Product Overview

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.
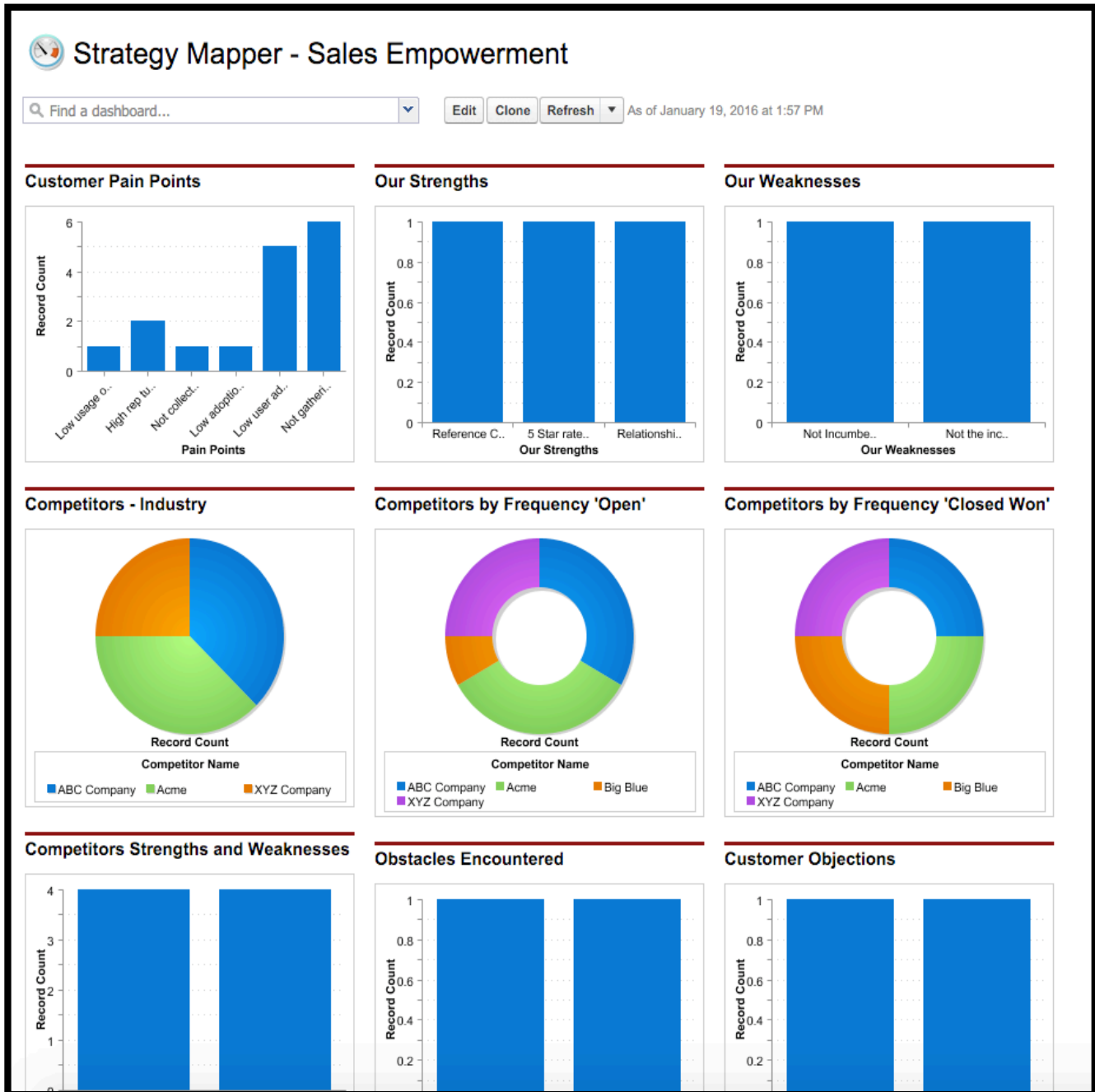
Key Features and Benefits

- 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

Product Overview

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.

Product Overview

Product Overview

StrategyMapper

Product Overview

Meeting Mapper 360

Find a dashboard... | Edit | Clone | Refresh ▼ | As of Today at 9:57 AM

Meetings Per Stage of Opportunity

Record Count

Opportunity: Stage
- Value Proposition
- Proposal/Price Quote
- Negotiation/Review
- Closed Won
- Closed Lost
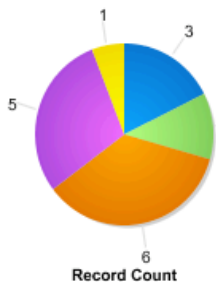
Meetings Per Opportunity

Record Count

Opportunity: 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

Meetings Per Account

Record Count

Account: Account Name
- Accounts Matter
- Acme
- Elite Software
- salesforce.com
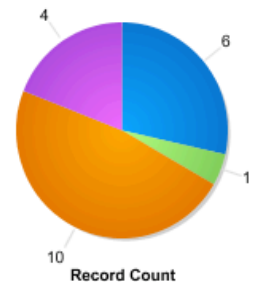
Meetings Per State Based State
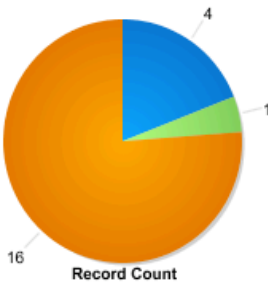
Record Count

Account: Billing State/Province
- CA
- NY
- TX

Meetings Per Industy

Record Count

Account: Industry
- Manufacturing
- Retail
- Technology

Attendee By Role(s)

Record Count

Opportunity
- America Sales
- Meeting Mapper Fierce
- Replace Help Desk
- salesforce.com - 1,000 Widgets
- Service Desk Replacement

Attendee Stance (Stage of Opportunity)
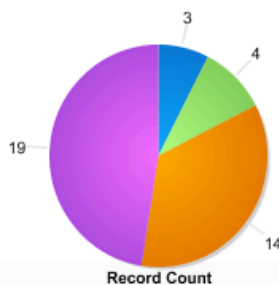
Record Count

Stance

Total Meeting Per Rep

Record Count
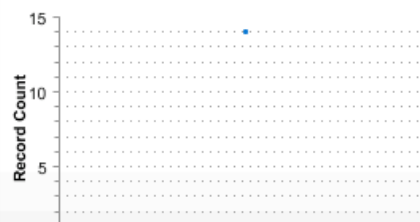
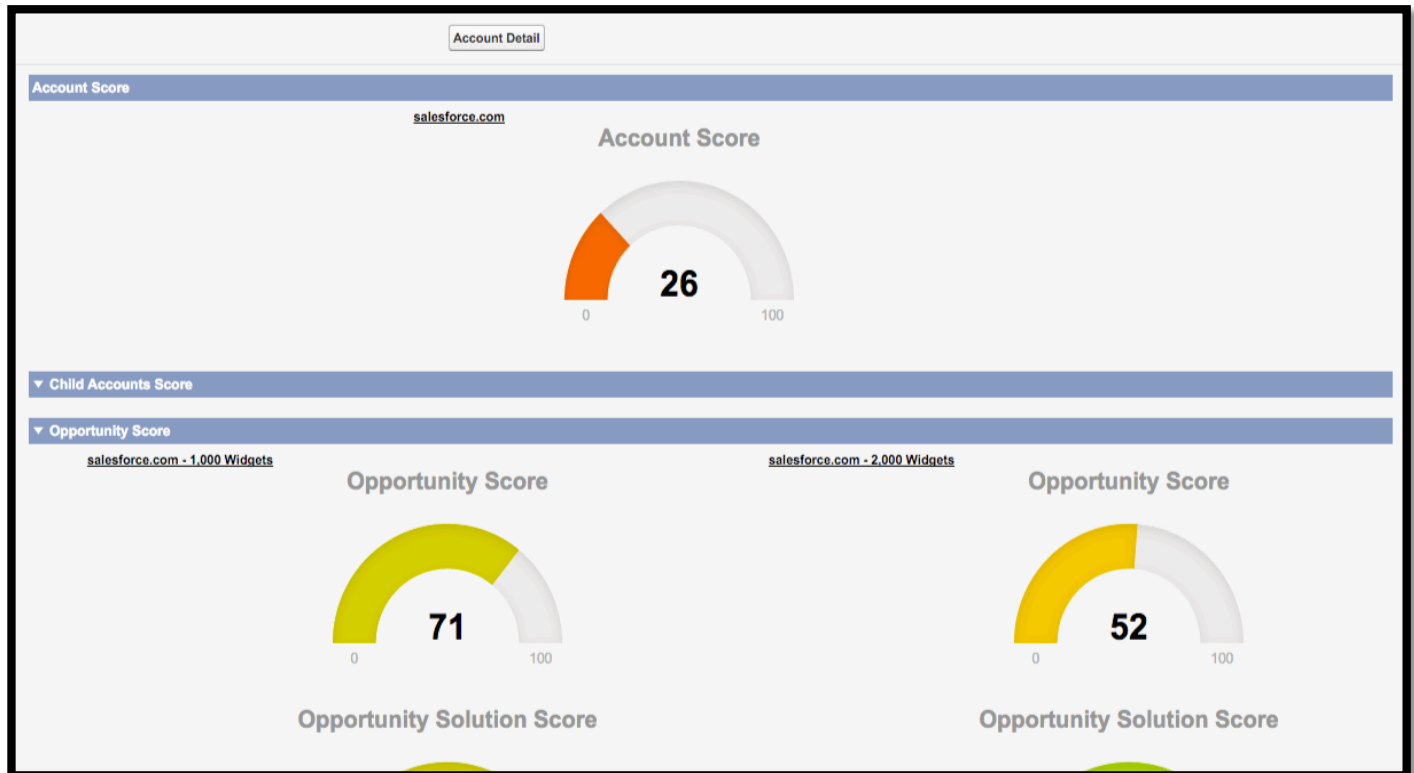### Meeting Type (Where Was the Meeting)

Product Overview
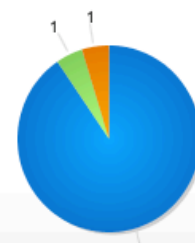
Account Mapper

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

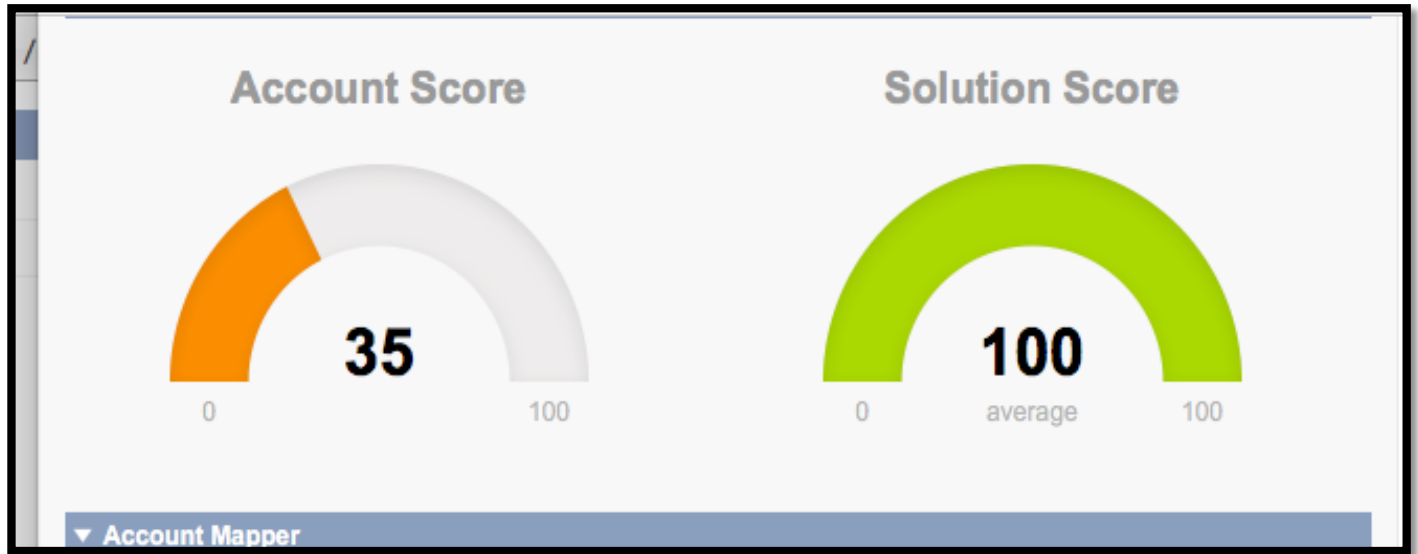This is a snapshot view of the account, open opportunity health and solution score.

![StrategyMapper logo]

Product Overview

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

Product Overview

Account Details

The account 6 and 12 month Plans and much more.

Document Customer Buying Process

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

StrategyMapper

Product Overview

Document customer initiatives

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

Product Overview

Create account milestones

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

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.

Notes

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

Competitors

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

StrategyMapper

Product Overview

Track meetings

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

Product Overview

Opportunity Overview

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

Child Accounts

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

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.

StrategyMapper

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**.

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.

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.

Product Overview

Challenges

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

Product Overview

Notes

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

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.

Product Overview

StrategyMapper

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.

StrategyMapper

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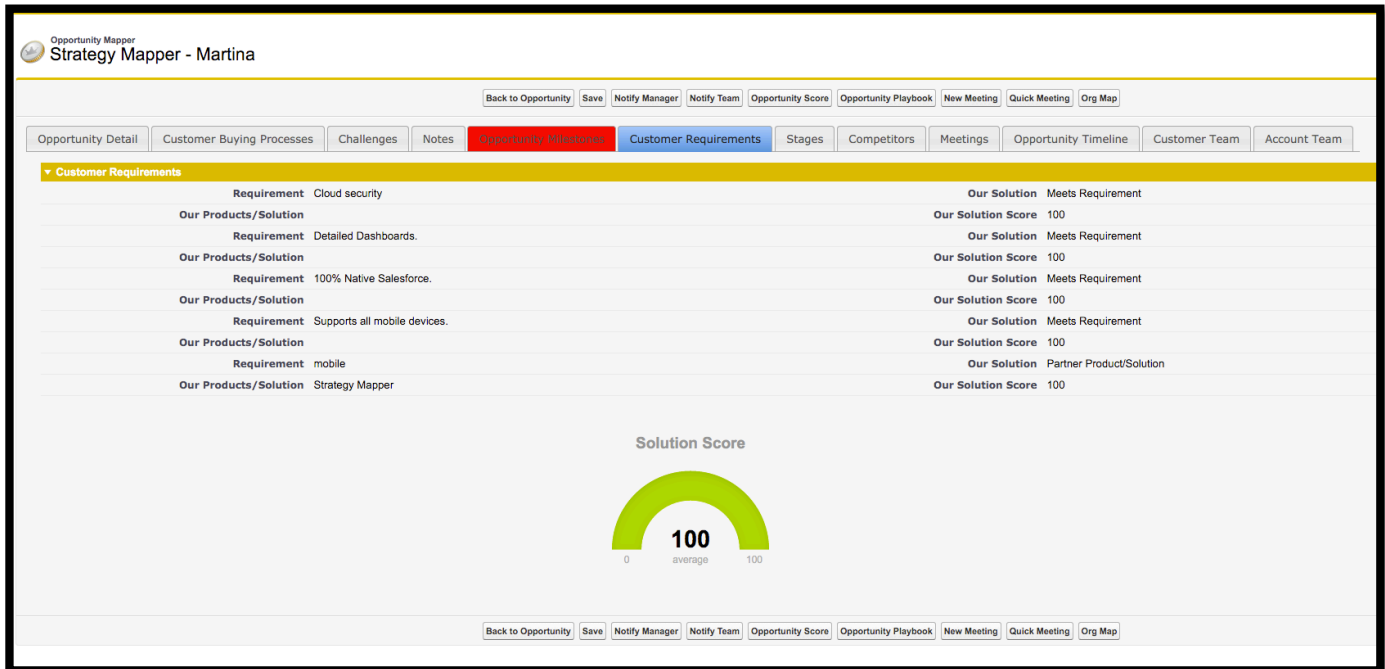
Your Salesforce.com opportunity stages are automatically included in the plan, or you can define your own stages. Create just in time Sales Enablement, give your teams key questions and links to valuable information to drive the deal to closure (a win).

Product Overview

StrategyMapper

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.

Product Overview

Meeting Mapper meetings are automatically included in Opportunity Mapper.

Product Overview

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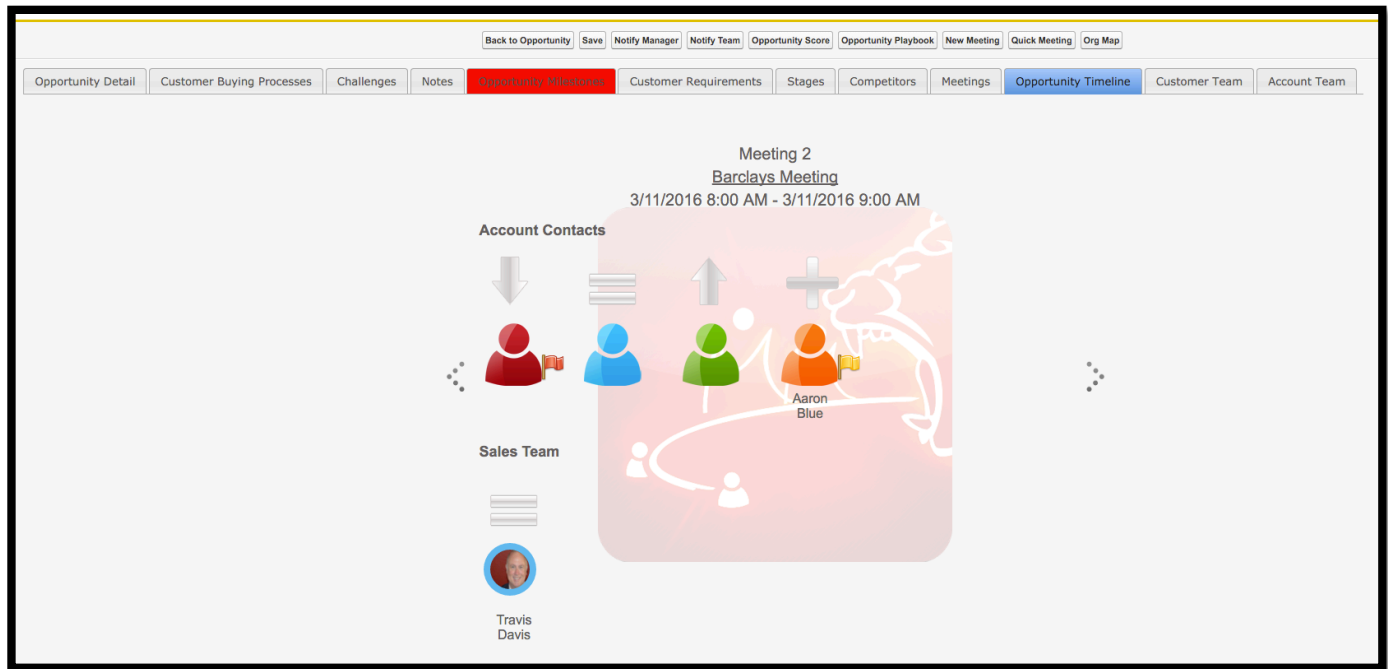
Product Overview

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

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

StrategyMapper

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.

Product Overview

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 Morals	Director Infrastructure	geoff@pnt.com	For	Decision Maker; Evaluator	Interactive			☐
Remove	Jon Brown	Director Service Desk	jonb@dsd.com	Undecided	Decision Maker; Evaluator			Geoff Morals	☐

Contacts

Keyword to search…

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

Product Overview

Send meeting invitations and agendas.

StrategyMapper

Product Overview

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

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.

Product Overview

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

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

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

Action	Actionable Intelligence Name	Actions	Decisions	Created Date	Budgeted Project
Edit | Del	New Meeting - Crawl, Walk, Run - AI			10/23/2014	
Edit | Del	New Meeting - Crawl, Walk, Run - AI			12/31/2014	

Meetings

New Meeting | Opportunity Timeline | Opportunity Report

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

Action	Product	Quantity	Sales Price	Date	Line Description
Edit | Del	Strategy Mapper	200.00	$20.00		

Open Activities

New Task | New Event

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

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

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

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@pnt.com	555.666.999	Decision Maker	

Product Overview

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.