

Strategy Mapper
Planning and Deployment Guide



StrategyMapper

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Introduction

Strategy Mapper is comprised of three integrated solutions, Account Mapper, Opportunity Mapper and Meeting Mapper and is designed to allow each organization to configure it to best fit its requirements. As with any system, a smooth deployment will help ensure the success and adoption. This document provides guidelines for the planning and deployment of Strategy Mapper and is broken down into the following phases outlined in the table below. The “Duration” of each phase is a somewhat arbitrary number and will depend upon your organization. Similarly, the “Human Resources” column will also vary with each organization.

This document does not intend to imply any degree of formality or bureaucracy in the implementation planning; rather its intention is to provide guidance on the overall thought process when implementing Strategy Mapper. The degree of formality and amount of bureaucracy are entirely left to the discretion of the organization implementing this solution.

Implementation Phase	Description	Duration	Human Resources
Installation and Setup	Initial Product Installation in production	2 hours	SFDC Admin
Configuration Planning	Plan the detailed functionality for each phase of the deployment	8 hours	Sales Management, Sales Enablement, Sales Team Rep, SFDC Admin
Deployment plan	The detailed roll-out plan (i.e. when each group of users is enabled)	8 hours	SFDC Admin, Stakeholders
Configuration Implementation	Implementation of the Configuration planning	4 hours	SFDC Admin
Communication Plan	Plan the required user communications for your organization.	4 hours	SFDC Admin, Sales Management
Training Plan	Working with PNT, plan and schedule training for each team	8 hours	SFDC Admin, Sales Management, PNT
User Training	Any personnel that will be responsible for supporting the solution	8 hours	SFDC Admin, Sales Management, Sales Team

Table 1- Strategy Mapper Deployment Phases

The amount of time required for each phase will vary from organization to organization. The overall deployment time will depend upon which solutions are deployed. On average, most will get through the initial deployment in one to two weeks.

Installation and Setup of Strategy Mapper

Strategy Mapper installation and setup usually requires about one to two hours. The step-by-step installation instructions are in the “Strategy Mapper Installation and Setup Guide”.

Implementation Planning

This will cover each of the major steps involved in planning the overall configuration and deployment of the solution.

Strategy Mapper Configuration Planning

This phase typically requires the most thought and time. You’ll want to apply your conceptual sales processes to the three solutions in Strategy Mapper. You’ll be able to utilize templates for each solution so it can be customized to your processes. For example, you can create and customize a meeting template for use in customer discovery meetings and create another for use in customer contract meetings. This allows you to choose the functionality as well as provide guidance to the user for each type of meeting. You can create an unlimited number of templates, but it’s recommended to use the minimum number of templates that are required for your processes. Creating a large number can become confusing for both users and administrators.

The “Strategy Mapper Configuration Guide” documents all of the options you can customize. There are a number of these items that have default values and it should be noted that most items don’t require configuration, but to get the most from the solution, thought should be given to the customization. You’ll want to document the configuration for each template and picklist. This documentation can then be used to do the actual solution configuration. A sample Microsoft Excel spreadsheet is available for use in documenting the customizations. It can be found here:

<http://www.pointntime.com/wp-content/uploads/2016/05/Strategy-Mapper-Configuration-worksheet-v1.3.xlsx>

At a high-level the following list depicts what will need to be planned for each solution.

- **Account Mapper Templates** – These are used to distinguish various types of customer accounts, like “Named Account” or “Major Account”. You can create as many as needed to meet your requirements. A minimum of one is required.
- **Account Mapper Picklists** – These are used to specify account specific items like “Customer Buying Process” and “Customer Initiatives”
- **Opportunity Mapper Templates** – These are used to distinguish various types of opportunities. You may have a template for a new customer and another for an existing customer. You can create as many as needed.
- **Opportunity Mapper Picklists** – There are only two picklists that need to be configured.
- **Meeting Mapper Templates** – Meeting Mapper templates are used to configure the meeting page display and functionality. Meetings can be linked to several standard Salesforce.com objects (Accounts, Campaigns, Cases, Contacts, Leads, and

Opportunities). At least one template must be created for each object that will be used with Meeting Mapper. The templates have a number of configurable items like “Internal Notes” which can be used to provide guidance on this type of meeting for the user. As an example set of templates

- **Prospect Meeting, Discovery Meeting, Demo Meeting, Contract Meeting, Closure Meeting**
- **Meeting Mapper Picklists** – This is the largest set of picklists to configure. There are over 20 items you can configure. Here you’ll configure items like Meeting Attendee Roles, Actionable Intelligence items, and Conference Type.

A common practice among Strategy Mapper customers is to have input from each of the affected groups, from Sales reps and Salesforce admins to Sales management and executives. This will help to produce the best configuration and generally accelerate adoption.

Phased functionality deployment planning

A number of Strategy Mapper customers have used a “crawl-walk-run” approach in deploying the solution. To that end the customization may involve multiple versions of templates that can be used as each “crawl-walk-run” phase is deployed. For example you may have 3 versions of the Discovery Meeting template. Each subsequent version of the template would activate additional Strategy Mapper functionality as illustrated below. There will be only one template for Discovery Meeting, but the functionality will be increased with each new phase.

Phase	Functionality	Description
Crawl	Add Attendee, Notes, Related Object, Export Report	Take notes, update SFDC field, Export Meeting Minutes report
Walk	As above, Actionable Intelligence, Send Agenda, Send Invites	Gather Actionable Intelligence as specified by the organization, Send meeting agendas and invitations
Run	As above, Score Meeting, Political Map, Tasks, Meeting Insights	Provide a score for each meeting based on organizational criteria, Display and update org charts for customer organizations, provide meeting insights

Communication Planning

As with any roll-out, there will be some level of communication that is necessary. Of course this is highly dependent upon the organization doing the implementation. In the case of Strategy Mapper we’ve found that some content in the communications is helpful with user adoption. Since any deployment of software can imply to the end-user more work, generally speaking it’s beneficial to point out the value that will be gained by the end user as a result of this deployment. Specifically for Strategy Mapper that can include:

- An less cluttered view and functionality of Salesforce
- Decreased time spent updating Salesforce
- Automatic reporting of customer status to management
- Decreased time generating and updating Account and Opportunity Plans

Sample User Communication

Here is a sample end-user communication:

Hi Mary User,

In the next couple of weeks we will be deploying a new solution in our Salesforce organization to accelerate sales and more effectively plan and execute on our revenue goals. Strategy Mapper is an intuitive, easy to use application that will allow us one integrated Account, Opportunity and Meeting planning and execution solution. It allows you to create account and opportunity plans in minutes and then automatically updates the plans using the interactions you’re having with prospects and customers. This will free you up to meet with more customers and prospects by reducing the administration overhead of Salesforce.

We’ll be scheduling training on Strategy Mapper for the team. It will be broken up into two sessions. Each session will be 1 hour long and done with the vendor via web conferencing. The two sessions are:

1. Account and Opportunity Planning – 60 minutes
2. Meeting Planning and Execution – 60 minutes

Date	User Group	Training Topic
2 May 2016	Sales Execs	Account and Opportunity Planning
5 May 2016	Sales Execs	Meeting Planning and Execution

We are very excited about the addition of Strategy Mapper and welcome your feedback. If you have any questions or would like to review some videos on Strategy Mapper please contact “your contact”.

Thank you,
Sales Management

Training Plan

Strategy Mapper comes with 8 hours of free training that can be broken into one hour increments. Typically customers will use the training to train three groups of users, Administrators/support personnel, Sales/Marketing and other affected management, and the Sales Execs. Each group will have training that’s geared toward their usage of the solution.

Strategy Mapper Administrator/Support Team Training

This set of users will learn how to install, upgrade and configure Strategy Mapper. Depending on the size of this group, 2 hours should be set aside for their training. These should be the first users trained on the solution.

Management Training

Training the management team is critical to the success of the solution. They will be the group that drives the usage of the solution. They'll need to understand how to leverage all of the valuable data collected with Strategy Mapper to drive sales and marketing efforts. In this training the Point N Time team will review dashboards, reporting, the "Business Intelligence Report/Brief" and Business Review Management reports. We'll also cover how the application functions and how the data is gathered and the different uses for the data gathered to accelerate sales and drive increased revenue

Sales Team Training

This set of users will be the day-to-day users of Strategy Mapper. This training typically takes 2 hours per group of users. The training will cover the basics of how to use the product as well as how to use it efficiently in your environment.

Deployment Schedule

The deployment schedule consists of just two primary items:

- Build/configure the environment based on the planning that's been completed
- Activate users for the solution on a schedule that fits with your organization

Strategy Mapper Deployment

As stated above the Strategy Mapper deployment is just a matter of building and configuring the solution based on the planning that has been completed, then activating the users on a schedule that fits with the organization. Typically a pilot set of users is deployed initially so any necessary refinements to the configuration can be made prior to the full user rollout.

The steps in the process are outlined below. The detailed instructions for the configuration are contained in the Strategy Mapper Configuration Guide.

- Build Strategy Mapper templates from the spreadsheet that documents the template configuration.
- Configure the picklists for each of the solutions as documented in the spreadsheet.
- Activate Templates by ensuring the "Active" box is checked in the template.
- Activate user licenses by allocating users (managing licenses).

NOTE: Users not assigned a Strategy Mapper license will not see any buttons, sections or any other Strategy Mapper related components.