

Strategy Mapper- Opportunity Mapper Templates



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This document is intended to provide you and assist you in the planning your Opportunity Mapper templates to be used in Strategy Mapper. Strategy Mapper gives you the ability to highly customize your templates to provide the information and activities to ensure your teams are successful in their opportunities. This document also, includes examples for each section to assist you in your planning.

Overview

An Opportunity Mapper template has 5 sections:

- ✓ Opportunity Mapper Template Details
- ✓ Button Configuration
- ✓ Tab Configuration
- ✓ Sales Coaching
- ✓ Opportunity Milestones

Opportunity Mapper Template Details

The Account Mapper Template Details consists of the following sections (**Figure 1**):

- ✓ Strategy to Win
- ✓ Tactics
- ✓ Value Proposition



Figure 1

NOTE: Once a user selects a template they can edit any or all of the sections detailed below, to better align with their particular accounts and plans. Their edits don't effect the template being used.

NOTE: It is not mandatory that the sections be completed for the users. They are meant to build consistence among account teams and provide guidance on the type of information required in the plan.

Strategy to Win

Strategy to Win – enter in information for account teams on the strategy to win this opportunity of this type (**Figure 2**). This can be used to provide guidance on what to include in this section.

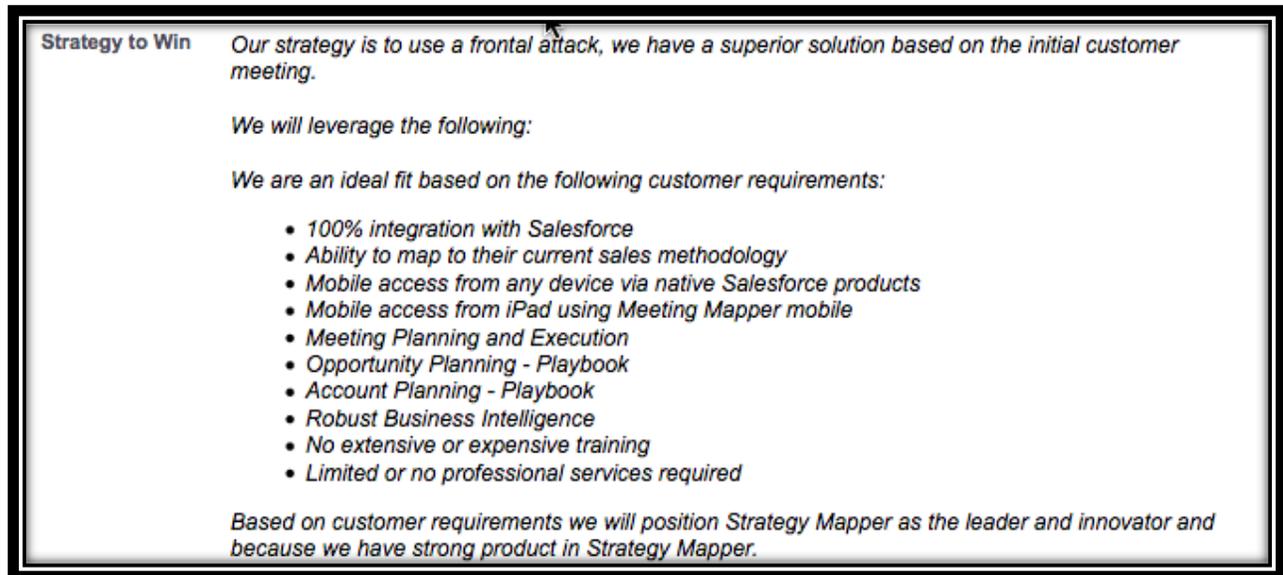


Figure 2

Tactics

Tactics – enter in generic tactics that support the Strategy to Win. (**Figure 3**). This can be used to provide guidance on what to include in this section.

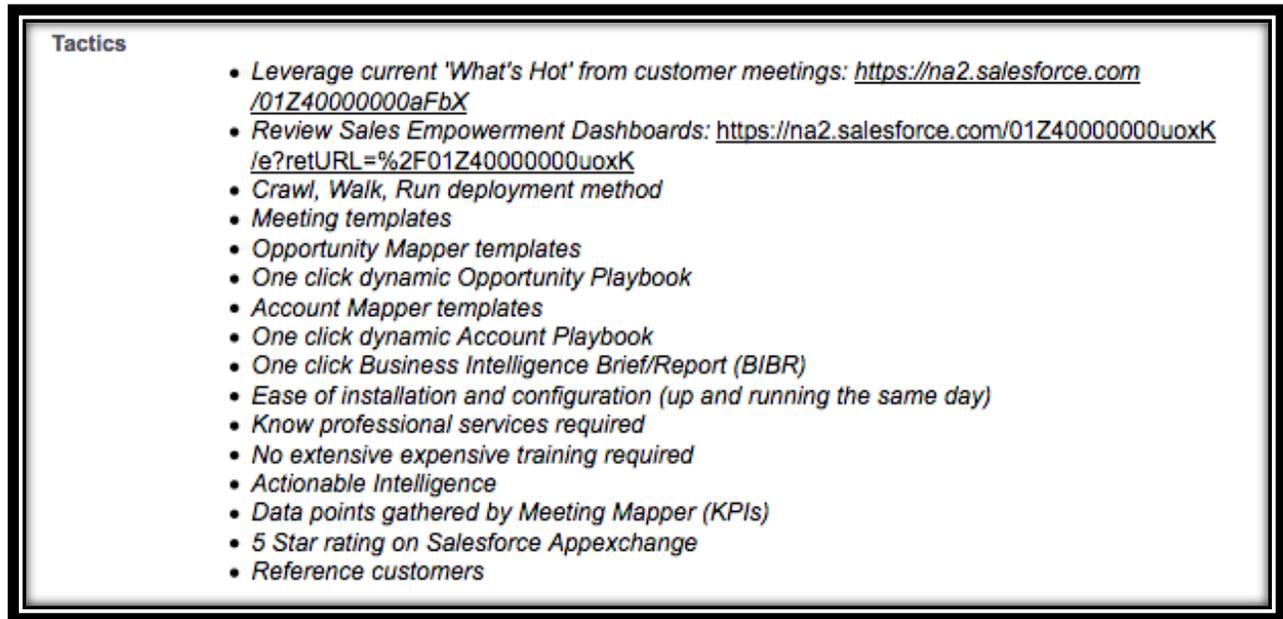


Figure 3

Value Proposition

Value Proposition – enter in the value proposition for your products/solutions for this type of account. This should be consistent and reviewed by your marketing department (**Figure 4**).

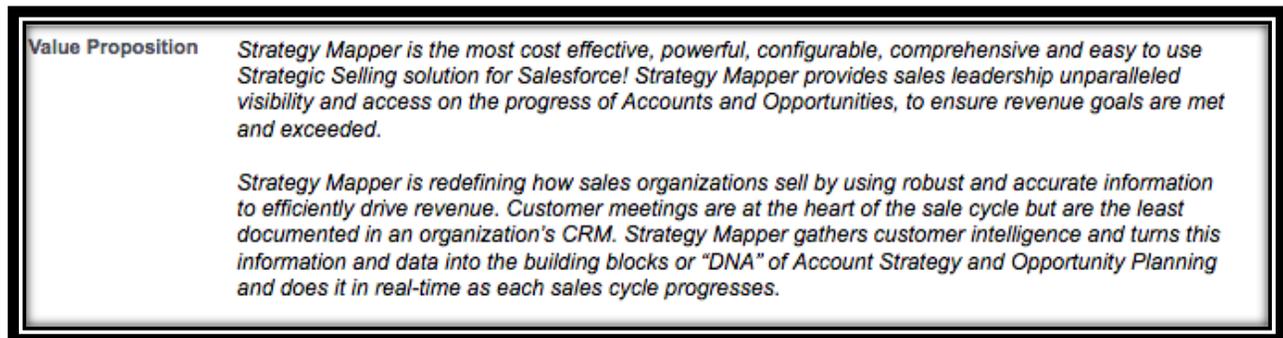


Figure 4

Button Configuration

Strategy Mapper gives you the ability to display what actions your users can complete. There are 9 buttons that can be displayed in the Opportunity Plan (**Figure 5**).

NOTE: Your buttons maybe be arranged in another order then displayed.



Figure 5

- ✓ Opportunity Playbook – Launches Opportunity Playbook
- ✓ Opportunity Action Plan – Launches Opportunity Action Plan
- ✓ Instant Meeting – Starts a meeting using Meeting Mapper
- ✓ Org Map – Displays the organizational map for the account
- ✓ Back to Opportunity – Back to the details of the account in Salesforce
- ✓ Notify Manager – Sends a notification to your manager to review the plan
- ✓ Opportunity Score – Health score of the account based on the plan and information gathered in meetings using Meeting Mapper
- ✓ New Meeting – Starts a meeting using Meeting Mapper
- ✓ Save – Saves the current plan
- ✓ Notify Team – Sends a notification to anyone on your team to review and/or any comments regarding the strategy for the account

Tab Configuration

Strategy Mapper gives you the ability to display what must be completed or displayed in an account plan. There are 11 tabs that can be displayed in the Account Plan (**Figure 6**).



Figure 6

- ✓ Account Team – Who from your team has been in meetings with the customer using Meeting Mapper
- ✓ Child Accounts – Any child accounts of this parent account
- ✓ Customer Selection Process – Allows the user to document the customer buying process
- ✓ Customer Team – Who have you met had meetings with using Meeting Mapper

- ✓ Sales Coaching – Allows the user to document their marketing or business development plan for the account
- ✓ Notes – Allows the user to add in notes regarding the account, these notes are added to the activity section for the account
- ✓ Red Flags – Allows the user to document any that can derail the success of the account
- ✓ Customer Requirements – Allows the user to create activities and assign them to team members
- ✓ Opportunity Timeline – A visual representation of the account from a meeting attendee perspective
- ✓ Cases – If you use Salesforce.com Cases, any cases for the account will be displayed in the plan
- ✓ Meeting – View completed meetings linked to the account where Meeting Mapper was used to documents the selling activities

Labels

Labels allow you to use your terminology and sales methodology (*Figure 7*).



Figure 7

Score Dashboard Configuration

By default, all score dashboards are visible, Opportunity Score Dashboard allow you to determine which ones are visible based on what features you are currently using in Strategy Mapper.



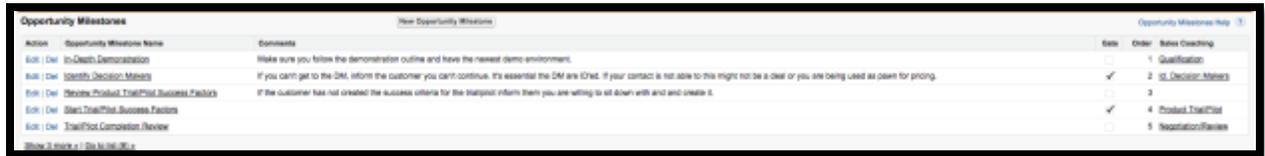
Figure 8

Sales Coaching

Sales Coaching allows you to link coaching advice for each stage of the stage for the opportunity. Sales Coaching is comprised of the name, sales coaching (advice for the user) and order (*Figure 8*).

Opportunity Milestones

Opportunity Milestones allows you to create milestones that must be completed to ensure winning the opportunity. Opportunity Milestones is comprised of the opportunity milestone name, gate, order and the sales stage it is linked to. (**Figure 10**). A gate is a significant milestone that must be completed before moving to the next milestone.



Action	Opportunity Milestone Name	Comments	Gate	Order	Sales Coaching
Edit Del	In-Depth Demonstration	Make sure you follow the demonstration outline and have the nearest demo environment.	<input type="checkbox"/>	1	Qualification
Edit Del	Identify Decision Makers	If you can't get to the DM, inform the customer you can't continue. It's essential the DM are IC'd, if your contact is not able to this might not be a deal or you are being used as a pawn for pricing.	<input checked="" type="checkbox"/>	2	IC Decision Makers
Edit Del	Review/Propose/Track/Post Business Factors	If the customer has not created the success criteria for the proposal inform them you are willing to sit down with and create it.	<input type="checkbox"/>	3	
Edit Del	Start/Track/Post Business Factors		<input checked="" type="checkbox"/>	4	Propose/Track/Close
Edit Del	Track/Post Completion/Review		<input type="checkbox"/>	5	Negotiation/Review

Figure 10

Opportunity Mapper Template Worksheet

This worksheet is design to assist you in planning your Opportunity Mapper templates for your teams. It is recommended you complete the sections then cut and paste into the templates in Salesforce.com.

Best Practice: Point N Time Software recommends you include your sellers when you are creating the templates. Their input is critical to ensure adoption.

NOTE: Each template can have its own configuration.

Template Name

Example – New Opportunity

Strategy to Win

Example

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:

.

Tactics

Example

Leverage current 'What's Hot' from customer

meetings: <https://na2.salesforce.com/01Z40000000aFbX>

Review Sales Empowerment

Dashboards: <https://na2.salesforce.com/01Z40000000uoxK/e?retURL=%2F01Z40000000uoxK>

Crawl, Walk, Run deployment method

Meeting templates

Opportunity Mapper templates

One click dynamic Opportunity Playbook

Account Mapper templates

One click dynamic Account Playbook

One click Business Intelligence Brief/Report (BIBR)

Ease of installation and configuration (up and running the same day)

Know professional services required

No extensive expensive training required

Actionable Intelligence

Data points gathered by Meeting Mapper (KPIs)

5 Star rating on Salesforce Appexchange

Reference customers

Value Proposition

Example

Strategy Mapper is the most cost effective, powerful, configurable, comprehensive and easy to use Strategic Selling solution for Salesforce! Strategy Mapper provides sales leadership unparalleled visibility and access on the progress of Accounts and Opportunities, to ensure revenue goals are met and exceeded.

Strategy Mapper is redefining how sales organizations sell by using robust and accurate information to efficiently drive revenue. Customer meetings are at the heart of the sale cycle but are the least documented in an organization's CRM. Strategy Mapper gathers customer intelligence and turns this information and data into the building blocks or "DNA" of Account Strategy and Opportunity Planning and does it in real-time as each sales cycle progresses.

Button Configuration

Review the buttons you want displayed in an Opportunity Mapper template. The buttons in your template may be in a different order. Check the box next to the button you want to include in your template.

NOTE: By default, all buttons are enabled.

- Opportunity Playbook
- Opportunity Action Plan
- Instant Meeting
- Org Map
- Back to Opportunity
- Notify Manager
- Opportunity Score
- New Meeting
- Save
- Notify Team

Tab Configuration

NOTE: By default all buttons are enabled.

- Account Team
- Customer Requirements
- Customer Selection Process
- Customer Team

- Opportunity Timeline
- Notes
- Red Flags
- Competitors
- Cases
- Meeting
- Sales Coaching

Labels

Strategy to Win
Tactics
Value Proposition

Score Dashboard Configuration

Hide Average Chart in Score
Hide Opportunity Health Chart in Score
Hide Opportunity Score Chart in Score
Hide Sales Intelligence Chart in Score

Sales Coaching

Sales Coaching is linked to the stages of an opportunity, so each stage can have coaching.

Coaching

Example

Ensure you understand the Pain Points or Challenges facing the customer. Once these are identified map our products and solutions to them. This will allow you and your team to highlight the value we bring and how we are different from our competitors.

Gate

Order

NOTE: Ensure you put the order number for each stage, this will ensure the stages are in the correct order.

Opportunity Milestones

Opportunity Milestone Name

Example – Completed in-depth demo?

Comments

Ensure you have the current solution installed or access to it.

Gate

Order

Sales Coaching (Selling Stage)