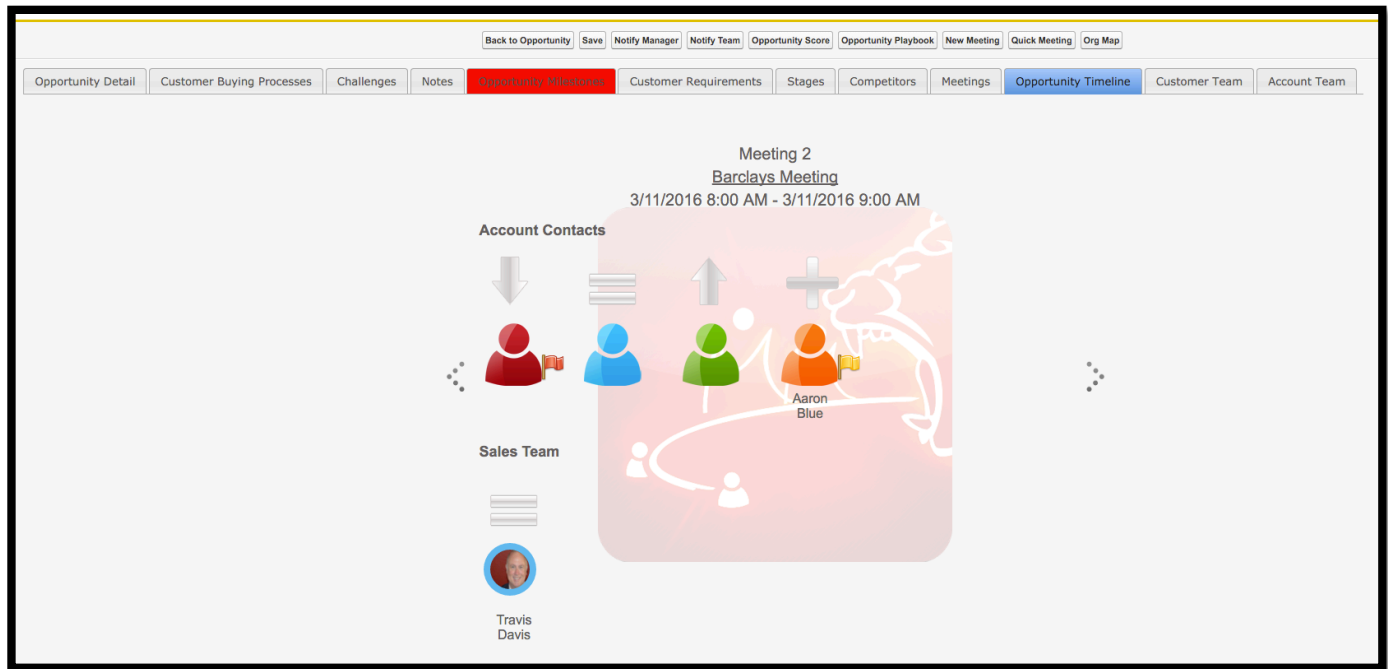
100



StrategyMapper

Product Overview

Opportunity Timeline gives users a visual depiction of the buying personas over the life of the opportunity.





StrategyMapper

Product Overview

You'll see all of the customer contacts you've met with, along with their roles and stances.

Home Meetings Accounts Contacts Campaigns Cases Leads Opportunities Reports Dashboards Documents Meeting Templates Add Picklist Values Opportunity Mapper Templates Account Mapper Templates PardotLinks

Opportunity Mapper
Strategy Mapper - Martina

Back to Opportunity Save Notify Manager Notify Team Opportunity Score Opportunity Playbook New Meeting Quick Meeting Org Map

Opportunity Detail Customer Buying Processes Challenges Notes Opportunity Roles Customer Requirements Stages Competitors Meetings Opportunity Timeline Customer Team Account Team

Travis Account
DM,E
Aaron Blue

Davis Sporting Goods
PP,PA
Sally Binkley

Davis Sporting Goods
Luffy 2

Davis Sporting Goods
E
Jimmy Lee

Davis Sporting Goods
Jordan Day

Davis Sporting Goods
Bob Fox

Davis Sporting Goods
Karl Bush

Davis Sporting Goods
Luffy 1

See who is involved in the opportunity from the account team.

Home Meetings Accounts Contacts Campaigns Cases Leads Opportunities Reports Dashboards Documents Meeting Templates Add Picklist Values Opportunity Mapper Templates Account Mapper Templates PardotLinks

Opportunity Mapper
Strategy Mapper - Martina

Back to Opportunity Save Notify Manager Notify Team Opportunity Score Opportunity Playbook New Meeting Quick Meeting Org Map

Opportunity Detail Customer Buying Processes Challenges Notes Opportunity Roles Customer Requirements Stages Competitors Meetings Opportunity Timeline Customer Team Account Team

Point N Time
AE
Travis Davis

Point N Time
AE
Dev User



StrategyMapper

Product Overview

Opportunity Playbook is a real-time PDF detailing the opportunity and providing tips to increase your chances of winning.



StrategyMapper

Opportunity Playbook for Strategy Mapper - Martina

Here is the Opportunity Playbook for **Strategy Mapper - Martina** as of **4/13/2016**. With a decision date of **2/18/2016**. We currently have **-55** days until the decision is reached. Is the customer's project budgeted? **No**.

Forecasted Revenue: **\$1,250,000.00**

Current Stage: **Perception Analysis**

Probability: **70%**

Close Date: **3/31/2016**

Situational Awareness

Based on the Product(s) selected, industry of the customer and their location the following intelligence is provided.

The most likely Pain Points of the customer are:

Pain Points
Low usage of Salesforce
No repeatable process to manage meetings
To much time in the day.
High rep turnover - losing deals
No consistent/reliable data

The competitor(s) your most likely to encounter are:



Meeting Mapper

Meeting Mapper is a meeting planning and execution solution that focuses on the effectiveness and flawless execution of sales meetings, ensuring teams properly position products and solutions to drive increased revenue throughout the sales cycle.

An intuitive meeting interface


This shows an example of the main Meeting Mapper page. Functionality buttons (i.e. Add Attendee) and other aspects of the display are based on a meeting template. The template allows your organization to configure the functionality of Meeting Mapper to fit your unique needs. In this case not all buttons are displayed and there are many more features of Meeting Mapper.

The screenshot displays the Meeting Mapper interface for a meeting titled "QM - 3/22/2016 1:54 PM". The interface includes a top navigation bar with tabs like Home, Meetings, Accounts, Contacts, Campaigns, Cases, Leads, Opportunities, Reports, Dashboards, Documents, Meeting Templates, Add Picklist Values, Opportunity Mapper Templates, Account Mapper Templates, and Pardot Links. Below the navigation bar, there's a toolbar with buttons such as Back, Add Attendees, Save, Send Invites, Individual Take Away, Notes, Actionable Intelligence, Tasks, Export Report, Org Map, Update Details, Attachments, Opportunity Mapper, Account Mapper, Tables, and Meeting Insights. The main area is divided into two sections: a central map and a right-hand panel. The map shows a central location with several attendees represented by icons and names: Point N Time AE, Dev User, Travis Account DM,E, Aaron Blue, Davis Sporting Goods E, Jimmy Lee, Point N Time AE, and Travis Davis. The right-hand panel, titled "Meeting Logistics", contains fields for Account (Davis Sporting Goods), Opportunity (Strategy Mapper - Martir), Title (QM - 3/22/2016 1:54 PM), Meeting Template (Quick Meeting), Type (Remote), Start Time (03/22/2016 1:54 PM), End Time (03/22/2016 2:54 PM), Repeat (--None--), Location, Conference (--None--), Completed? (checked), Hot Insights Score (mi1), and a progress bar showing 64. At the bottom, there's a "Share" button and a "Write something..." input field.



Add meeting attendees

Here you can add new meeting attendees from your team and the customer's. You can also create new contacts that are automatically added to the correct Salesforce account.

 Add Attendees

[Back To My Meeting](#)

[User Attendees](#) [Contact Attendees](#)

[Add New Contact](#)

Attendees

Action	Name	Title	Email	Stance	Role	Level Of Participation	Individual Notes	Reports To	Via Conference Call
Remove	Geoff Morales	Director Infrastructure	geoff@pnt.com	For	Decision Maker; Evaluator	Interactive			<input type="checkbox"/>
Remove	Jon Brown	Director Service Desk	jonb@dsd.com	Undecided	Decision Maker; Evaluator			Geoff Morales	<input type="checkbox"/>

Contacts

Keyword to search...

Action	Name	Title	Email	Phone
Add	Bob Small	CEO	bob.small@dec.com	
Add	Pedro Mendiola		pmendiola@evhd.org	
Add	Tyler Brandon	Director	tyler.b@ac.com	
Add	Billy Brown	VP	billy.b@ac.com	
Add	Travis Davis	Sales Engineer	travisd@pointintime.com	2145098864
Add	Joe Framer			
Add	Brad Shook	Director	rshook@echd.org	
Add	Mary Strong	Service Desk Manager	mary@pnt.com	(555) 777-1234




StrategyMapper

Product Overview

Send meeting invitations and agendas.

Choose Attendees for Invite

https://site-customization-9201--meetingmapper.na14.visual.force.com/apex/MeetingMapper_Ch...

 Choose Attendees for Invite

All Attendees

Create AgendaSendCancel

Add all0 items selectedRemove all

Geoff Morals+

Jon Brown+

Invite Information

←→

B*I*U~~S~~




StrategyMapper

Product Overview

Take detailed meeting notes both public and private. Save meetings notes as Word doc.

Meeting Notes

https://site-customization-9201--meetingmapper.na14.visual.force.com/apex/MeetingMapper_MeetingNotes?meet

 Meeting Notes



SaveCancel




Value Prop 1New Meeting - Crawl, Walk, Run




Public NotesInternal Notes

←→

B*I*U~~S~~







Thank you for your interest in Strategy Mapper. Maximizing revenue from all your accounts is critical to maintaining revenue growth. Let's schedule a short 20-minute demo to show you all the capabilities, ease of use and power of Strategy Mapper.

I look forward talking to you.

Save as Doc

12/31/2014 9:52 AM

SaveCancel



StrategyMapper

Product Overview

Gather Actionable Intelligence in every meeting. Selections in the different sections are all dropdown pick lists for ease of use. The picklist choices are configured by your organization.

https://site-customization-9201--meetingmapper.na14.visual.force.com/apex/MeetingMapper__ActionableIntelligence?meetingid=a03d000000ZYbPEAA1&isfrombutton=1

Actionable Intelligence

Save Cancel

Actionable Intelligence Customer Requirements Competitors Pain Points Strengths Weaknesses Obstacles Objections Why Buys

Actionable Intelligence

Name New Meeting - Crawl, V

Decision Date [1/22/2016]

Budgeted Project --None--

Reference Customer --None--

Actions

Available		Chosen
Move to Contracts		
Decided to do nothing	▶	
Create test plan		
Identify trial users	◀	

Decisions

Available		Chosen
Setup test environment		
Move to pilot to production	▶	
No decisions made at this meeting	◀	

Open Issues

No open issues at this time.



StrategyMapper

Product Overview

Create **Salesforce.com tasks and events** in the meeting and update the status in the meeting.

The screenshot shows the 'Meetings' section of the StrategyMapper application. At the top, there's a navigation bar with links: Home, Meetings, Leads, Accounts, Opportunities, Contacts, Reports, Dashboards, Meeting Insights, Meeting Templates, Executive Sponsors, and Add Picklist Values. Below this, the 'Value Prop 1' meeting is selected. A 'Refresh' and 'Save' button are visible. A list of users (Travis Daily, Travis Dorn, Jon Brown, Geoff Morals) is shown. The 'Travis Daily (User)' section is active, displaying a table with columns: Action, Subject, Assigned To, Contact, Due Date, Status, and Description. The table contains one row: Action: Next Step, Subject: (empty), Assigned To: Travis Daily, Contact: Billy Brown, Due Date: 1/29/2016, Status: In Progress, Description: Send new pricing. A 'New' button is at the bottom left, and 'Refresh' and 'Save' buttons are at the bottom right.

Export meeting reports right after the meeting so you can keep all meeting attendees informed.

The screenshot shows the 'Meetings' section of the StrategyMapper application. The 'Export Report' dropdown menu is open, showing options: Export Public Report, Export Private Report, Export Private Chatter Report, Export Setting, Send Public Export, and Send Private Export. The background shows the 'Value Prop 1' meeting details. The 'Meeting Template' section is visible, showing fields: Type (Remote), Start Time (12/31/2014 9:52 AM), End Time (12/31/2014 10:52 AM), Repeat (--None--), Location (1313 Mocking Bird Lane, Bay), Conference (GoToMeeting), Completed? (checked), Hot Insights, and Not Hot Insights.



StrategyMapper

Product Overview

Everything captured in Meeting Mapper automatically updates Salesforce.com.

You can even update standard Salesforce.com objects from within Meeting Mapper so there's no need to jump around in Salesforce.

Actionable Intelligences

Actionable Intelligence Name

Actions

Decisions

Created Date

Budgeted Project

Edit | Del

New Meeting - Crawl_Walk_Run - AI

Edit | Del

New Meeting - Crawl_Walk_Run - AI

10/23/2014

12/31/2014

Meetings

New Meeting

Opportunity Timeline

Opportunity Report

Meetings Help

Action

Subject

Title

Date/Time

Related To

Total Attendee Count

Completed?

Score Number

Edit | Del

New Meeting - Crawl_Walk_Run

New Meeting - Crawl_Walk_Run

10/31/2014 1:30 PM

Meeting Mapper Fierce

2

✓

4

Edit | Del

Value Prop.1

Value Prop.1

12/31/2014 9:52 AM

Meeting Mapper Fierce

4

✓

4

Products (Strategy Mapper)

Add Product

Edit All

Choose Price Book

Sort

Products (Strategy Mapper) Help

Action

Product

Quantity

Sales Price

Date

Line Description

Edit | Del

Strategy Mapper

200.00

\$20.00

Open Activities

New Task

New Event

Open Activities Help

Action

Subject

Name

Task

Due Date

Status

Priority

Assigned To

Edit | Cls

Next Step

Billy Brown

✓

1/29/2016

In Progress

Normal

Travis Daily

Activity History

Log a Call

Mail Merge

Send an Email

View All

Activity History Help

Action

Subject

Name

Task

Due Date

Assigned To

Last Modified Date/Time

Edit | Del

Event for Value Prop.1

12/31/2014 9:52 AM

Travis Daily

12/31/2014 9:52 AM

Edit | Del

Event for New Meeting - Crawl_Walk_Run

10/31/2014 1:30 PM

Travis Daily

10/23/2014 1:33 PM

Notes & Attachments

New Note

Attach File

View All

Notes & Attachments Help

Action

Type

Title

Last Modified

Created By

Edit | Del

Note

Value Prop.1

12/31/2014 9:57 AM

Travis Daily

Edit | Del

Note

New Meeting - Crawl_Walk_Run

10/23/2014 1:49 PM

Travis Daily

Contact Roles

New

Contact Roles Help

Action

Contact Name

Account Name

Email

Phone

Role

Primary

Edit | Del

Jon Brown

Elite Software

jonb@dsd.com

(555) 444-1234

Decision Maker

☐

Edit | Del

Jon Brown

Elite Software

jonb@dsd.com

(555) 444-1234

Evaluator

☐

Edit | Del

Geoff Morals

Elite Software

geoff@cont.com

555 666 999

Decision Maker

☐



Pardot integration

Populate Pardot campaigns with Actionable Intelligence from your customer meetings. Campaigns are updated in real-time based on Actionable Intelligence from all customer meetings in your organization.

Home Meetings Accounts Contacts Campaigns Cases Leads Opportunities Reports Dashboards Documents Meeting Templates Add Picklist Values Opportunity Mapper Templates Acc

Save Save & New Cancel

INFORMATION

Actionable Intelligence Type: Customer Initiatives

Actionable Intelligence Value: Sales Enablement Platform

Industry Filter (Optional): Construction

Account Type (Optional): Prospect

Product (Optional): Strategy Mapper

Country (Optional): United States

State (Optional): Kentucky Louisiana Maryland Maine Michigan

Chosen: Arkansas Arizona California Illinois

Only My Opportunities: ☐

Save Save & New Cancel

View: Current Campaigns Filter: Tags + Add Campaign Tools

<input type="checkbox"/> Name	Visitors	Prospects	Updated	Actions
<input type="checkbox"/> High rep turnover - losing deals Uncategorized/Campaigns	0	24	Mar 28, 2016 11:22 AM	⚙
<input type="checkbox"/> Gotomeeting sync Uncategorized/Campaigns/GotoMeeting Synce/Gotomeeting sync	0	0	Jul 10, 2015 12:05 PM	⚙
<input type="checkbox"/> UP cold leads Uncategorized/Campaigns/Universal Picklists	0	1	Jun 26, 2015 10:59 AM	⚙
<input type="checkbox"/> Google AdWords Uncategorized/Campaigns	Calculating	0	Jun 23, 2015 12:46 PM	⚙
<input type="checkbox"/> Highlighter Uncategorized/Campaigns	3	0	Jun 22, 2015 4:34 PM	⚙

With 0 selected: Go Showing 5 of 7 Page 1 of 2 Next