Strategy Mapper User Guide

Table of Contents

User Guide Strategy Mapper

Introduction

Welcome to Strategy Mapper, this guide will walk you through every step to effectively use Strategy Mapper.

Strategy Mapper functions and looks the same whether you're in Salesforce Classic or Lightning interface. The examples in this guide are utilizing Lightning interface. It's important before you start to use this guide that you are familiar with templates and how and why they are used in Strategy Mapper.

Templates

Templates are used to allow your organization to configure (what needs to be completed and/or presented to the users) based on what is required in the sales process for your organization. Templates are very powerful, yet very intuitive and easy to use. In addition, templates can be pre-populated to assist users and allow coaching throughout the entire sales process. There is no limit in the number of templates that can be created per solution, for example Meeting Templates. There are three types of templates:

Account Mapper Templates – these are used to configure what must be completed and what is included in account plans. They can be created for different types of accounts, geos and groups for example.
Opportunity Mapper Templates – these are used to configure what must be completed and what is included in opportunity plans. They can be created for different types of opportunities, products, solutions and geos for example
Meeting Templates – these are used to configure based on the different type of meetings you are having with your customers and prospects. Meeting templates can be linked to Accounts, Campaigns, Cases, Contacts, Leads or Opportunities.

The Point N Time Software, Inc. team wants to thank you for selecting Strategy Mapper.

Let's get started!

Using Account Mapper

The examples used in this section will walk you through creating and modifying a plan, using all the features available in an account plan based on the template.

Note: It's assumed an Account Mapper template has been created and made active. If not, please create an Account Mapper template first.

Creating an Account Plan

1. Select an Account (figure 1).

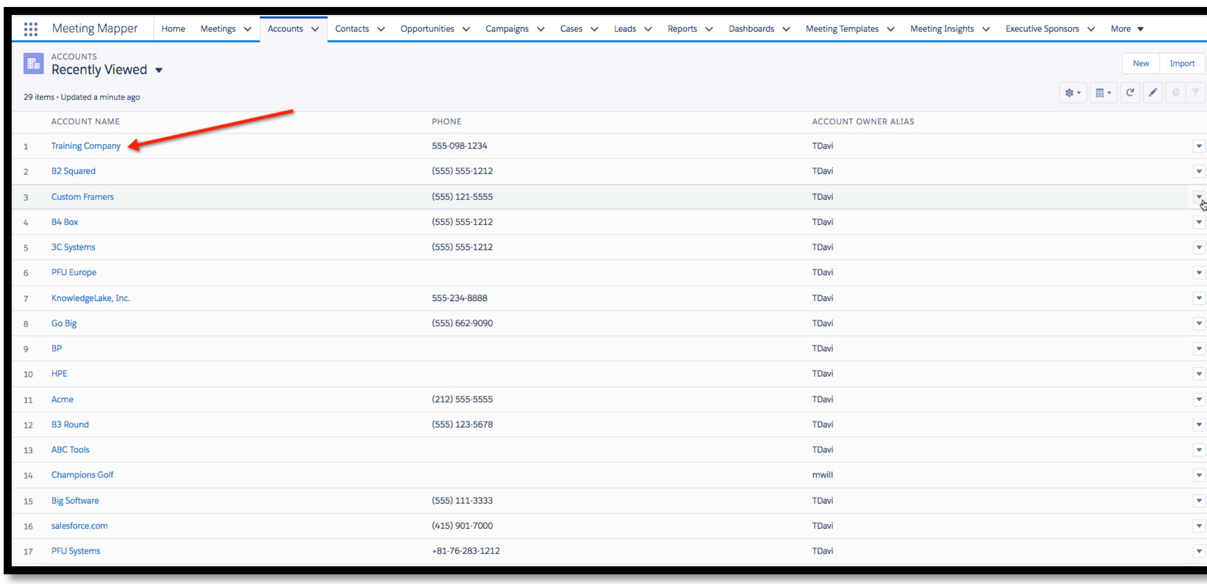


Figure 1

2. Click on Account Mapper, it can be displayed in one of two places. On the top navigation bar or on the dropdown (figure 2).

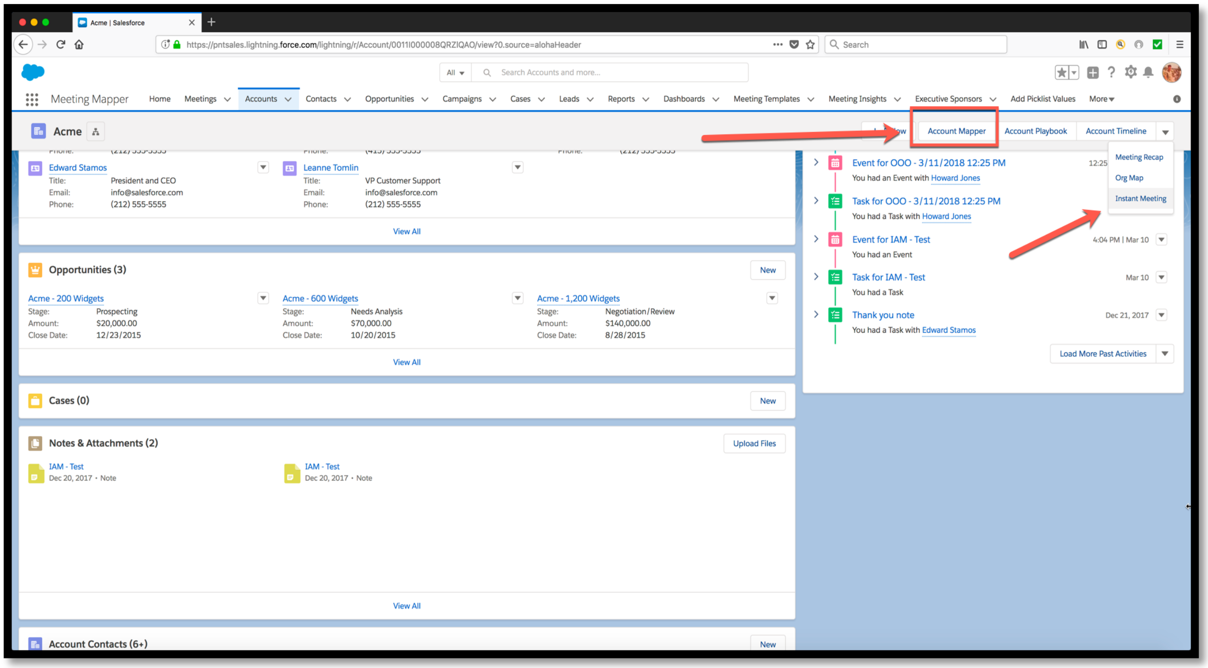


Figure 2

3. Select a template, if this is the first time clicking on Account Mapper, select the template and click Save (figure 3). If a template has been selected before, Account Mapper will display, based on the configuration of the template.

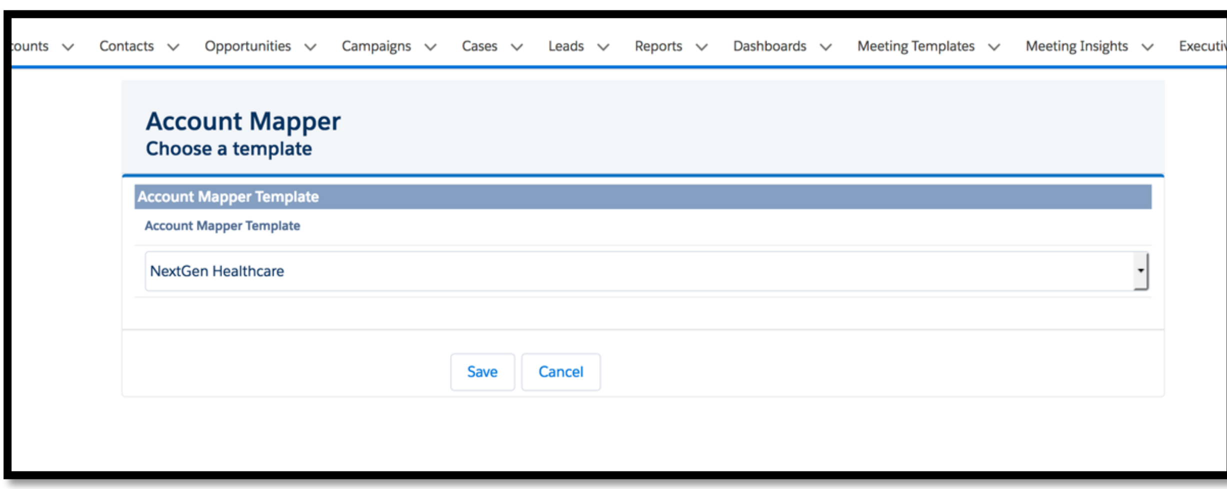


Figure 3

The Account Mapper page is comprised of Buttons along the top and Tabs (Pages) under them (figure 4).

Note: Your plan may have different buttons and tabs to select and complete. This guide shows the most used capabilities in an account plan.

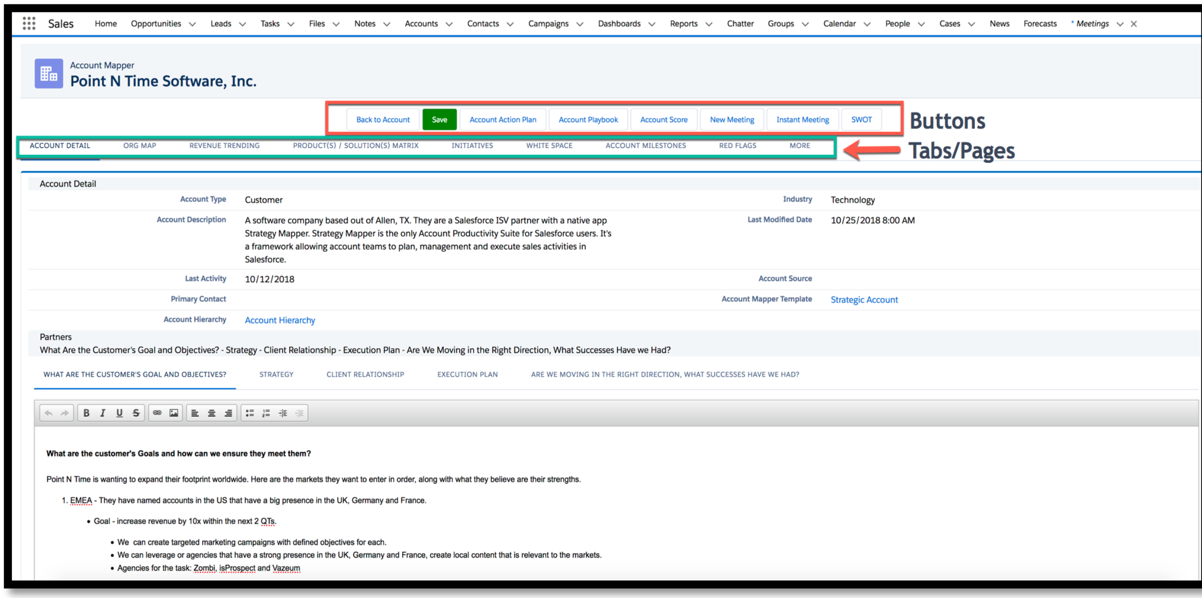


Figure 4

To start building your plan, start with the Tabs (Pages).

Details Page

4. The Account Details has information that was selected in the template. This data can't be edited (figure 5).

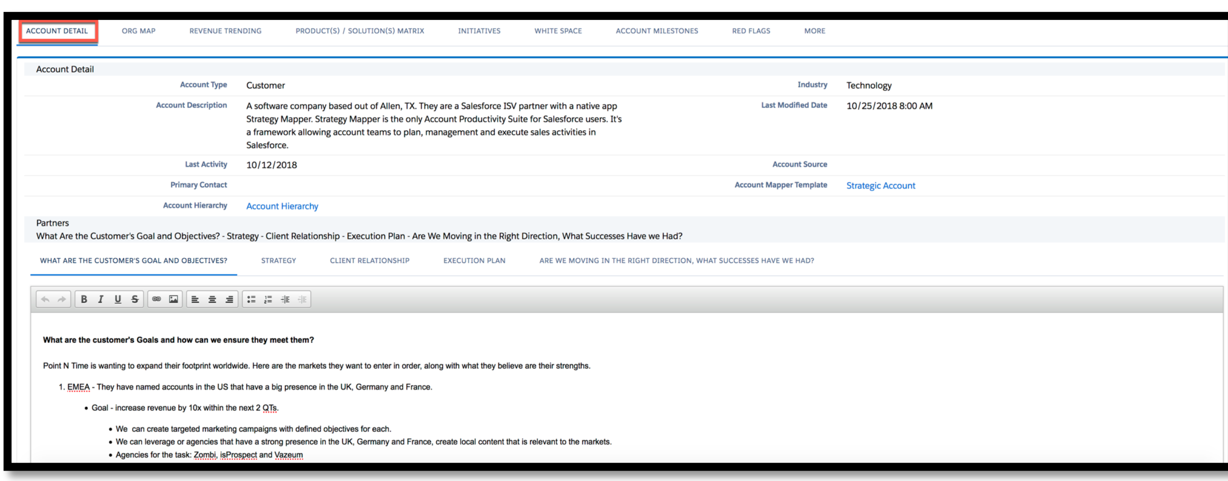


Figure 5

Account Hierarchy

Account Hierarchy allows you to view the parent/child relationships between accounts. Not only view the relationships but quickly identify the accounts with open opportunities.

5. Click on Account Hierarchy (figure 6). The Account Hierarch page will display (figure 7).

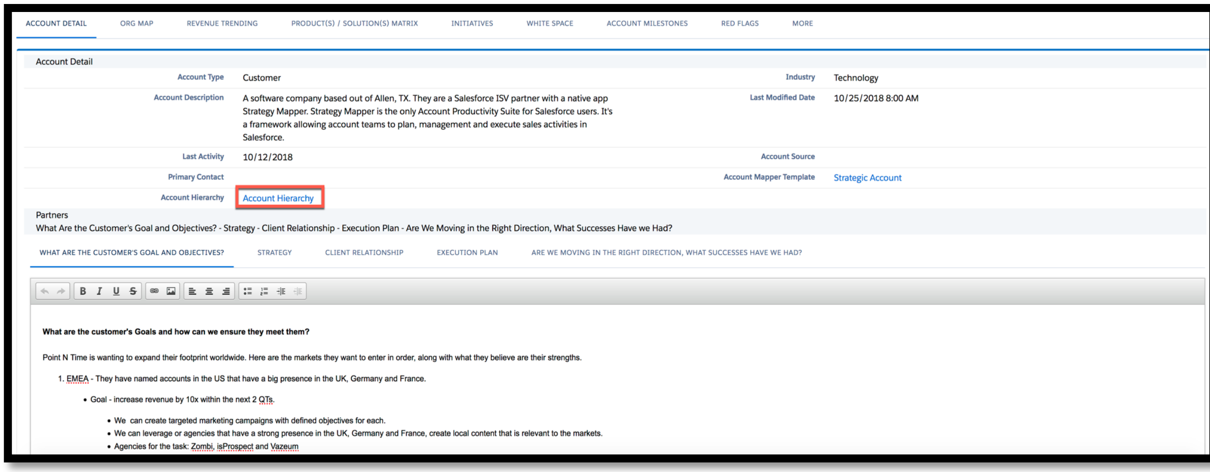


Figure 6

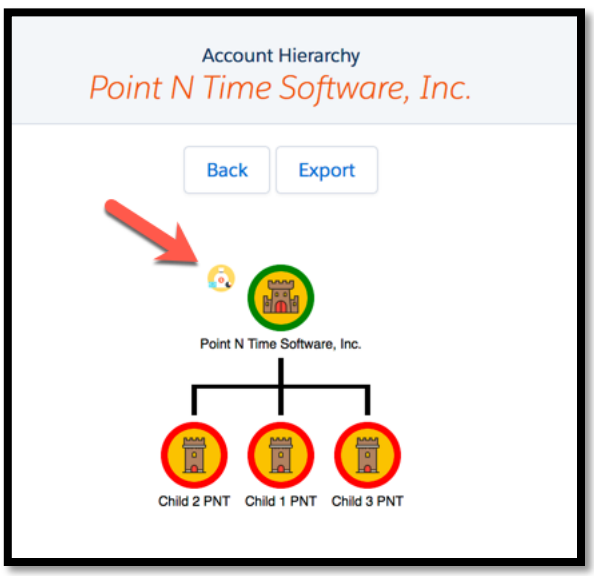
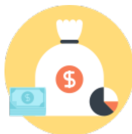


Figure 7

Account Hierarchy Icon definitions

 Parent Account  Current Account  Child Account  SBU

 Revenue has been generated in this account

- Green around the icon indicates open opportunities
- Red around the icon indicates no open opportunities

6. To view the Account Overview or Org Map, right mouse click, select from the options (figure 8) and (figure 9).

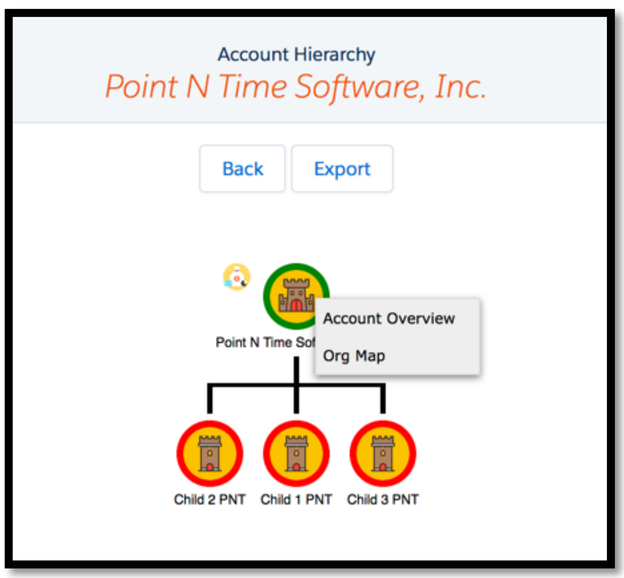


Figure 8

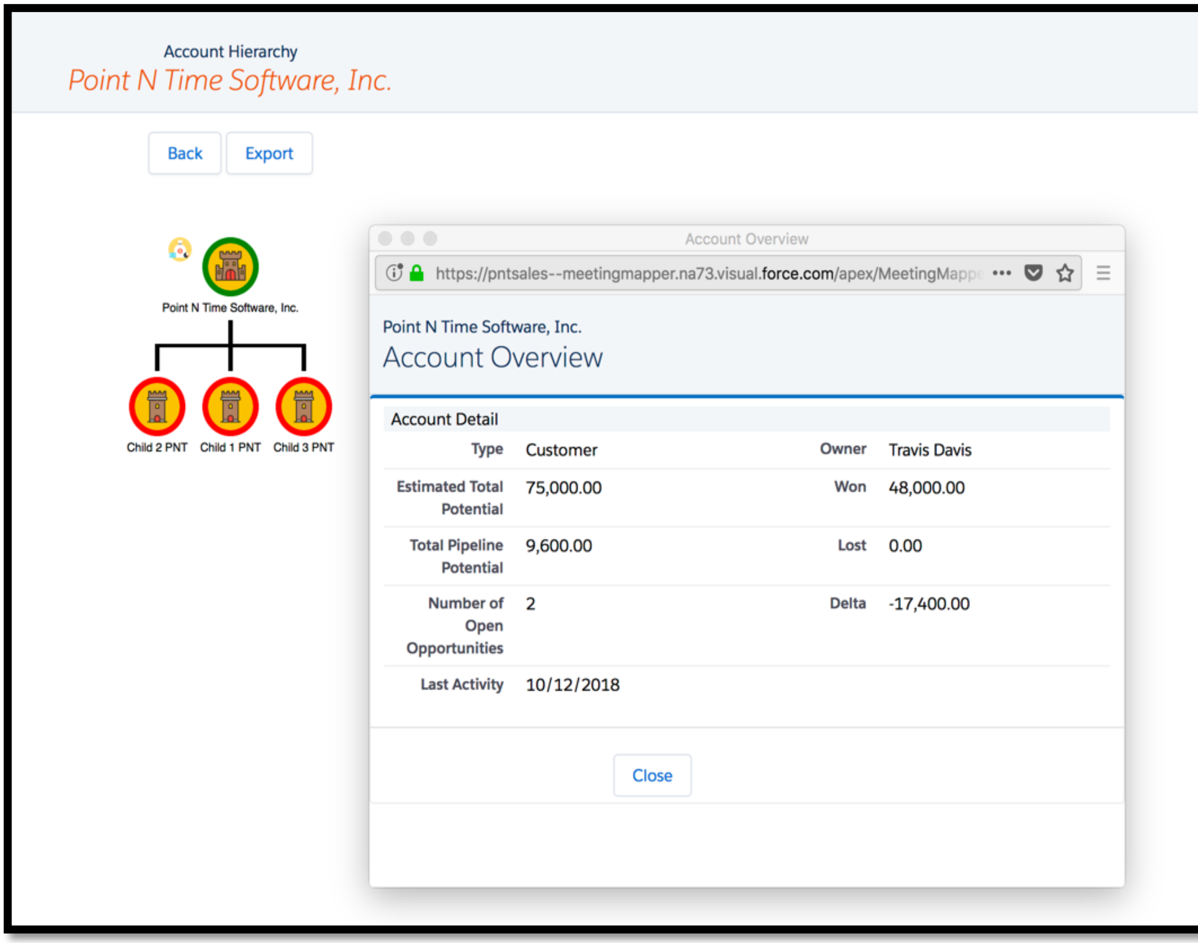


Figure 9

7. To collapse the hierarchy, click on the account icon (by default only one level below your starting point is displayed.
8. Click the Back button to return to the Account Details page.
9. Click Export if you want to save the Hierarchy to include in a document or presentation.
10. In the Partners section, it will display the partners supporting opportunities linked to this account (figure 10).

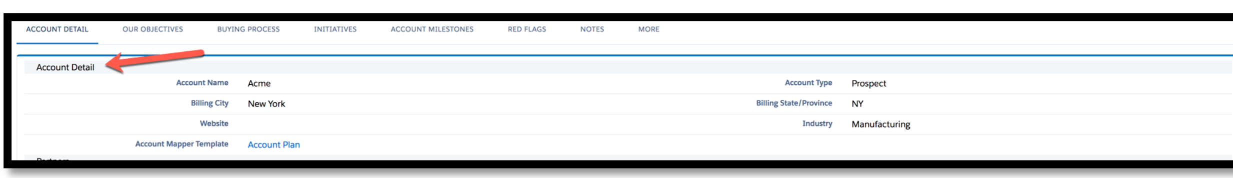


Figure 10

11. Click in the sections (tabs) to add information to your plan (figure 11). Depending on your template, the sections can be pre-populated with information. You can edit, delete and add to the sections. This doesn't alter or change the template, only your plan. Ensure you click on Save when moving from section to section.

Note: The sections below may have different titles based on the template selected to create the plan.

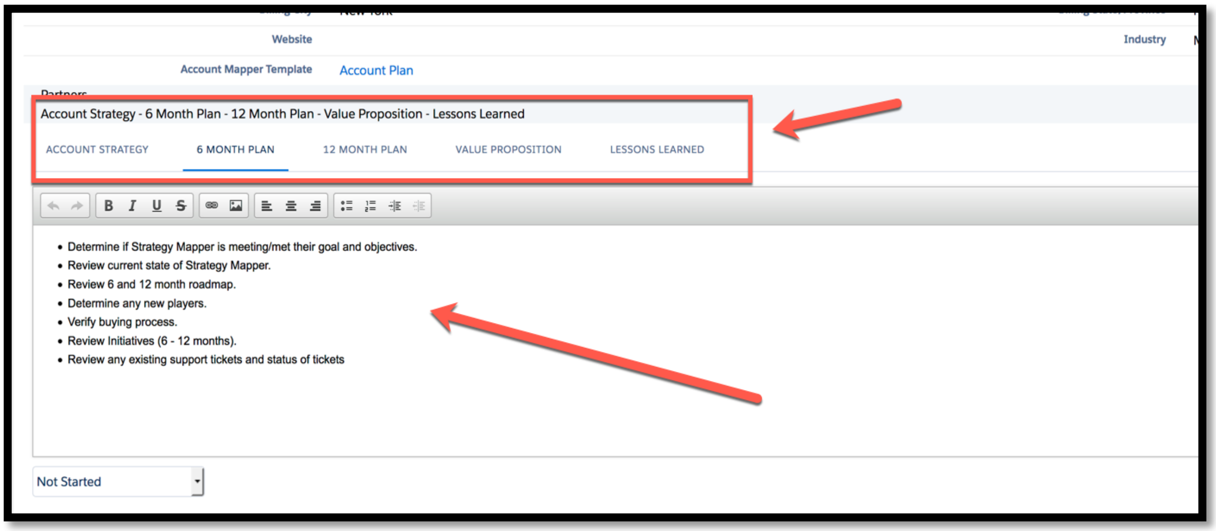


Figure 11

Note: When changes are made to the plan, the Save button turns to Red. Once you click on Save, it will revert back to Green (figure 12 & 13).

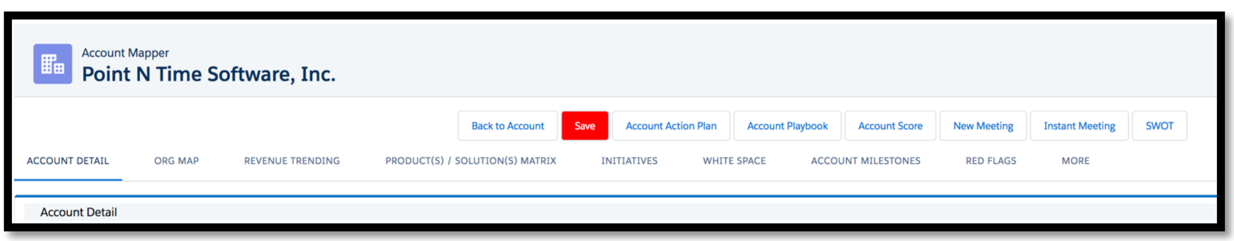


Figure 12

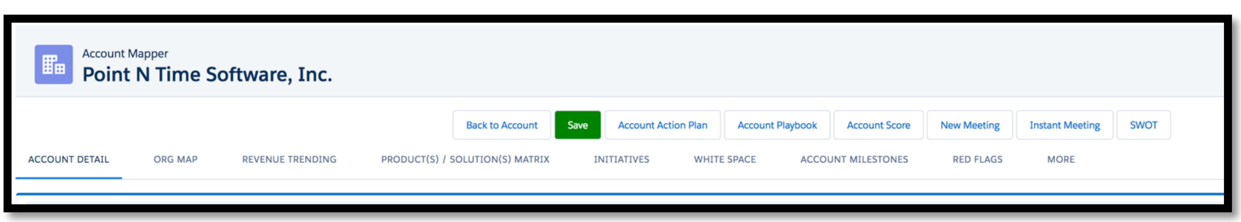


Figure 13

12. After you have completed your edits, click on Not Started to display a dropdown selection. Selecting how complete the plan is, this is very important. They are components of the overall scoring for the plan (figure 14).

Note: Scoring Matrix:

Not Started = 0
Working = 50
Completed = 100

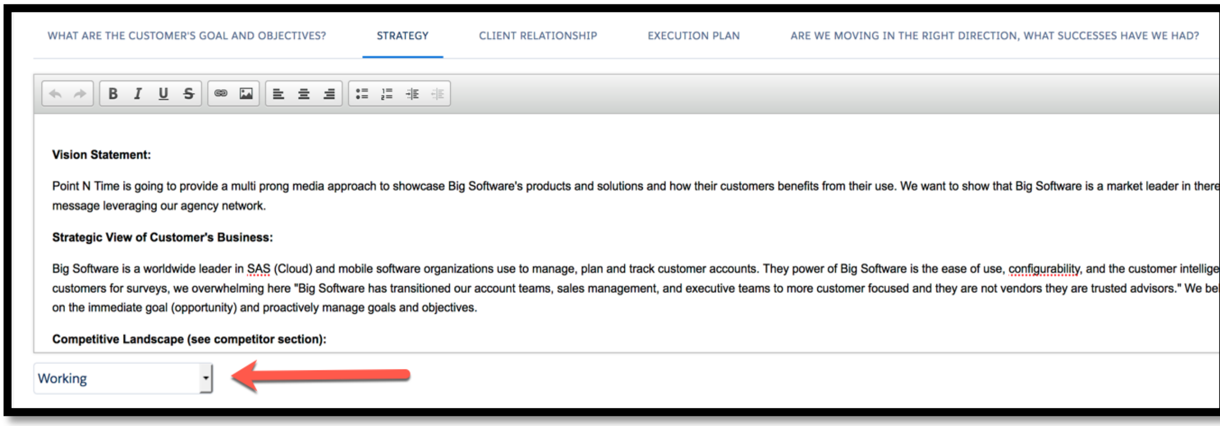


Figure 14

13. Once you have selected Complete you can set up a recurring task to revisit the section to ensure, it's up to date.

Note: It's critical to ensure account plans are maintained and updated on a set frequency. Recurring task can be configured when the section 'Completed' is selected for the status. The following sections on the Account Detail page (default names) can have recurring tasks:

- *Account Strategy (default title)*
- *12 Month Plan (default title)*
- *6 Month Plan (default title)*
- *Value Proposition (default title)*
- *Lessons Learned (default title)*

14. Select Monthly, Every Six Months or Yearly (figure 15).

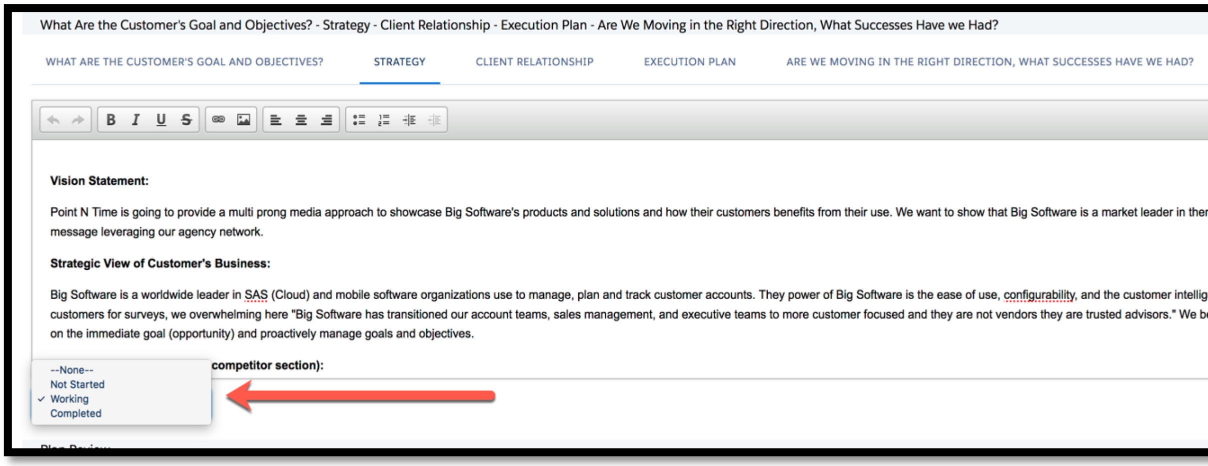


Figure 15

15. When you select Completed you have the option of selecting the frequency to review and update the section (figure 16).

What is the Value to Me and My Team?

We all get busy and forget to do things and when your juggling multiple accounts it's important to have reminders. You can't let your account plans get stale or out of date. Recurring tasks ensures you and your team perform maintenance on you plan based on the interval you deem.

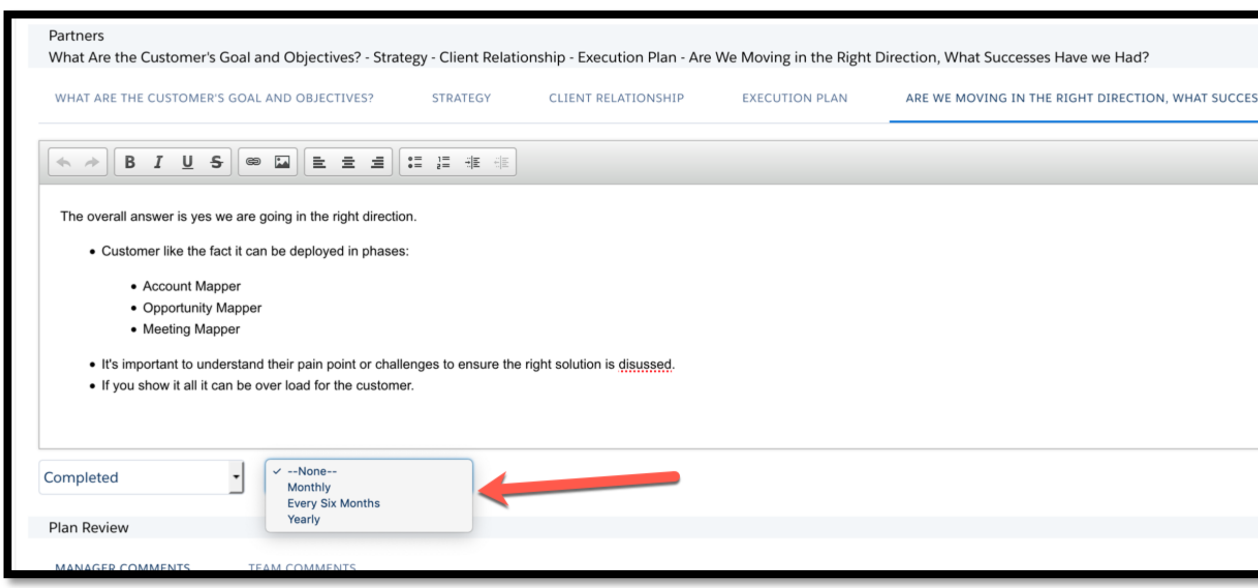


Figure 16

16. Once you selected the frequency, click Save.

17. After the section is saved, Recurring Task is visible. To view the Task, click on the hyperlink (figure 17 and 18).

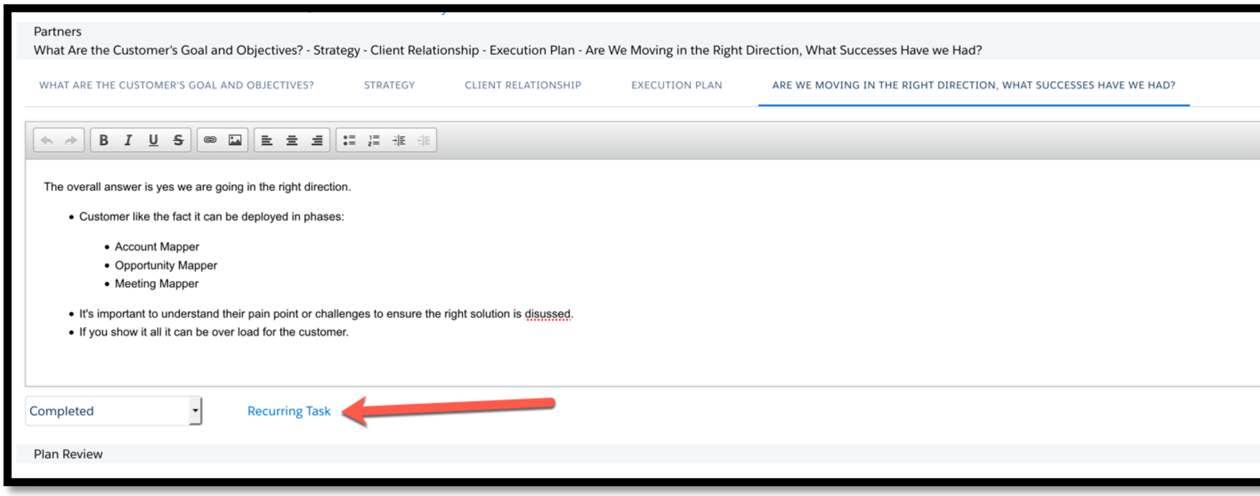


Figure 17

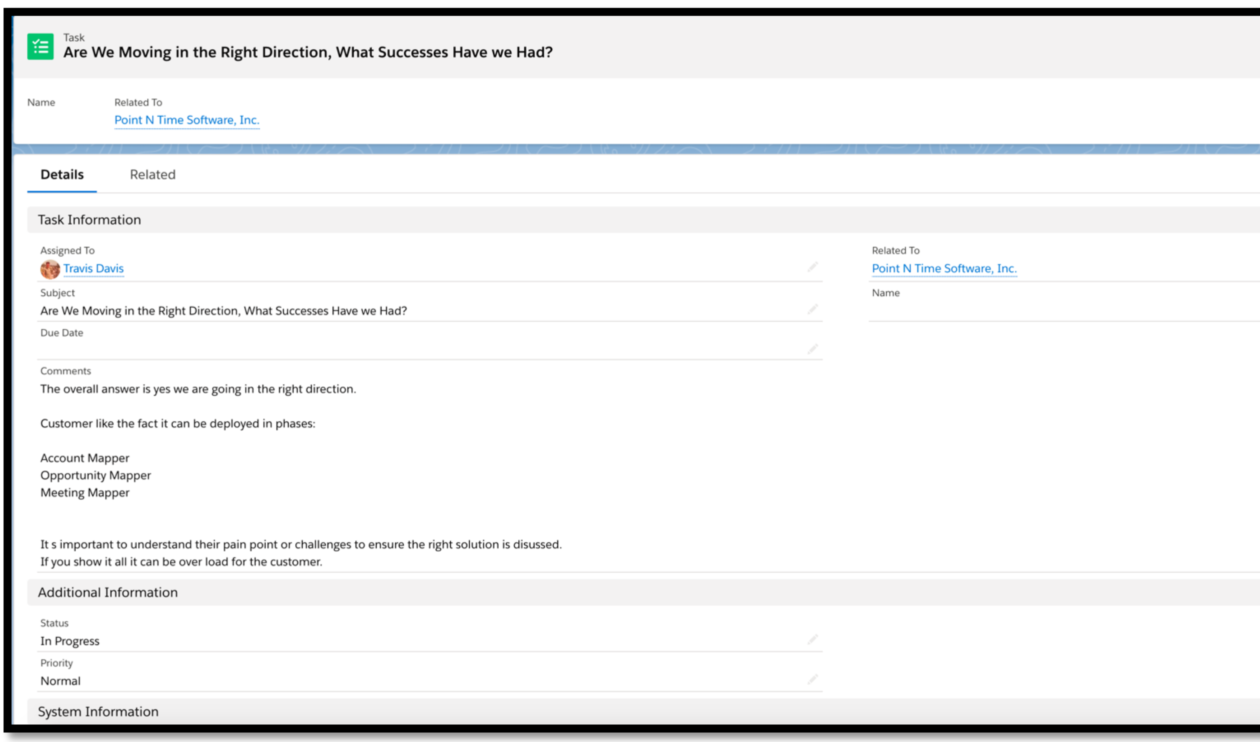


Figure 18

Plan Review

The plan review section allows your manager and team members to provide input to the plan. This ensures all team members are involved and management is in sync the plan (figure 19).

What is the Value to Me and My Team?

Having more eyes on a plan is always better. Allowing your manager and team to provide their updates ensures the team is on the same page. Everyone looks at a plan through a different lens and will notice and have a view that may be different than yours based on their role, responsibilities and experience.

Figure 19

To notify manager(s) or team members to provide input and review the plan:

18. Click on either Notify Manager button or Notify Team button (figure 20).

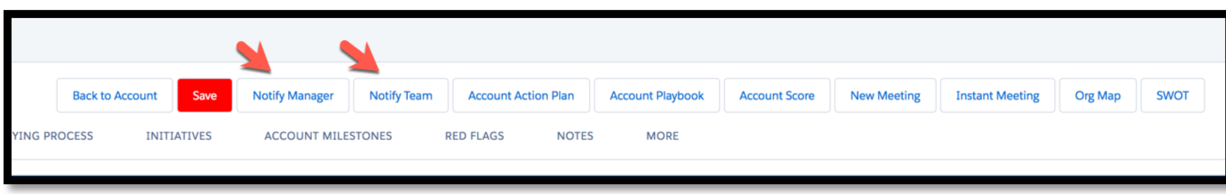


Figure 20

19. Click Add next to the manager (figure 21). To Save the manager(s), click Save. To send a review request select Send (figure 22).

Note: You can add more than one manager to send a review request.

Best Practice
When you initially create your plan, build your list of manager(s) to send review notices. When you want to send notices all you have to do is click on Send.

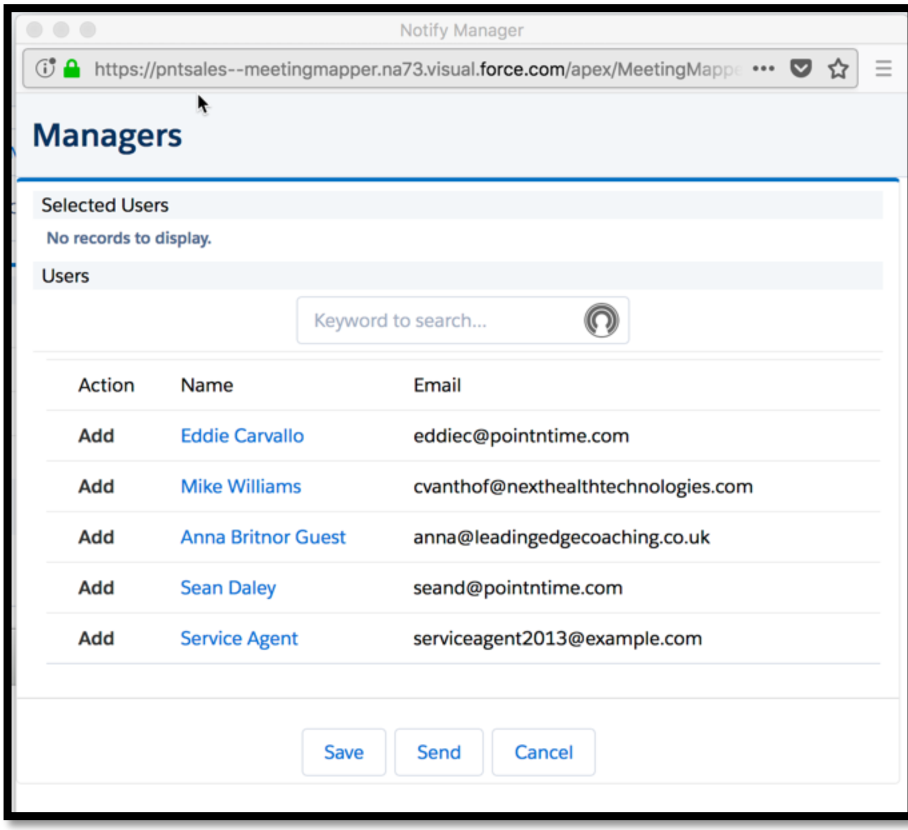

Notify Manager
https://pntsales--meetingmapper.na73.visual.force.com/apex/MeetingMappe
Managers
Selected Users
No records to display.
Users
Keyword to search...
Action
Name
Email
Add
Eddie Carvallo
eddiec@pointntime.com
Add
Mike Williams
cvanthof@nexthealthtechnologies.com
Add
Anna Britnor Guest
anna@leadingedgecoaching.co.uk
Add
Sean Daley
seand@pointntime.com
Add
Service Agent
serviceagent2013@example.com
Save
Send
Cancel

Figure 21

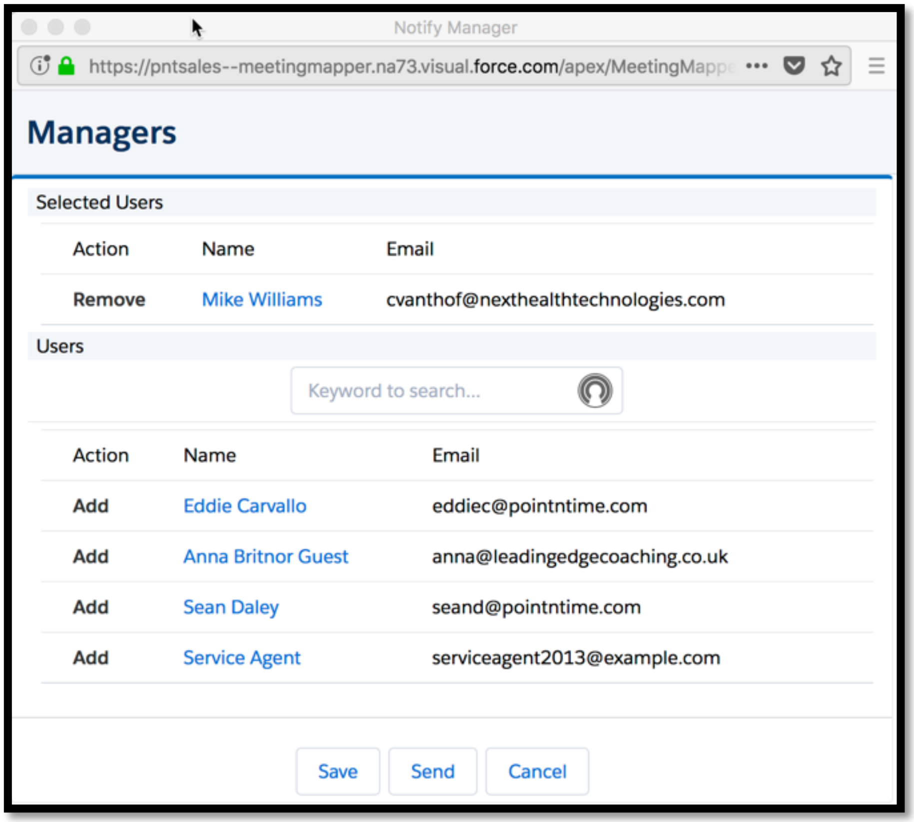


Figure 22

The send to Notify Team uses the same the steps (figure 23).

Best Practice
When you initially create your plan, build your list of team members to send review notices. When you want to send notices all you have to do is click on Send.

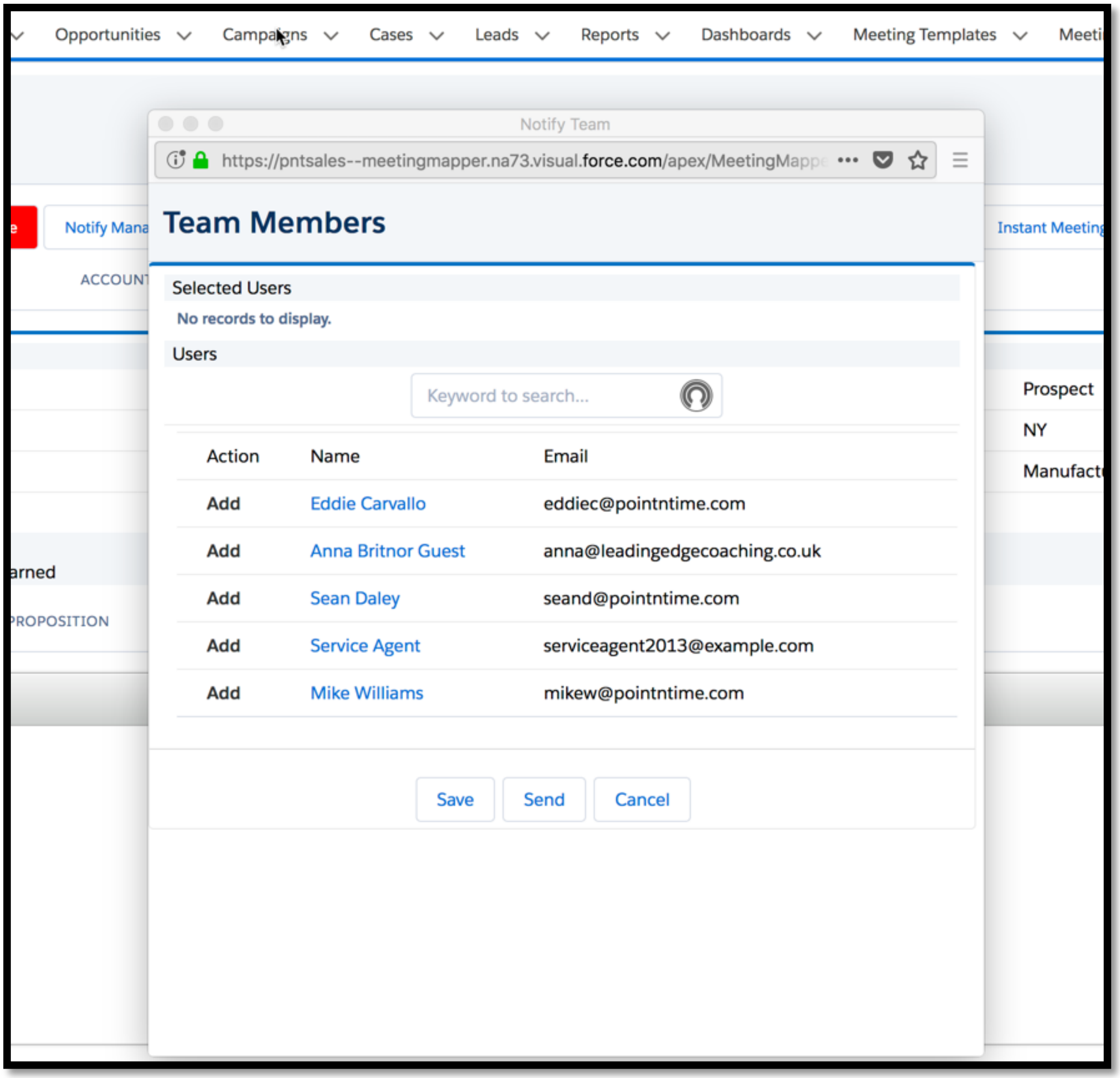


Figure 23

Organizational Map (Org Map)

By default, the Org Map will be populated with contacts (and their reports and who they report to if defined in Salesforce) that have attended a meeting using Meeting Mapper. If no meetings have been created, the Org Map will be blank the initial time it is open.

What is the Value to Me and My Team?

There is no better way to understand the stakeholders in your accounts. The information available in the Org Map allows you, your team and management to view very quickly the health of the relationships. Your team members can update contacts based on their last

interaction with them. Org Maps are great for account reviews, OBRs and other critical presentations.

To view the Org Map, click on Org Map tab (figure 24). This will display the current Org Map based on the 'Reports To' field for the Contact (figure 25). If the Org Map is empty, go to the Adding Contacts Section.

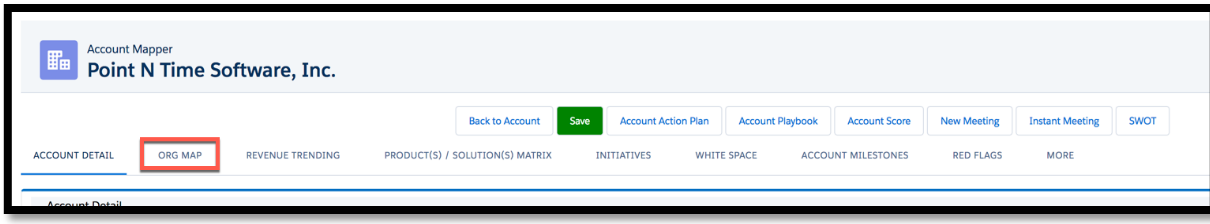


Figure 24

Note: You can also view the Org Map by clicking on the button 'Org Map' is displayed based on the template settings.

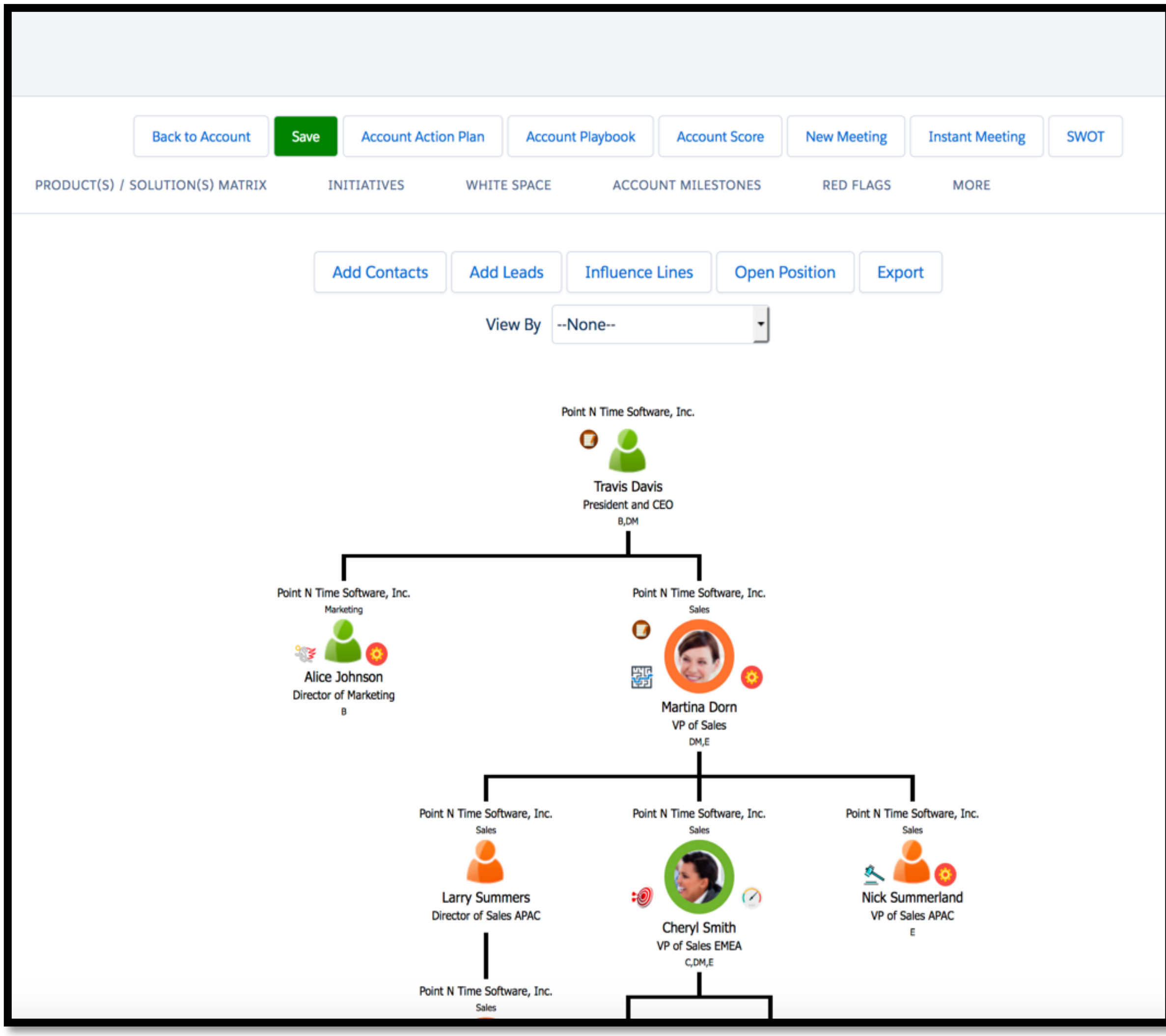


Figure 25

Org Map Fundamentals

Add Contacts

This allows you to add contacts to the Org Map, by default only contacts that have been meeting attendees using Meeting Mapper are displayed in the Org Map. In addition, to the contact their 'Reports To' and who reports to them are displayed. However, you can add additional contacts to the Org Map. These can be from the Account or other Accounts.

20. Click on Add Contacts, either select from the pre-populated list or search for the contact (figure 26). Click Add next to the contact.

Note: Only a certain number of contacts are displayed by default.

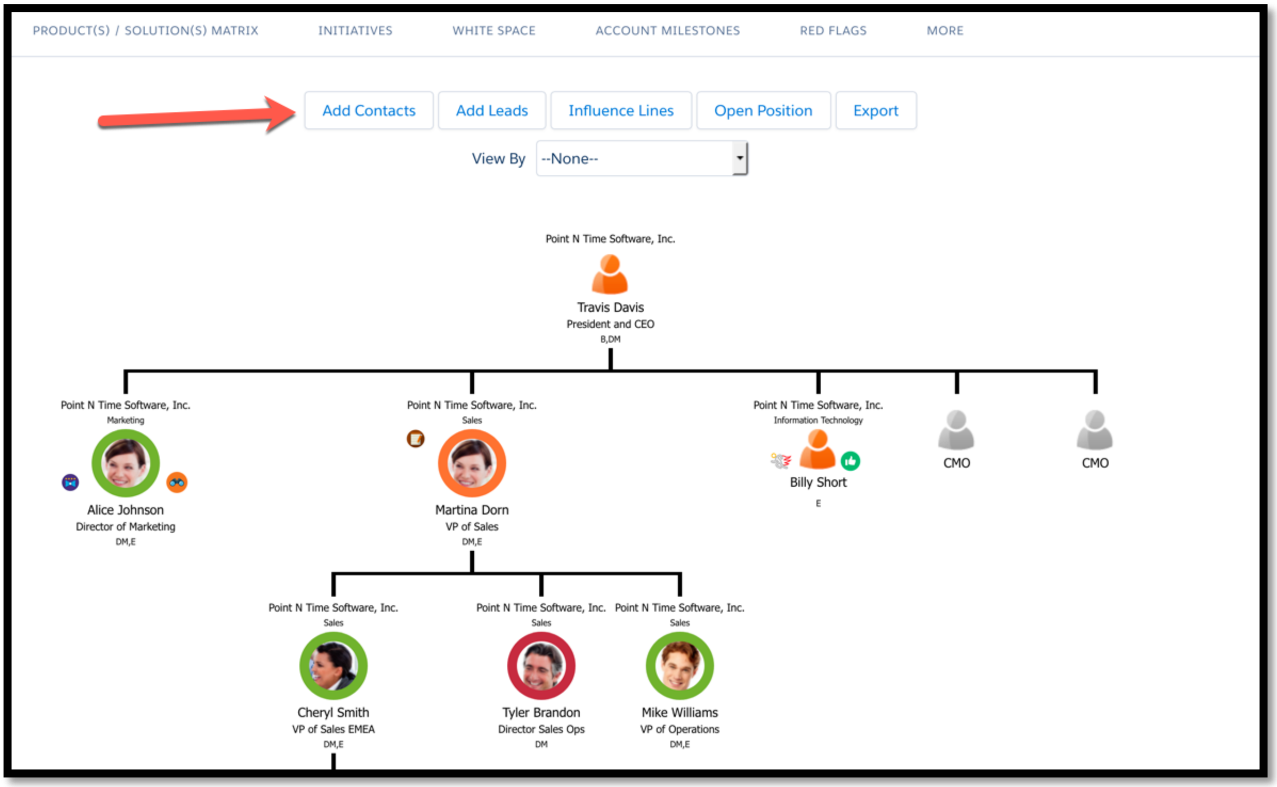


Figure 26

Show All Contacts displays contacts from other accounts in Salesforce, this is helpful if you want to add a partner to the org map to show a relationship.

21. Click Save (figure 27).

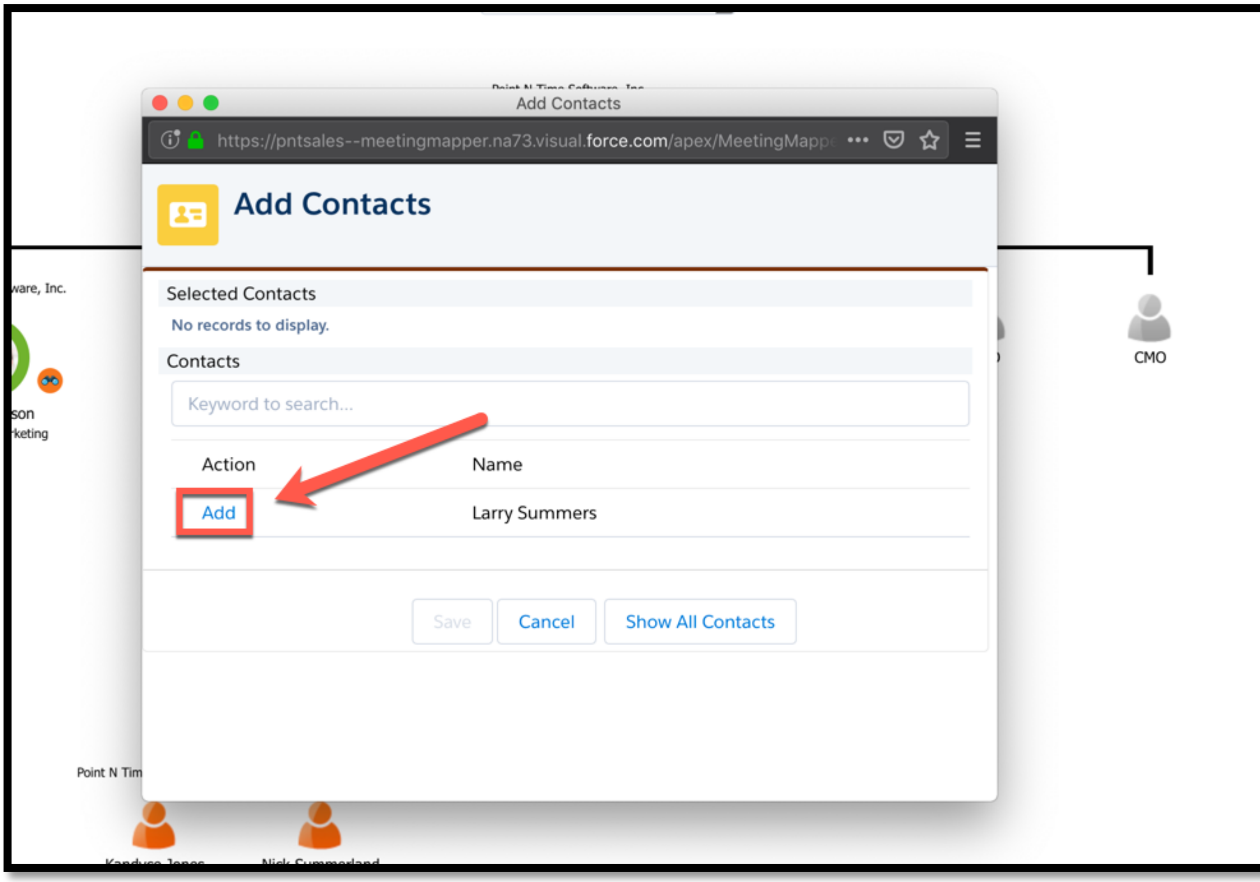


Figure 27

22. New contact will display on Org Map (figure 28). If the contact reports to a contact on the org map, the contact will be aligned to the other contact. In the event the 'Reports To' field is not completed the contact will display on the org map.

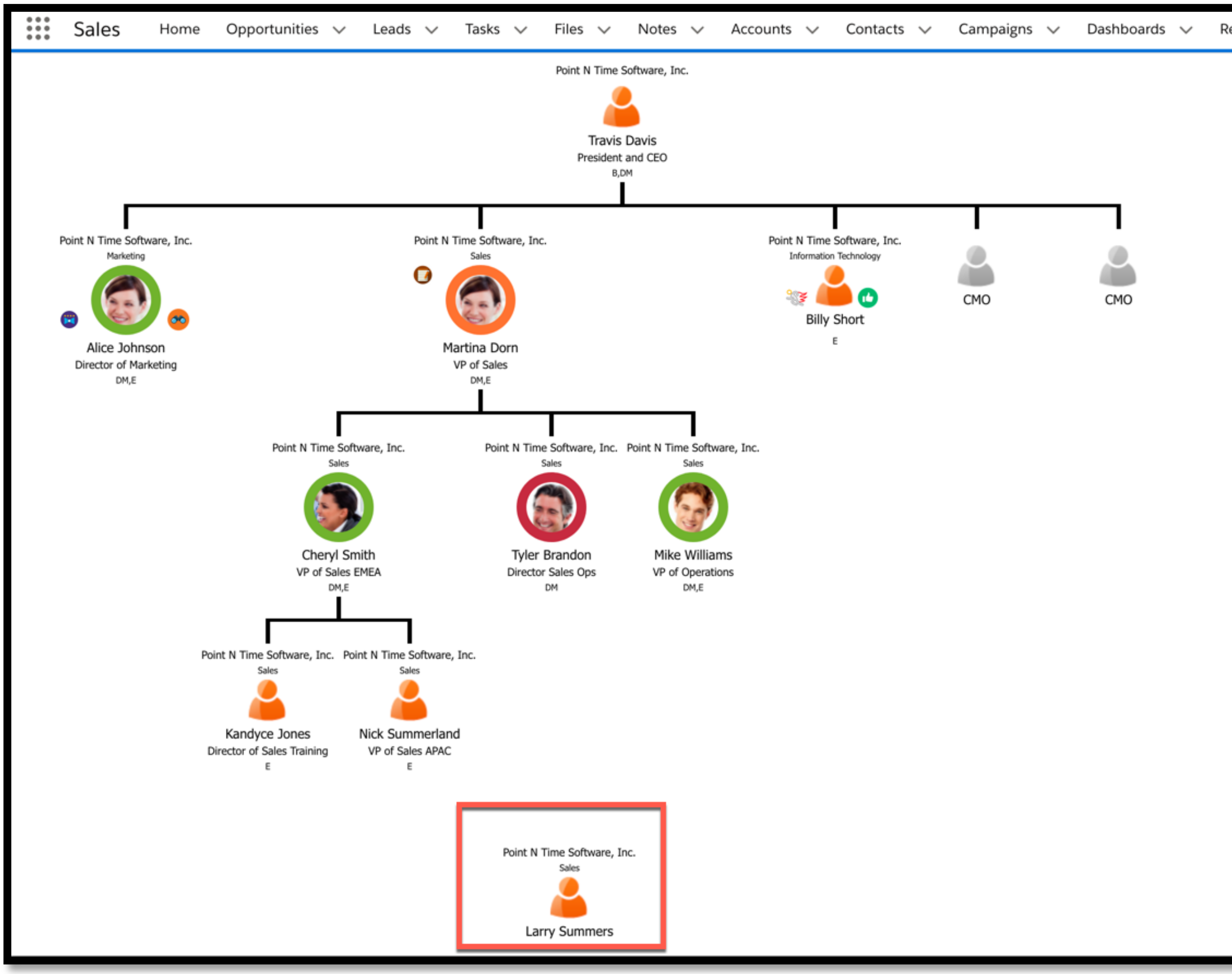


Figure 28

Re-aligning a Contact

Re-aligning a contact gives you the ability to dynamically re-align contacts and who they report to in the Org Map.

23. Click on the contact and drag to the new position, release mouse (figure 29).

Figure 29

Contact Details

The contact icon can display several smaller icons highlighting key factors related to the icon (figure 30 & 31).

Figure 30

- Icon color depicts the Stance (see Meeting Mapper section)
- Individual Notes – top left corner
- Department within the Organization they belong to – under account name
- Main Influencing Factor – bottom left and right corner
- Title – under contact name

- Role – Under title

Change Contact Details – you can change several contact details in the Org Map.

- **Stance** - Edit current Stance
- **Role** – Edit current Role
- **Executive Sponsor** – Assign an executive from your company to reach out this this contact
- **Attendee Notes** – Create individual notes for this contact (when a note is created the note icon will be displayed next to the contact icon, click on the icon to review the notes.
- **Reports To** – Change the Reports To, it's recommended just move the contact icon to the new reports to on the org map
- **Remove** – Removes the contact from the org map, can be added later at anytime
- **Realign** – Will remove the contact from the reporting structure, will remain on the org map page.
- **Departments** – What department or business unit does the contact report into.
- **Main Influencing Factor(s)** – What is influencing their decision.

Note: MIF will only be displayed if the contact has been a meeting attendee in Meeting Mapper.

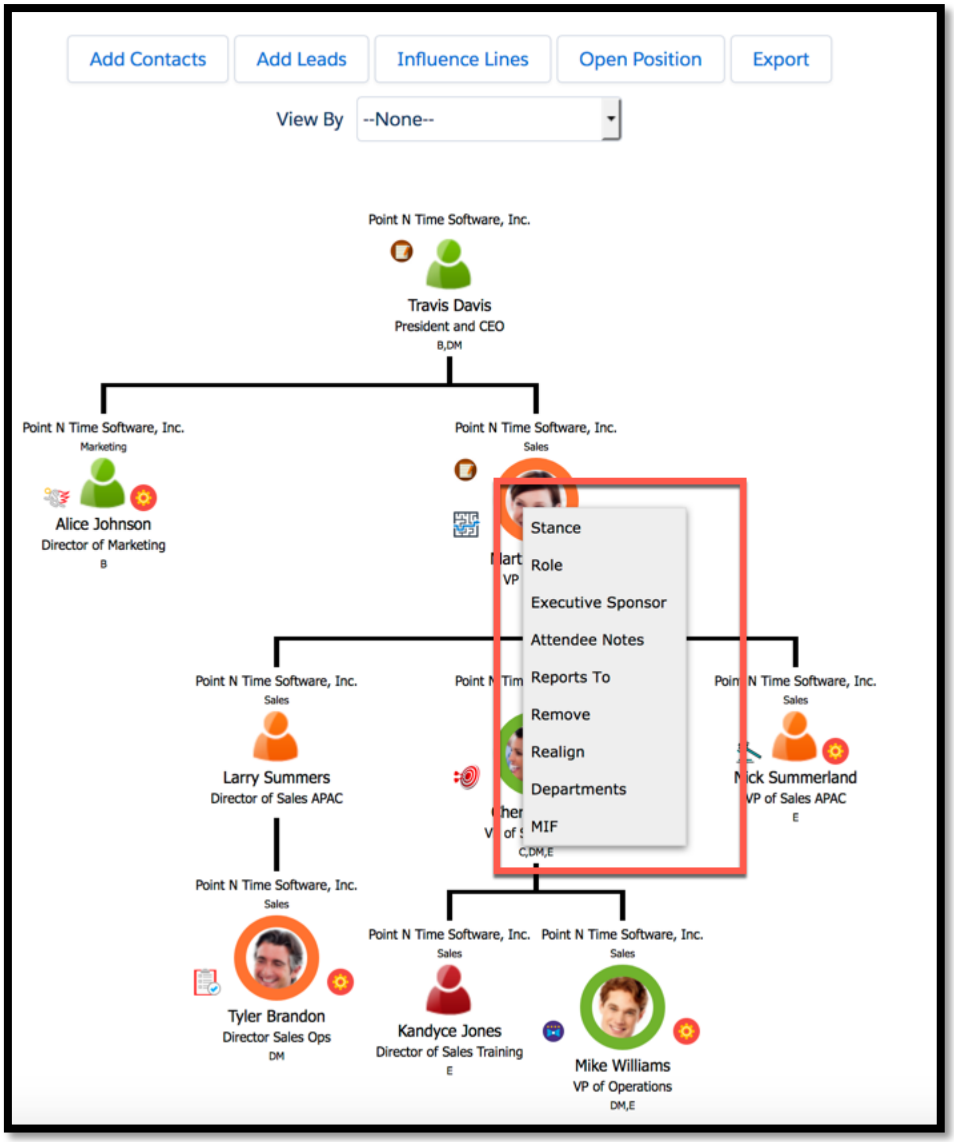


Figure 31

Influencer Lines Mode

Line Mode allows you to build lines of relationships between contacts (figure 32).

Note: The org map can't be collapsed in Influence Line Mode. When an influence line is created between two contacts, in the event the contact is re-aligned the influence line will be maintained between the contacts.

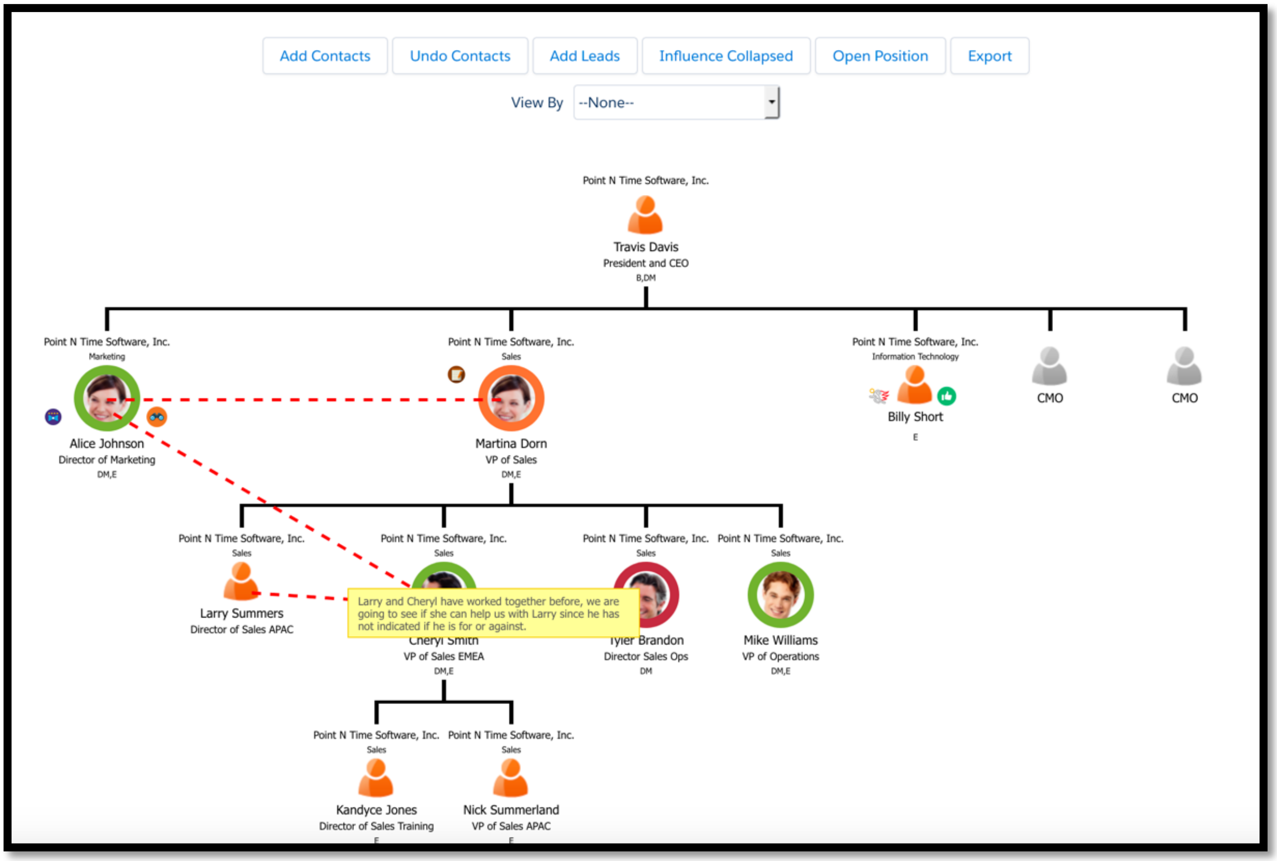


Figure 32

24. Verify you're in Influence Lines Mode, (to verify the button will display Switch to Influence Collapsed) mouse click on the first contact, then mouse click on the second contact. This will draw a dashed line connecting them.
25. Hover of click on the line to add information why the relationship (figure 33). Mouse click to review the information regarding the connection.

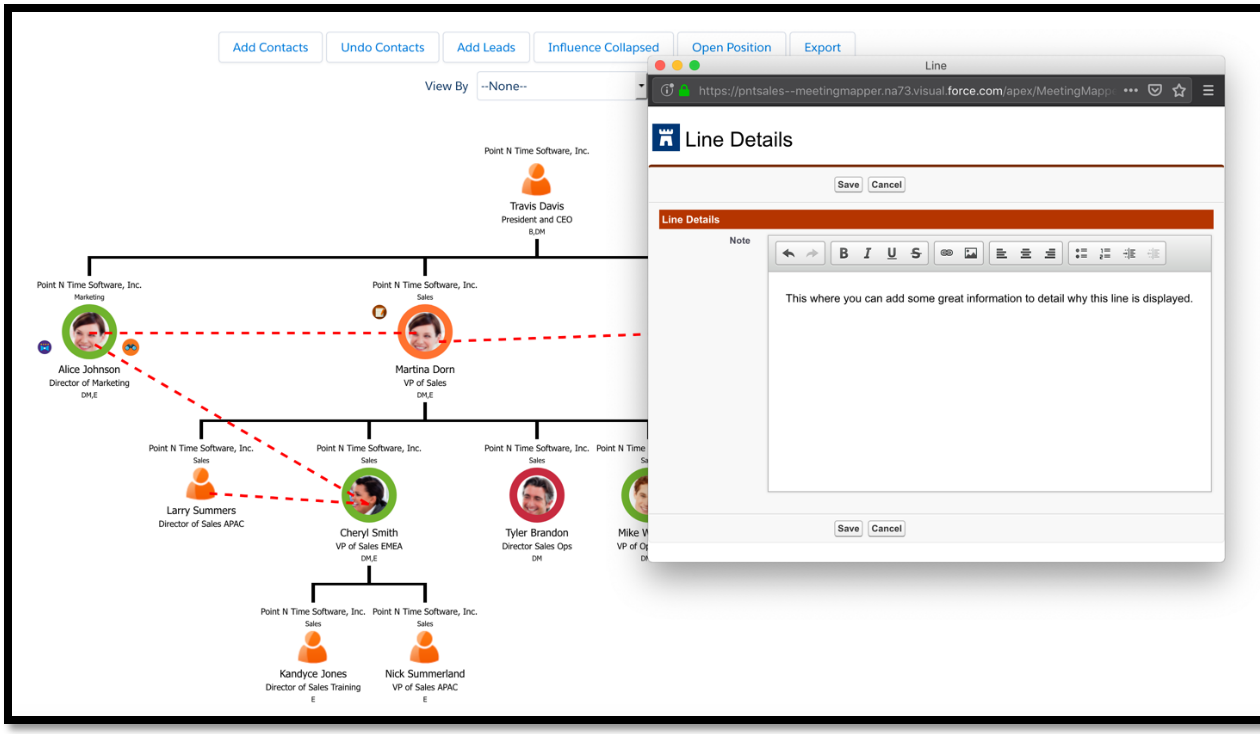


Figure 33

26. To delete the relationship, right mouse click on the line and click Ok (figure 34).

Figure 34

Note: The Org Map as the ability to create an org map based on Leads. However, a lead can't report to a contact or a contact report to a lead. The steps and procedures are the same for lead and contacts.

Add Open Position

Open Position allows you to add a 'Placeholder' for a position in the org map. For example, you know there is a VP of HR but you don't know or have identified who it is. However, you do want to display the position.

27. Click on Open Position (figure 35). Enter in the position title (figure 35) and click Save.

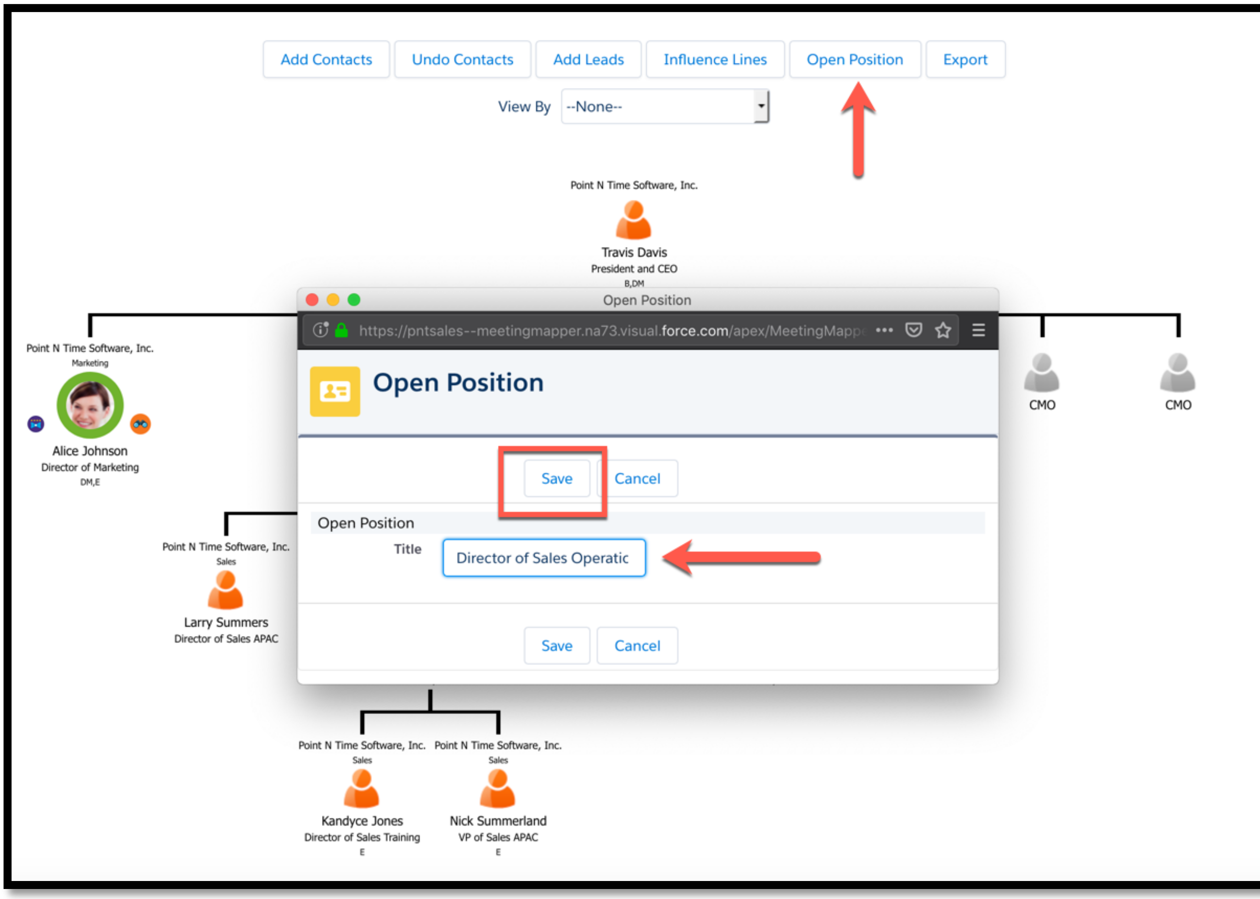


Figure 35

Open Position Rules:

- A contact cannot report to an Open Position
- An Open Position can report to a contact
- An Open Position can report to another Open Position (Figure 36)

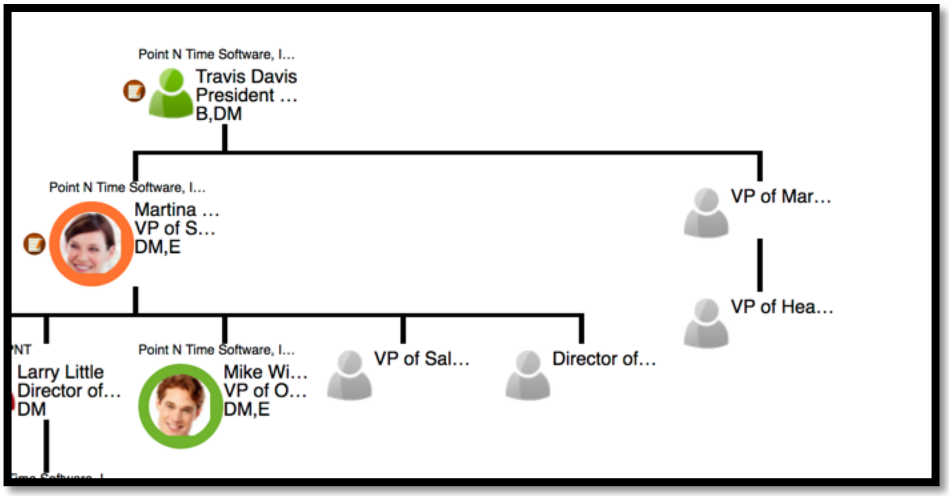


Figure 36

28. The open position will display on the left side of the org map, drag the icon over the contact it reports to (figure 37).

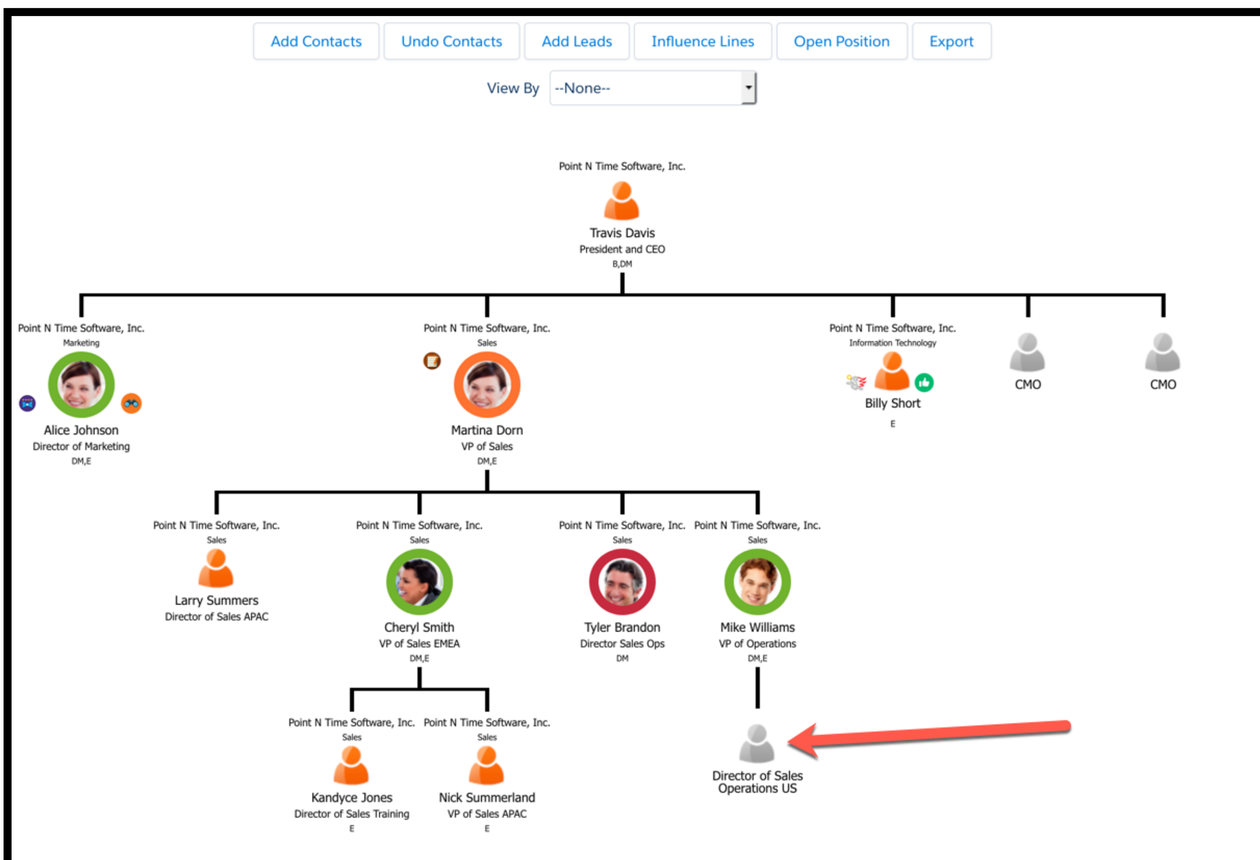


Figure 37

Export the Org Map

29. To export the Org Map, click on Export (figure 38).

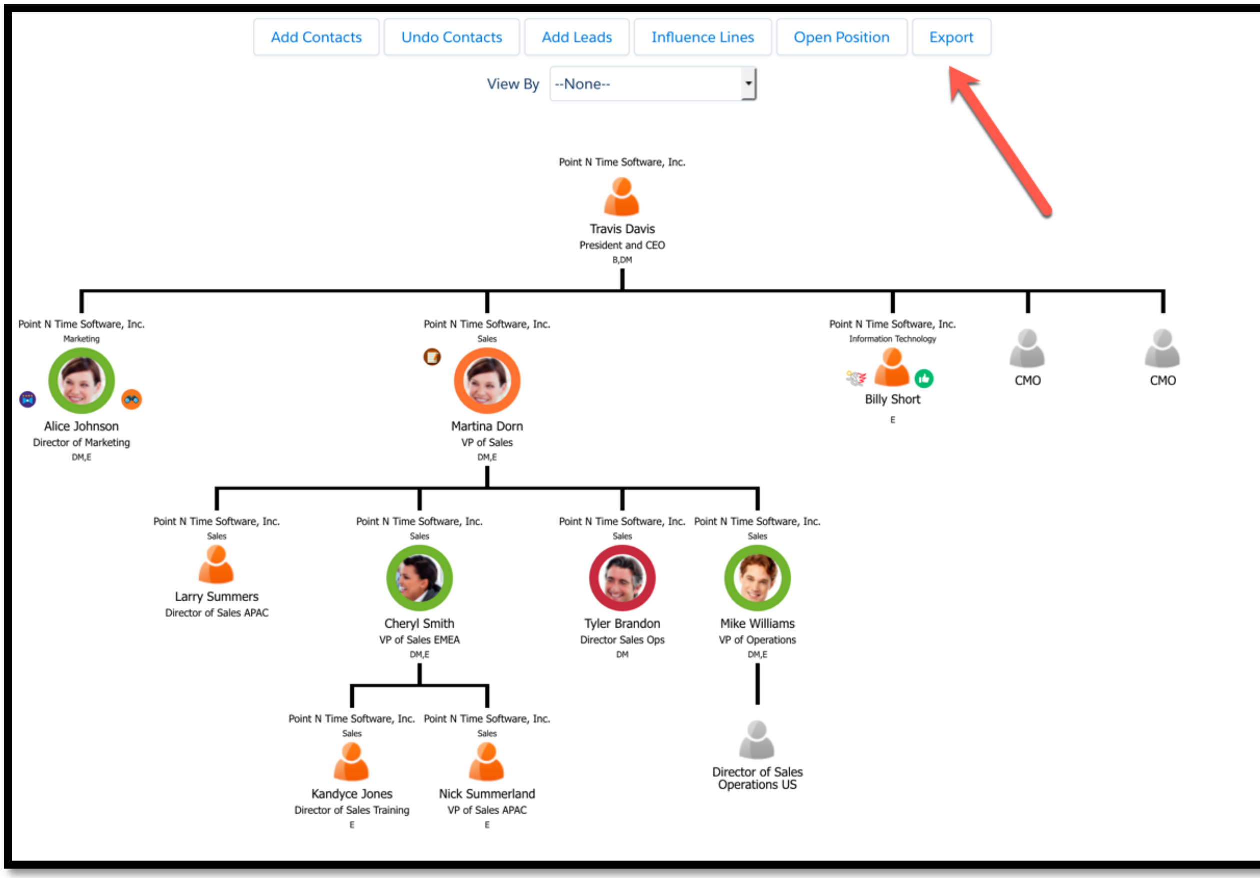


Figure 38

The following page will display, right mouse click on the page select 'Save Image As… '(figure 39). Give it a name and click Save (figure 40).

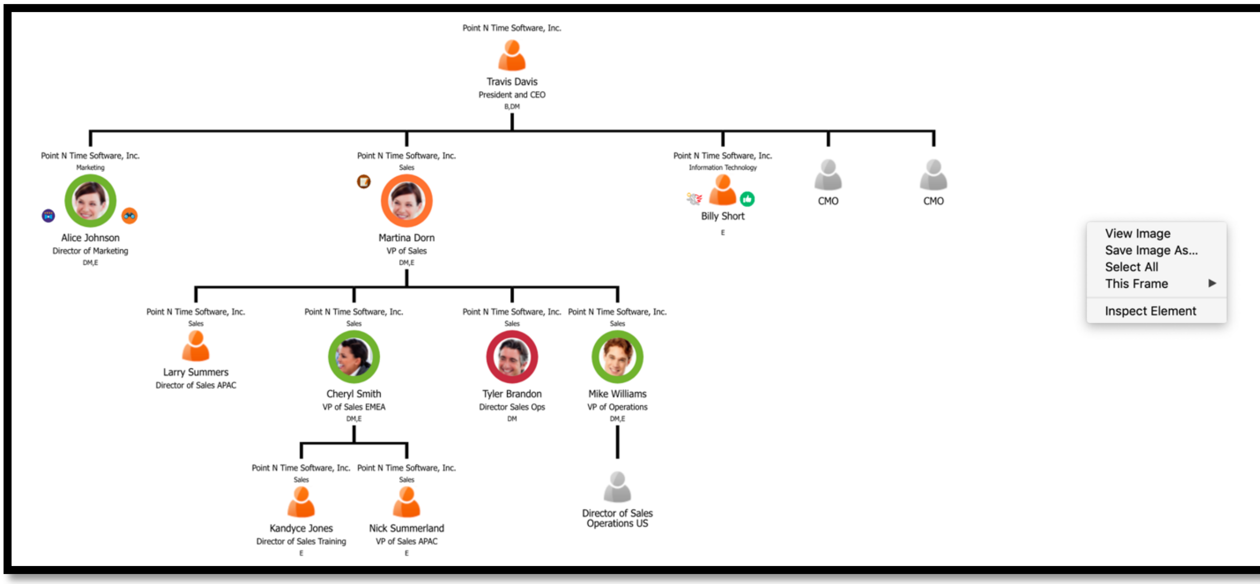


Figure 39

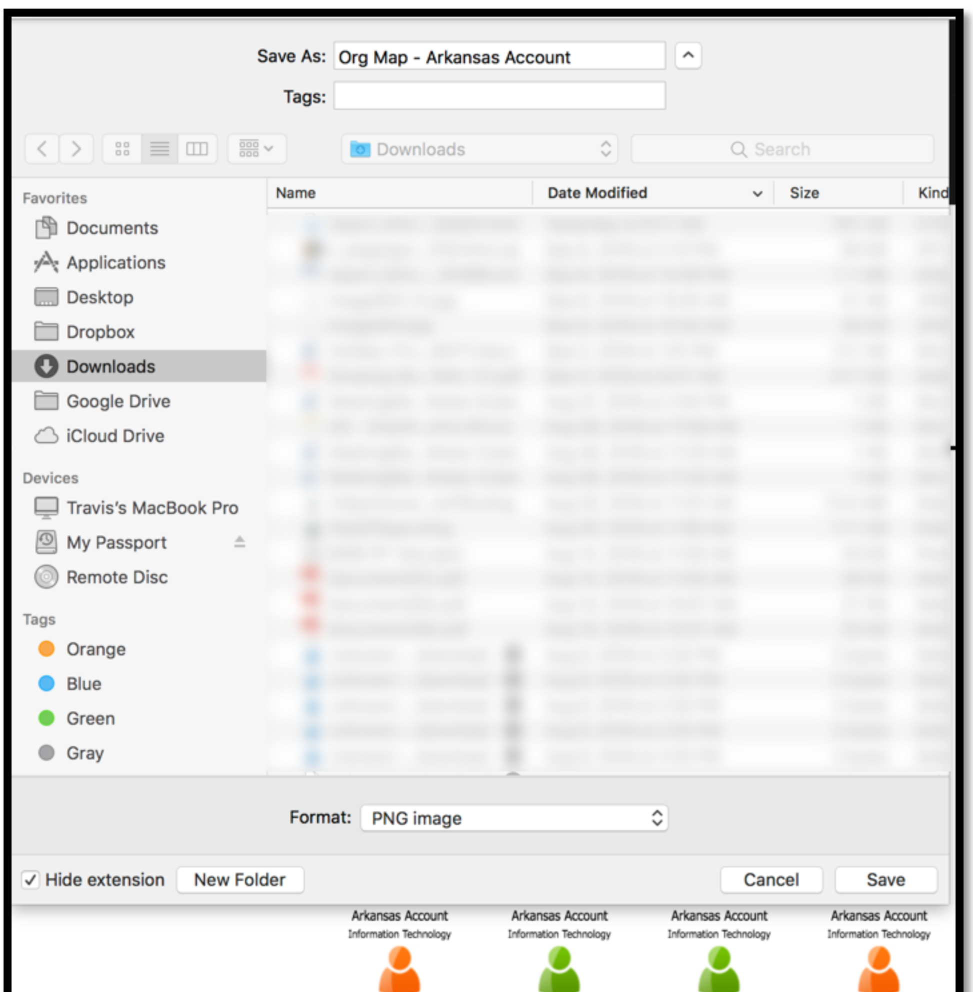


Figure 40

Display by Department

Note: Ensure contacts have their Department selected in their contact record (figure 41). If not, contact your Salesforce Administrator.

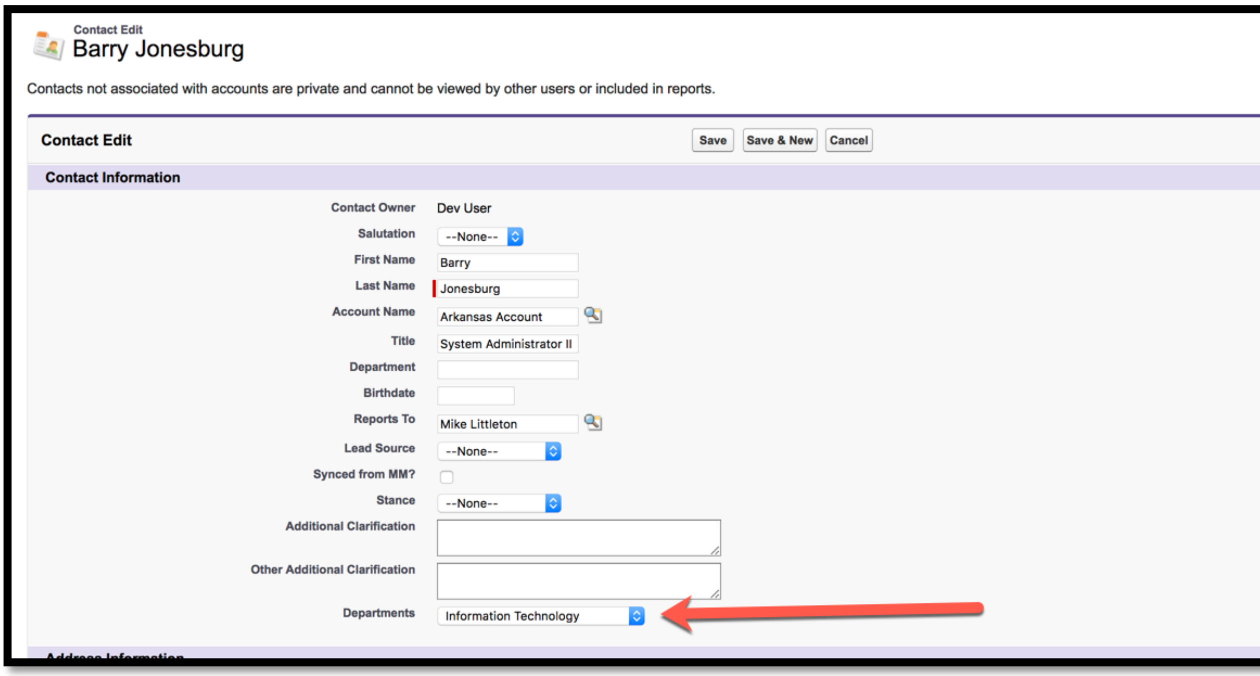


Figure 41

30. To display an Org Map for a department, click View By: on dropdown 'None' to display the list of departments (figure 42).

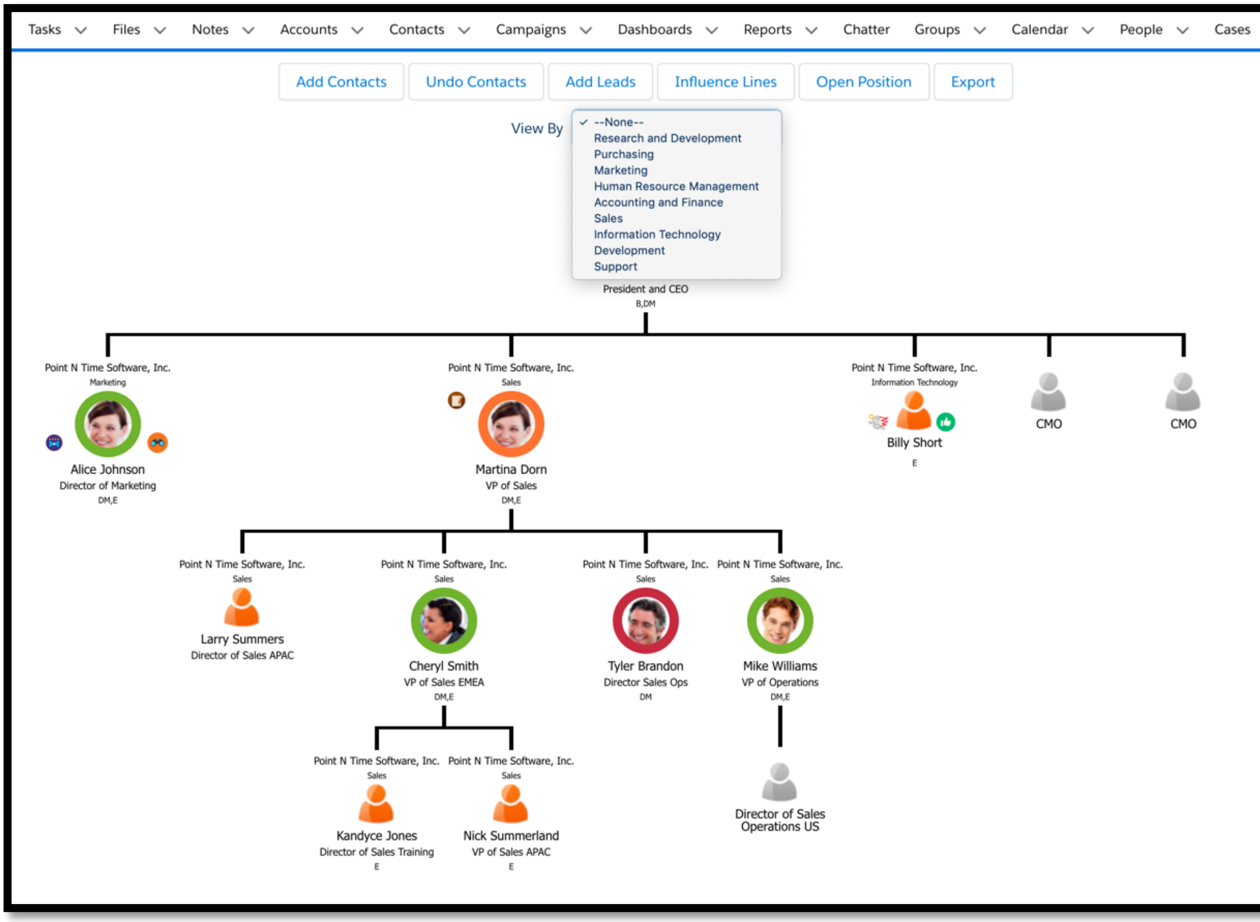


Figure 42

31. Select the department from the list (figure 43).

In this example, Sales is selected (figure 43). Only the Org Map for Information Technology is displayed. This view all the capabilities of the full view. To return to full view, click on the dropdown and select None.

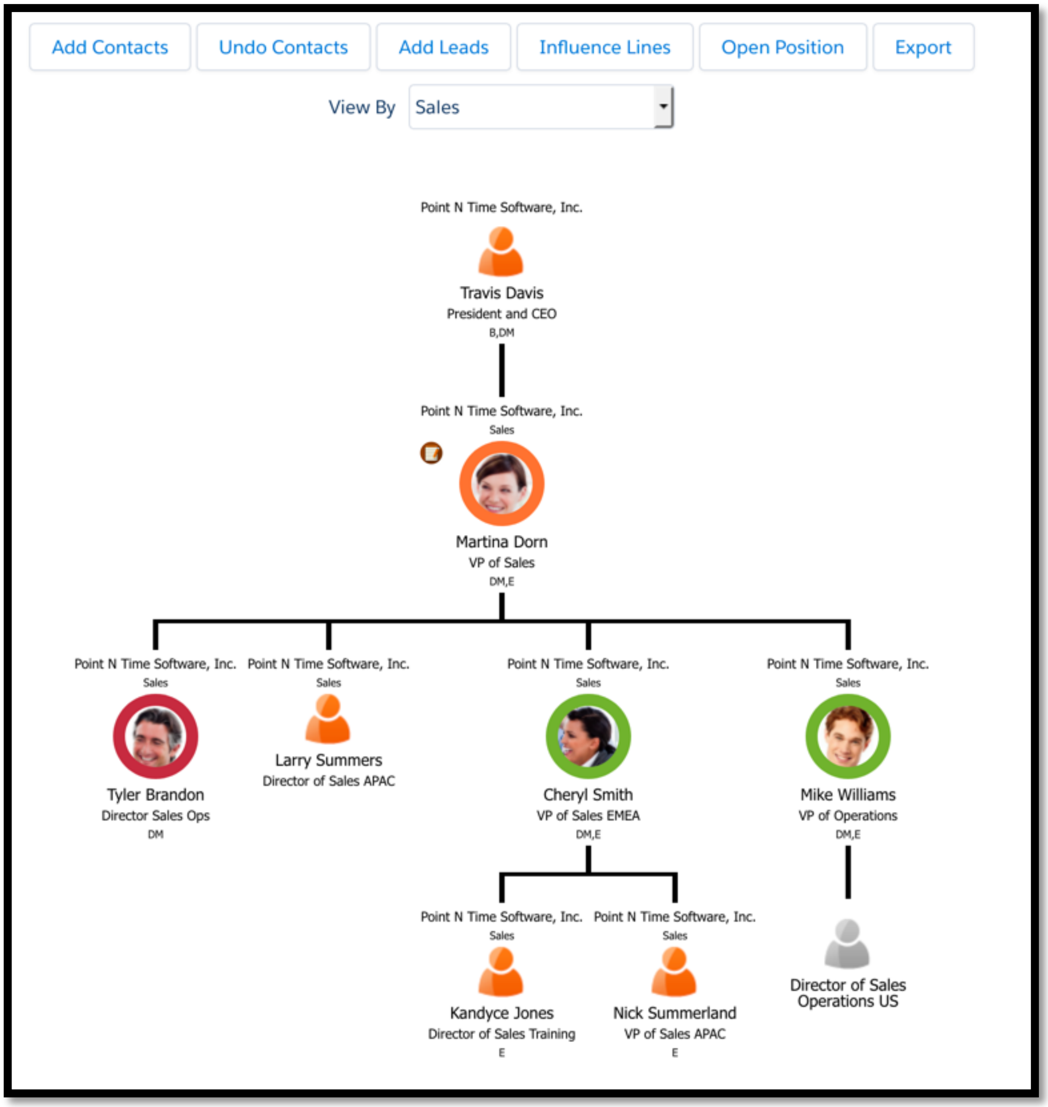


Figure 43

Revenue Trending

The revenue trending shown on this page provides a quick view into historical, current revenue and pipeline information. These charts are populated from information in opportunities based on the stage and close date (figure 44).

What is the Value to Me and My Team?

Understanding historical, current and future revenues gives you the information to determine if the account is growing, steady state or in decline. This is a great barometer for an account.

Revenue Trending consists of six components:

- Account Overview
  - Open (Pipeline)
  - Closed Won
  - Closed Lost
- Products/Services Won
- Products/Services Lost
- Products/Services in Play (Open Opportunities)
- Past, Present and Potential Revenue
- Lost Revenue (Previous, Last and Current Year)

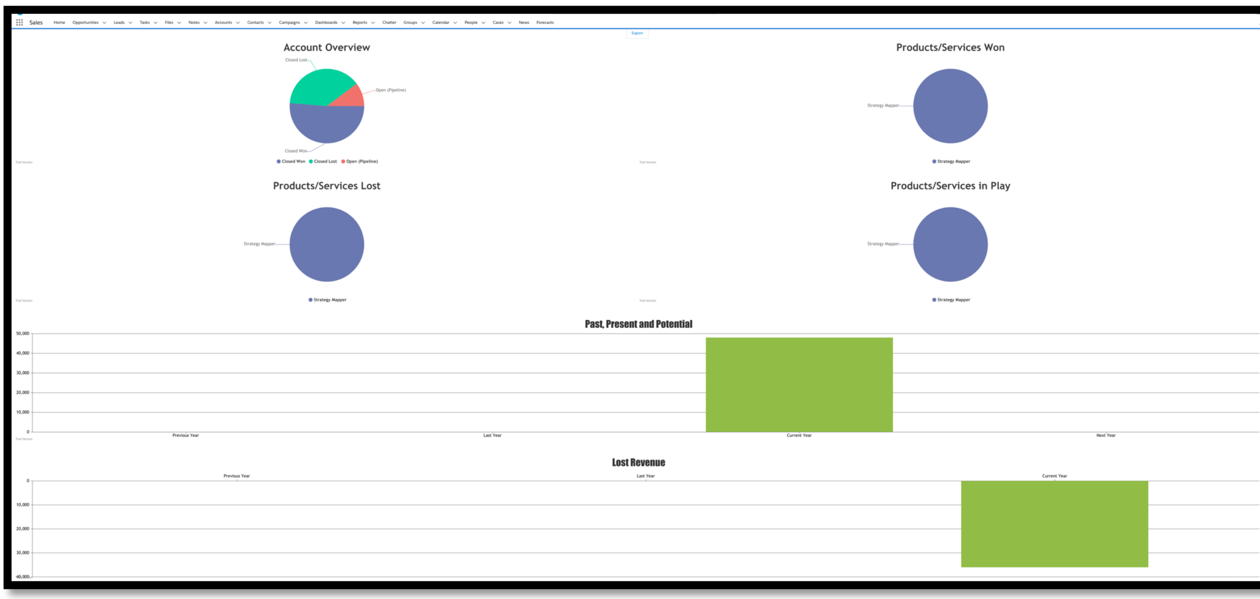


Figure 44

Product Matrix

The product matrix displays current information on product placement in the account (figure 45). This report is generated by information in the product catalog, opportunities (won and lost), and customer initiatives. The products displayed are only active products in the product catalog.

What is the Value to Me and My Team?

The Product Matrix gives you a view into how your products/services are positioned in the account. This information allows you and your team to build strategy to place products or solutions in the account (white space).

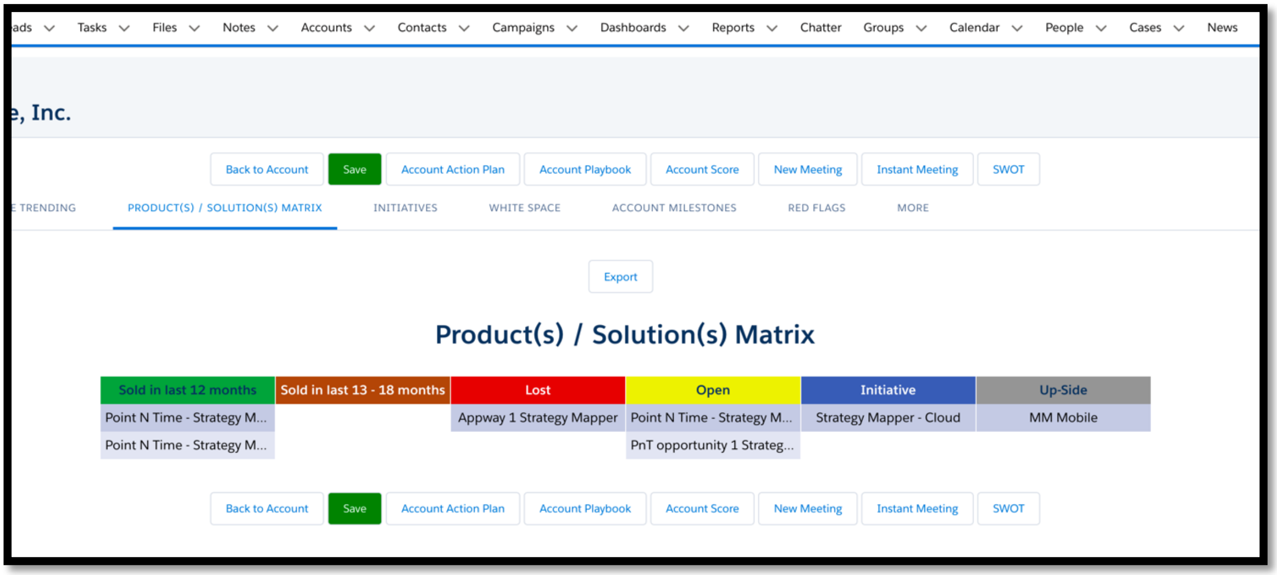


Figure 45

Initiatives

Initiatives provide you a way to track pre-pipeline revenue, without impacting your pipeline.

What is the Value to Me and My Team?

Not 100% relying on marketing to build your pipeline is critical for success. You and your team are the closest to the customers. Understanding how you can support their goal and objectives with your products and solutions, ensure you are building future pipeline. It also puts you one step ahead of the competition.

32. Click on New (figure 46), select from the dropdown the customer initiative (figure 47).

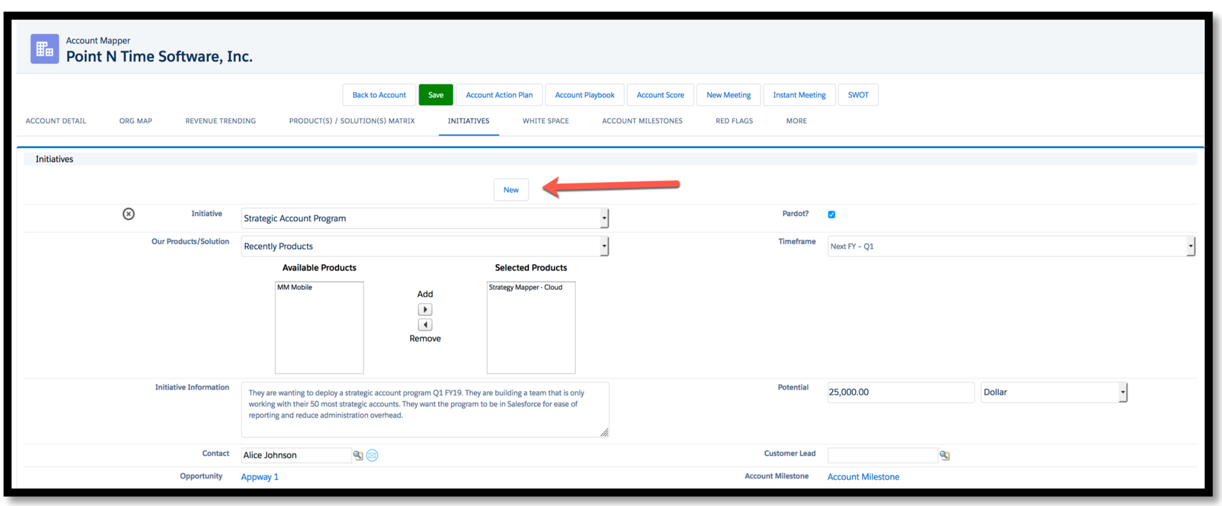


Figure 46

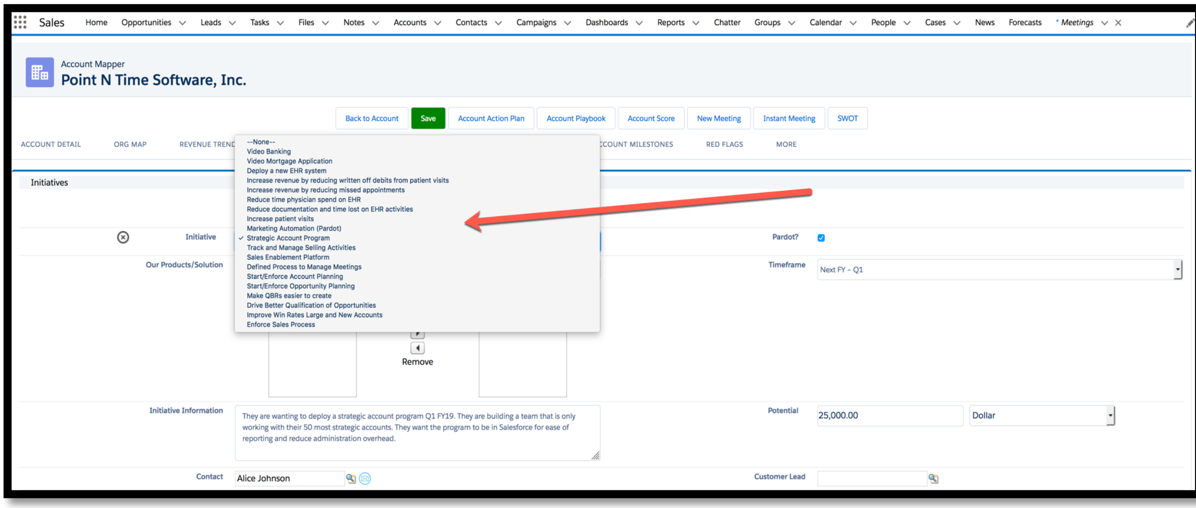


Figure 47

33. Once the initiative has been selected, select the product(s) or solution that best supports the initiative from either Recently Products, Search Products, Not Listed (figure 48).

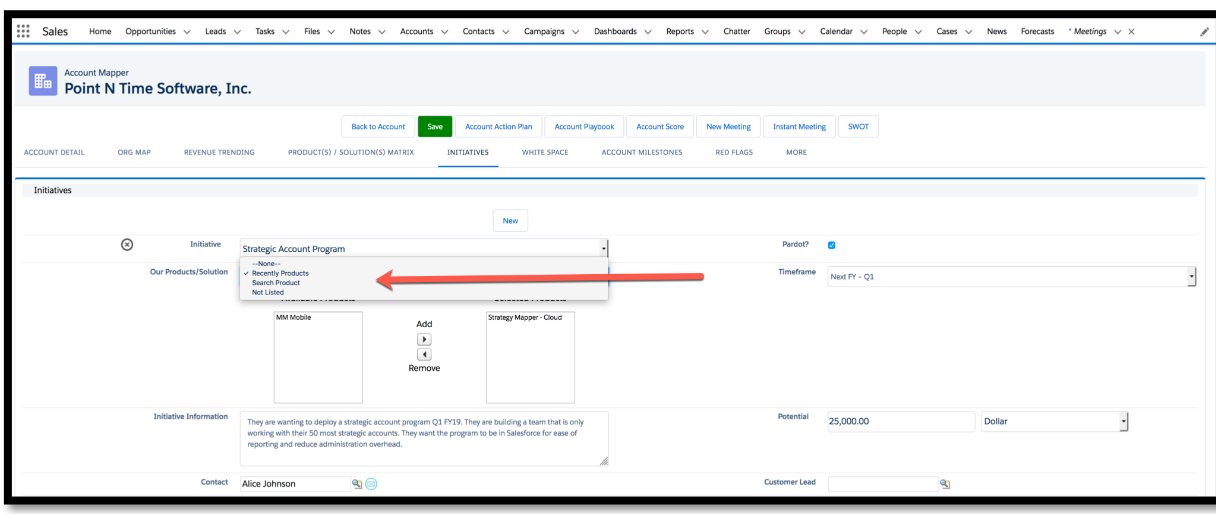


Figure 48

Note: In this example Search Products is selected. Based on my input a list of products from the product catalog will display (figure 49).

Recently Products – will display the products that have been the most recently selected
Search Products – allow you to search by name or from a list (figure 49). Enter in the name of the product or just click on the search icon. Then select the product.

Not Listed – select this if there are no products that currently meet the initiatives requirements. Add in the product information in Additional Details Section.

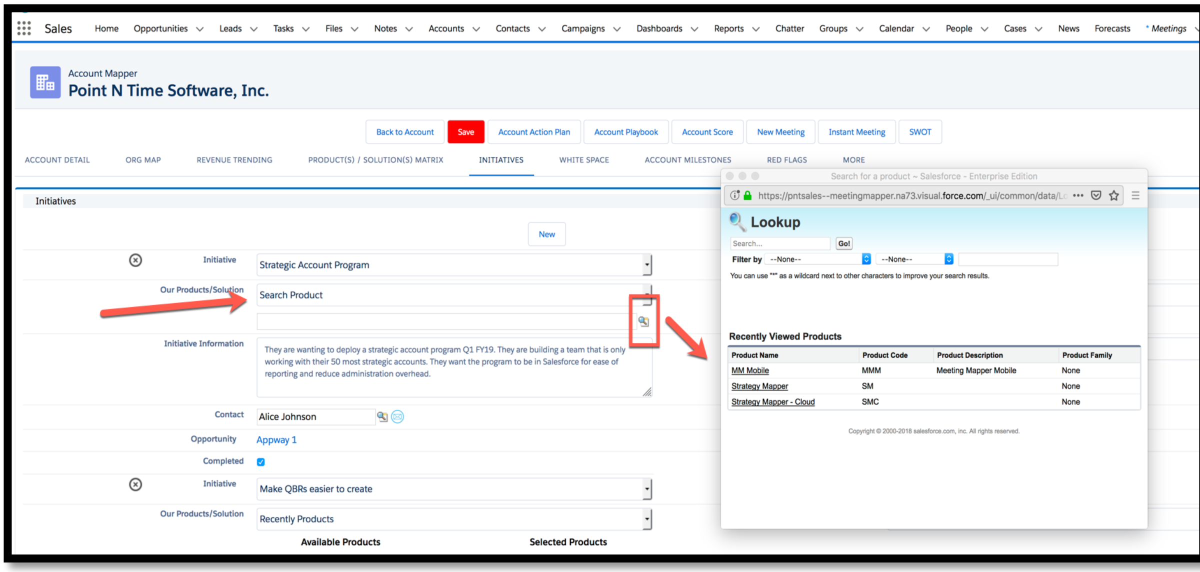


Figure 49

34. Click on the product, add any additional information regarding the initiative.
35. Add a customer contact to the initiative, click on the search icon (figure 50), select the contact from the list.

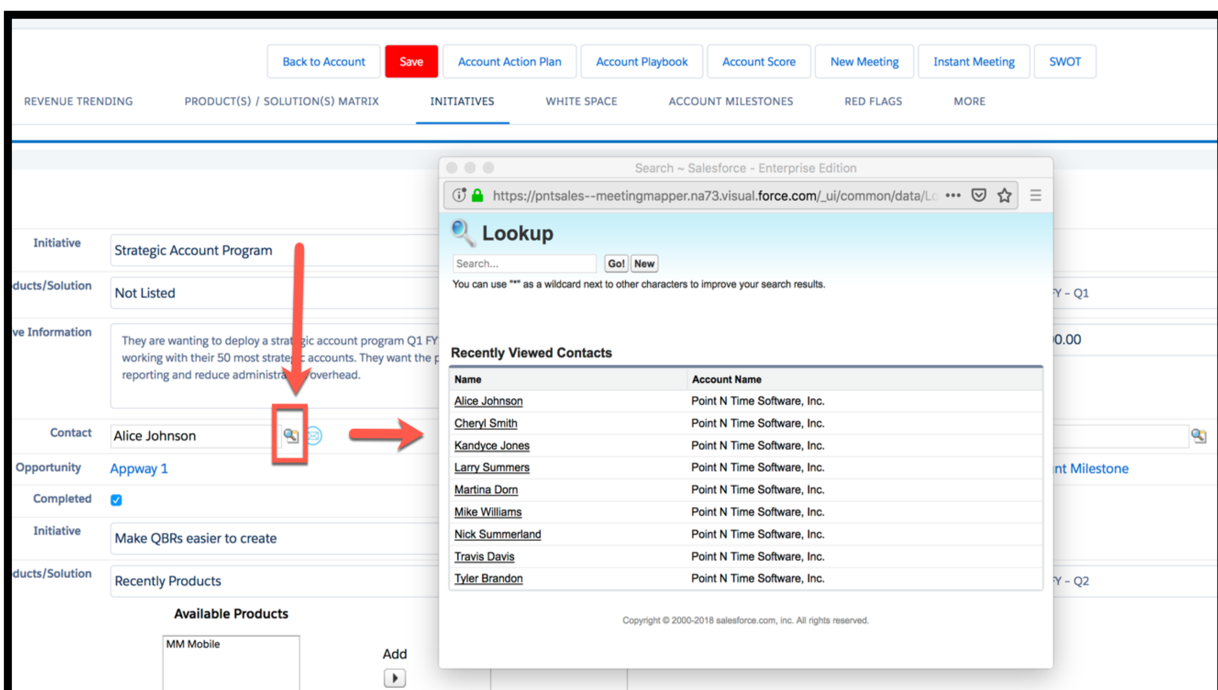


Figure 50

Send an Email to Initiative Contact

You can send an email the contact linked to the initiative by clicking on the email icon (figure 51). Add in your meeting test, the subject line for the email is auto-populated with the initiative name.

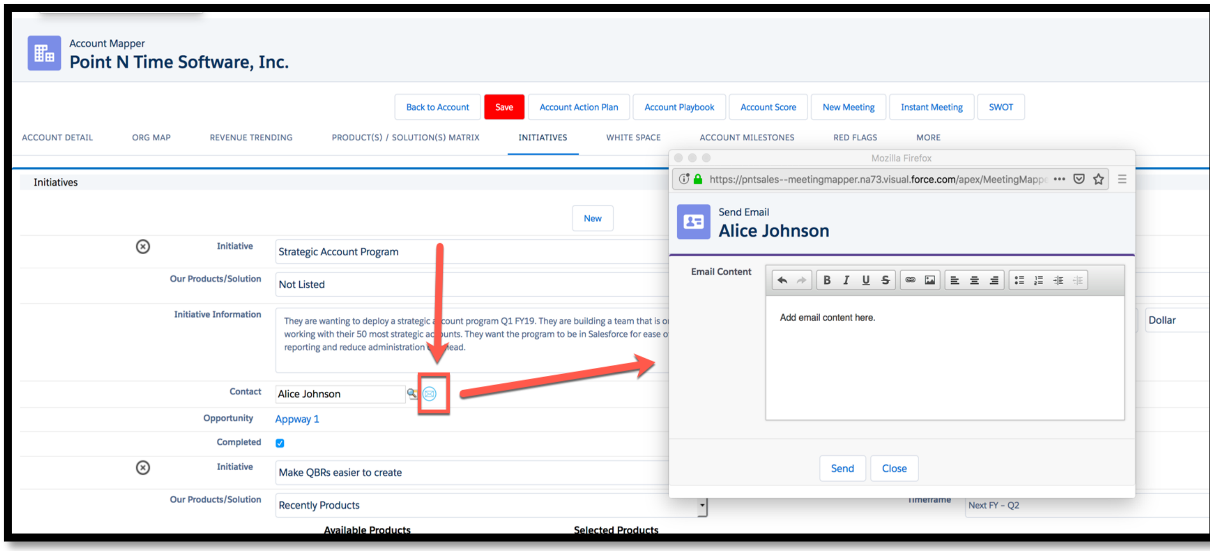


Figure 51

Note: The contact must be from the account, if you select a contact not from the account, it will not be saved.

36. Select the timeframe the initiative will start (figure 52).

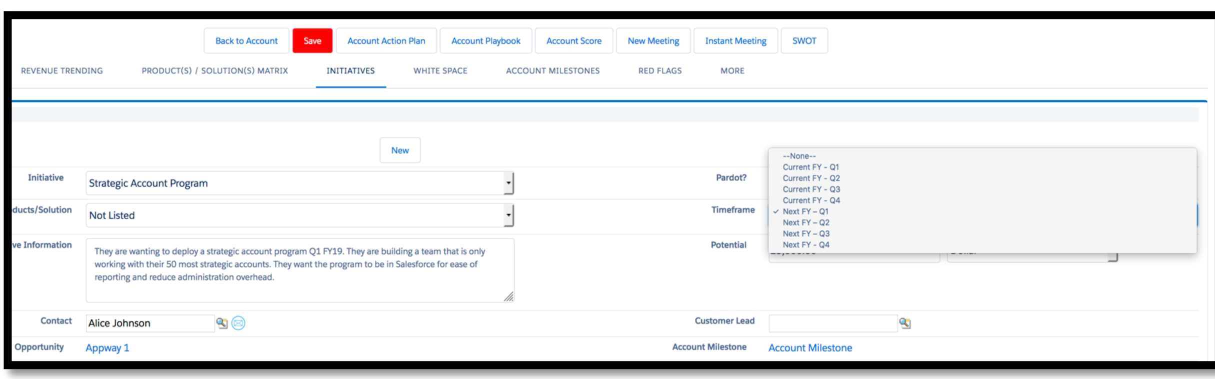


Figure 52

37. Enter in a potential amount (figure 53). Click Save.

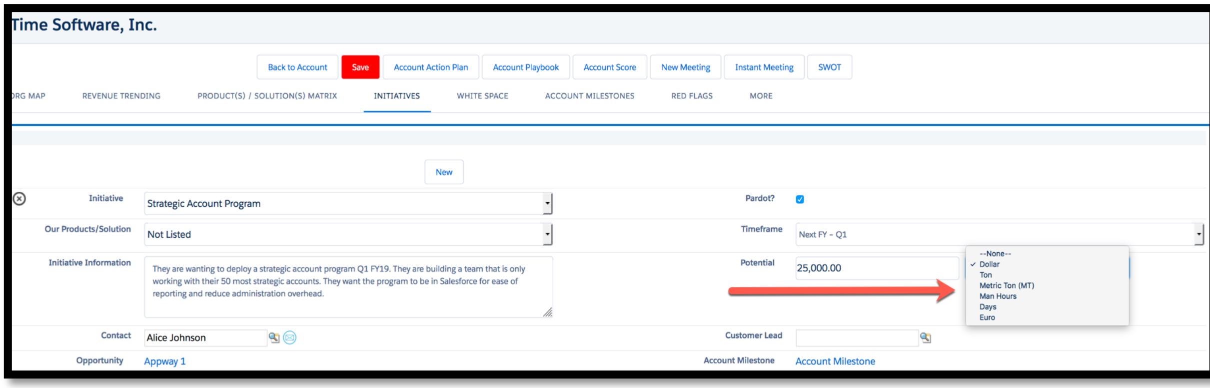


Figure 53

Create an Opportunity from a Customer Initiative

38. Click on Create Opportunity (figure 54). Complete all the required fields. This will create an opportunity based on the information in the New Opportunity page. It will not bring any information over from the initiative.

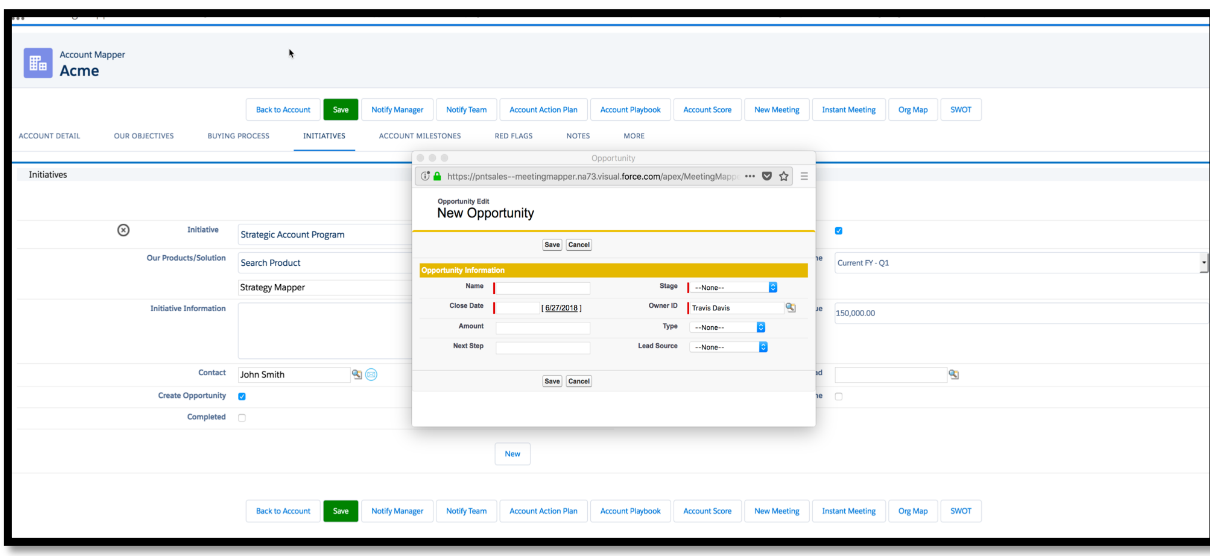


Figure 54

Best Practice
Always create the opportunity from a milestone, this ensures it is tracked correctly in the dashboards and charts.

Create an Account Milestone from a Customer Initiative

39. Click on Create Account Milestone (figure 55). Selected information will create the account milestone.

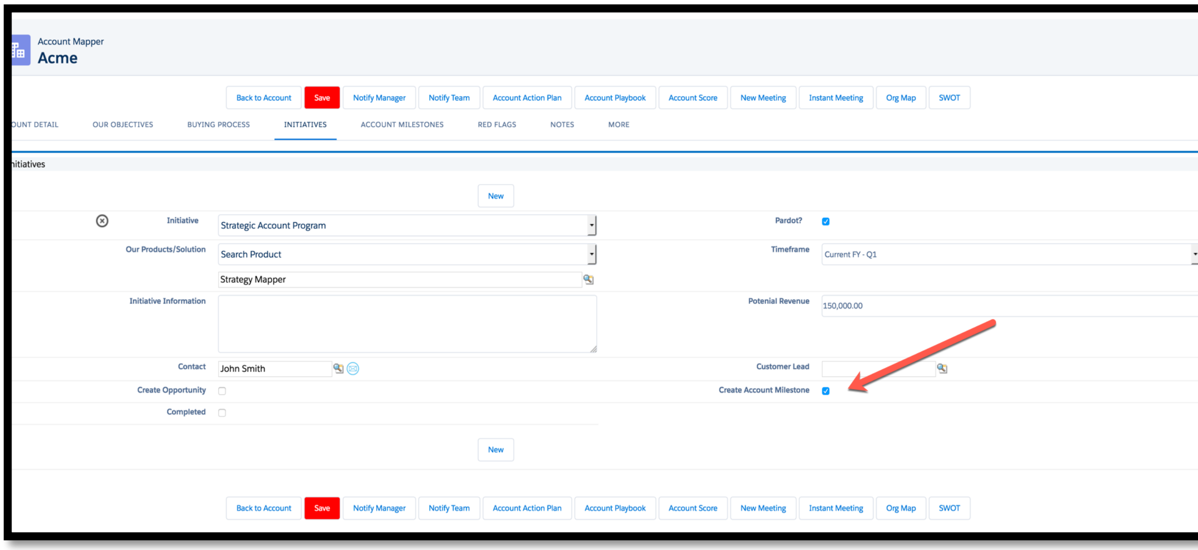


Figure 55

Green Field / White Space

Depending on the customer type in Salesforce, the title will be either Green Field or White Space (figure 56).

Green Field – a potential customer that you have not sold into
White Space – a current customer that you have sold into

When the initiatives are converted to opportunities, they will be removed from this chart.

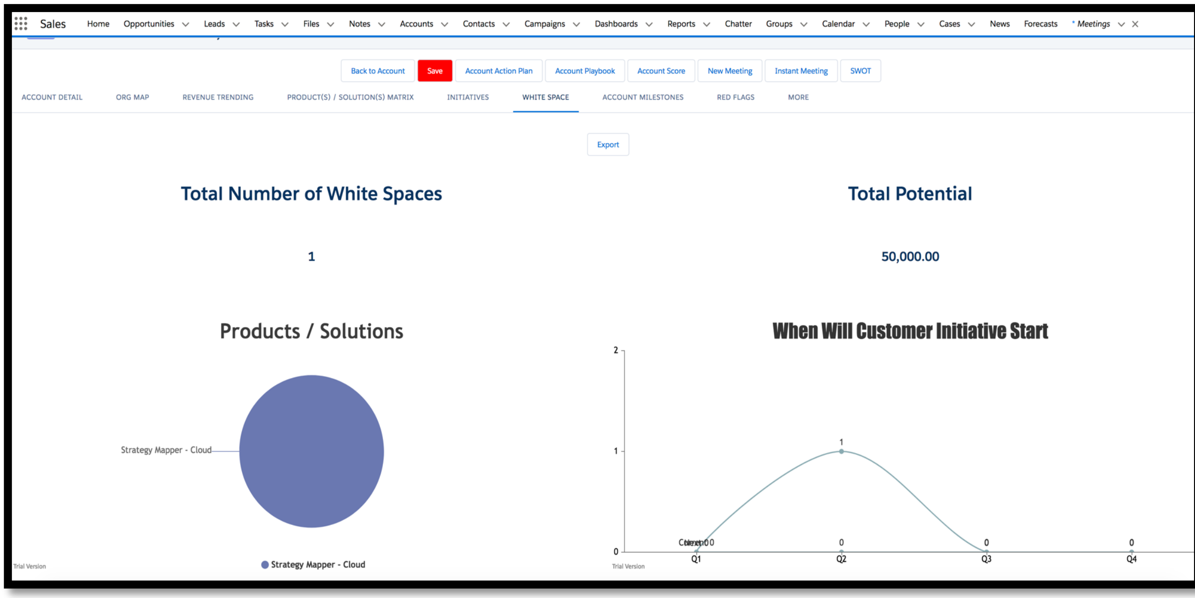


Figure 56

Account Milestones

Account Milestones allow you to plan, schedule and assign critical ‘To-Dos/Tactics’ to yourself or team members. This ensures nothing is falling through the cracks.

What is the Value to Me and My Team?

Planning out future important activities ensures you and your team are managing the customer and leaving nothing to chance. Milestones also allow you to assign them to other team members that maybe better suited to accomplish the Milestone.

Note: Milestones are tracked and are a component of the account score.

Best Practice
Plan out all your known activates for the next 6 months for your accounts. Assign them to the correct team member.

Milestones can be created two methods, either way the milestone is created they have the same actions.

- Milestones can be auto-created from Customer Initiatives, discussed in the previous section. When a milestone is created by a Customer Initiative, the Customer Initiative check box will be checked (figure 57).

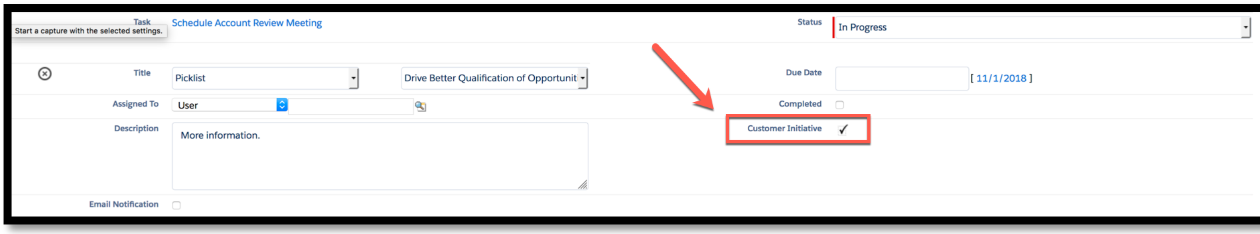


Figure 57

Note: Based on the timeframe of the initiative, the due date for the milestone is the first day of the quarter (figure 58).

- By clicking on New.

In this example adding a New milestone will be detailed.

40. In Account Milestones, click New (figure 58). Once you click new a blank milestone will be created.

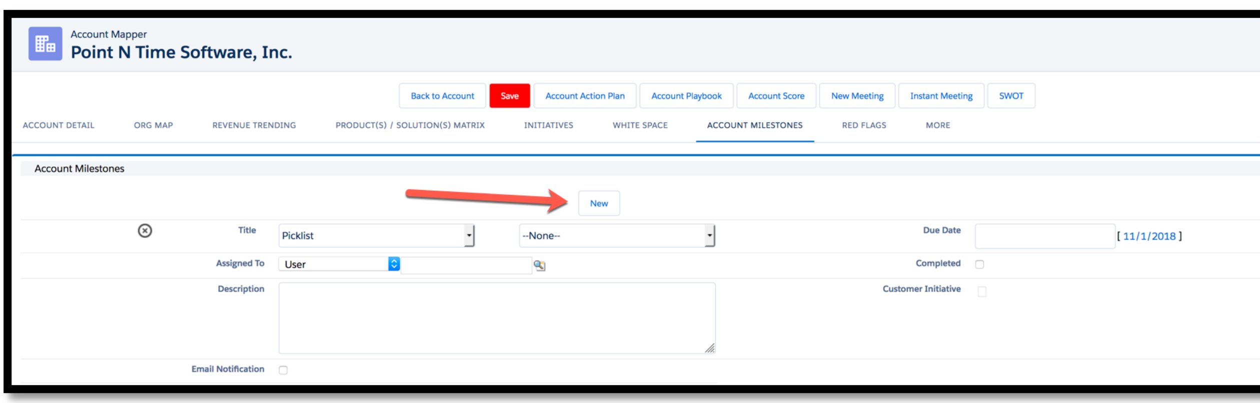


Figure 58

41. In the Title section (figure 59), select Picklist this will display list of pre-configured milestones (figure 60) or select Text and enter in your own milestone (figure 61).

Note: The default value is Picklist.

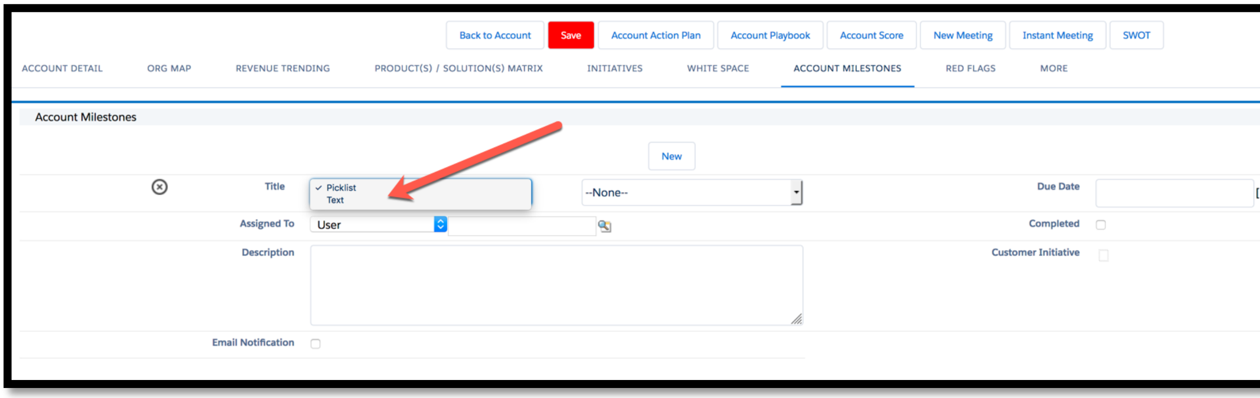


Figure 59

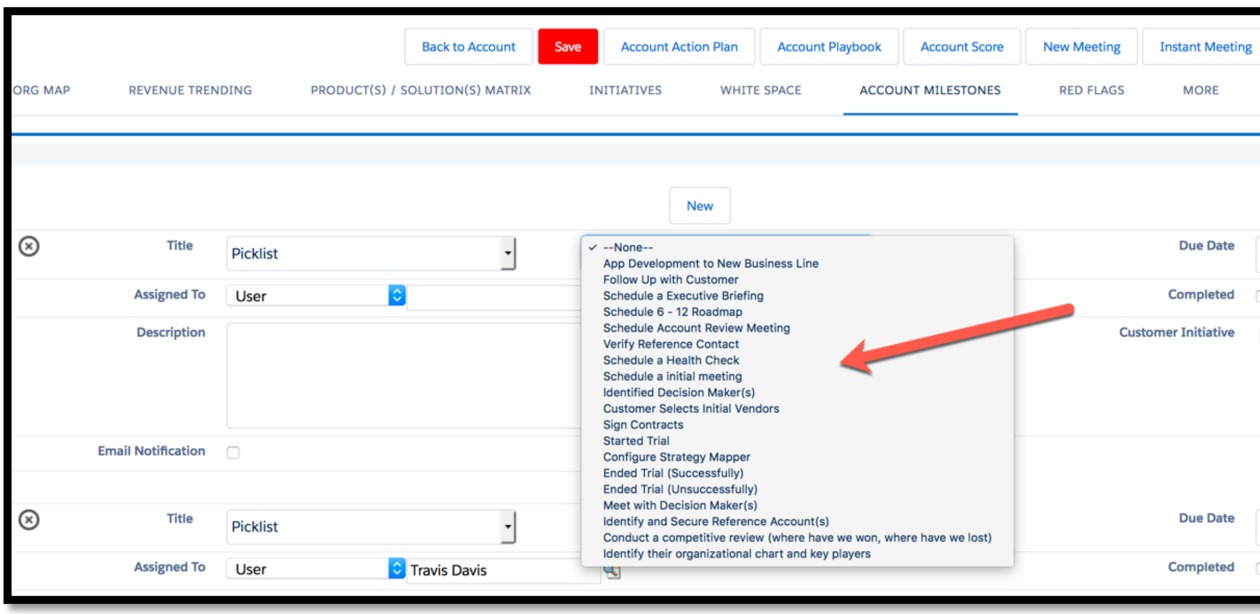


Figure 60

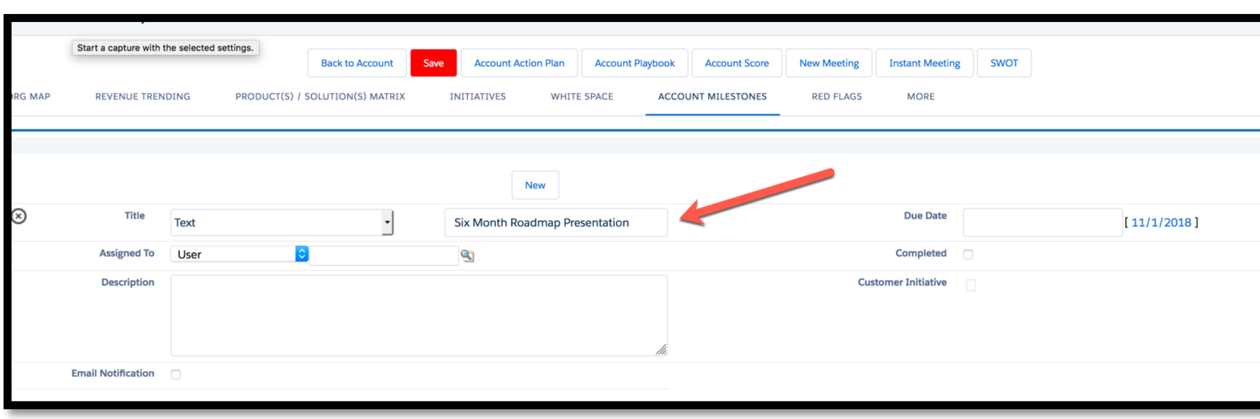


Figure 61

42. In the description field add any additional information to provide context or more details for the milestone the assigned user will need to successfully complete the milestone (figure 62).

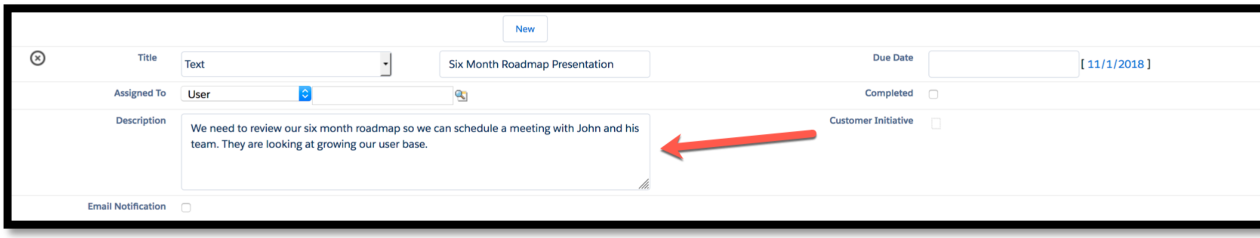


Figure 62

43. To assign to another team member, click on the search icon and select the user (figure 63).

Best Practice
Always assign a user to the milestone, in the event you don't know the user yet, assign to yourself. You can always resign the milestone at a later time. This will ensure the task is created and assigned to someone for follow up and completion.

Note: When you assign a milestone to another team member, you will get notified when it's overdue or completed.

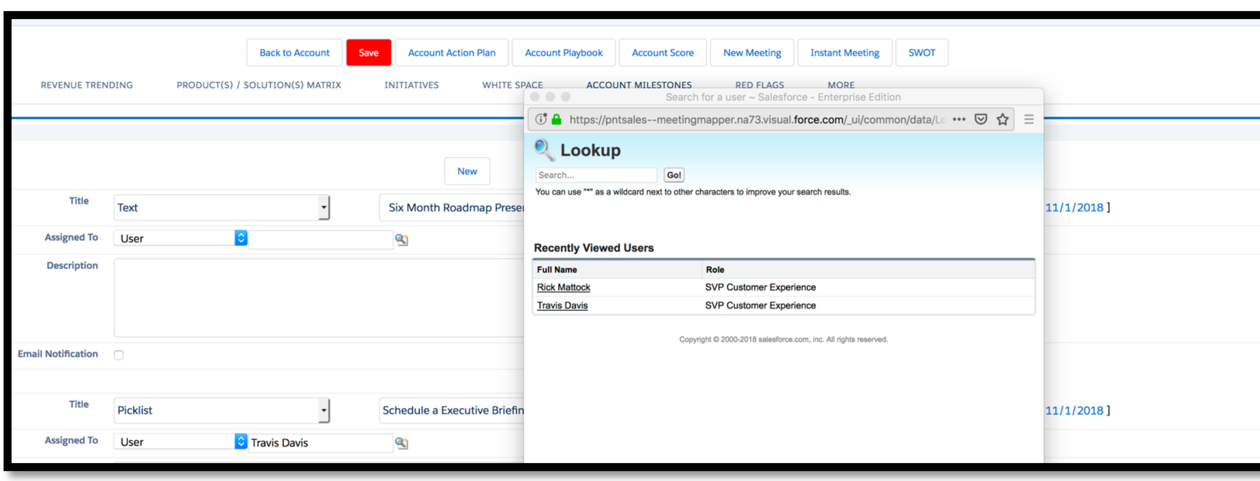


Figure 63

44. To send an email to the 'Assigned To', click on Email Notification. The user will receive an email with a link back into Salesforce for the task (figure 64).

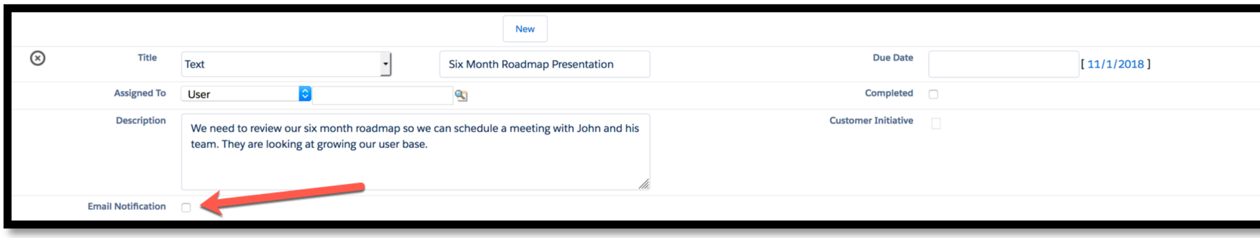


Figure 64

45. Select a Due Date for the Task (figure 65).

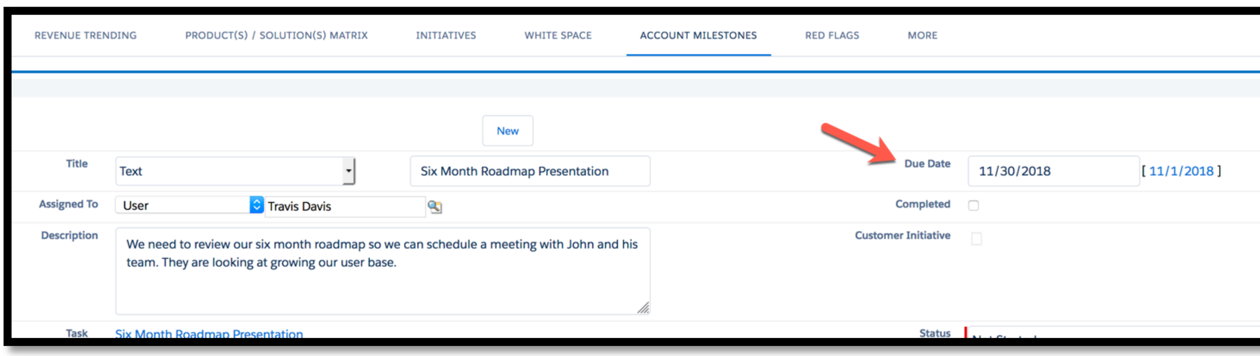


Figure 65

46. Click Save to send the email and create the task. Once it's saved a link to the task is available on the milestone (figure 66). In addition, the Status dropdown is displayed, this allows you to see the current status and update the status in the Account Milestone itself. If the Account Milestone status is updated here, the task is also updated.

Note: If the Status dropdown is not displayed, ensure the Milestones is assigned to a user.

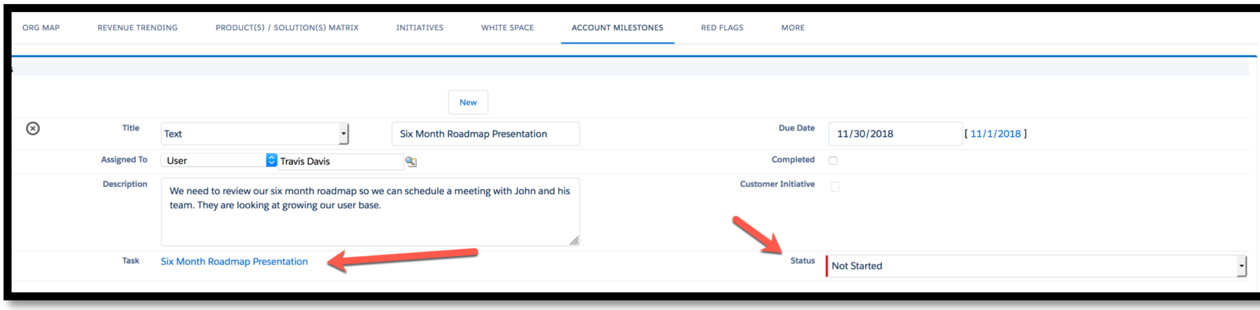


Figure 66

Note: Here is an example of the task created (figure 67).

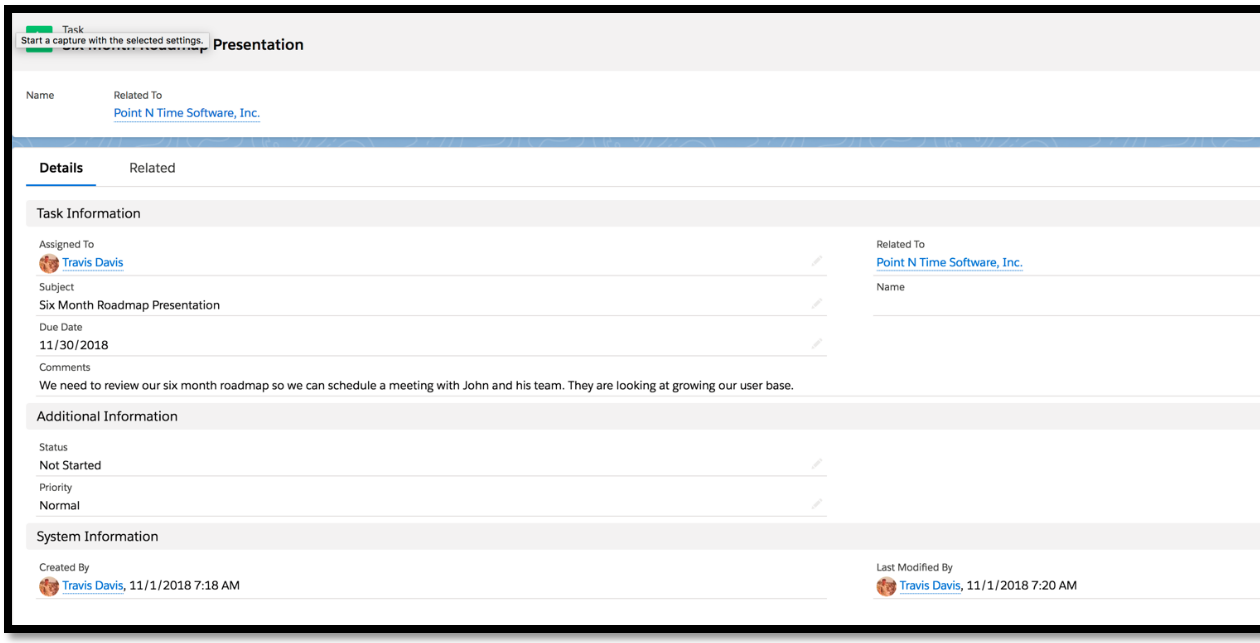


Figure 67

Red Flags (Risks)

Red Flags provide a way to identify things that can derail or jeopardize success in the account.

What is the Value to Me and My Team?

Planning for the unknown is key to driving customer success. Red Flags allow you to identify the potential problem and create your mitigation plan. They are also great when meeting with your team or mangers and so everyone can ask "Did you think about this, what happens if it happens"?

Best Practice
Review the Red Flags with team members and managers. They can provide great feedback and assist with the mitigation plans. Also, it's important to ask other team members if they have encountered any Red Flags, you are not aware of.

47. Click on Red Flags, click New, select the Red Flag from the dropdown (Figure 68).

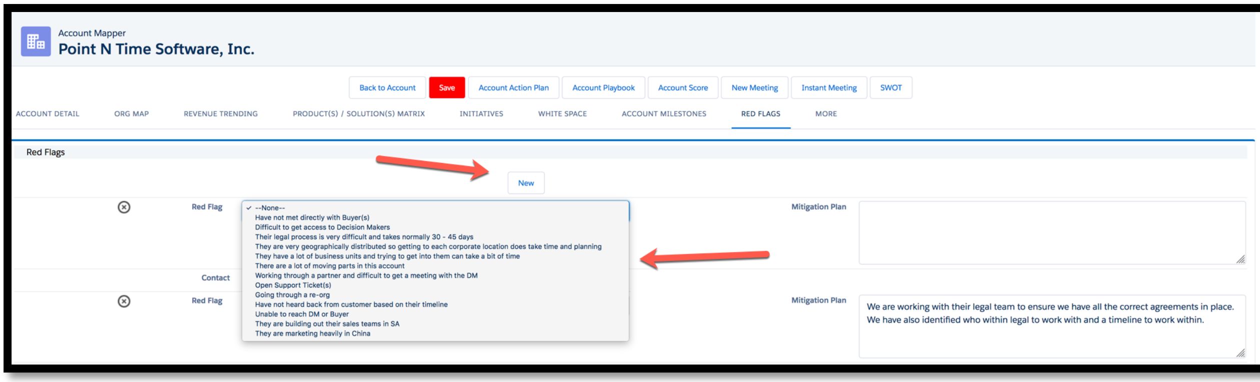


Figure 68

Note: Red Flags identified at the account will automatically be added to all opportunity plans.

---

48. After you have selected a Red Flag, you can now enter in your Mitigation Plan for the Red Flag (figure 69).

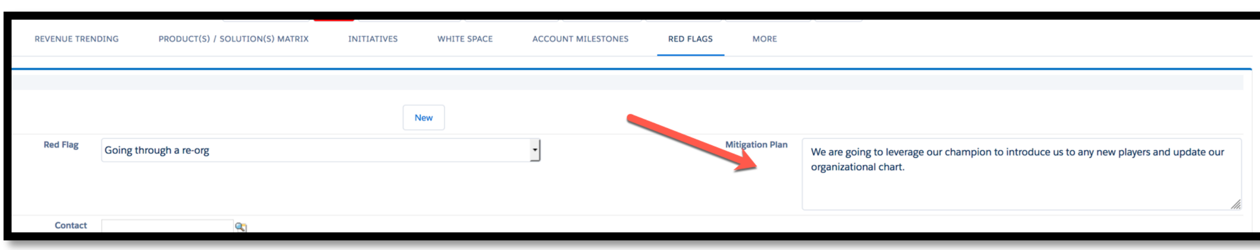


Figure 69

Note: Red Flags are a component of the account score, not having a mitigation effects the score.

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49. Select the contact related to this Red Flag, this could be the contact that brought to your attention or the contact the Red Flag is associated (figure 70).

50. Click Save when completed.

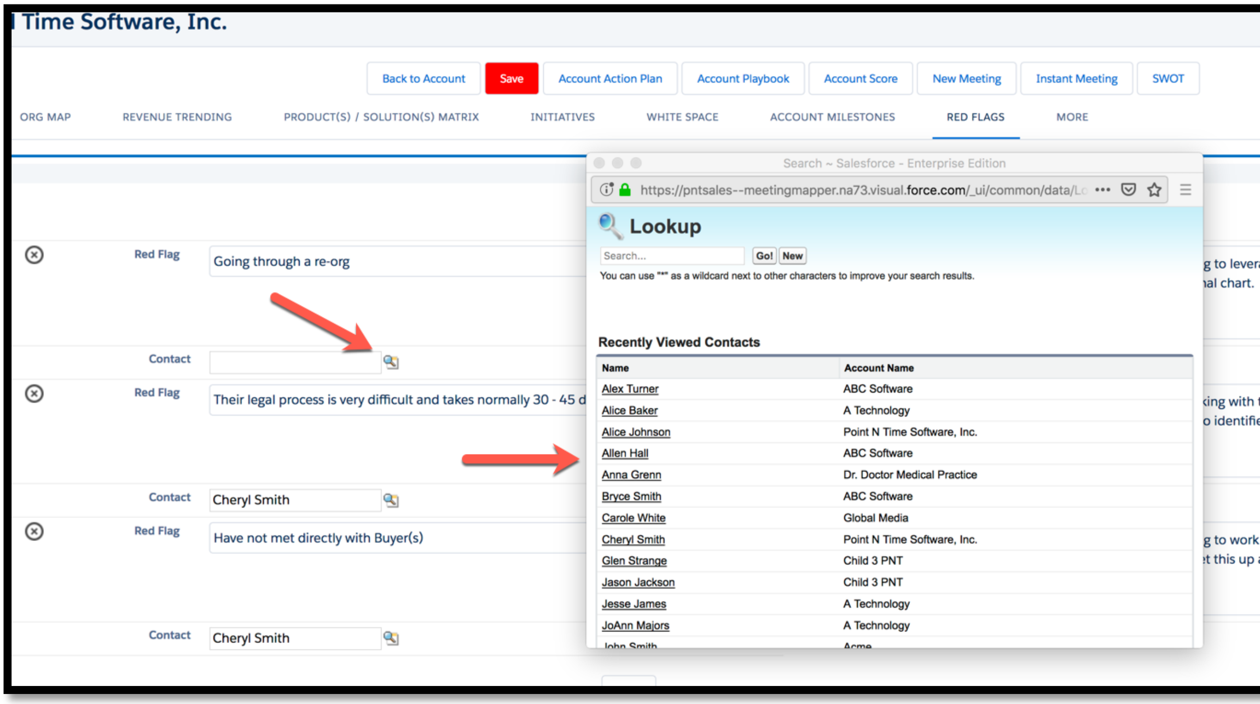


Figure 70

51. Click on More (figure 71) to view additional Account Plan pages (based on the template used to create your plan).

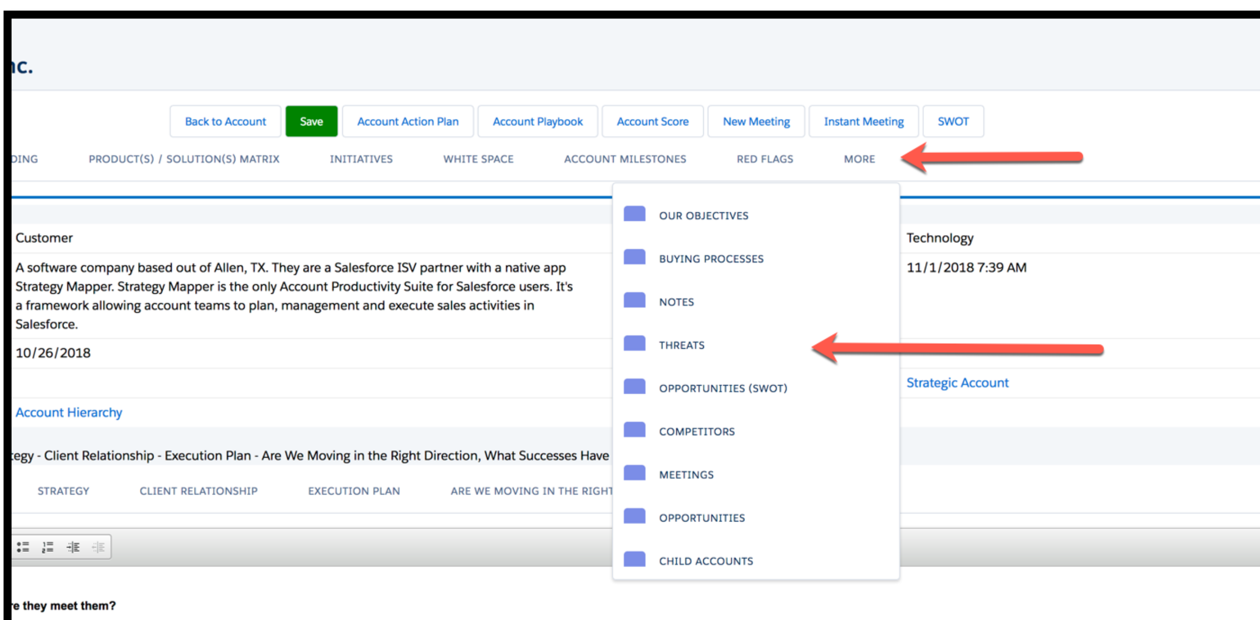


Figure 71

Our Objectives

Objectives are pre-defined based on the template. They are color-coded for scoring and tracking. Simply, click on the color to manage the status of the objective (figure 72).

What is the Value to Me and My Team?

Having a generic list of basic objectives for an account allow you and your team to track basic progress and status, what is not completed or having issues.

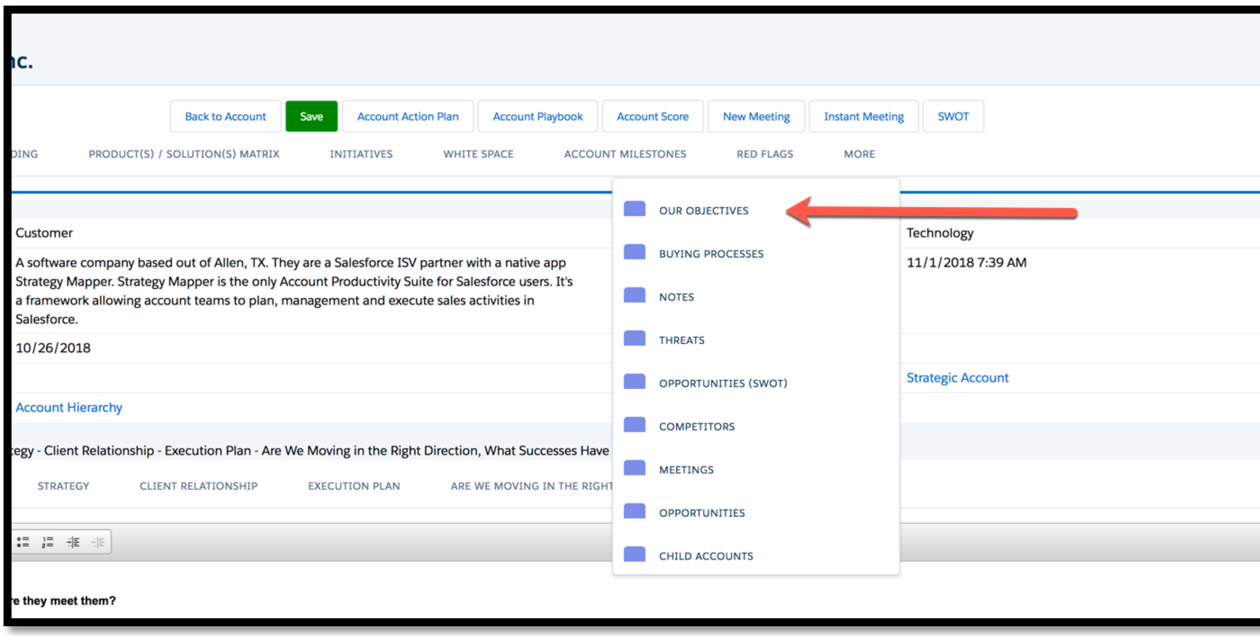


Figure 72

52. Click on Our Objectives to view the pre-defined objectives for this account. The objective consists of the name, current Status and any pre-defined Coaching. You can add or remove any information in the Coaching section, this will not impact the template only your plan (figure 73).

Note: The status does impact the scoring for the account.

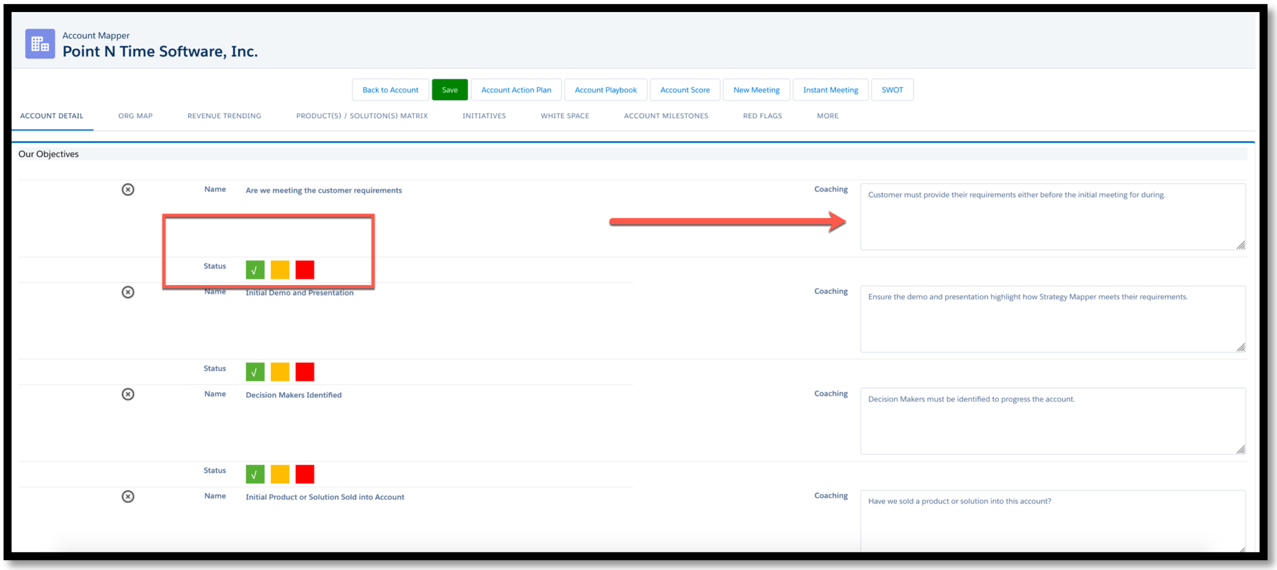


Figure 73

Customer Buying Process

Customer Buying Process allow you to formalize the process the customer goes through to select a vendor.

What is the Value to Me and My Team?

It's difficult to sell to a customer if you don't know how they buy. Documenting their Buying Process ensures you and your team know where you are at any point in time. In addition, who is responsible at the customer for each process.

Note: Customer Buying Process identified at the account will automatically be added to all opportunity plans in the Customer Selection Process.

---

53. Click New, select the process from the dropdown list (figure 74).

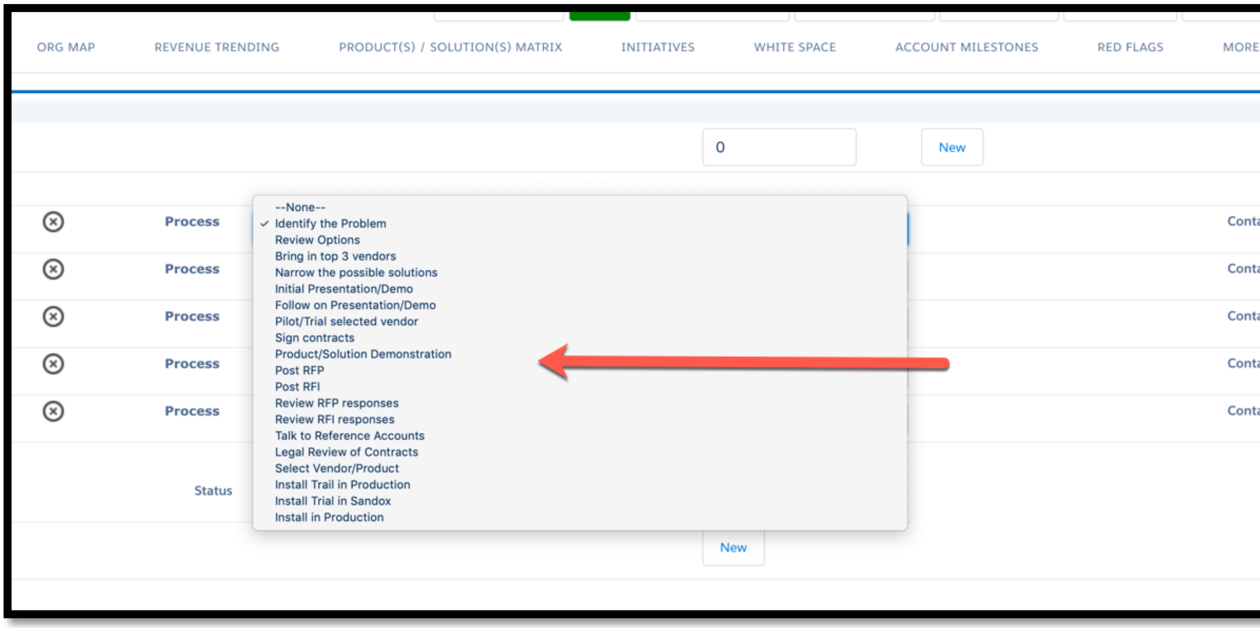


Figure 74

54. Continue to click New based on the information you have (figure 75). Click Save when done.

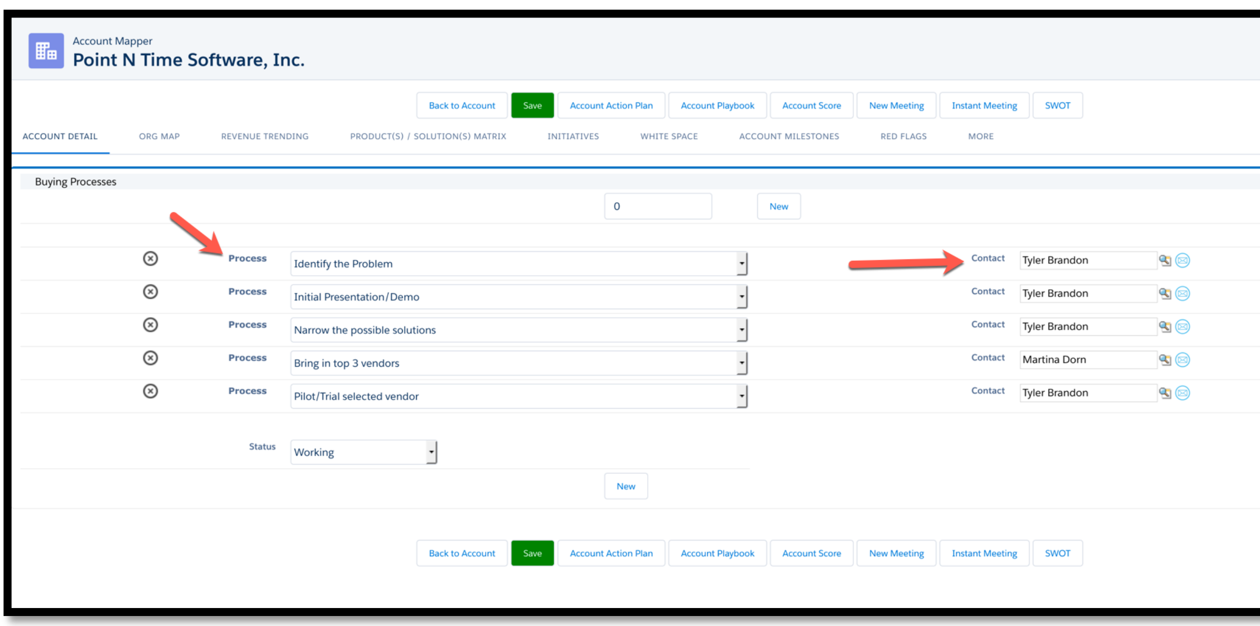


Figure 75

55. Click the Status dropdown and select the current status (figure 76). The status is part of the overall account scoring.

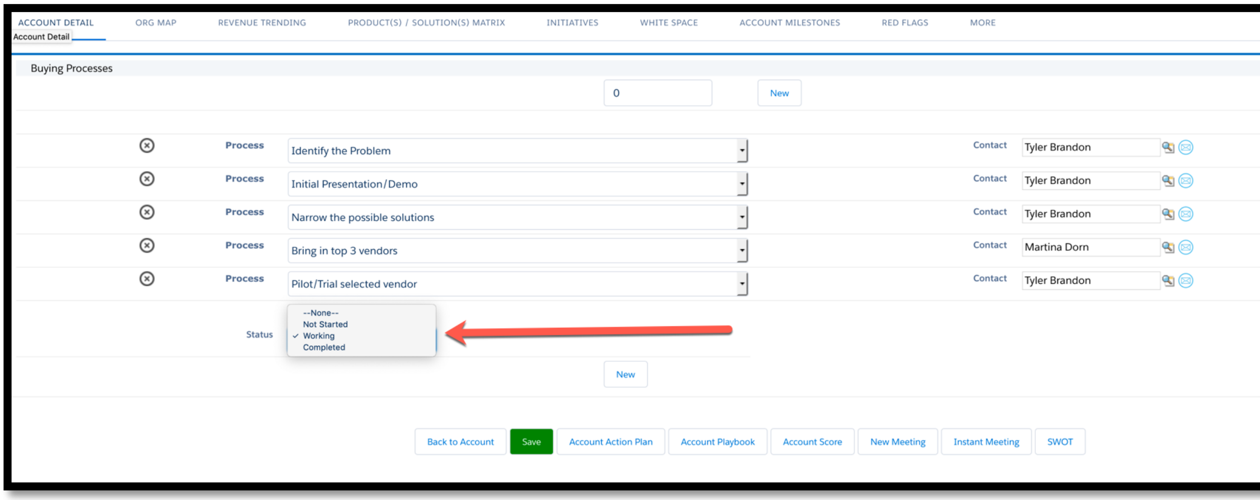


Figure 76

Note: Scoring Matrix:

Not Started = 0
Working = 50
Completed = 100

56. To add a new process in-line, click New, enter in the position number (placement), select the process from the dropdown (figure 77).

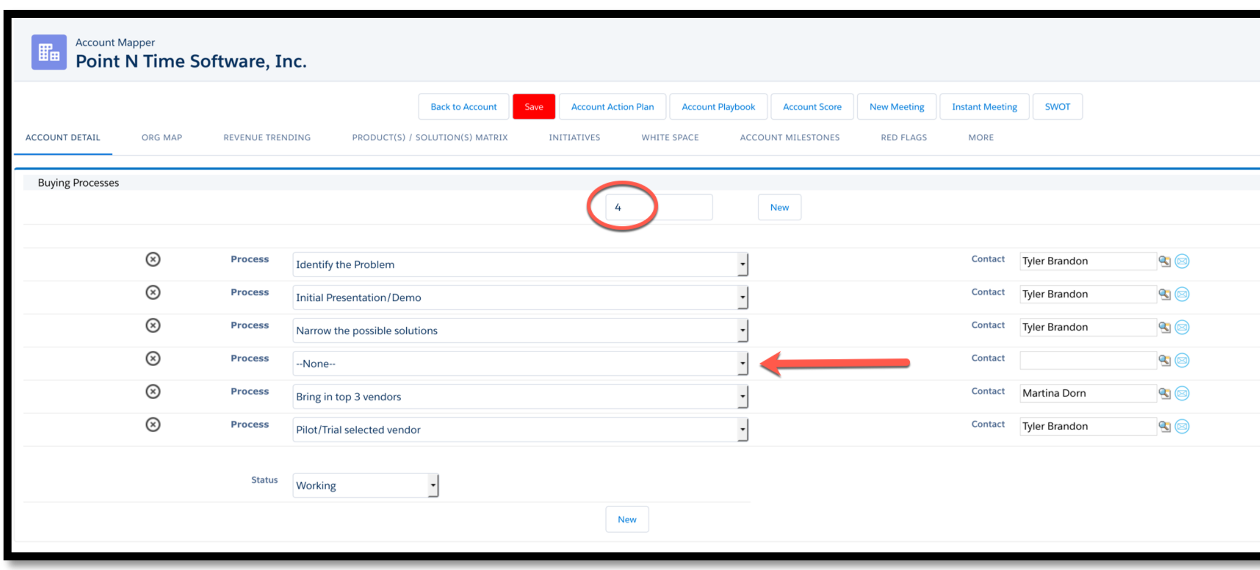


Figure 77

Note: Edits can be made to the process at any time.

57. Once you have created a Customer Buying Process, a customer contact can be assigned as the responsible individual. You can either enter the name of the contact or click on the search icon to bring up a Lookup window. This will help ensure the successful completion of the process (figure 78).

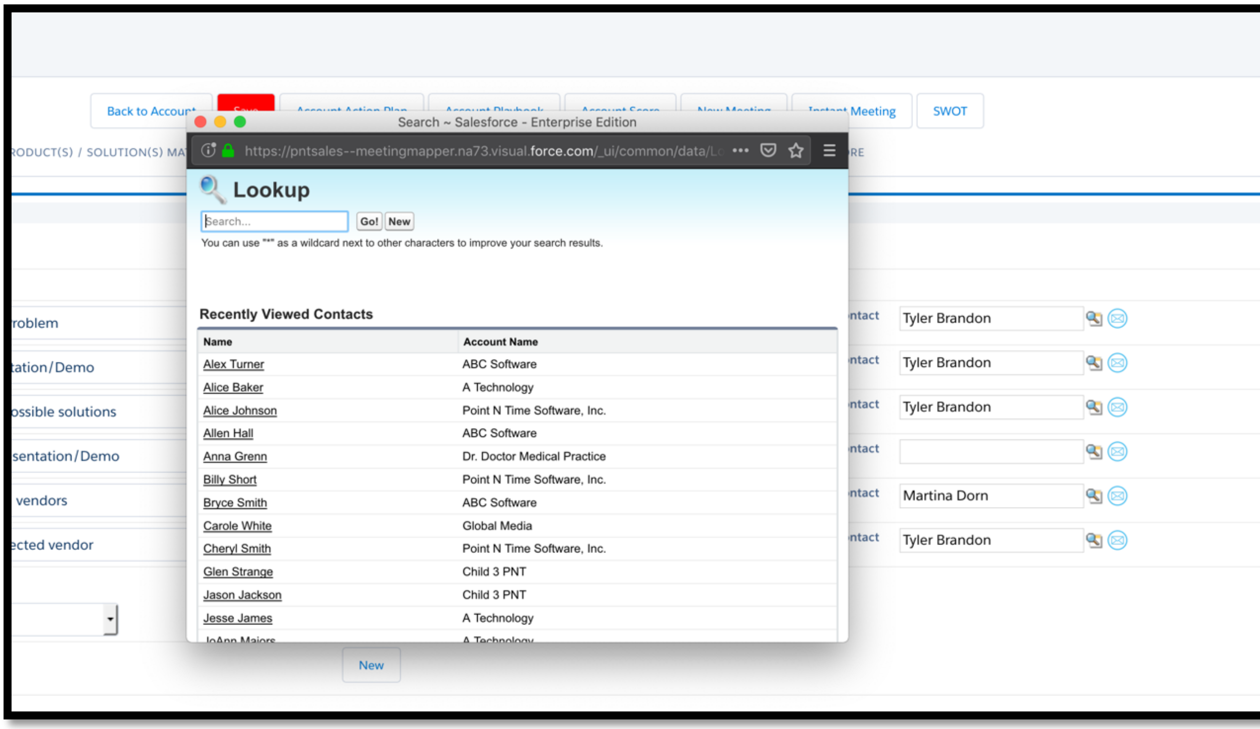


Figure 78

58. An email icon has been added to the Customer Contact. This allows the user to send an email to the contact linked to the process (figure 79). When the email icon is clicked, the user is presented a box to input the email content. The subject of the email is the Process title (figure 80).

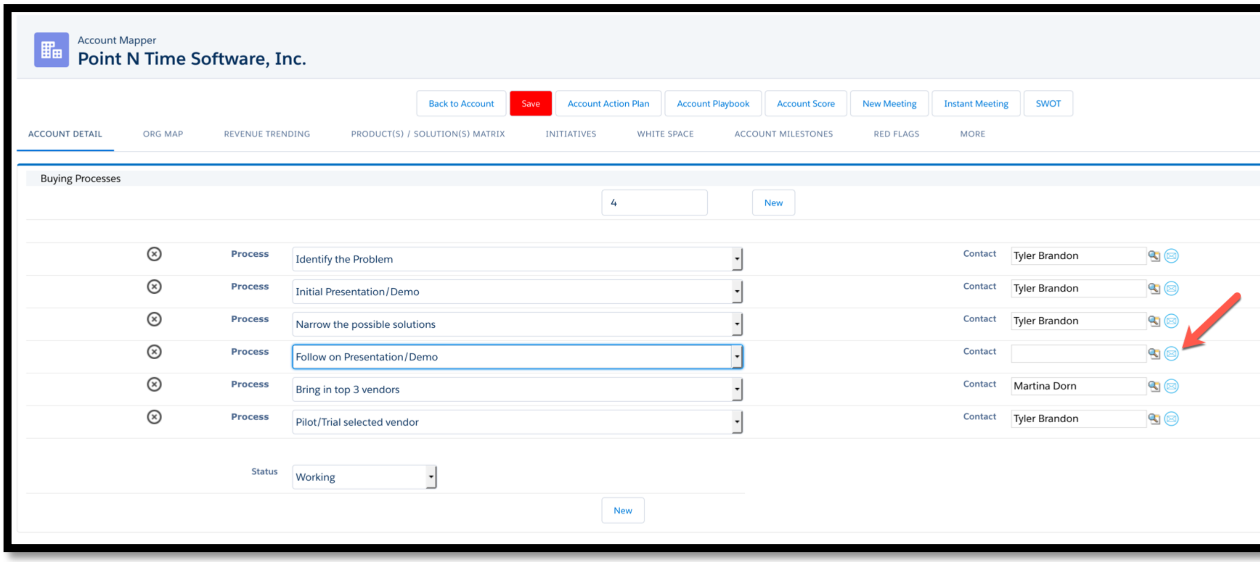


Figure 79

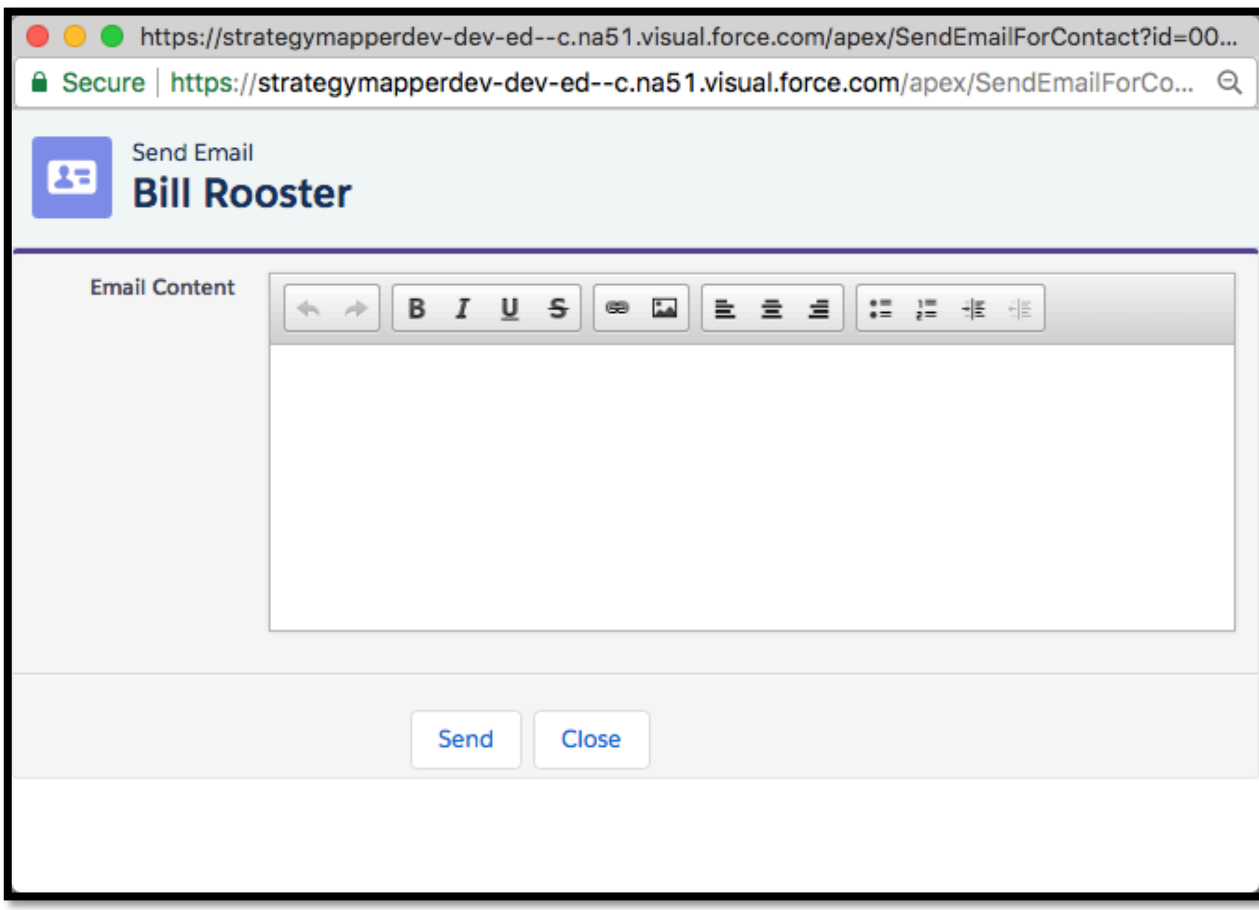


Figure 80

Notes

Notes provide a way to link important short conversations and record activity in the account plan.

What is the Value to Me and My Team?

Adding the most basic note in your account plan could be the most important thing you can do. We all get busy and if the customer asks you to do something and forget that has a negative impact and maybe fatal.

Best Practice
Copy and paste important emails from the customer in the Notes. This provides a way to ensure you follow up on them, by creating tasks. In addition, notes become activity history for the account. Utilize Notes to add all your notes regarding the account. This will take the place of doing this in the account. Notes in Account Mapper are more robust and allow you to create a task from a note.

59. Click on Notes, select new, enter in the information, click Save (figure 81).

Note: The note will be timestamped when you create it. This can be changed, for example you had a call the day before but just entered the information, you can select the date and time to reflect this.

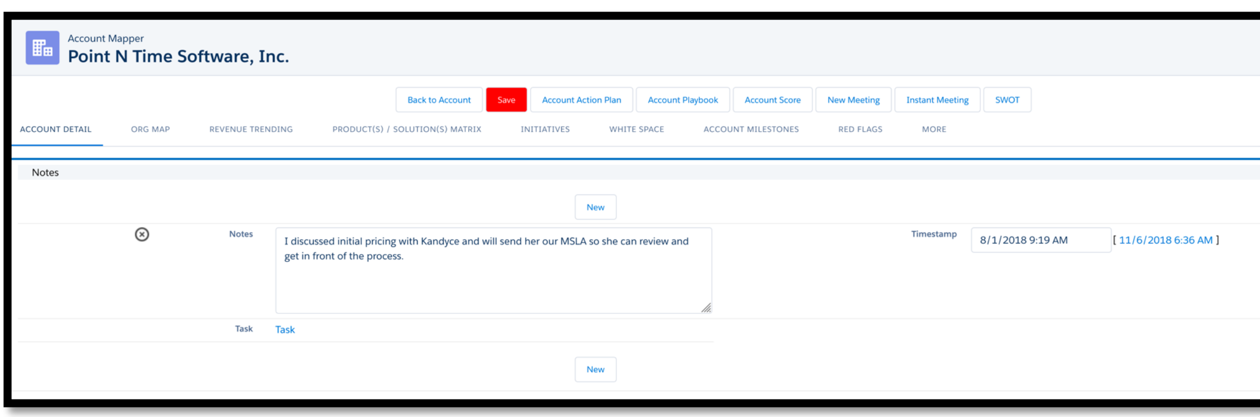


Figure 81

60. To create a follow up task, click on the Create Follow Up Task box, complete the information, click Save (figure 82). Ensure you enter in a due date.

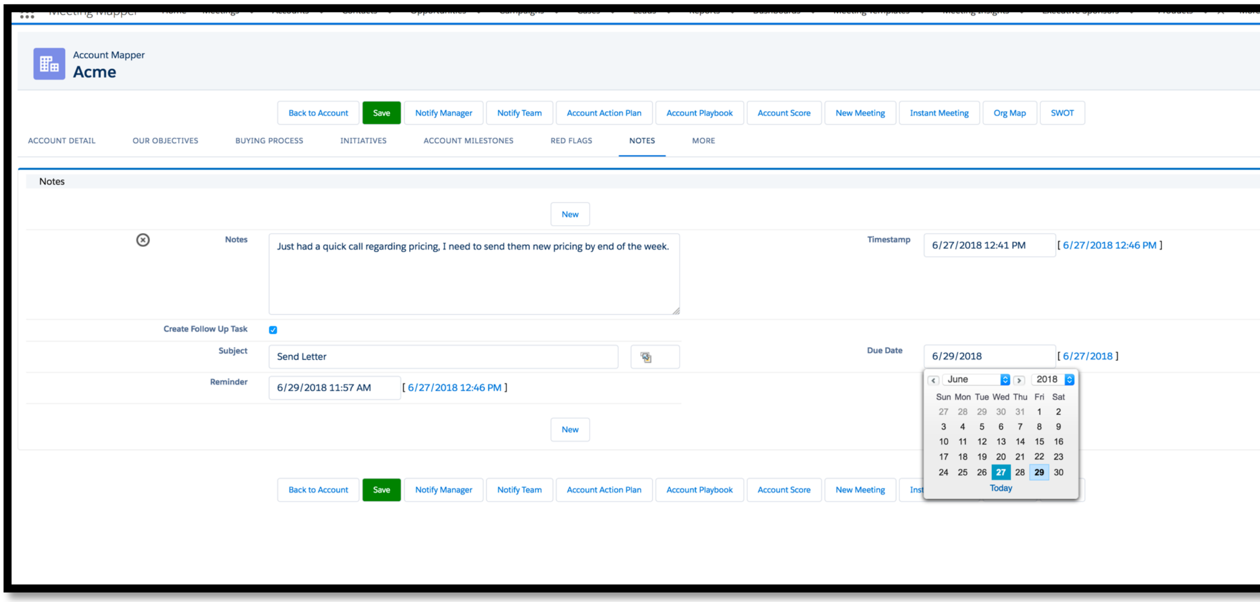


Figure 82

Threats

Threats is a component of the SWOT+ Analyst and allow you to include strategic Threats to the account.

What is the Value to Me and My Team?

Threats are a part of your overall SWOT+ Analysis. Think of these as strategic threats that can impact the account at any time.

61. Click on Threat, click New, enter in your information. You can either enter in multiple Threats in a single field or click on New for each Threat (figure 83).

Best Practice
Create individual Threats, this allows you to delete them individually. Ensure you include any threats identified by your team members.

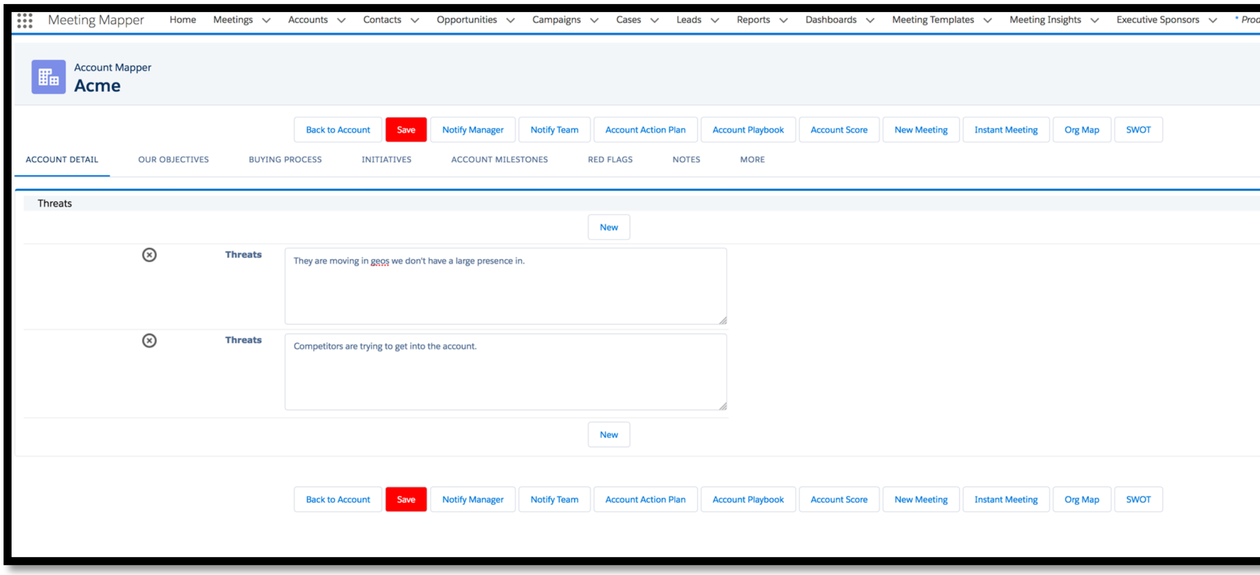


Figure 83

Opportunities (SWOT)

Opportunities is a component of the SWOT+ Analyst and allow you to include strategic Opportunities to the account. These opportunities are not linked to any specific revenue.

What is the Value to Me and My Team?

These are strategic opportunities not revenue generating. Opportunities are just one of the pieces of your SWOT+ Analysis.

62. Click on Opportunities (SWOT), click New, enter in your information. You can either enter in multiple Opportunities in a single field or click on New for each Opportunity (figure 84).

Best Practice
Create individual Opportunities this allows you to delete them individually. Ensure you include any Opportunities identified by your team members.

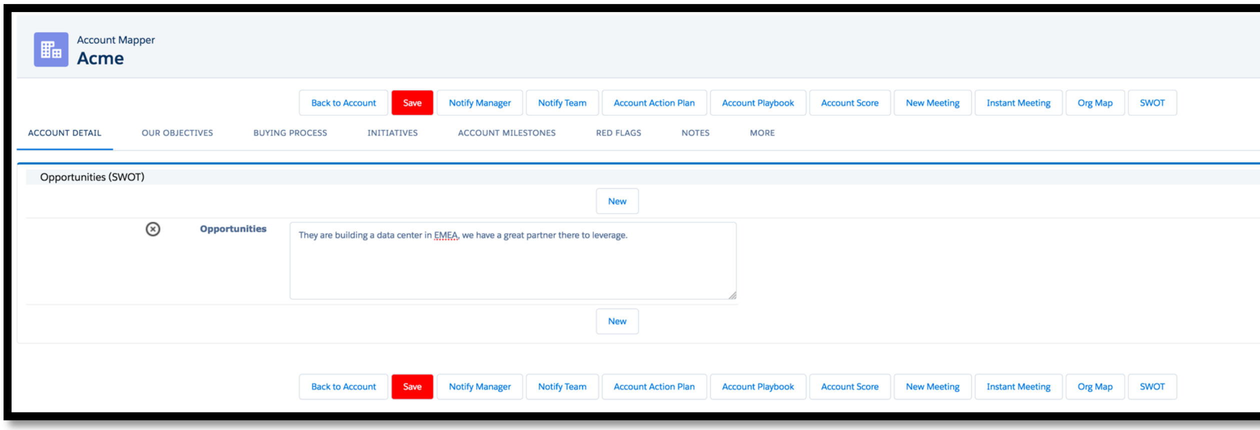


Figure 84

Competitors

Competitors in your opportunities are listed along with what opportunities you are competing against them in (figure 85).

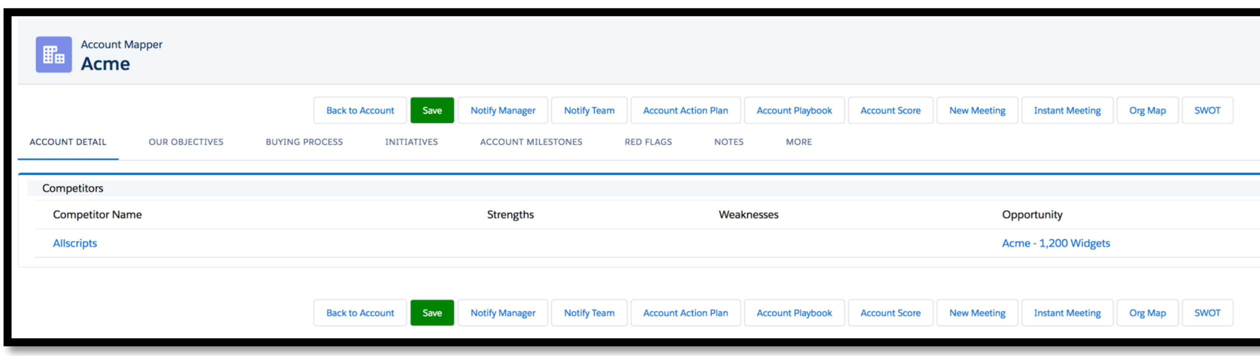


Figure 85

Meetings

The most current meeting conducted using Meeting Mapper will be displayed. This allows you to review the meeting, attendees, notes and sales intelligence (figure 86).

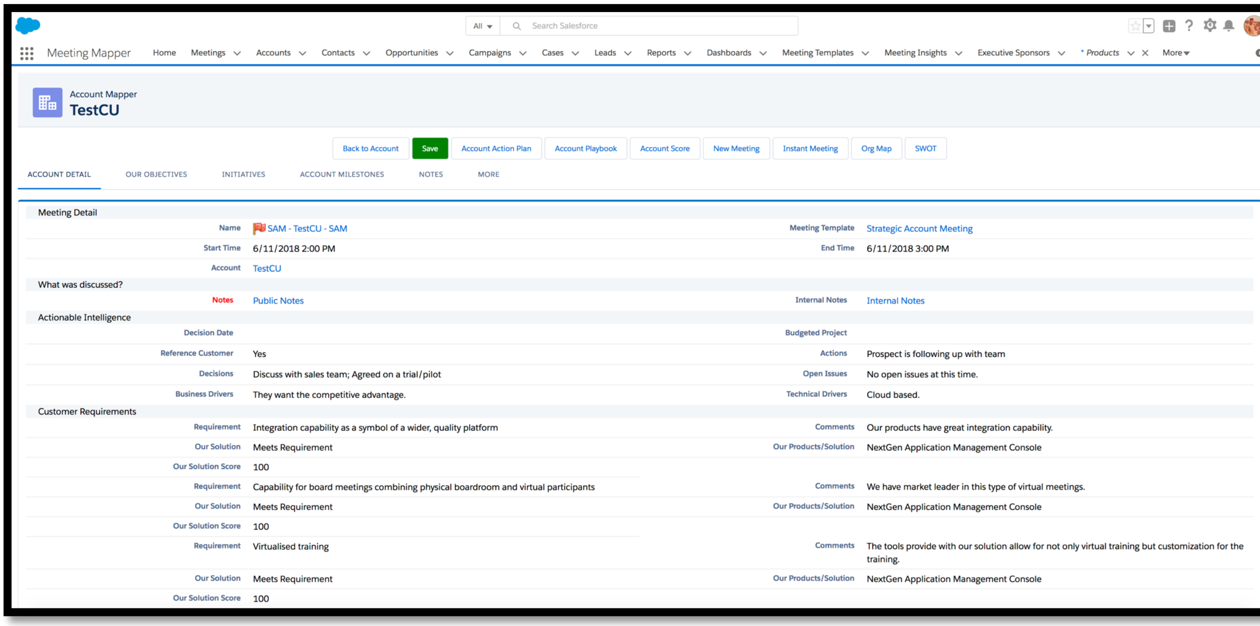


Figure 86

63. To view the meeting click on the hyperlink to edit the meeting itself (figure 87 & 88).

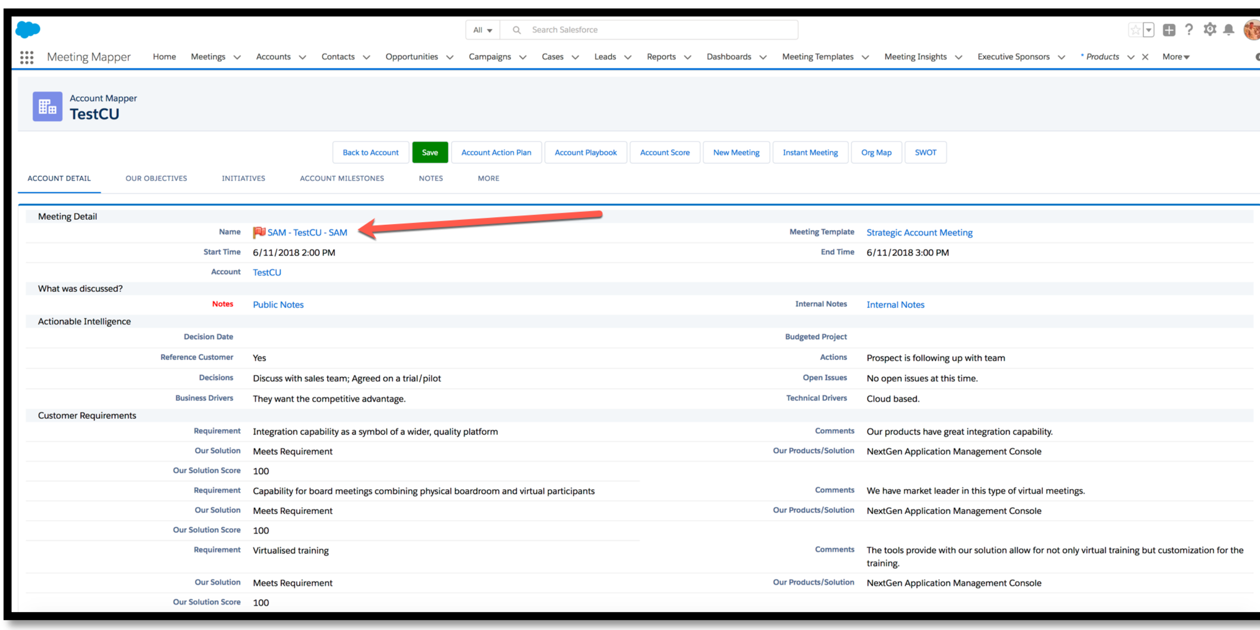


Figure 87

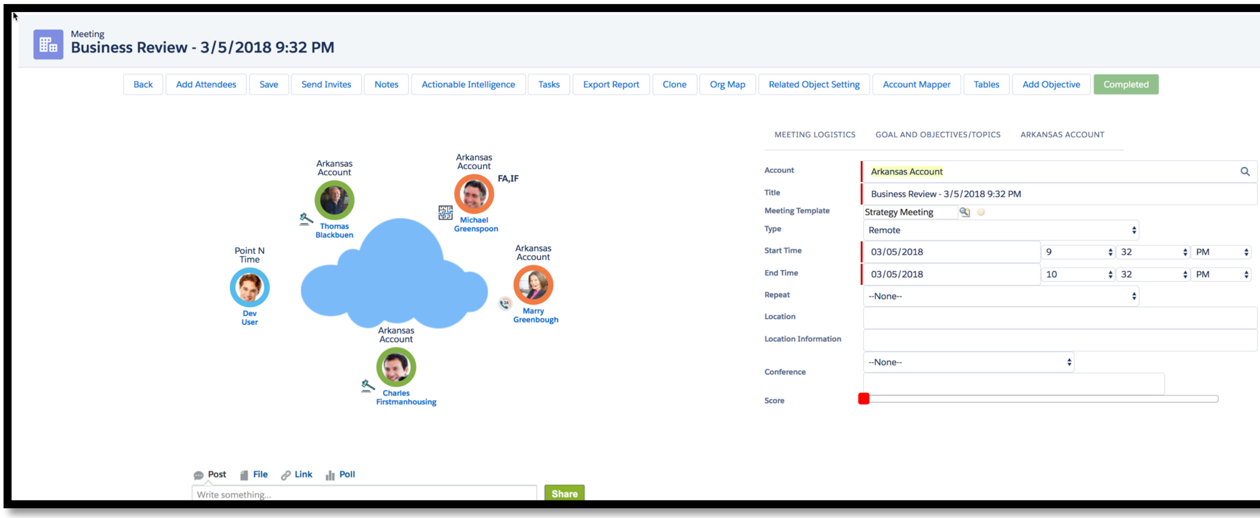


Figure 88

Account Timeline

Account Timeline allows you to cycle through the meeting attendees in meetings conducted using Meeting Mapper. You can see how contacts are added to meetings, opinions (Stance), role and how they change over time (figure 89). Use the arrow icon to move from one meeting to another. In addition, you can launch the raw meeting by clicking on the meeting name.

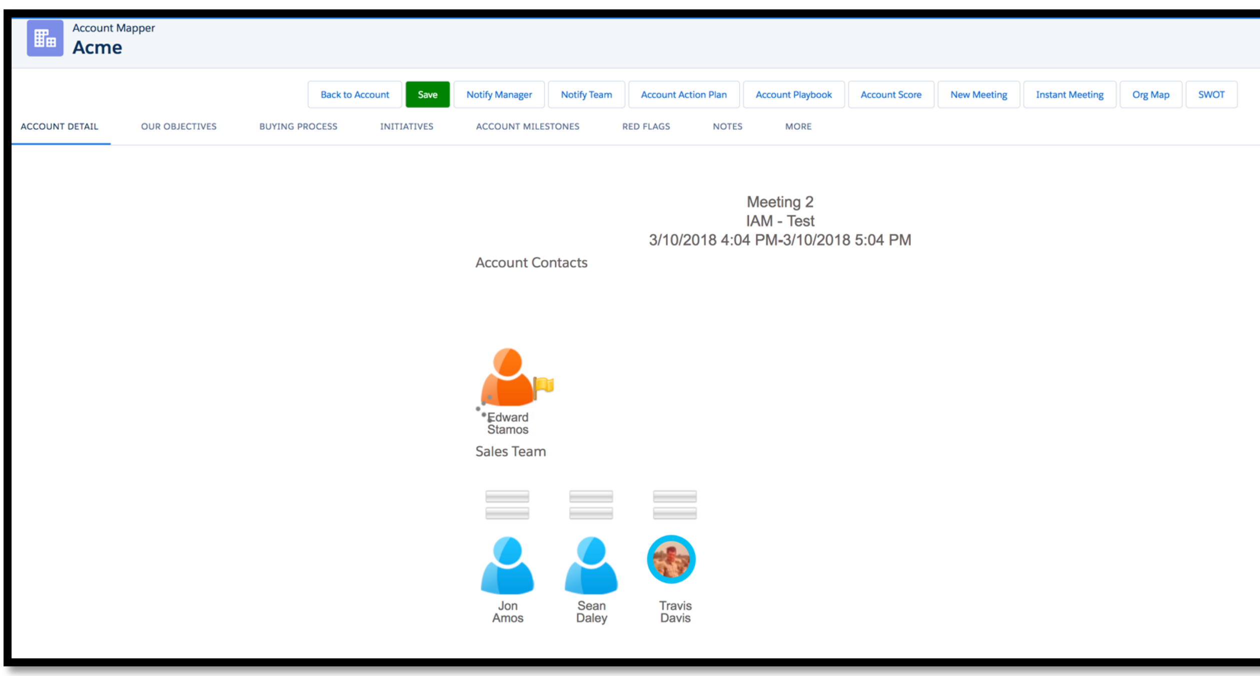


Figure 89

Customer Team

64. Customer team visually displays who has attended meeting either using Meeting Mapper or manually added by clicking on Add Attendees (figure 90).

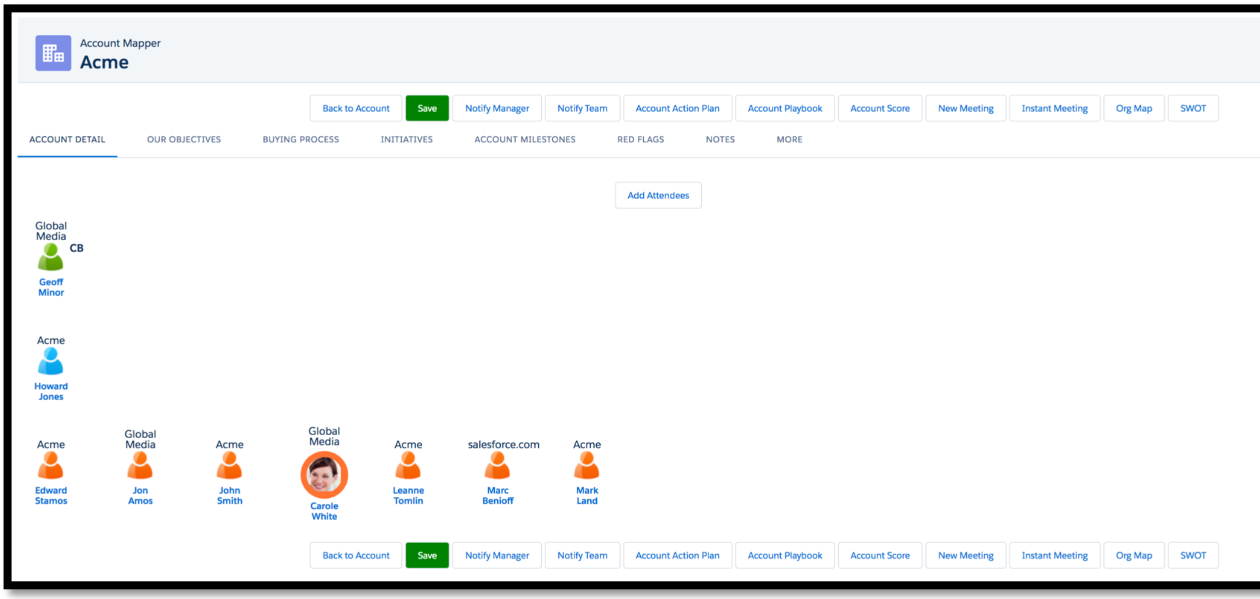


Figure 90

65. Clicking on the attendee’s name, you can change their information (figure 91). This is very useful if for example, you talked to a contact and their role or stance has changed. They change can be easily modified on this page.

Note: Contact’s Role and Stance will automatically be updated when they attend a meeting.

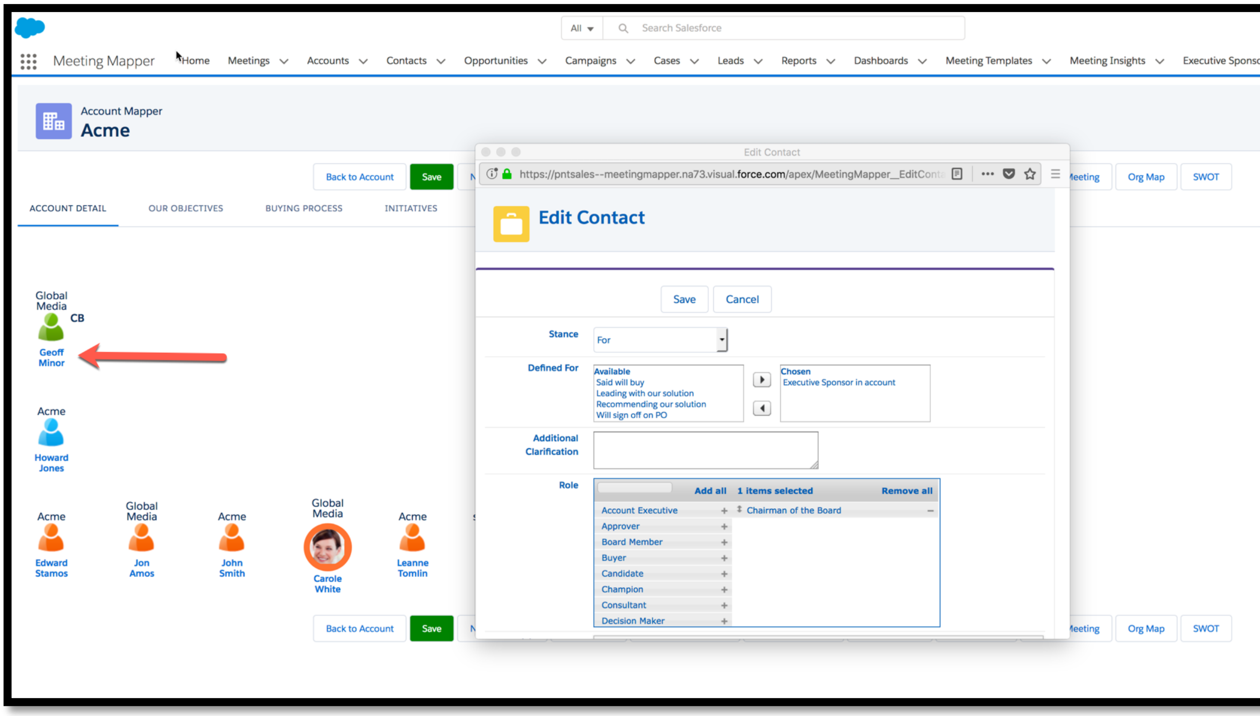


Figure 91

Account Team

Knowing who on your team as engaged with the account is critical. The Account Team pages populates with your team members and partners, if they have attended a meeting or been added manually (figure 92).

Note: Partners are added based on the role of partner.

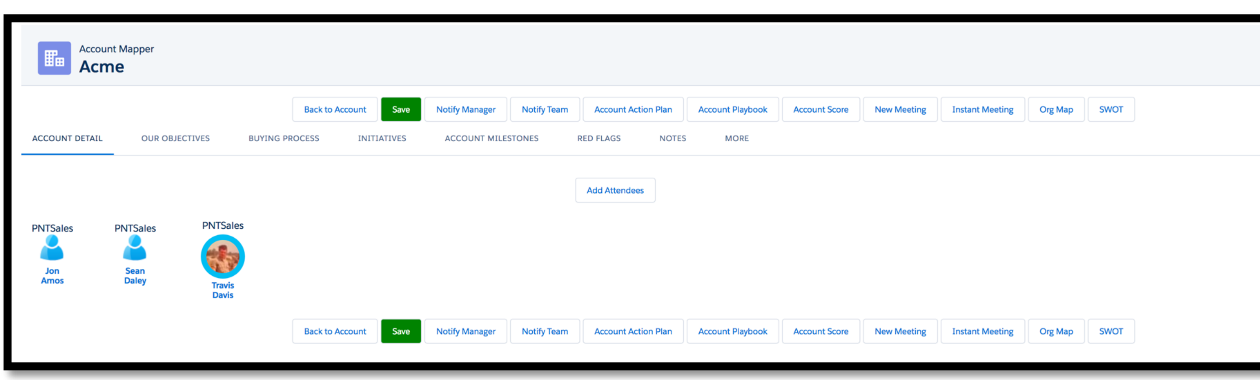


Figure 92

Opportunities

All opportunities will be listed on this page, the information shown is based on what was selected for the template (figure 93).

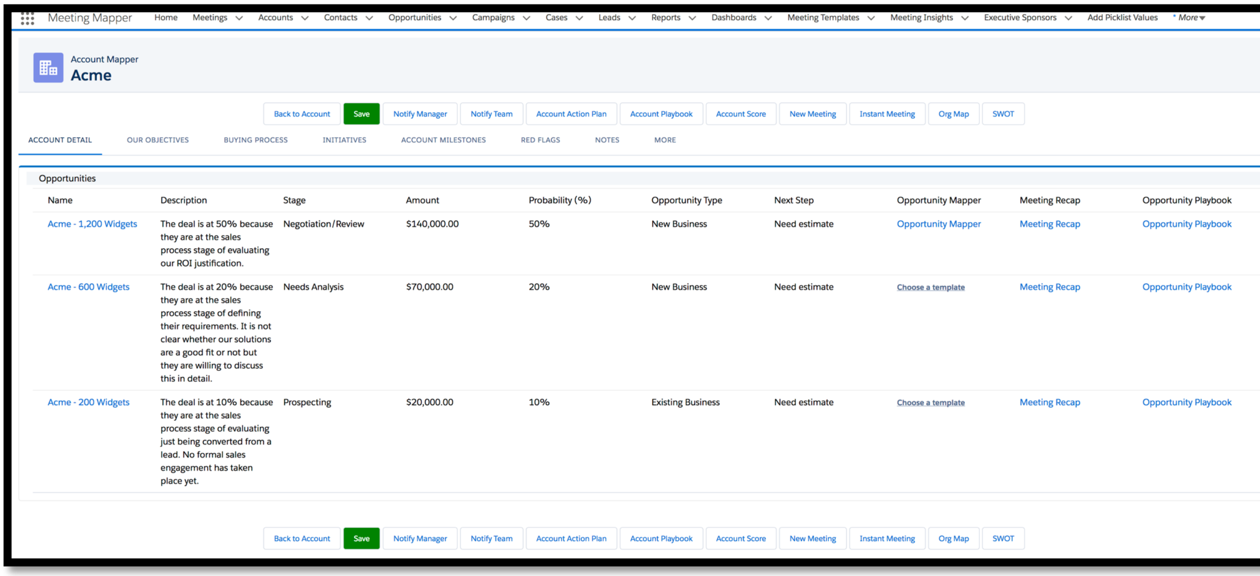


Figure 93

Note: Opportunities that have opportunity plans created using Opportunity Mapper, will have hyperlinks to their plan, meeting recap and playbook.

Additional Tabs

Custom Data

Custom Data allows you to display any Salesforce object data to Account Mapper. This data can be from standard Salesforce objects, custom objects, or objects from 3rd party applications (figure 94).

Note: Ensure you select the correct object to link the custom data to (Account, Opportunity or SBU) in Where to Display dropdown.

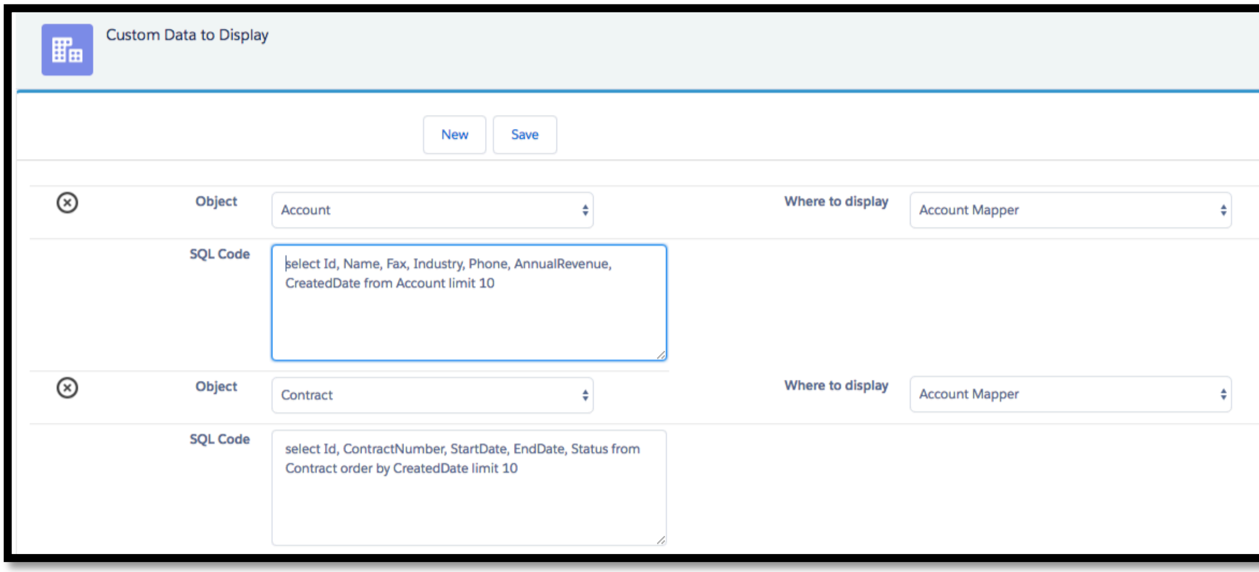


Figure 94

The data will be displayed in the “More” section of the Account Plan as well as the Account Playbook (figure 95).

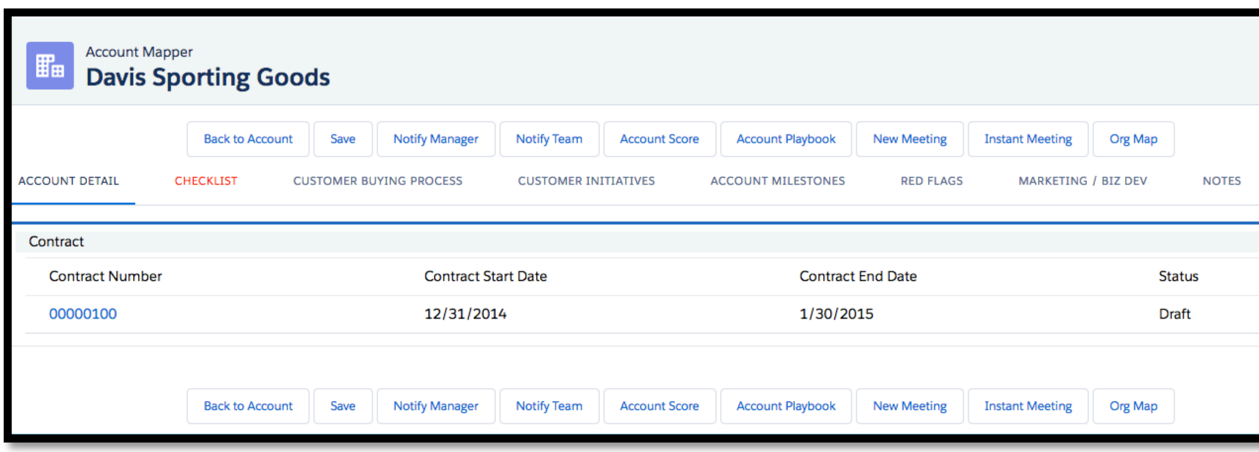


Figure 95

Cases

Service Cloud cases are available to be viewed in the Account plan (figure 96).

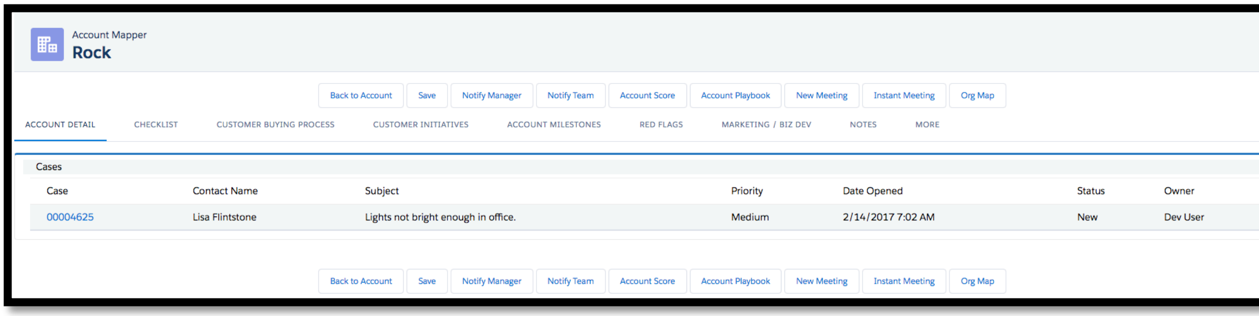


Figure 96

Child Accounts

Child account are displayed along with the opportunities linked to them. (figure 97). To view the account, click on the hyperlink for that account.

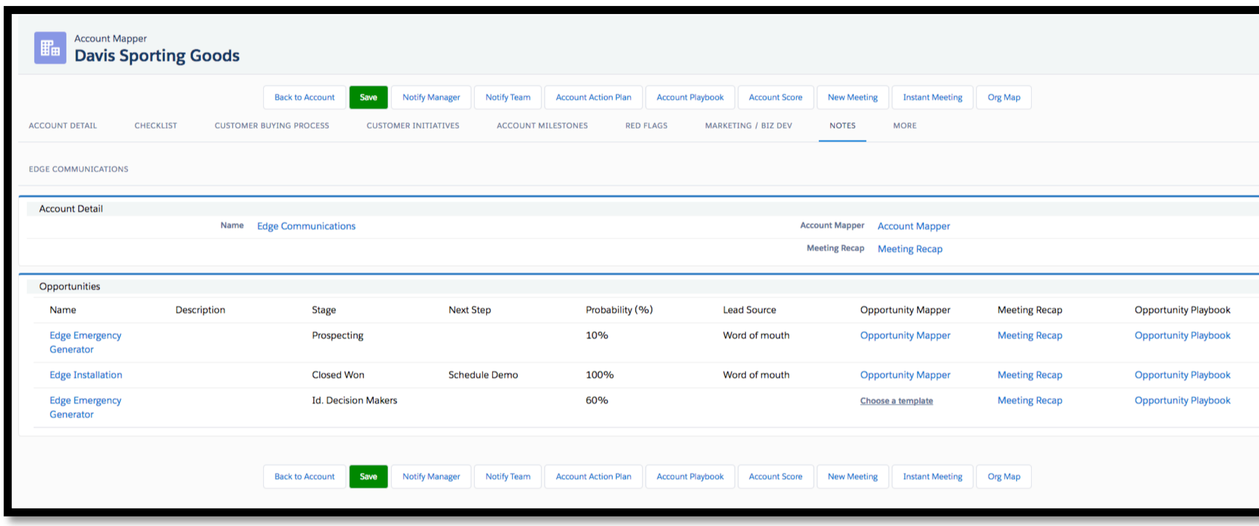


Figure 97

Buttons

Depending on the template buttons will populate on the top of the account plan (figure 98). There are 11 potential buttons take can be displayed on the Account Mapper page.

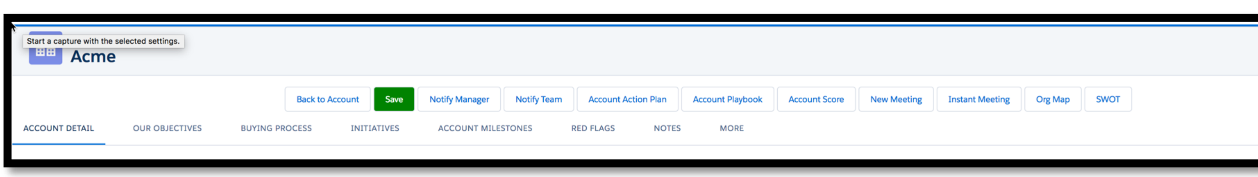


Figure 98

- **Back to Account** - Back to Account will take you back into the account itself.
- **Save** – Save the current plan.

- **Notify Manager** – Send notification to manager(s) to review plan.
- **Notify Team** – Send notification to team members to review plan.
- **Account Action Plan** - Account Action Plan

The Action Plan is a condensed version of the Account Playbook that provides the user with the most important information to ensure success and revenue in the account. The Action Plan consists of the following:

- Percent and status of the Account Checklist completed along with the items not completed (when an item is checked Green it's completed).
- List of the Account Milestones not completed.
- List of the Red Flags along with mitigation plan for each, if a Red Flag does not have a mitigation plan the Red Flag will be marked in red.
- List of the Top Ten Open Opportunities.
- List of Key Players, as defined by the roles below, in the Account along with their Stance.
    - Champion
    - Decision Maker(s)
    - Buyer(s)
- Weaknesses
- Obstacles
- Objections
- List of Open Activities

- **Playbook**

In the account playbook the following sections were added (figure 99): This is a snapshot of an Account Playbook, to see a complete playbook click on this link: Account Playbook

✓ Account Owner – Displays the account owner's name

✓ Account Team – Displays all team members that have been engaged in account. A member engaged in an account is defined as one that has attended a meeting as documented by Meeting Mapper.

StrategyMapper

Account Playbook for Davis Sporting Goods

Account Overview

Here is the Account Playbook for **Davis Sporting Goods** as of **10/25/2016**. At the present time there are **6** open opportunities in various stages in the sales cycle.

Currently **Davis Sporting Goods** is a **Customer - Direct**. The account owner is **Dev User**.

The following team members have been engaged in this account:

Name	Title
Dev User	Account Executive
Travis Davis	Account Executive
Admin User	
Chatter Expert	

Figure 99

Revenue Information (figure 100)

a. Total Potential Revenue
b. Total Potential Revenue based on pipeline
c. Won
d. Lost
e. Delta

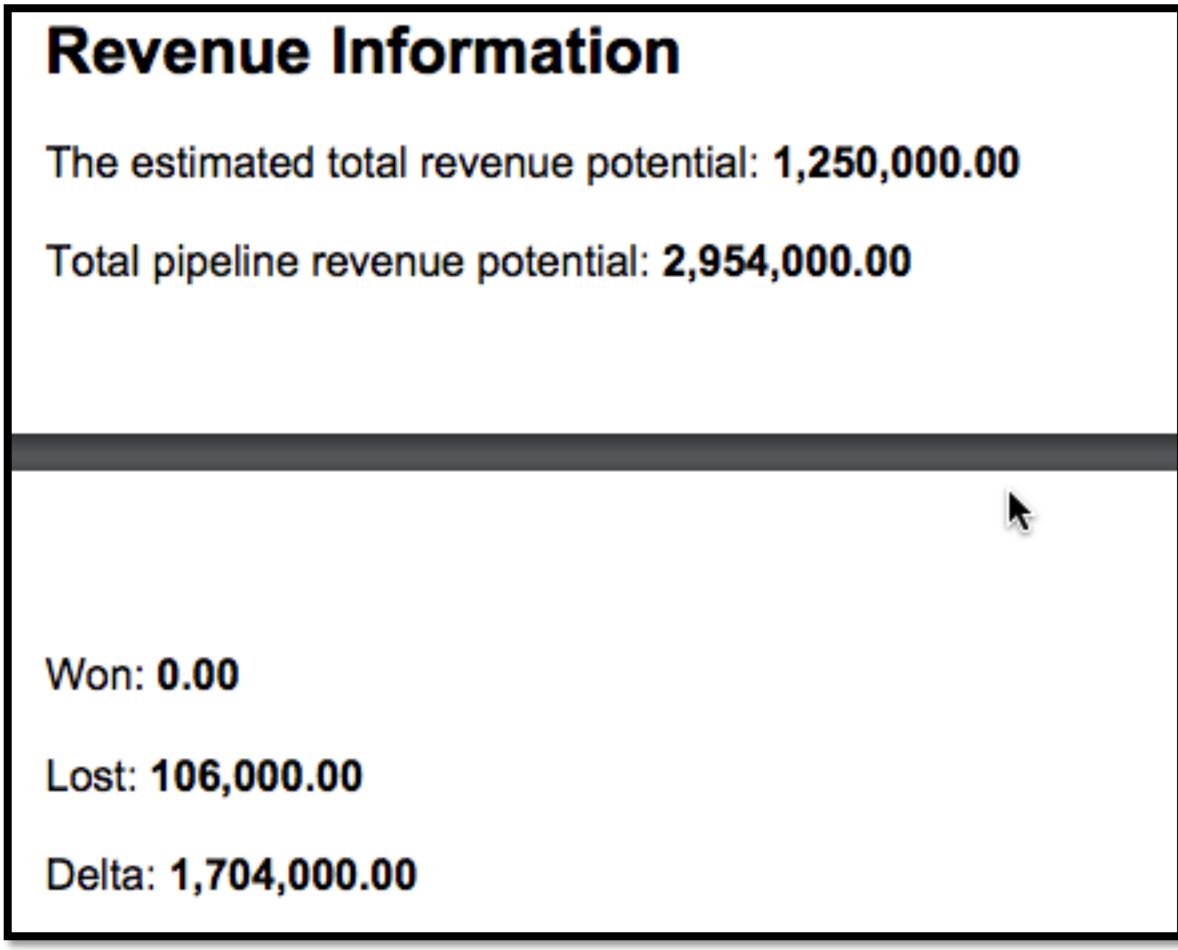


Figure 100

Opportunity Details – List all opportunities for the current FY (figure 101)

a. Closed Won
b. Closed Lost
c. Open – slipped are indicated by red type

Opportunities

Total revenue lost:

Name	Stage	Close Date	Amount	Owner
Davis Sporting Goods MM	Closed Lost	4/29/2016	80,000.00	Dev User
New Years 2016	Closed Lost	2/26/2016	13,000.00	Dev User
New Years 2016 - Update	Closed Lost	2/26/2016	13,000.00	Dev User

Open opportunities (Red indicates opportunity past forecast date):

Name	Stage	Close Date	Amount	Owner
BAVO	Prospecting	7/26/2016	80,000.00	Dev User
Benz - Security	Prospecting	8/31/2016	100,000.00	Dev User
Boom	Prospecting	7/28/2016		Dev User
Strategy Mapper - Davis Sporting	Value Proposition	2/29/2016	1,500,000.00	Dev User
Strategy Mapper - Martina	Proposal/Price Quote	3/31/2016	1,250,000.00	Dev User
Strategy Mapper - Salesforce	Negotiation/Review	12/30/2016	24,000.00	Dev User

Figure 101

Products / Solutions Sold into the Account – Displays all products or solutions sold into the account specified by closed-won opportunities (figure 102).

Products/Solutions Sold Into This Account:

Name
Davis Sporting Goods MM SLA: Platinum
New Years 2016 - Update Strategy Mapper
New Years 2016 Strategy Mapper

Figure 102

Account Strategy (figure 103)

Account Strategy

This is where the team puts their overall strategy for this account. This can be high level or as detailed as required.

Figure 103

Lesson Learned (Figure 104)

Lessons Learned

The following was uncovered while working this account.

1. It's important to uncover the pain points from the numerous divisions in this company. It seems they communicate often regarding products and solutions being pitched.
2. They leverage each other budgets and will bring in different groups to pool their budgets.

Figure 104

Red Flag with mitigation plan (figure 104). In the event the Red Flag is displayed Red, this indicates there is no mitigation plan.

Red Flags

We have identified the following red flags:

Red Flag	Mitigation Plan
They are very geographically distributed so getting to each corporate location does take time and planning	They are spread out and it is difficult to schedule meetings with everyone of the key players.
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.
Their legal process is very difficult and takes normally 30 - 45 days.	Their legal department can take 45 days to complete a contract. Ensure you send over a word doc so they can markup.

Figure 105

Notes (Public and Internal)

Meeting notes from last meeting are displayed in the Account Plan.

Account History

The last 60 days of account history are displayed (figure 106).

Account History (last 60 days)

Subject	Name	Task	Due Date	Status	Priority	Assigned To
Task for QM - 9/7/2016 10:22 AM		true	9/7/2016	Completed	Normal	Dev User
Task for Business Review - 10/14/2016 7:51 PM		true	10/14/2016	Completed	Normal	Dev User
Task for QM - 10/18/2016 1:45 AM		true	10/18/2016	Completed	Normal	Dev User
Schedule Account Review Meeting		true	10/25/2016	Completed	Normal	Dev User
Event for QM - 9/7/2016 10:22 AM		false	9/7/2016 10:22 AM			Dev User
Event for IMO - AAR		false	10/11/2016 2:41 AM			Dev User
Event for Business Review - 10/14/2016 7:51 PM		false	10/14/2016 7:51 PM			Dev User
Event for QM - 10/18/2016 1:45 AM		false	10/18/2016 1:45 AM			Dev User

Figure 106

Open Activities

The next 60 days of open activities are displayed (figure 107).

Scheduled Activities (next 60 days)

Subject	Name	Task	Due Date	Status	Priority	Assigned To
Test	Luffy 1	true	10/31/2016	In Progress	Normal	Dev User
BI/Analytics		true	12/1/2016	Not Started	Normal	Dev User
BI/Analytics		true	12/1/2016	Not Started	Normal	Dev User
BI/Analytics		true	12/1/2016	Not Started	Normal	Dev User

Figure 107

Cases linked to the account and custom data are now included in the Account Playbook (figure 108).

Account Playbook for Davis Sporting Goods

Account Overview

Here is the Account Playbook for **Davis Sporting Goods** as of **2/14/2017**. At the present time there are **10** open opportunities in various stages in the sales cycle.

Currently **Davis Sporting Goods** is a **Customer - Direct**. The account owner is **Dev User**.

The following are cases in this account:

Case	Contact Name	Subject	Priority	Date Opened	Status	Owner
00004626	Jordan Day	Lights not bright enough in office.	Medium	2/14/2017 11:41 PM	New	Dev User
00004274		test	Medium	12/9/2016 10:40 AM	New	Dev User
00004027		A big Test	Medium	7/21/2016 7:30 AM	New	Dev User
00003549	Luffy 1		Medium	2/17/2016 10:08 AM	New	Dev User

Figure 108

The custom data information included in the account plan, is also included in the account playbook (figure 109)

Account

Account Name	Account Fax	Industry	Account Phone	Annual Revenue	Created Date
Aethna Home Products			(434) 369-3100		7/23/2014 12:47 PM
New Year		Technology			12/31/2015 8:54 AM
American Banking Corp.			(610) 265-9100		7/23/2014 12:32 PM
Touchdown					12/28/2015 2:33 PM
United Oil & Gas, Singapore	(650) 450-8820	Energy	(650) 450-8810		12/28/2012 6:11 PM
Edge Communications	(512) 757-9000	Electronics	(512) 757-6000	$139,000,000	12/28/2012 6:11 PM
Burlington Textiles Corp of America	(336) 222-8000	Apparel	(336) 222-7000	$350,000,000	12/28/2012 6:11 PM
Pyramid Construction Inc.	(014) 427-4428	Construction	(014) 427-4427	$950,000,000	12/28/2012 6:11 PM
Dickenson plc	(785) 241-6201	Consulting	(785) 241-6200	$50,000,000	12/28/2012 6:11 PM
Grand Hotels & Resorts Ltd	(312) 596-1500	Hospitality	(312) 596-1000	$500,000,000	12/28/2012 6:11 PM

Contract

Contract Number	Contract Start Date	Contract End Date	Status
00000100	12/31/2014	1/30/2015	Draft

Figure 109

- **Account Score**

There are two levels in Account Scoring:

The top level is Account Health, it's comprised of information gathered in the account plan and in all opportunity plans. This is an overall health of the account.

The second level is comprised only of information gathered in the Account Plan and the other feeds into the plan. In addition, we have separated out the different components (figure 110):

Account Score – The score based on Information gathered in the Account Plan (what has the user accomplished in the plan)
Sales Intelligence – The score based on Information gathered in Meeting Mapper
Opportunity Average Score – Takes into account all opportunities and their health score

Figure 110

- **New Meeting**

Create and schedule a meeting with Meeting Mapper

✓ **Instant Meeting**

Create a new meeting with Meeting Mapper for the Account.

✓ **Org Map**

The Org Map button launches the Org Map, the only difference the search capability.

In the event your org map is large and complex, and you can't see a contact, enter in the name of the contact in the search field, the org map will shift to display and highlight the contact (figure 111).

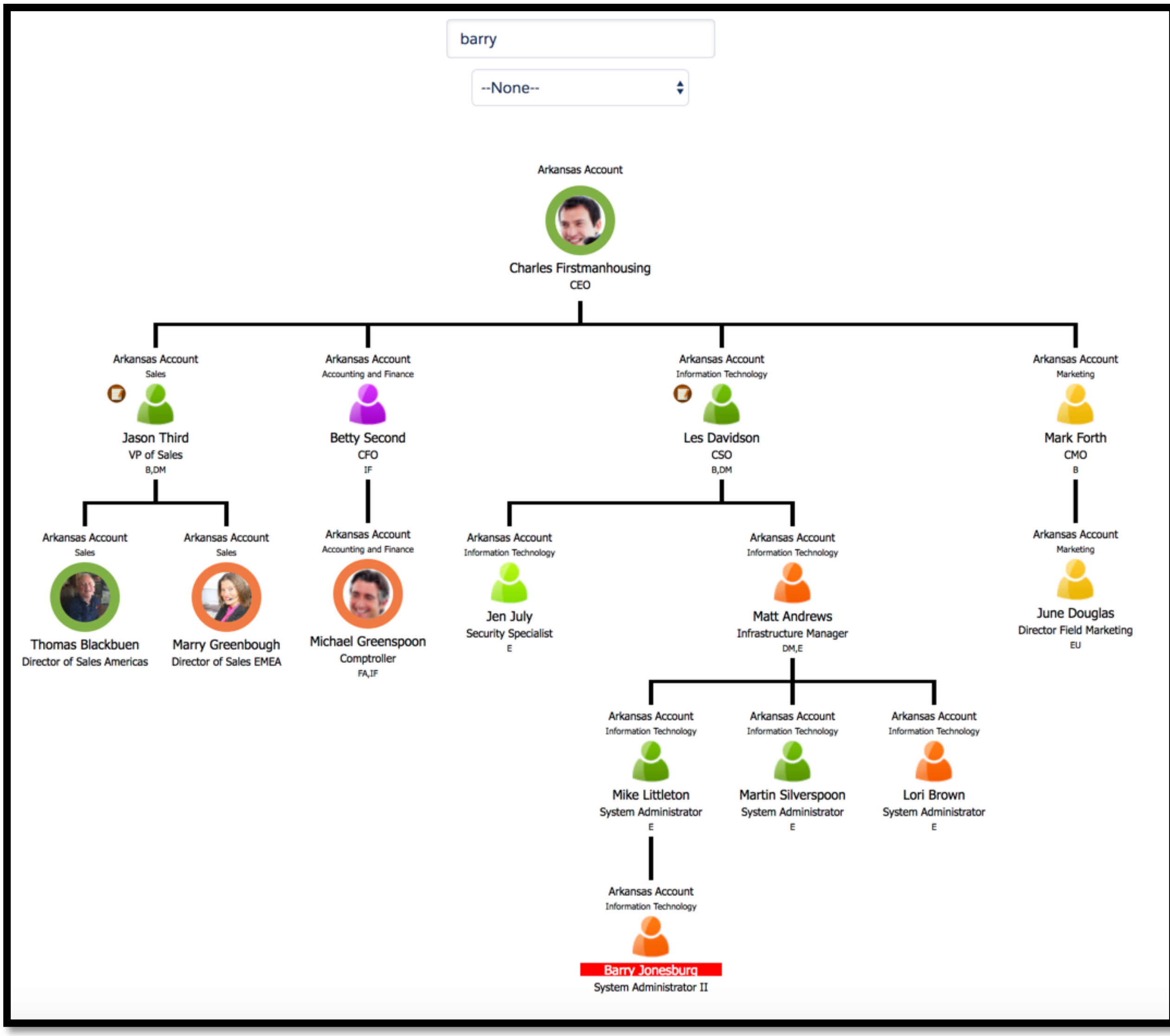


Figure 111

✓ **SWOT**

The SWOT+ Analysis is comprised of information gathered in customer meetings using Meeting Mapper and information added as part of the plan (Strengths and Opportunities (SWOT). The traditional SWOT Analysis is comprised of Strengths, Weaknesses, Opportunities and Threats. The SWOT+ Analysis in Strategy Mapper includes those and Obstacles, Objections, Red Flags and Competitors (figure 112).

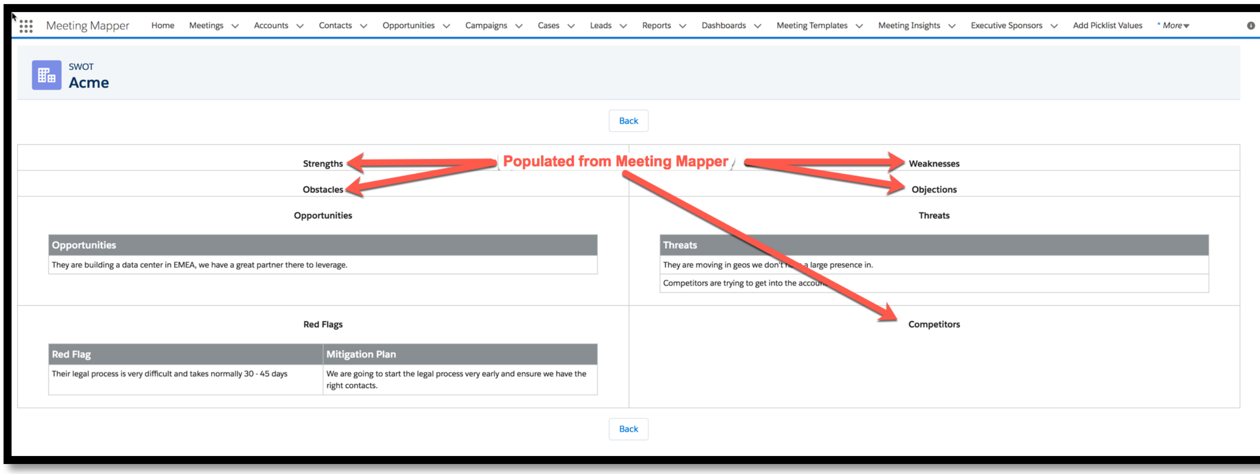

Meeting Mapper
Home
Meetings
Accounts
Contacts
Opportunities
Campaigns
Cases
Leads
Reports
Dashboards
Meeting Templates
Meeting Insights
Executive Sponsors
Add Picklist Values
More
SWOT
Acme
Back
Populated from Meeting Mapper
Strengths
Weaknesses
Obstacles
Objections
Opportunities
Threats
Opportunities
They are building a data center in EMEA, we have a great partner there to leverage.
Threats
Red Flags
Competitors
Red Flag
Mitigation Plan
Their legal process is very difficult and takes normally 30 - 45 days
We are going to start the legal process very early and ensure we have the right contacts.
Back

Figure 112

Using Opportunity Mapper

The examples used in this section will walk you through creating and modifying a plan, using all the features available in an account plan based on the template.

Note: It's assumed an Opportunity Mapper template has been created and made active. If not, please create an Opportunity Mapper template first.

Creating an Opportunity Plan

1. Select an Opportunity from the list of opportunities or from the account page the opportunity is linked to. In this example, select from the list is used (figure 113).

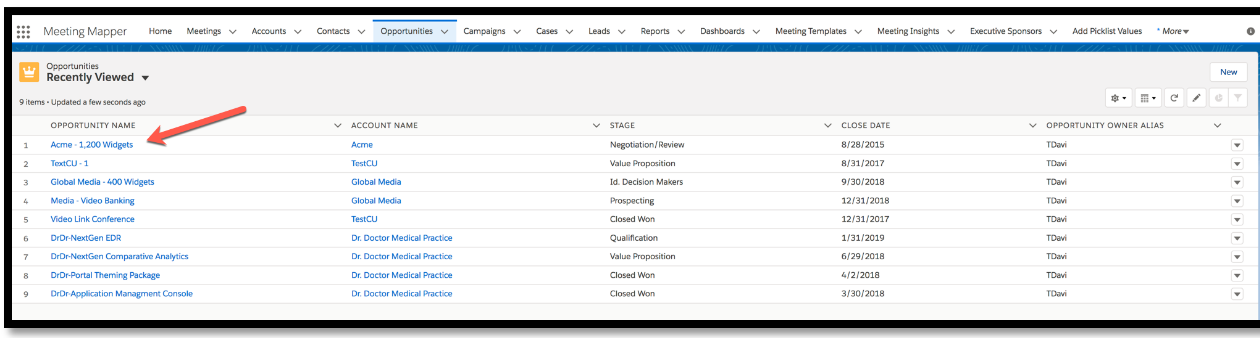


Figure 113

2. Click on Opportunity Mapper, it can be displayed in one of two places. On the top navigation bar or on the dropdown (figure 114). This is dependent on how your page is configured.

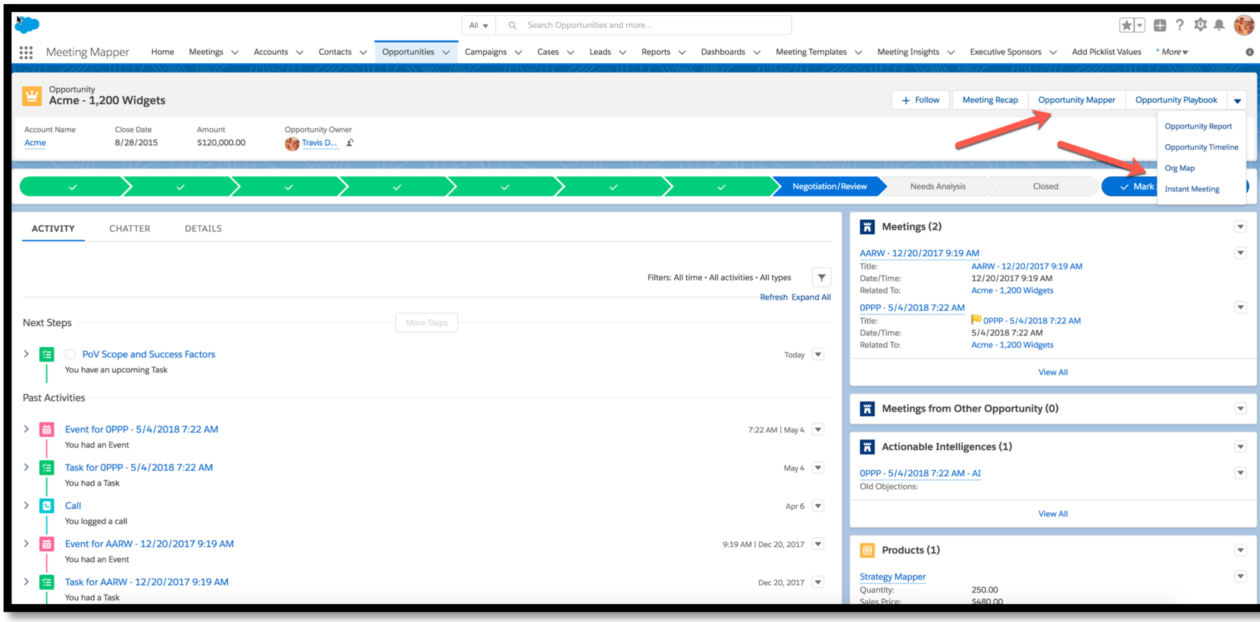


Figure 114

3. Select a template, if this is the first time clicking on Opportunity Mapper, select the template from the dropdown and click Save (figure 115). If a template has been selected before, Opportunity Mapper will display, based on the configuration of the template (figure 116).

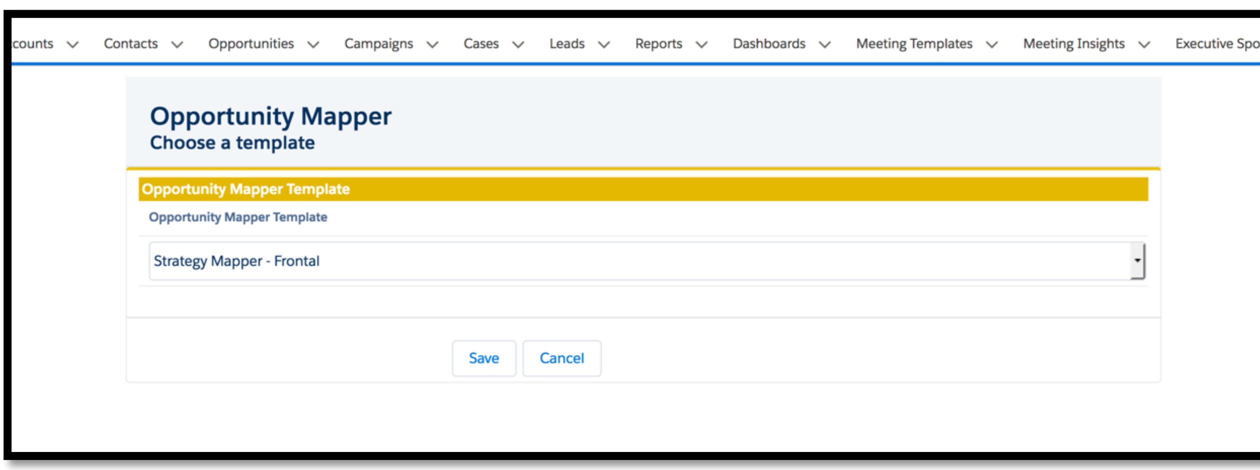


Figure 115

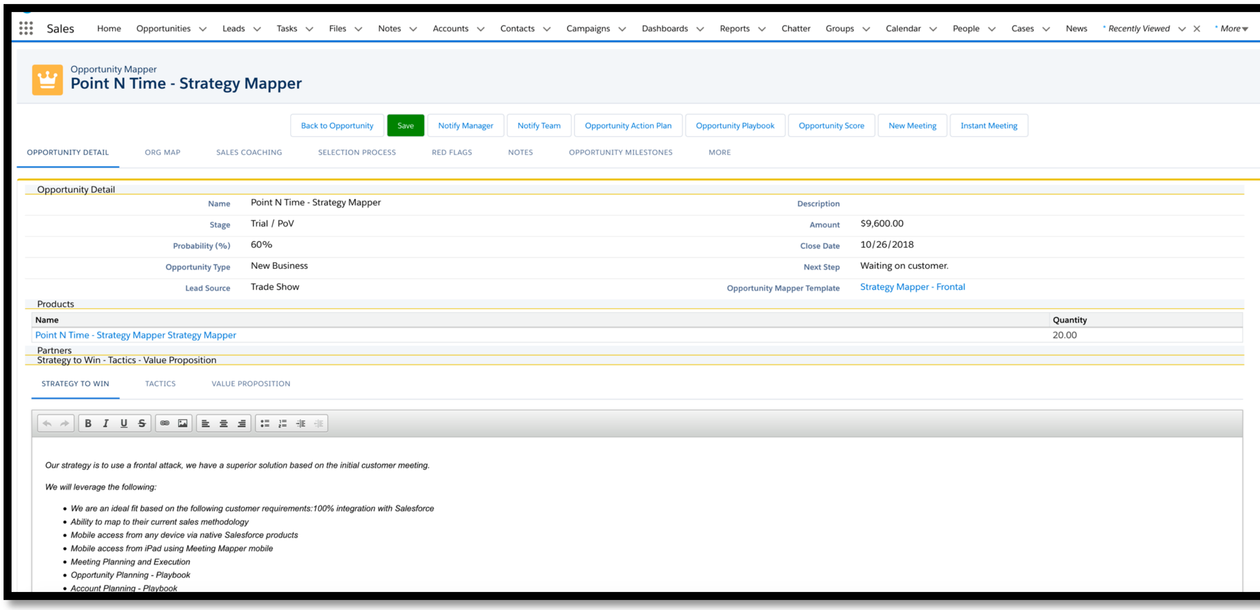


Figure 116

The Opportunity Mapper page is comprised of Buttons along the top and Tabs under them (Pages) (figure 117).

Note: Your plan may have different buttons and tabs to select and complete. This guide is shows most used capabilities in an opportunity plan.

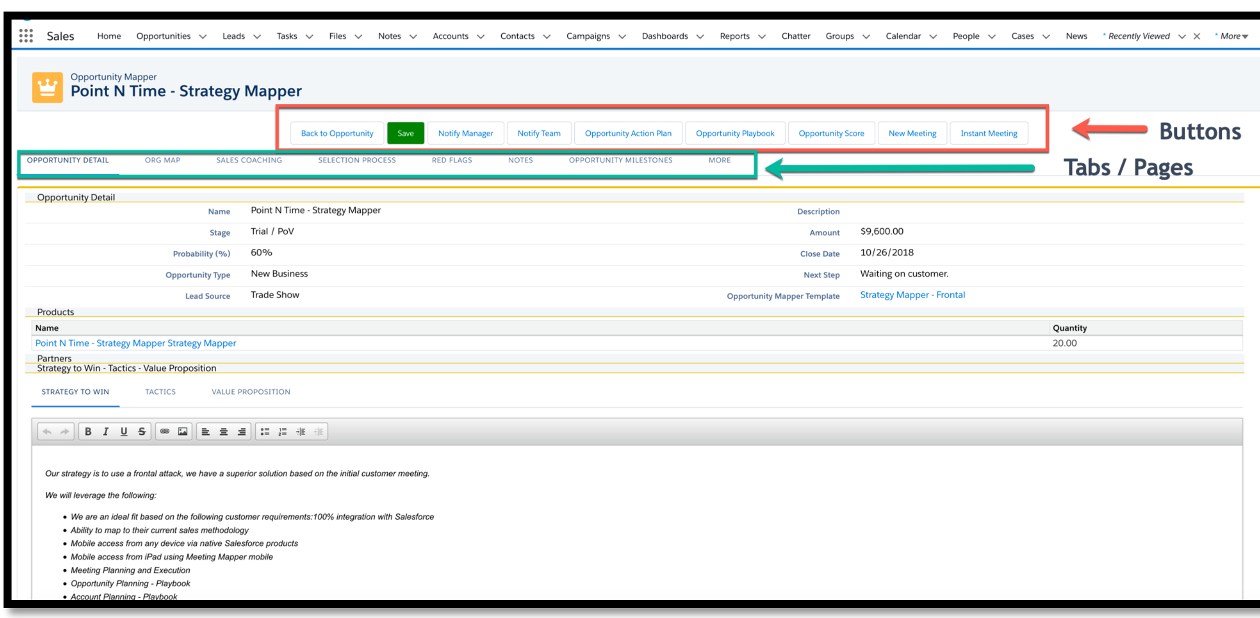


Figure 117

Opportunity Detail Page

The Opportunity Detail page consist of the following:

4. Opportunity Detail section, the information displayed is based on the template, it is not editable (figure 118). This is for informational proposes only.

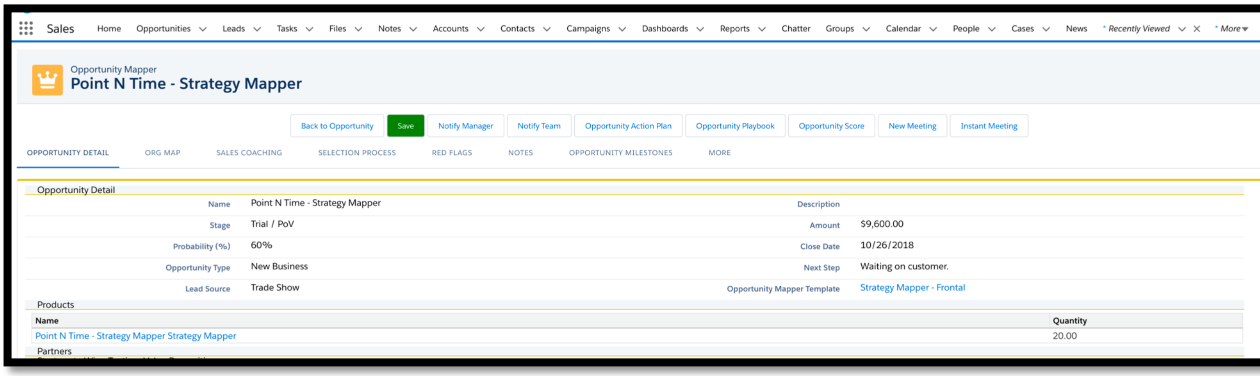


Figure 118

5. Products and Partners, this will display products linked to the opportunity and partners assisting in the opportunity (figure 119).

Figure 119

6. Click in the sections to add information to your plan (figure 120). Depending on your template, the sections can be pre-populated with information. You can edit, delete and add to the sections. This doesn't alter or change the template, only your plan. Ensure you click on Save when moving from section to section. The current open section will be underlined, for example: Strategy to Win is the active section.

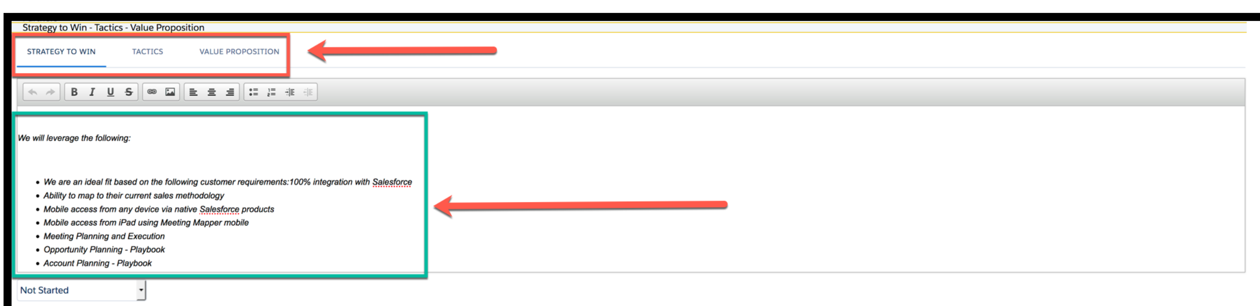


Figure 120

Note: When changes are made to the plan, the Save button turns to Red. Once you click on Save, it will revert back to Green (figure 121 & 122).

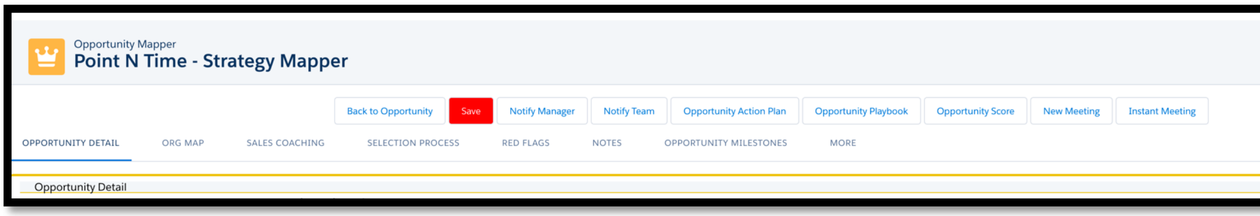


Figure 121

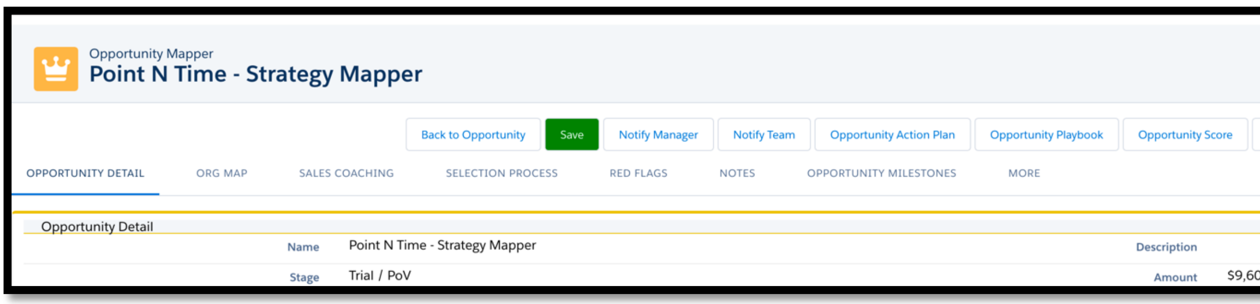


Figure 122

7. After you have completed your edits, click on Not Started to display a dropdown selection. Selecting how complete the plan is, is very important. They are components of the overall scoring for the plan (figure 123).

Note: Scoring Matrix:

Not Started = 0
Working = 50
Completed = 100

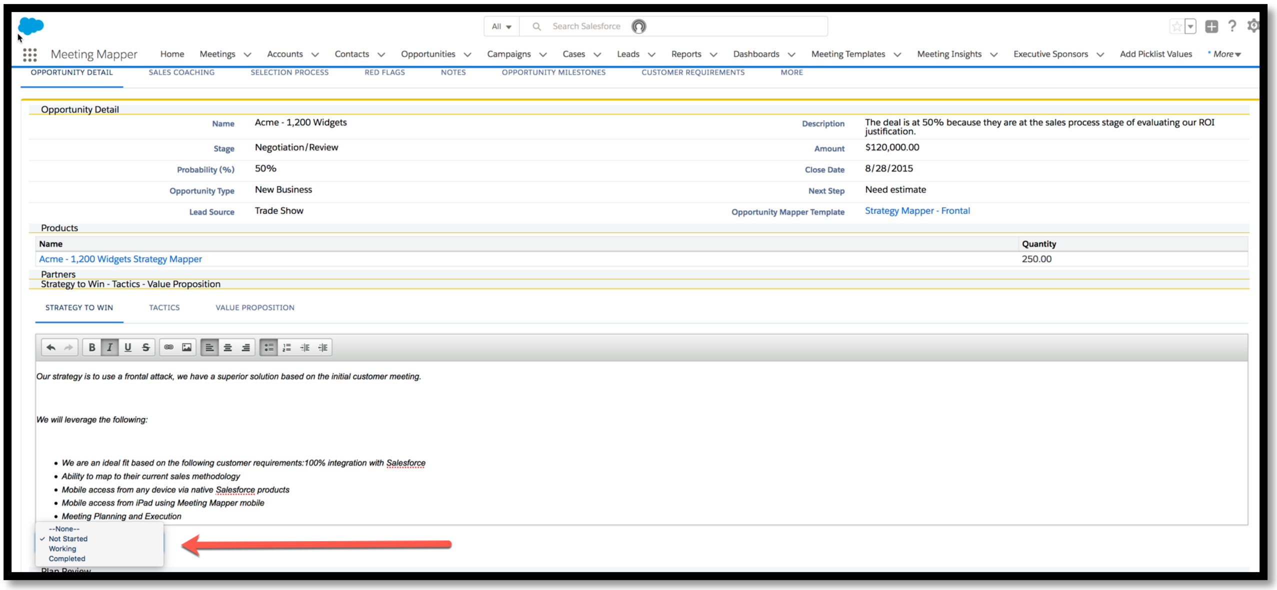


Figure 123

Plan Review

The plan review section allows your manager and team members to provide input to the plan. This ensures all team members are involved and management is in sync the plan (figure 123).

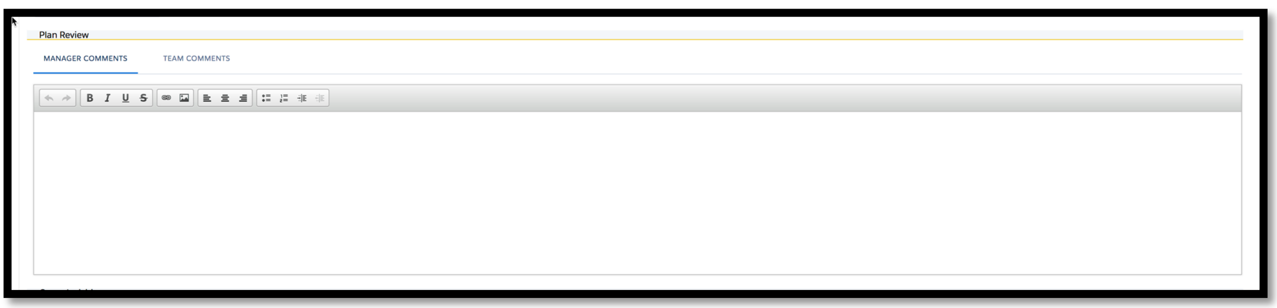


Figure 124

To notify manager(s) or team members to provide input and review the plan:

8. Click on either Notify Manager button or Notify Team button (figure 125).

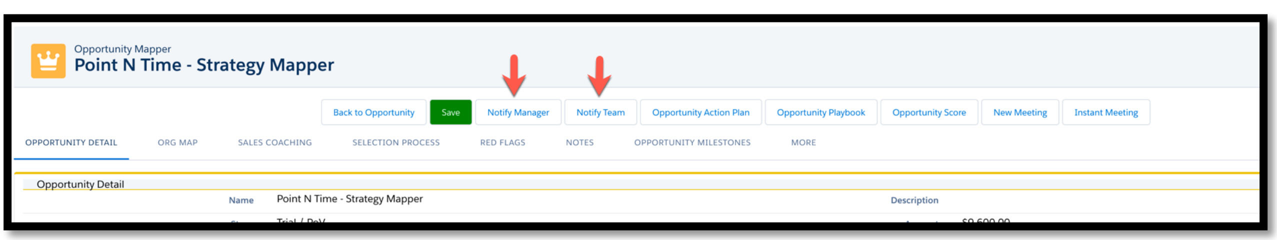


Figure 125

9. Click Add next to the manager (figure 126). To Save the manager(s), click Save. To send a review request select Send (figure 127).

Best Practice
When you initially create your plan, build your list of manger(s) to send review notices. When you want to send notices all you have to do is click on Send.

Note: You can add more than one manager to send a review request.

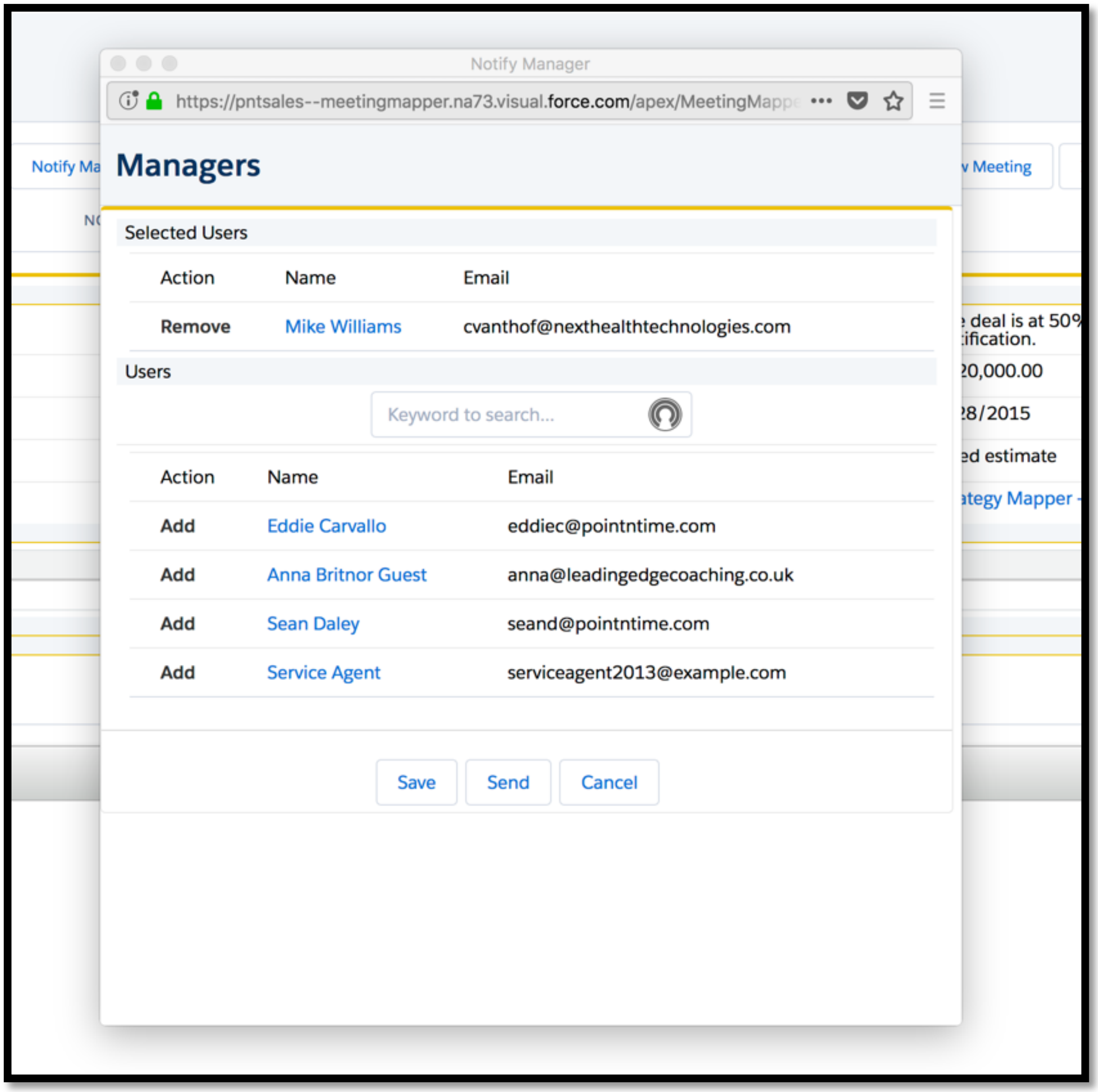

Notify Manager
https://pntsales--meetingmapper.na73.visual.force.com/apex/MeetingMapp
Managers
Selected Users
Action
Name
Email
Remove
Mike Williams
cvanthof@nexthealthtechnologies.com
Users
Keyword to search...
Action
Name
Email
Add
Eddie Carvallo
eddiec@pointntime.com
Add
Anna Britnor Guest
anna@leadingedgecoaching.co.uk
Add
Sean Daley
seand@pointntime.com
Add
Service Agent
serviceagent2013@example.com
Save
Send
Cancel

Figure 126

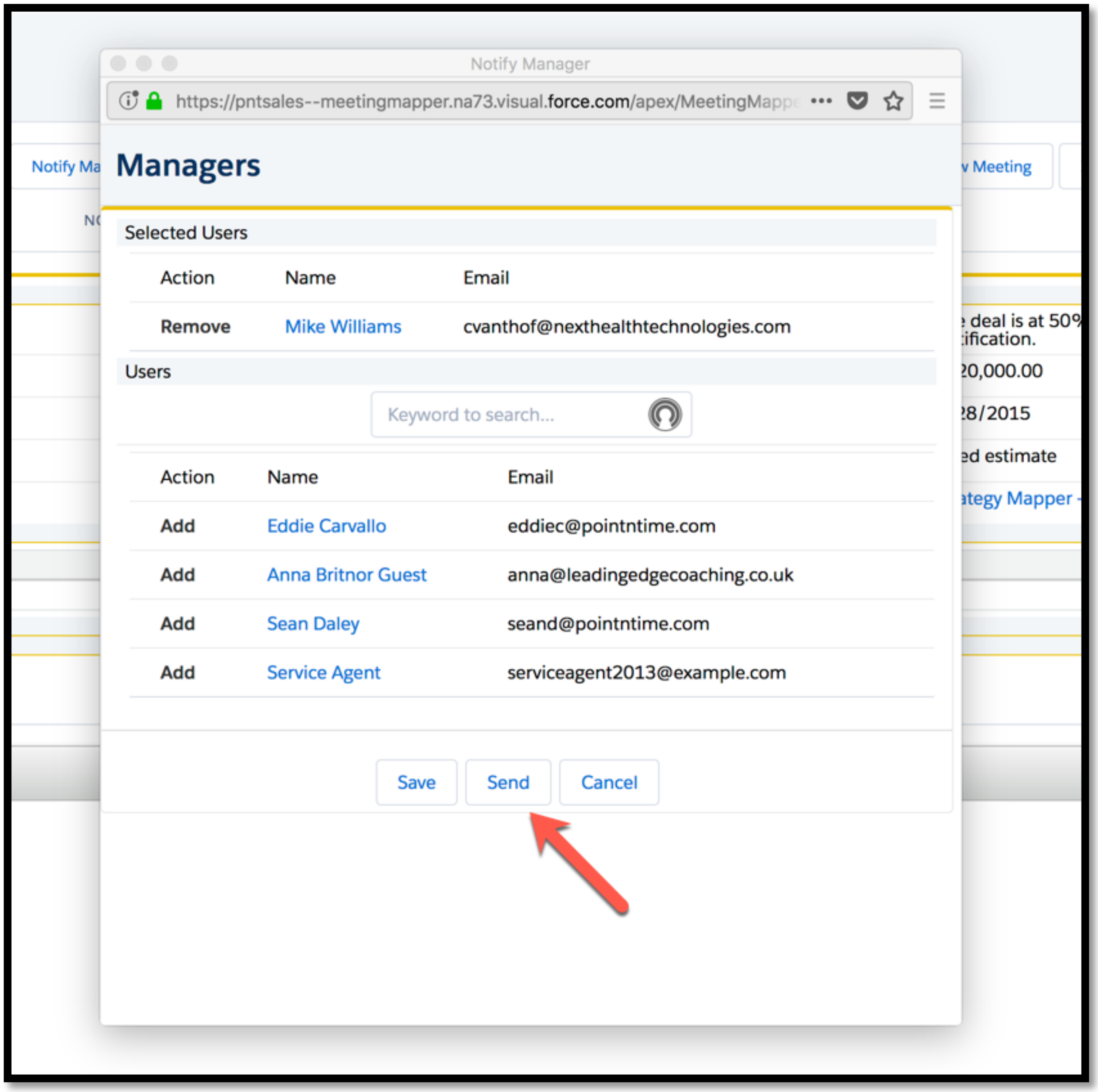


Figure 127

The send to Notify Team uses the same the steps (figure 128 & 129).

Best Practice
When you initially create your plan, build your list of team members to send review notices. When you want to send notices all you have to do is click on Send.

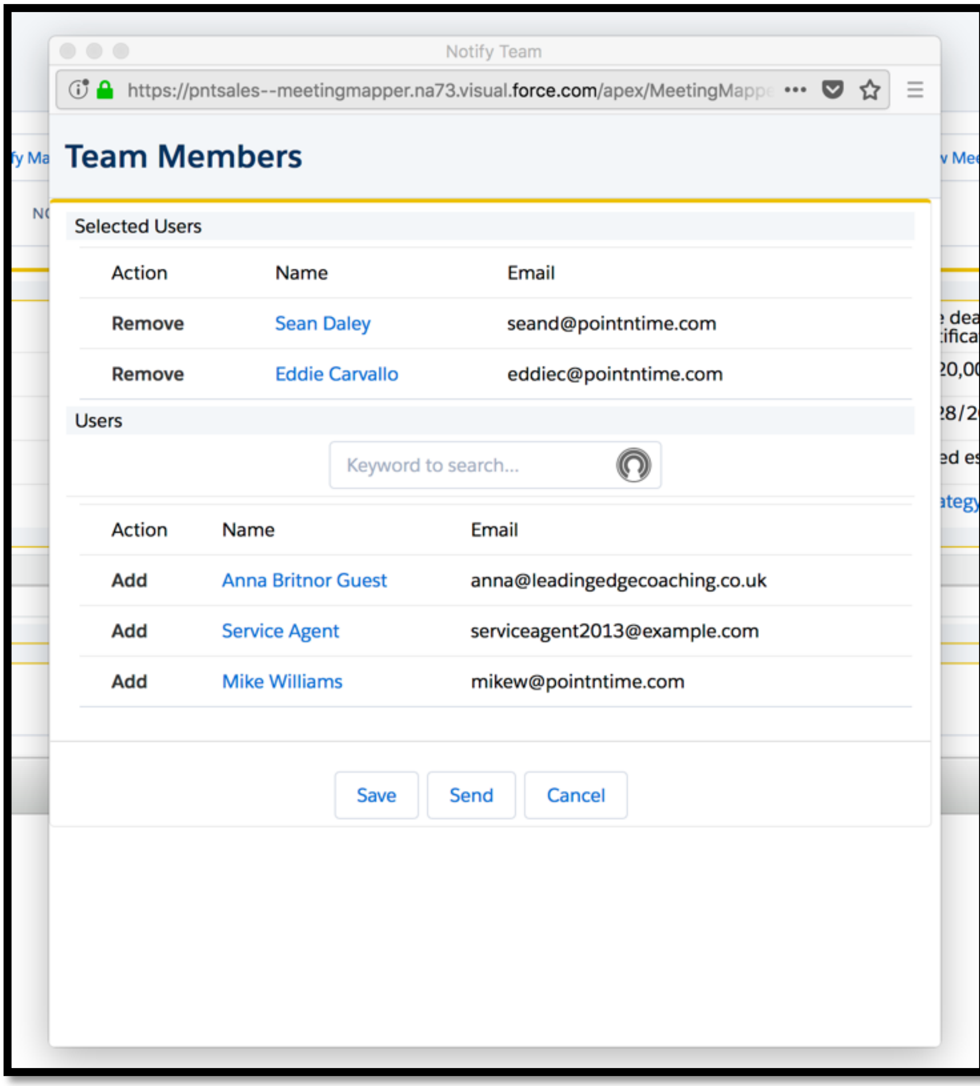

Notify Team
https://pntsales--meetingmapper.na73.visual.force.com/apex/MeetingMappe
Team Members
Selected Users
Action
Name
Email
Remove
Sean Daley
seand@pointntime.com
Remove
Eddie Carvallo
eddiec@pointntime.com
Users
Keyword to search...
Action
Name
Email
Add
Anna Britnor Guest
anna@leadingedgecoaching.co.uk
Add
Service Agent
serviceagent2013@example.com
Add
Mike Williams
mikew@pointntime.com
Save
Send
Cancel

Figure 128

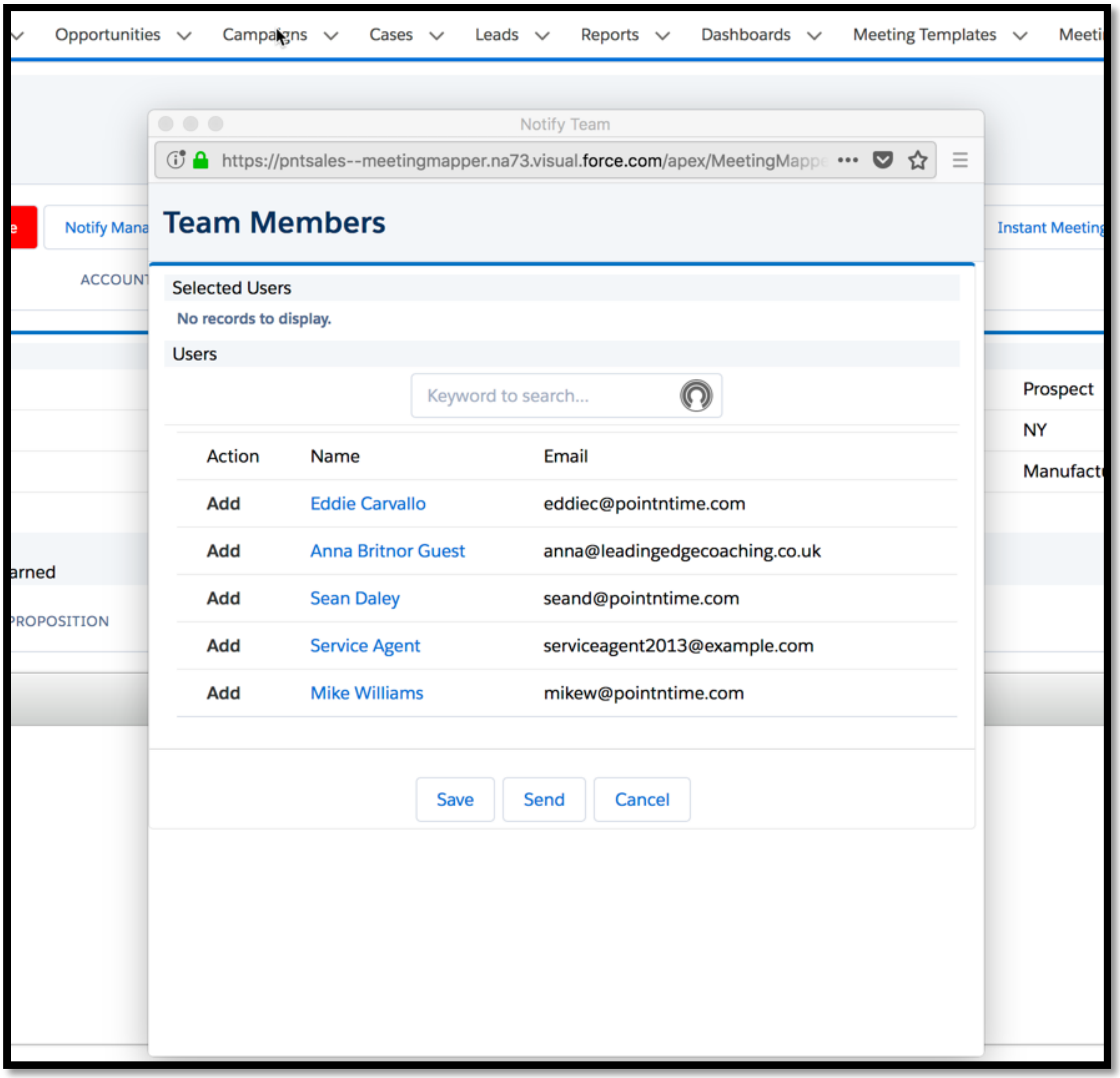


Figure 129

Organizational Map (Org Map)

By default, the Org Map will be populated with contacts (and their reports and who they report to if defined in Salesforce) that have attended a meeting using Meeting Mapper. If no meetings have been created, the Org Map will be blank the initial time it is open.

What is the Value to Me and My Team?

There is no better way to understand the stakeholders in your accounts. The information available in the Org Map allows you, your team and management to view very quickly the health of the relationships. Your team members can update contacts based on their last

interaction with them. Org Maps are great for opportunity reviews, OBRs and other critical presentations.

To view the Org Map, click on Org Map tab (figure 130). This will display the current Org Map based on the 'Reports To' field for the Contact (figure 131). If the Org Map is empty, go to the Adding Contacts Section.

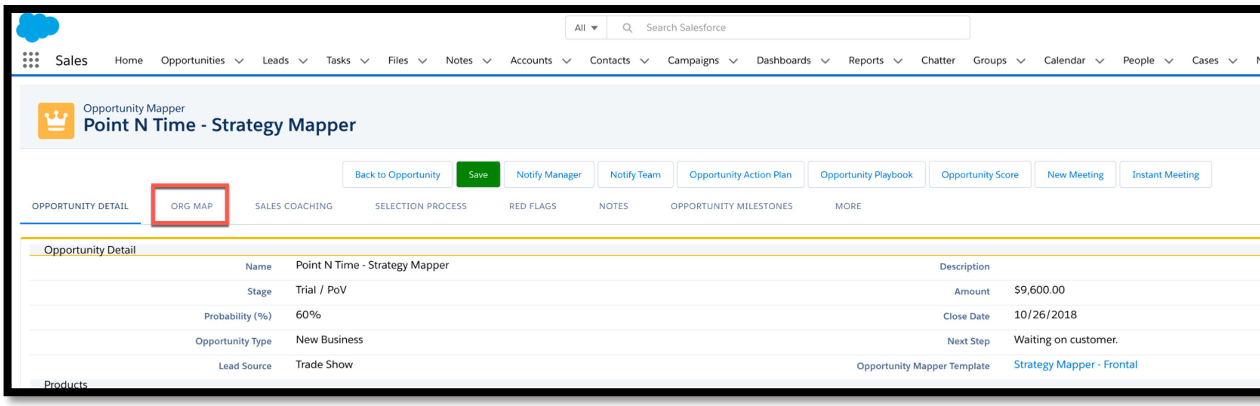


Figure 130

Note: You can also view the Org Map by clicking on the button 'Org Map' is displayed based on the template settings.

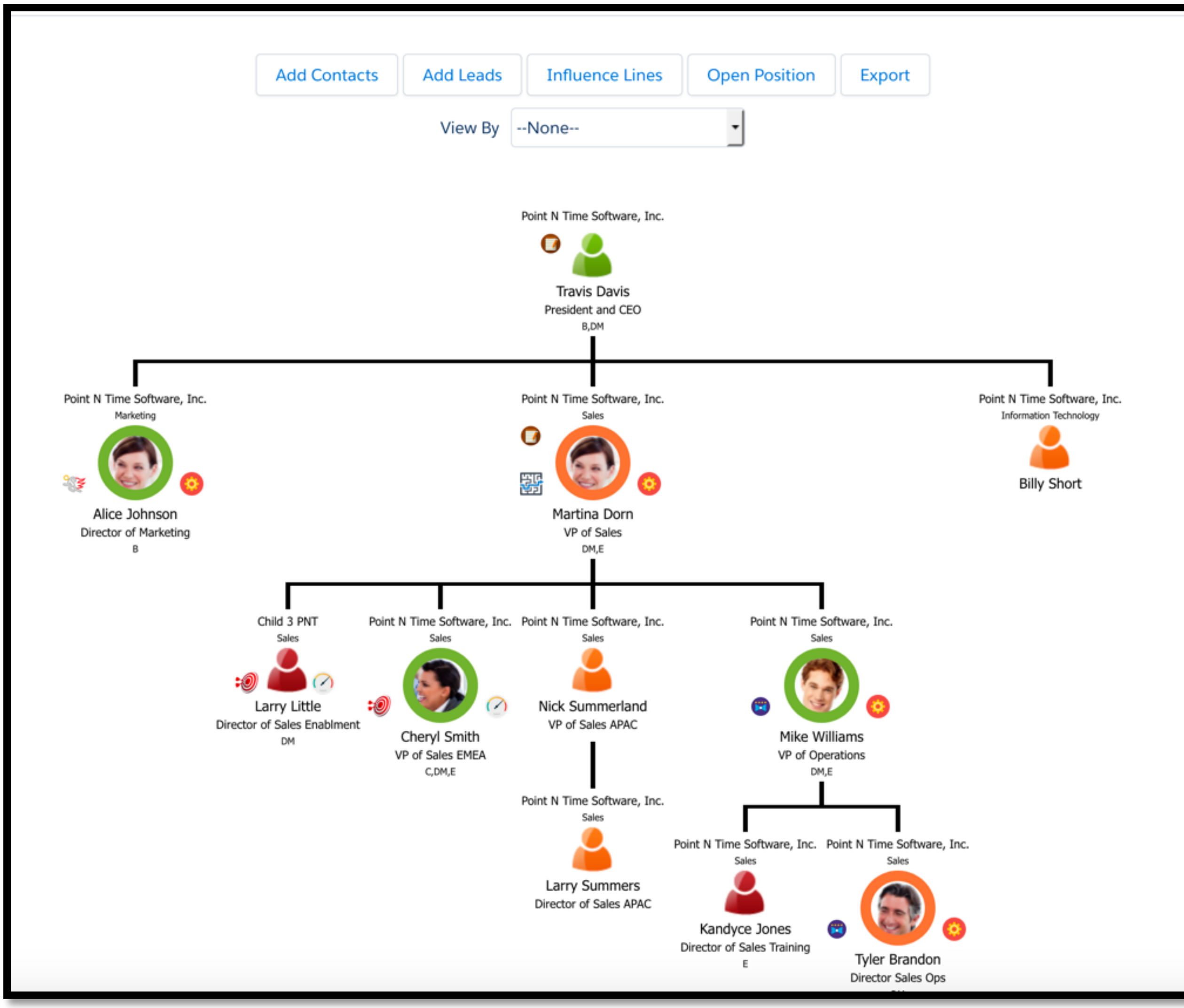


Figure 131

Org Map Fundamentals

Add Contacts

This allows you to add contacts to the Org Map, by default only contacts that have been meeting attendees using Meeting Mapper are displayed in the Org Map. In addition, to the contact their 'Reports To' and who reports to them are displayed. However, you can add additional contacts to the Org Map. These can be from the Account or other Accounts.

10. Click on Add Contacts, either select from the pre-populated list or search for the contact (figure 132). Click Add next to the contact.

Note: Only a certain number of contacts are displayed by default.

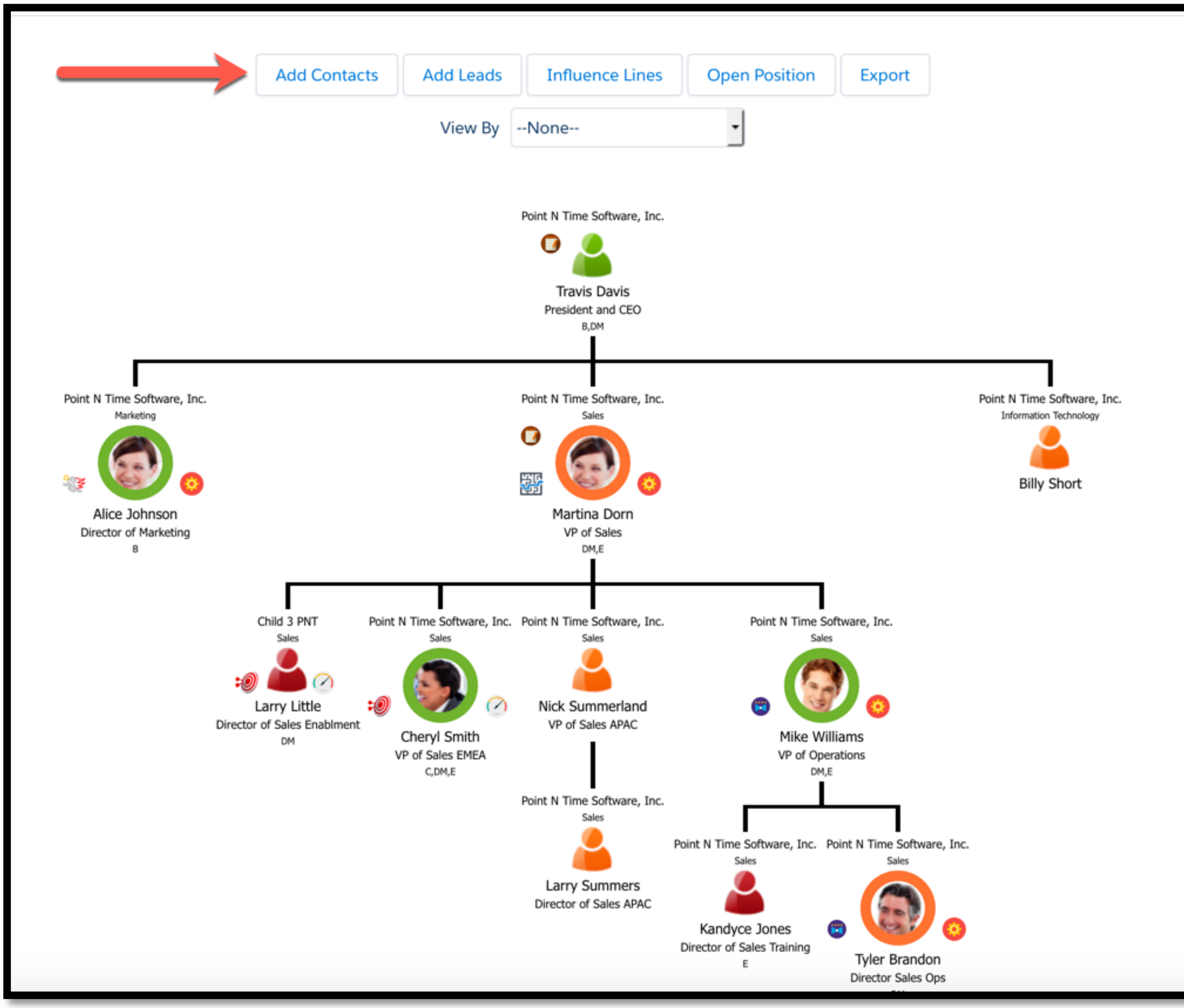


Figure 132

Show All Contacts displays contacts from other accounts in Salesforce, this is helpful if you want to add a partner to the org map to show a relationship.

11. Click Save (figure 133).

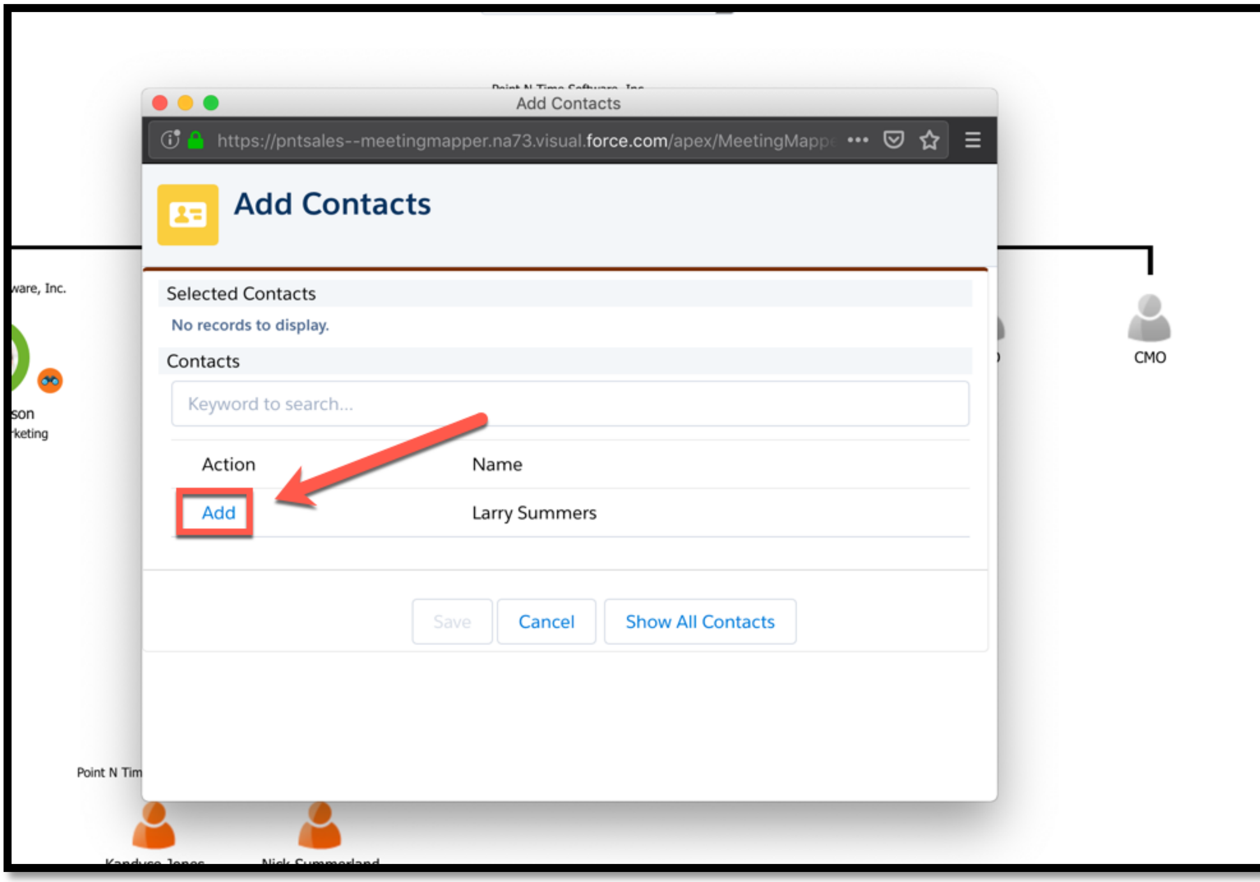


Figure 133

12. New contact will display on Org Map (figure 134). If the contact reports to a contact on the org map, the contact will be aligned to the other contact. In the event the 'Reports To' field is not completed the contact will display on the org map.

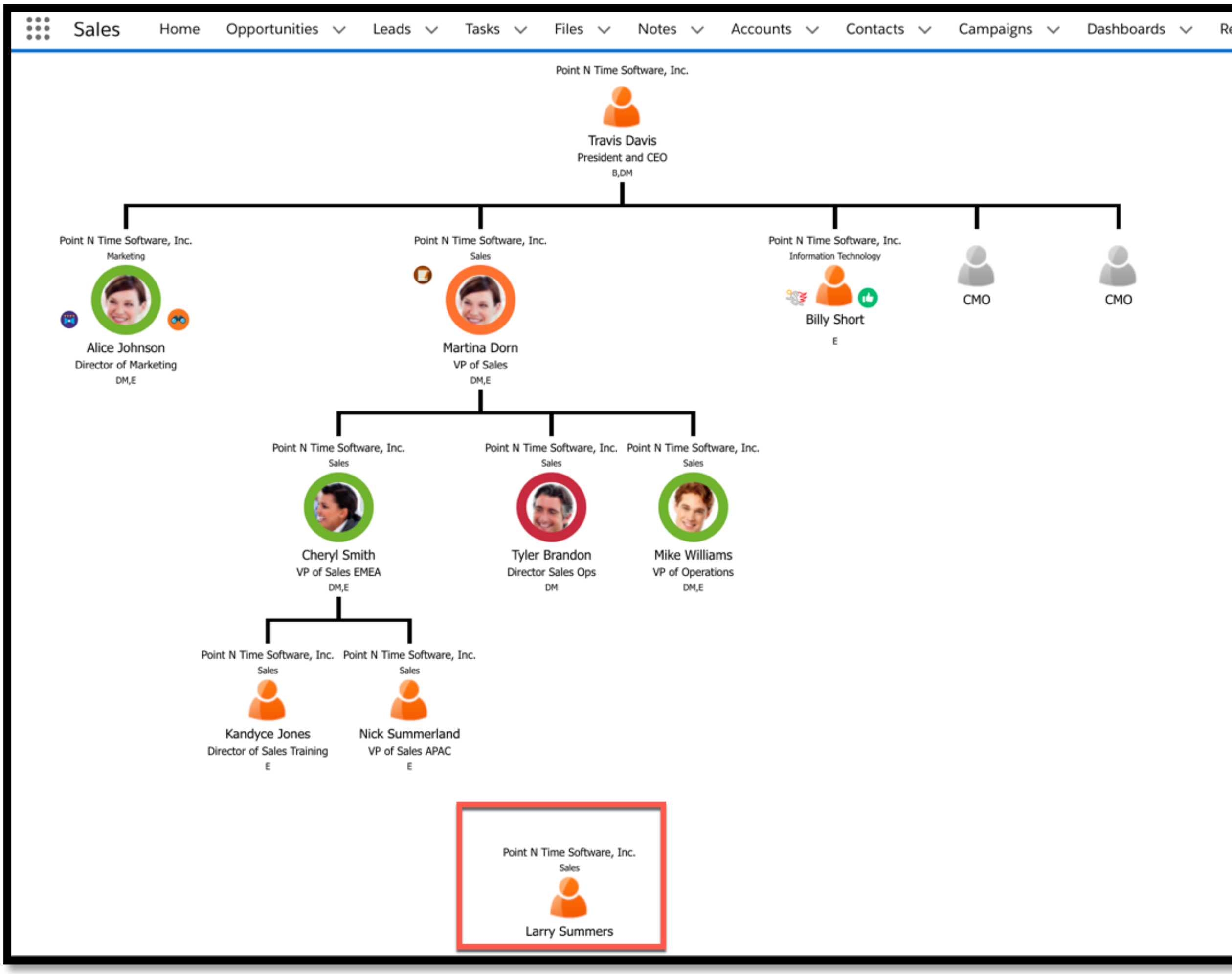


Figure 134

Re-aligning a Contact

Re-aligning a contact gives you the ability to dynamically re-align contacts and who they report to in the Org Map.

13. Click on the contact and drag to the new position, release mouse (figure 135).

Figure 135

Contact Details

The contact icon can display several smaller icons highlighting key factors related to the icon (figure 136 & 137).

Figure 136

- Icon color depicts the Stance (see Meeting Mapper section)
- Individual Notes – top left corner
- Department within the Organization they belong to – under account name
- Main Influencing Factor – bottom left and right corner
- Title – under contact name

- Role – Under title

Change Contact Details – you can change several contact details in the Org Map.

- **Stance** - Edit current Stance
- **Role** – Edit current Role
- **Executive Sponsor** – Assign an executive from your company to reach out this this contact
- **Attendee Notes** – Create individual notes for this contact (when a note is created the note icon will be displayed next to the contact icon, click on the icon to review the notes.
- **Reports To** – Change the Reports To, it's recommended just move the contact icon to the new reports to on the org map
- **Remove** – Removes the contact from the org map, can be added later at anytime
- **Realign** – Will remove the contact from the reporting structure, will remain on the org map page.
- **Departments** – What department or business unit does the contact report into.
- **Main Influencing Factor(s)** – What is influencing their decision.

Note: MIF will only be displayed if the contact has been a meeting attendee in Meeting Mapper.

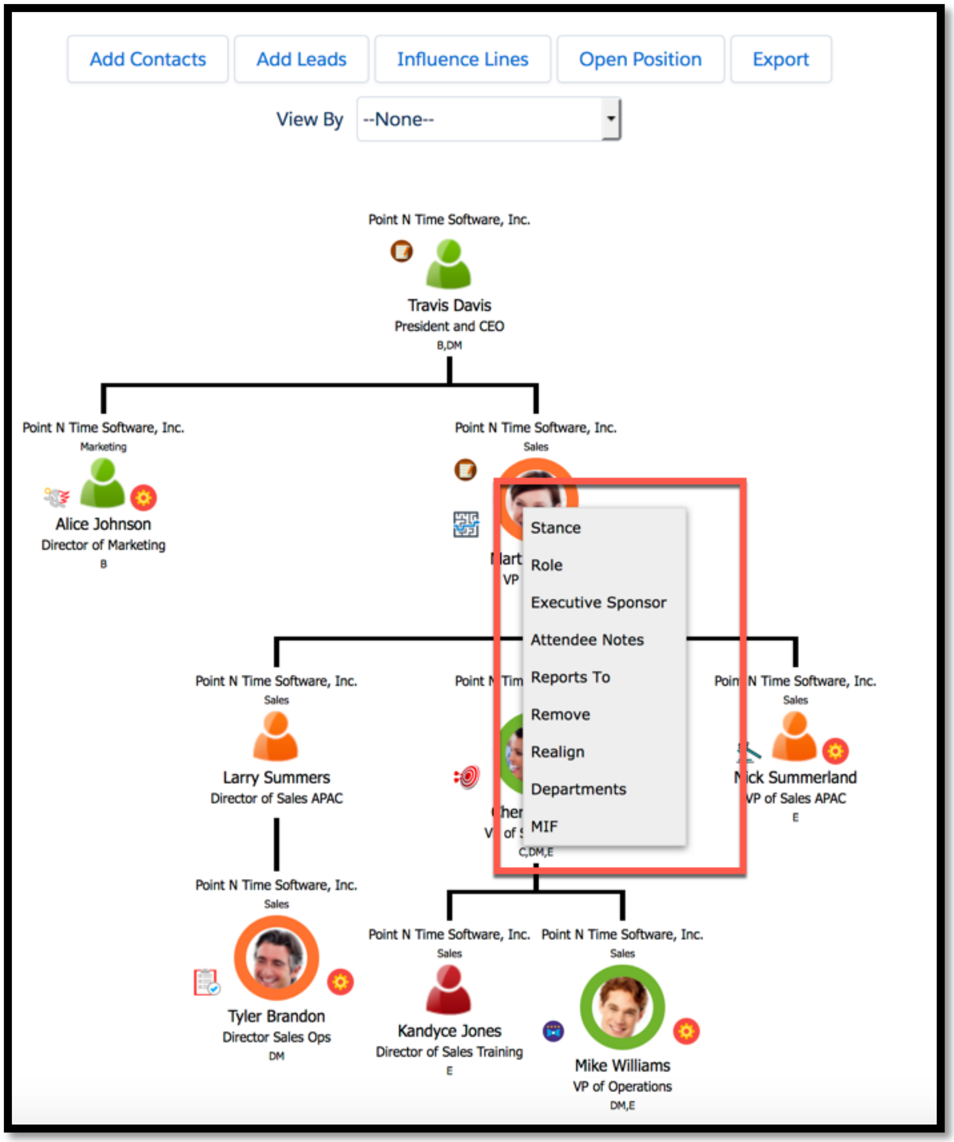


Figure 137

Influencer Lines Mode

Line Mode allows you to build lines of relationships between contacts (figure 138).

Note: The org map can't be collapsed in Influence Line Mode. When an influence line is created between two contacts, in the event the contact is re-aligned the influence line will be maintained between the contacts.

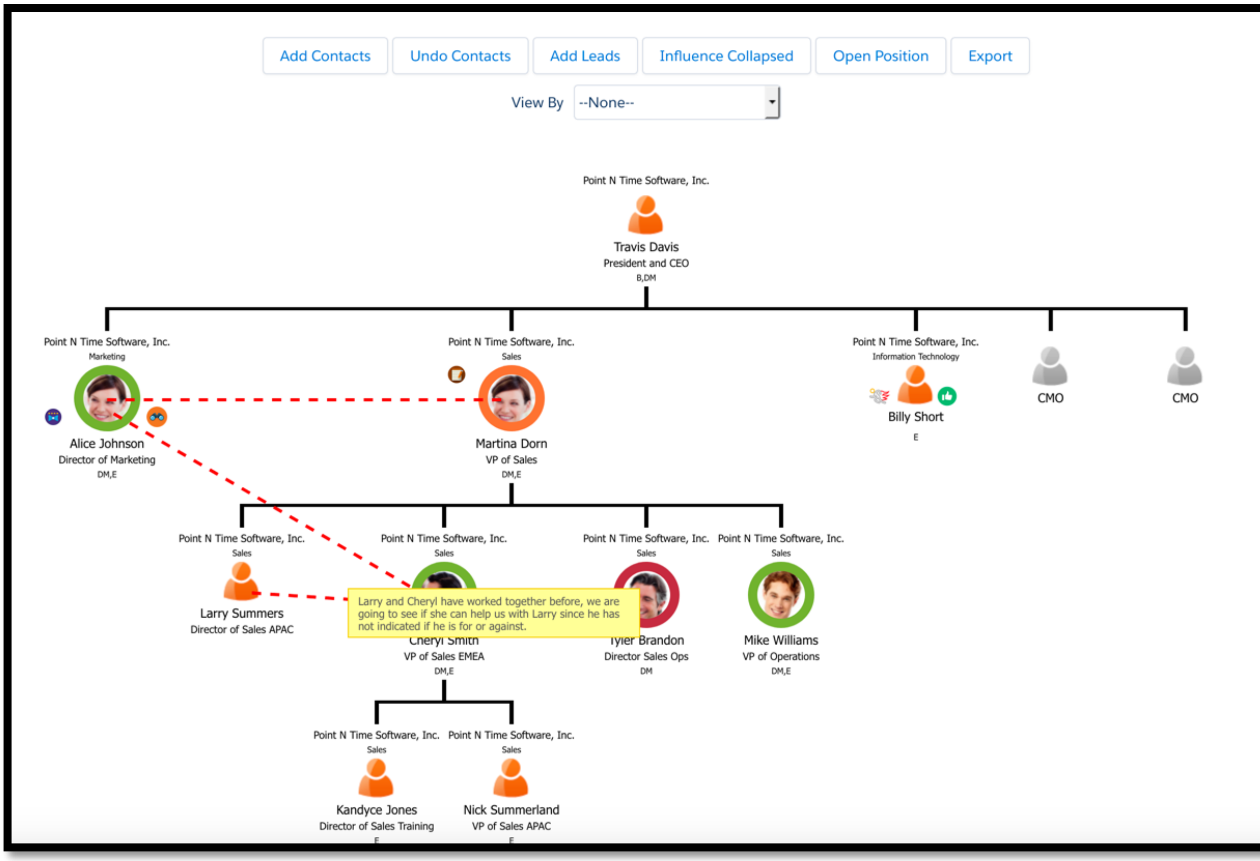


Figure 138

14. Verify you're in Influence Lines Mode, (to verify the button will display Switch to Influence Collapsed) mouse click on the first contact, then mouse click on the second contact. This will draw a dashed line connecting them.
15. Hover of click on the line to add information why the relationship (figure 139). Mouse click to review the information regarding the connection.

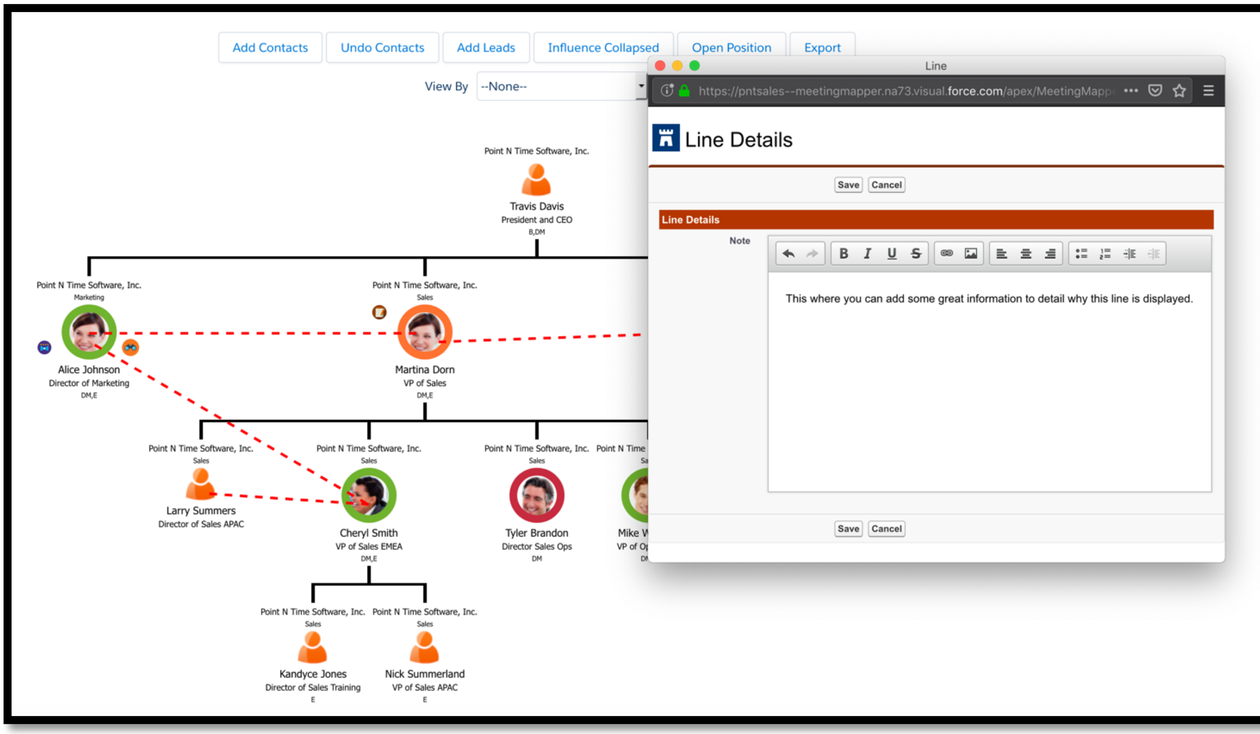


Figure 139

16. To delete the relationship, right mouse click on the line and click Ok (figure 140).

Figure 140

Note: The Org Map as the ability to create an org map based on Leads. However, a lead can't report to a contact or a contact report to a lead. The steps and procedures are the same for lead and contacts.

Add Open Position

Open Position allows you to add a 'Placeholder' for a position in the org map. For example, you know there is a VP of HR but you don't know or have identified who it is. However, you do want to display the position.

17. Click on Open Position (figure 141). Enter in the position title (figure 142) and click Save.

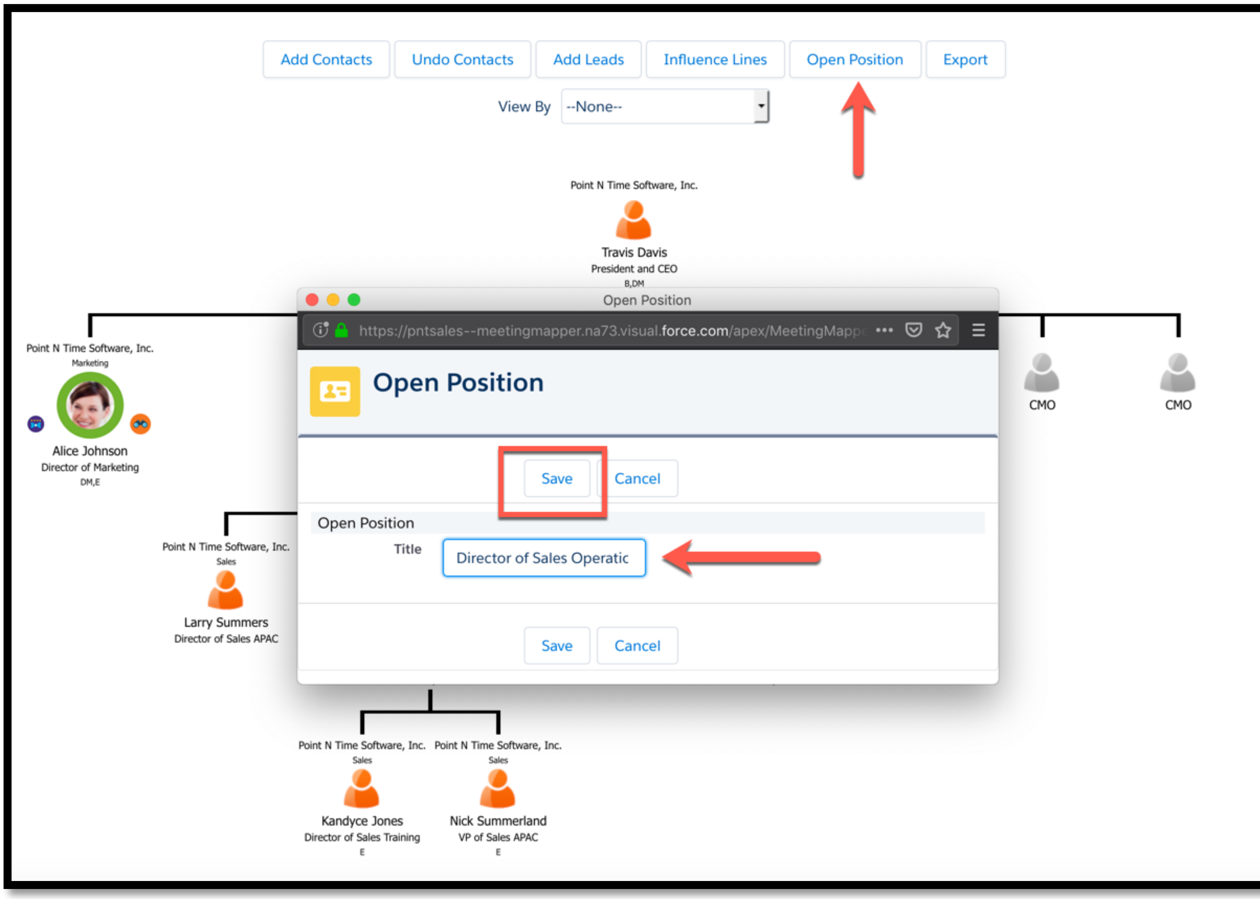


Figure 141

Open Position Rules:

- A contact cannot report to an Open Position
- An Open Position can report to a contact
- An Open Position can report to another Open Position (Figure 142)

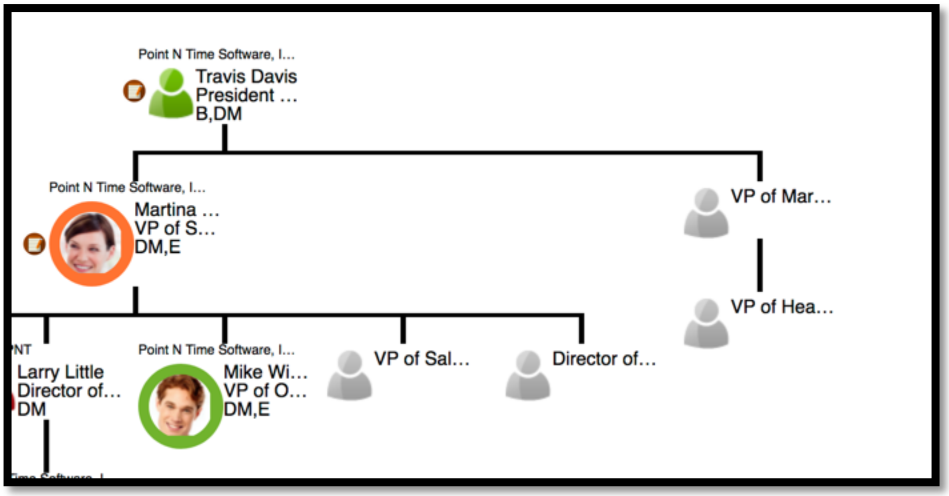


Figure 142

18. The open position will display on the left side of the org map, drag the icon over the contact it reports to (figure 143).

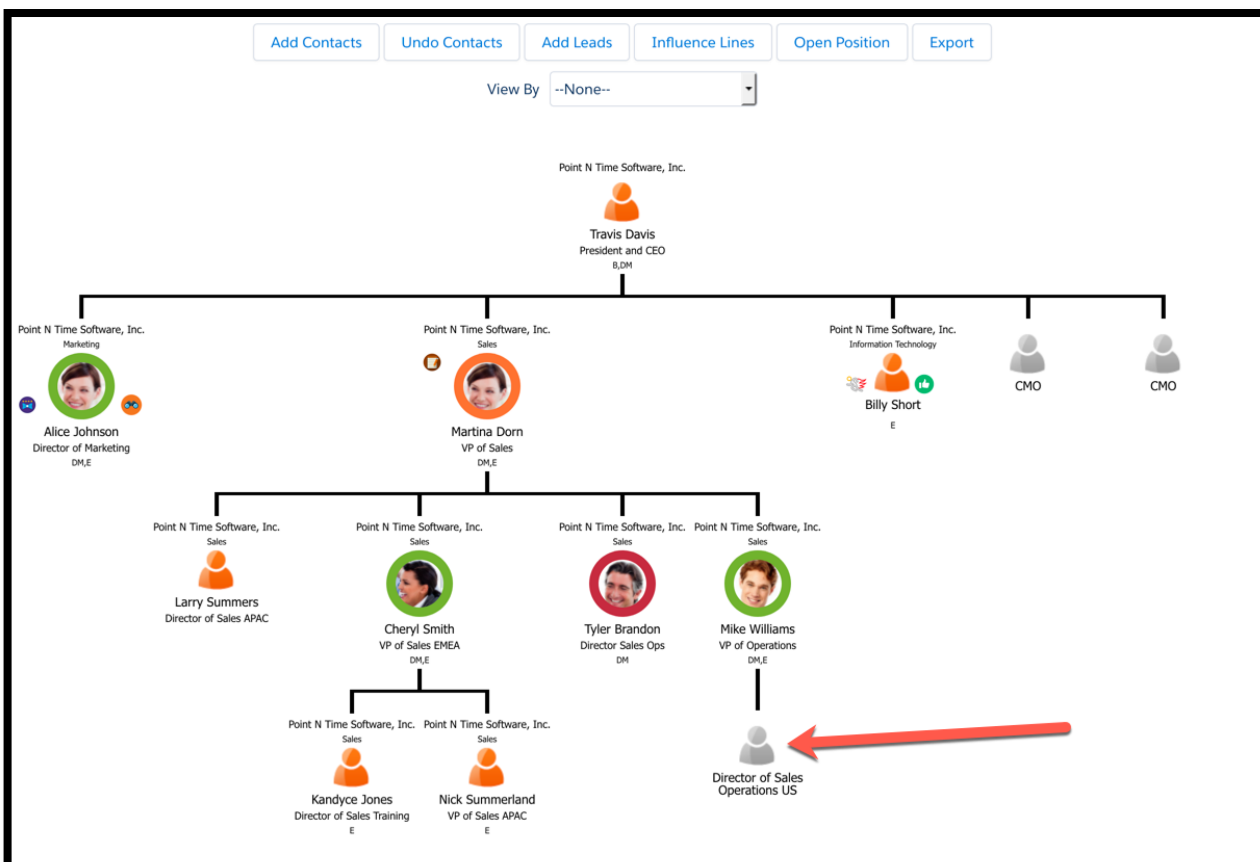


Figure 143

Export the Org Map

19. To export the Org Map, click on Export (figure 144).

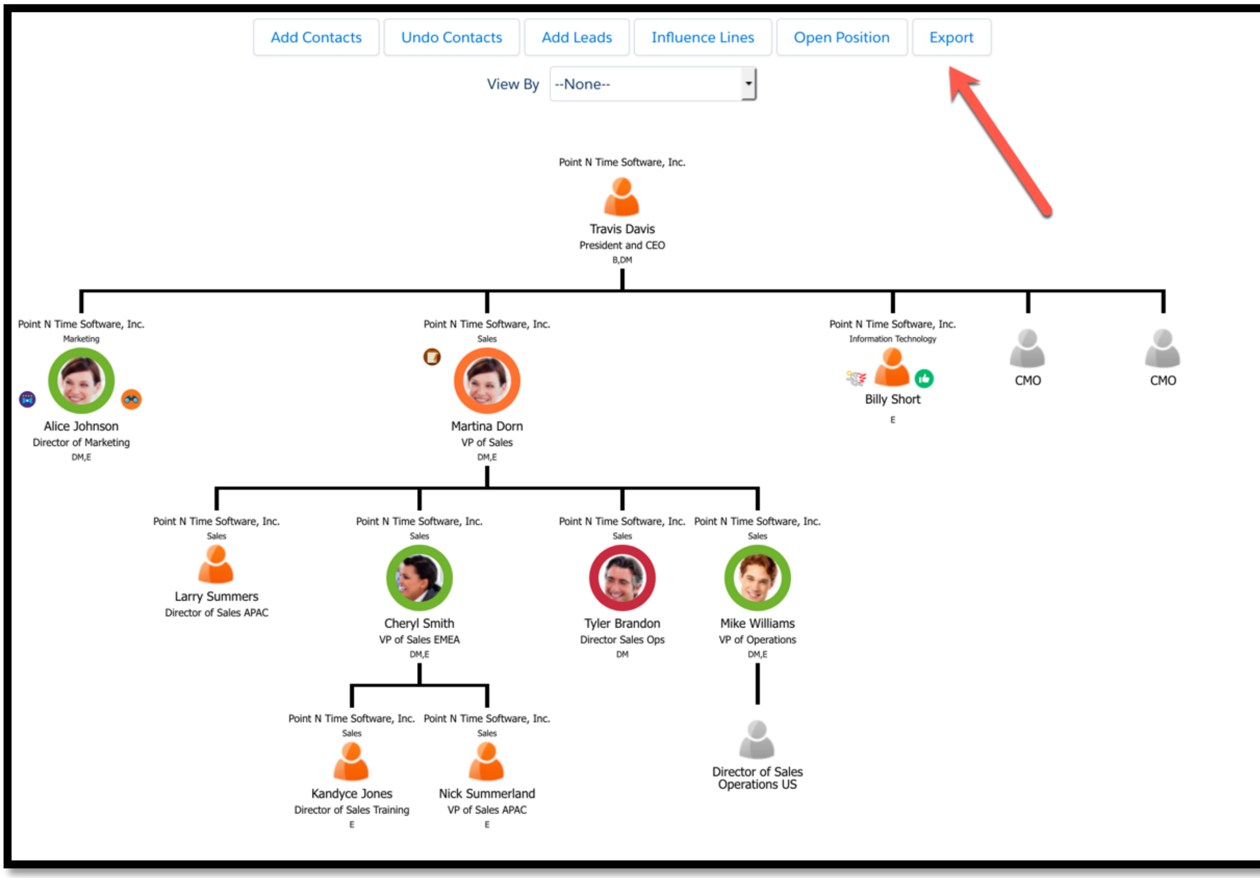


Figure 144

The following page will display, right mouse click on the page select 'Save Image As… '(figure 145). Give it a name and click Save (figure 146).

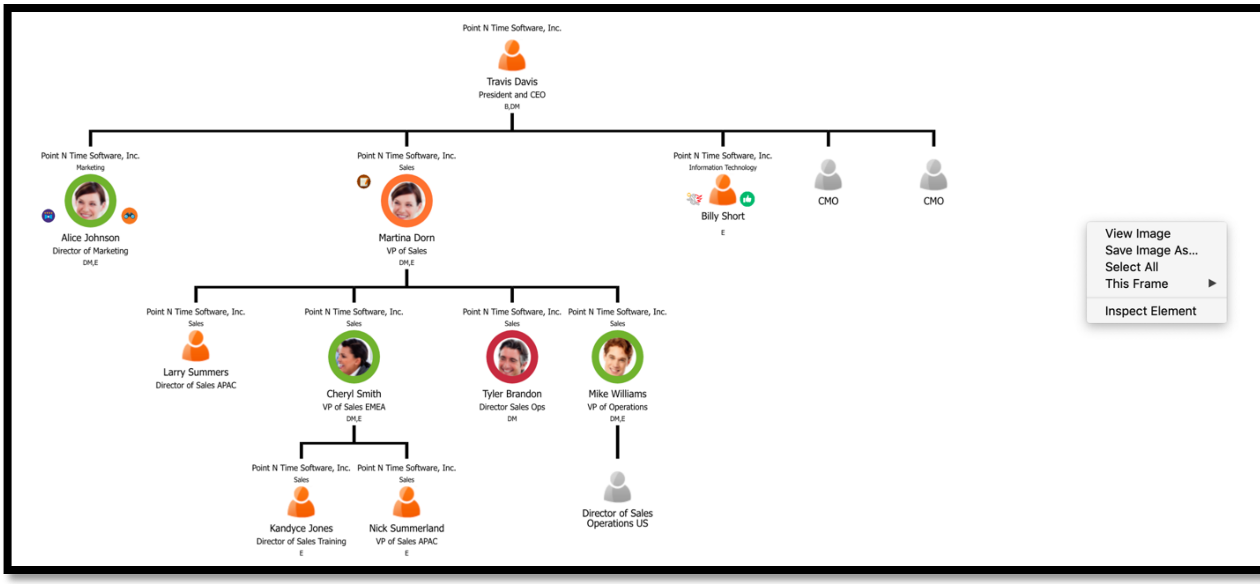


Figure 145

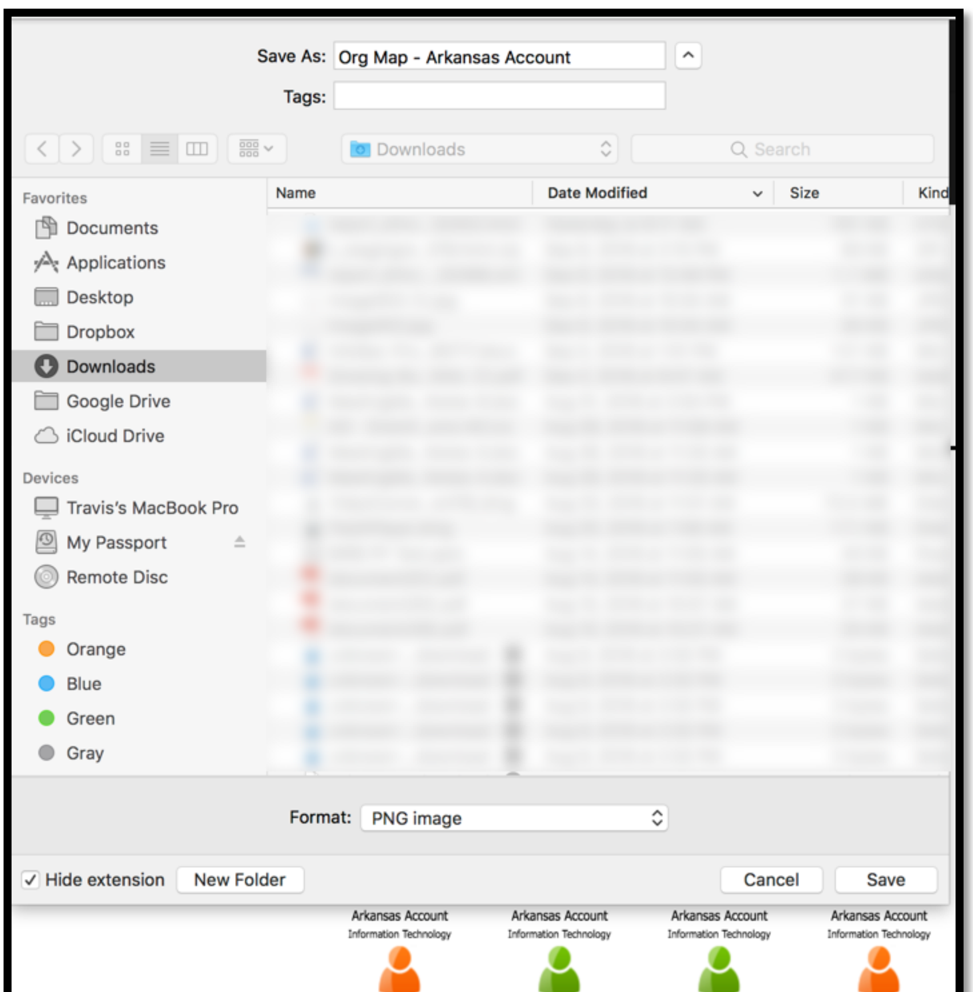


Figure 146

Display by Department

Note: Ensure contacts have their Department selected in their contact record (figure 147). If not, contact your Salesforce Administrator.

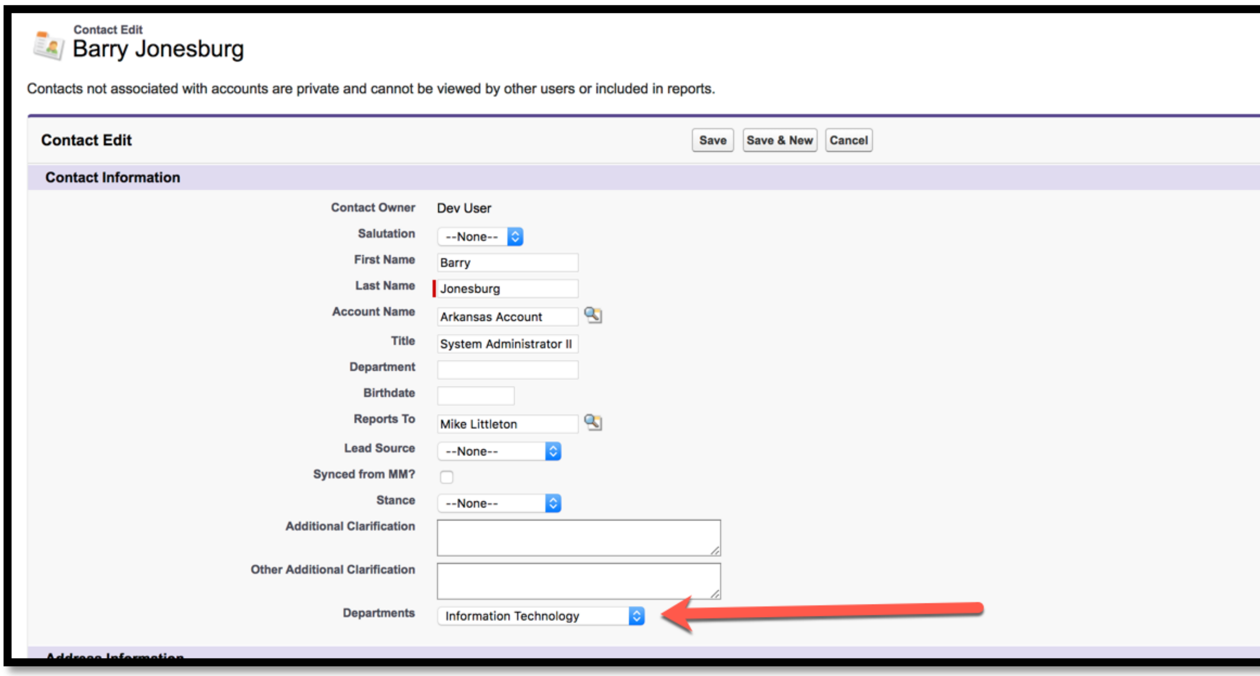


Figure 147

20. To display an Org Map for a department, click View By: on dropdown 'None' to display the list of departments (figure 148).

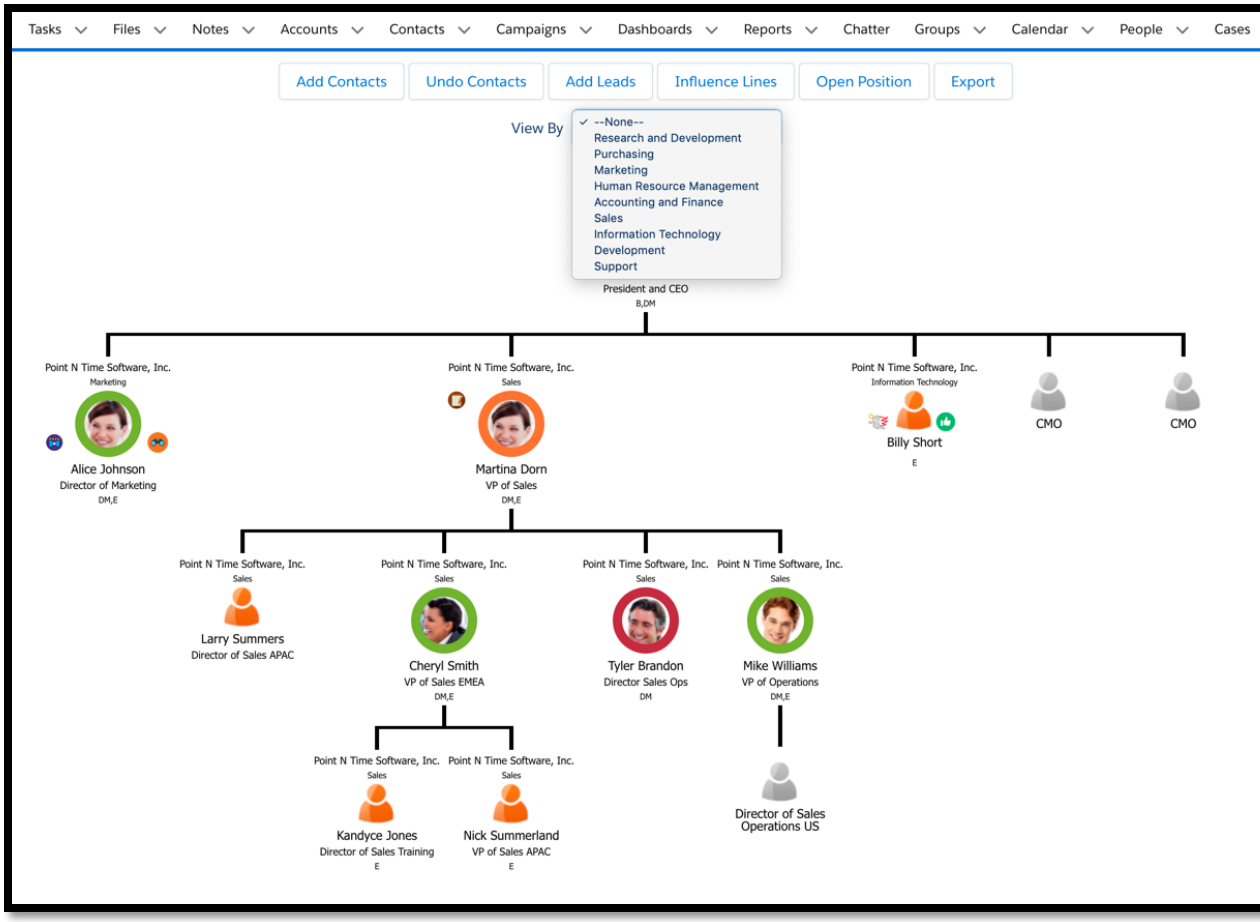


Figure 148

21. Select the department from the list.

In this example, Sales is selected (figure 149). Only the Org Map for Information Technology is displayed. This view all the capabilities of the full view. To return to full view, click on the dropdown and select None.

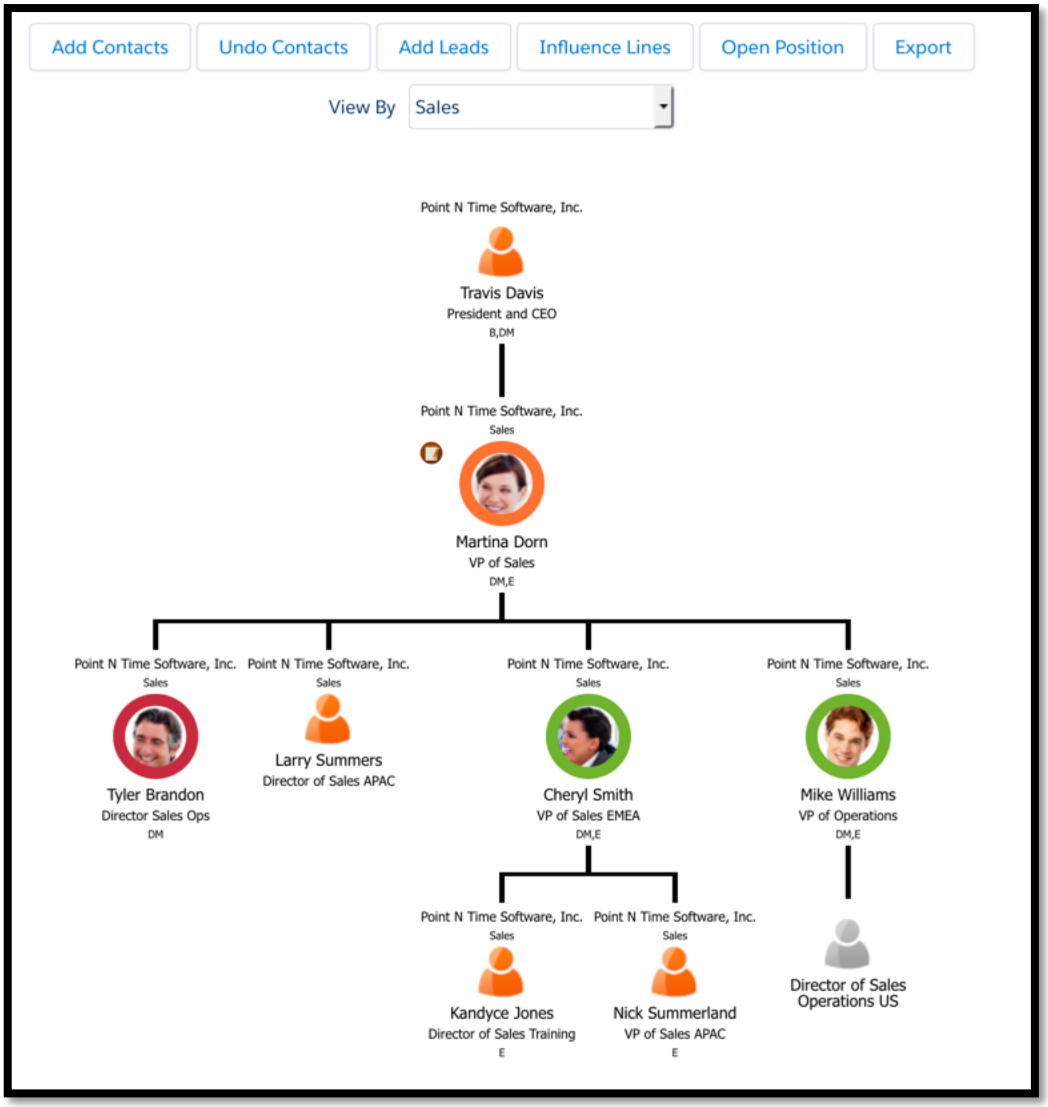


Figure 149

Sale Coaching

Sales Coaching provides the user with just in-time information that will assist them in the stage of the opportunity they are currently in. Sales Coaching is based on the template and can be different based on the template selected. In addition, to the coaching meetings conducted in the stage of the opportunity are also displayed. Clicking on a meeting allows the user to review any information or sales intelligence uncovered in the meeting.

What is the Value to Me and My Team?

Sales Coaching allows all your team players to execute and plan like 'A-Players'. The just in-time information is tailored the product or solution being sold in the opportunity.

22. Click on Sales Coaching, based on the current stage of the opportunity coaching advice, links to doc, videos or other information will be displayed based on the template (figure 150). You can add, remove or edit the information in the stages, to best match your strategy and tactics. Editing will not affect the template.

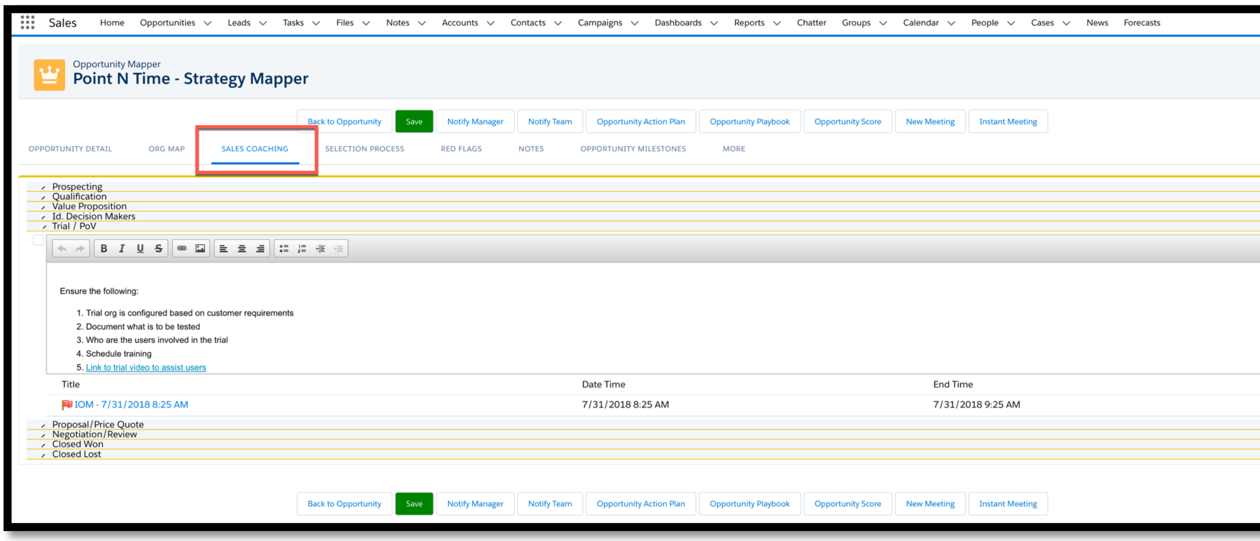


Figure 150

23. Click the check box to complete the stage, it will not move to the next stage, only complete the sales coaching for scoring of the opportunity (figure 151).

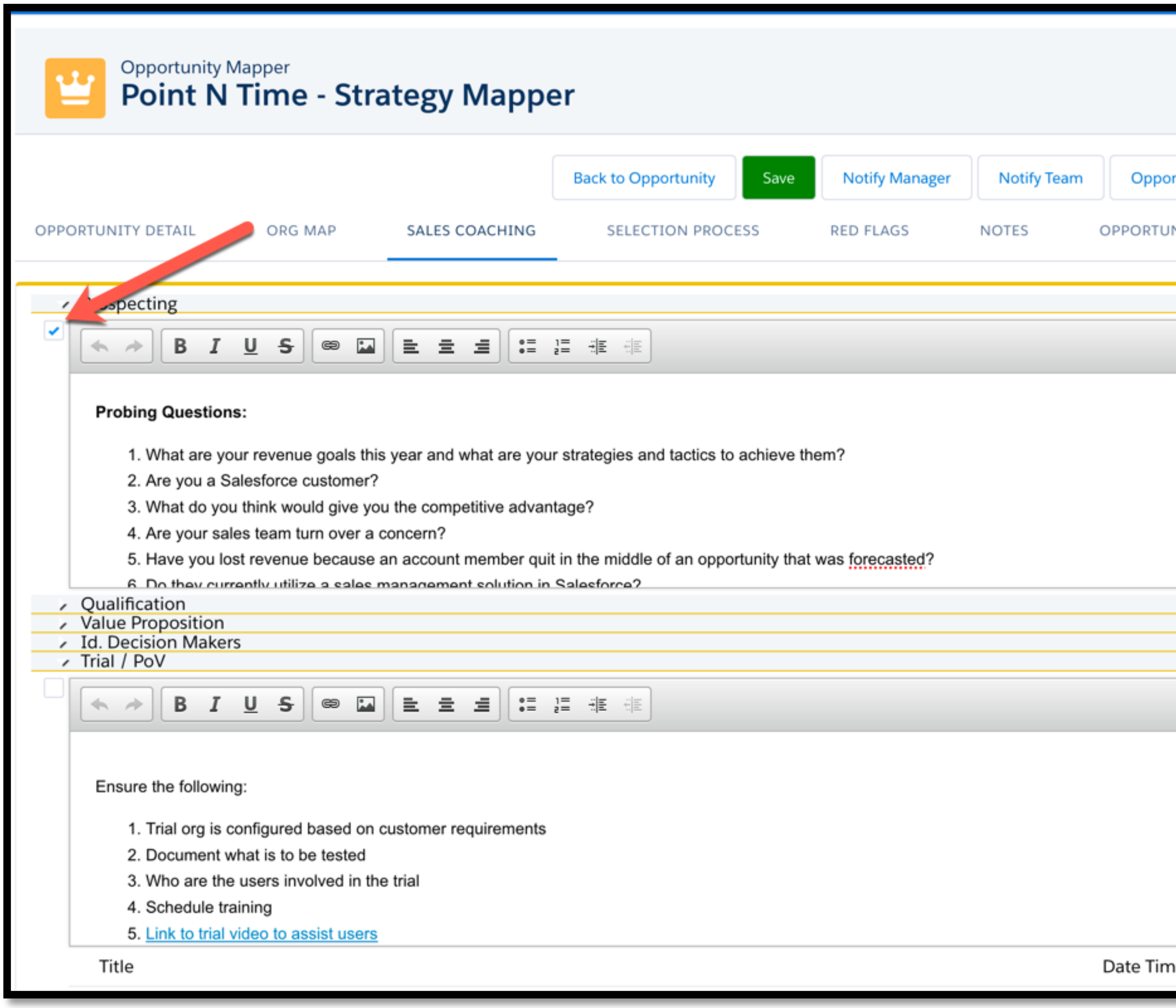


Figure 151

Note: Once you click the check box, it will close this stage and update the scoring for the opportunity.

Selection Process

It's important to understand how the customer selects a product to ensure you are in sync from a selling prospective (figure 152).

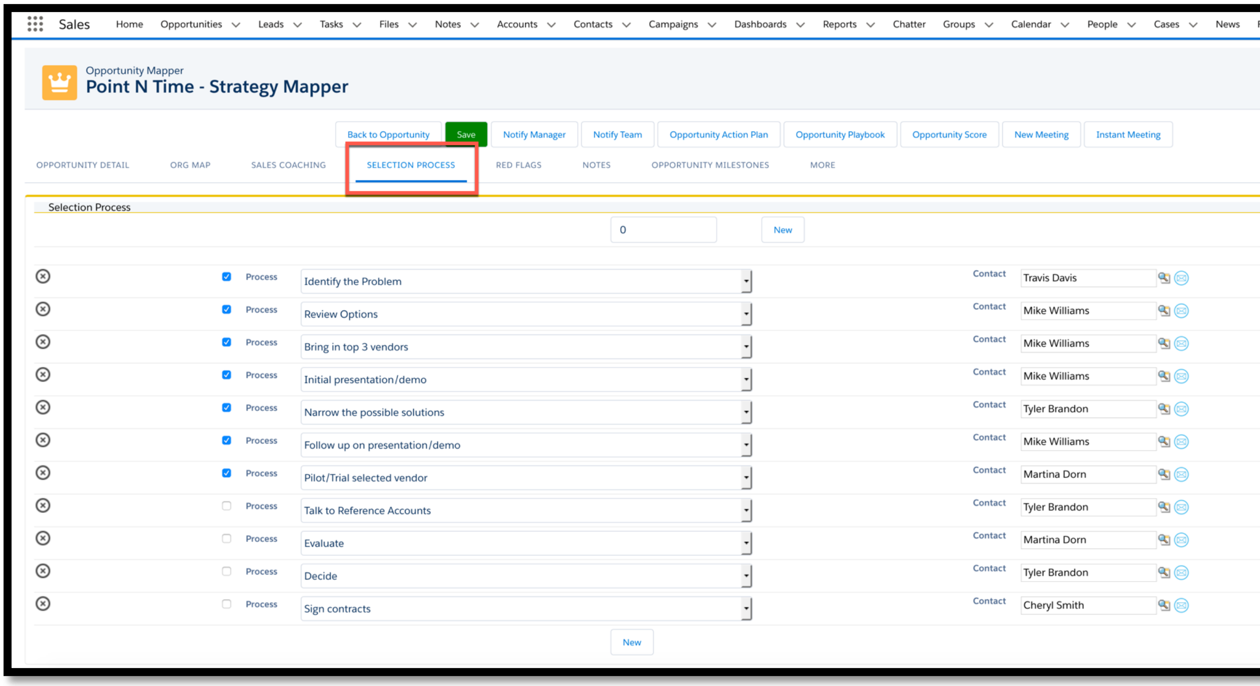


Figure 152

What is the Value to Me and My Team?

It's hard to sell to someone when you don't know how they buy. In the selection process you can define it for a particular opportunity and align a customer contact to the process. By checking the processes that have been completed, Strategy Mapper will align them with your selling stages in the Opportunity Playbook (figure 153). You can determine very quickly if your selling stages is aligned with the process the customers, they are currently in. Are you both on the same page?

Selection Process

The customer is currently in **Talk to Reference Accounts** of their buying process.

They have completed their process below. We are currently in our selling stage of **Trial / PoV**.

Process	Completed	Contact
Identify the Problem	✓	Travis Davis
Review Options	✓	Mike Williams
Bring in top 3 vendors	✓	Mike Williams
Initial presentation/demo	✓	Mike Williams
Narrow the possible solutions	✓	Tyler Brandon
Follow up on presentation/demo	✓	Mike Williams
Pilot/Trial selected vendor	✓	Martina Dorn
Talk to Reference Accounts	☐	Tyler Brandon
Evaluate	☐	Martina Dorn
Decide	☐	Tyler Brandon
Sign contracts	☐	Cheryl Smith

Figure 153

Note: If there is an account plan created for the parent account and the Customer Buying Process had been identified, when the opportunity plan is initially created it will populate the Selection Process. Changes made to the Customer Buying Process will populate in the Selection Process. They will not remove processes you added to the plan only append. You can delete any process at any time.

---

24. Click on Selection Process, click New to add a process, select the process from the dropdown list (figure 154). To delete a process, just click on the X to the left of the process.

Note: By default, the new process is added at the bottom of the list.

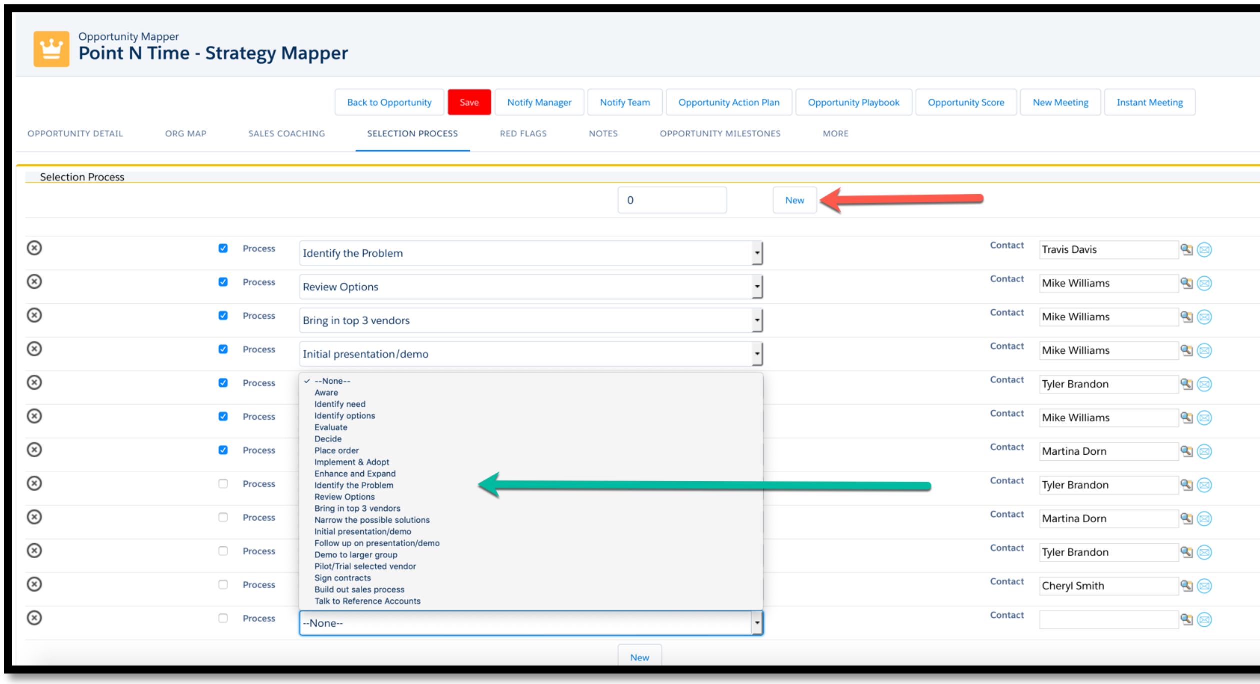


Figure 154

25. Once you have created a Selection Process, a customer contact can be assigned as the responsible individual. This will help ensure the successful completion of the process (figure 155).

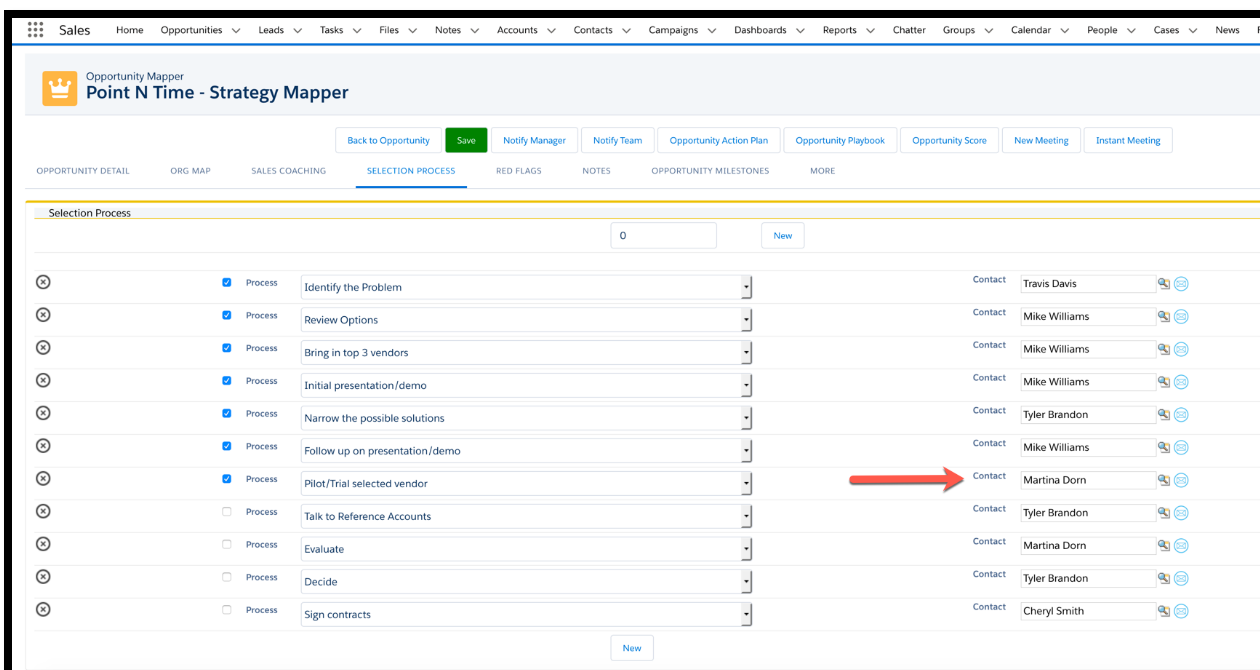


Figure 155

26. To add a new process in-line, click New, enter in the position number (placement), select the process from the dropdown (figure 156).

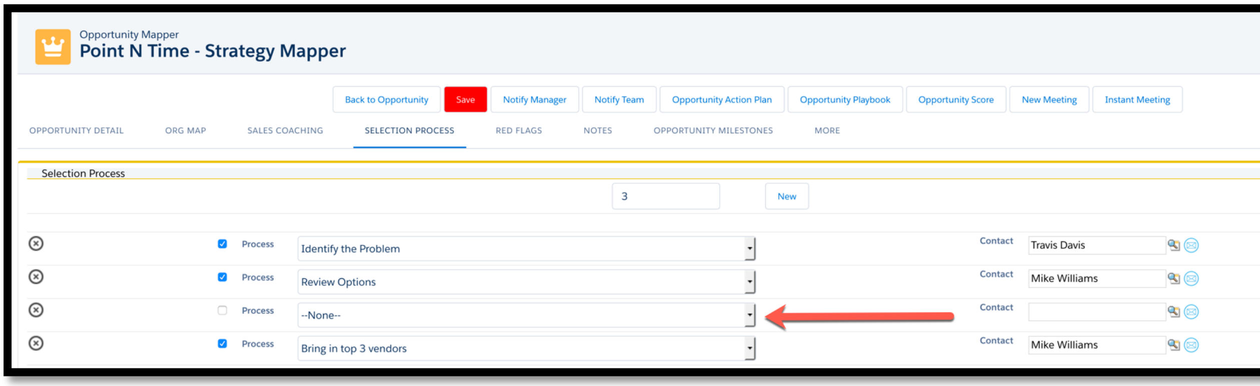


Figure 156

NOTE: Edits can be made to the process at any time.

---

27. An email icon has been added to the Customer Contact. This allows the user to send an email to the contact linked to the process (figure 157). When the email icon is clicked, the user is presented a box to input the email content. The subject of the email is the Process title (figure 158).

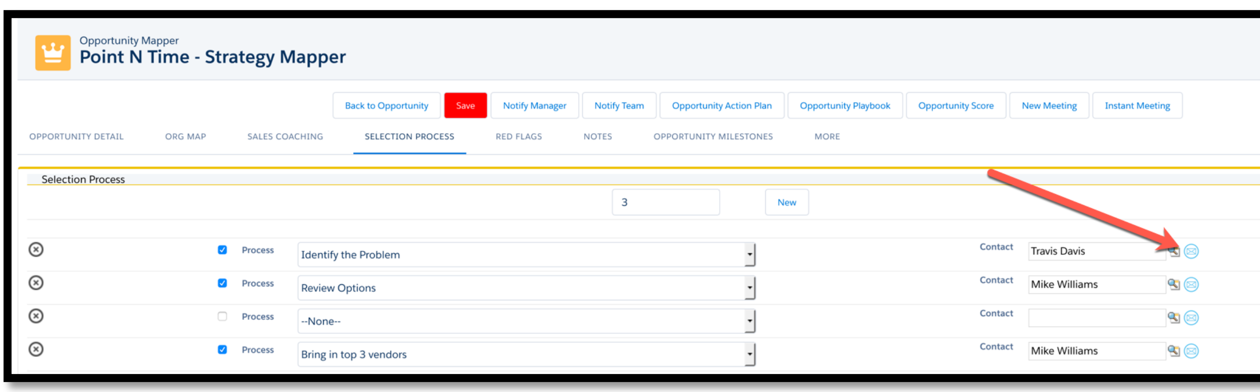


Figure 157

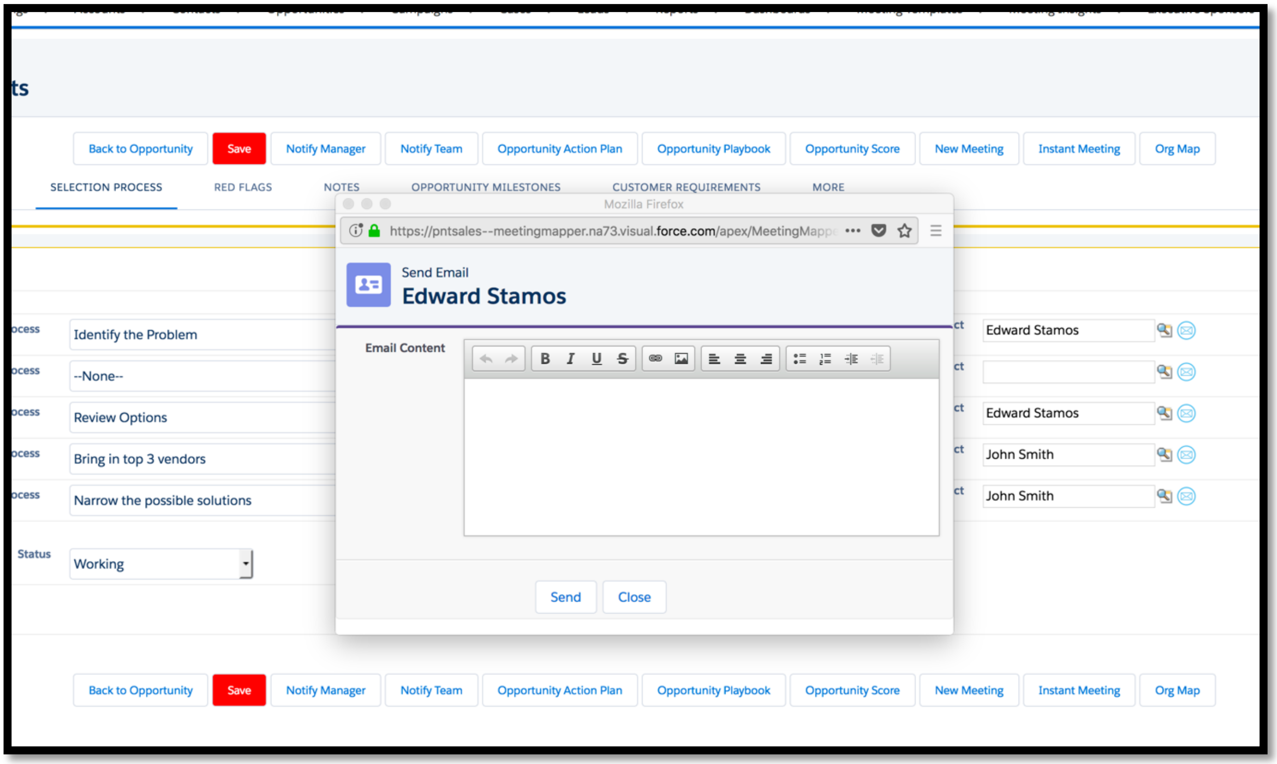


Figure 158

Red Flags (Risks)

Identifying Red Flags allows you time to build out strategy and tactics to mitigate them.

What is the Value to Me and My Team?

Planning for the unknown is key to driving customer success. Red Flags allow you to identify the potential problem and create your mitigation plan. They are also great when meeting with your team or mangers and so everyone can ask "Did you think about this, what happens if it happens"?

28. Click on Red Flags, if there were Red Flags identified in the account plan, they will automatically populate in the opportunity plan Red Flags (figure 159) or you can click on New to create one that is particular to your opportunity.

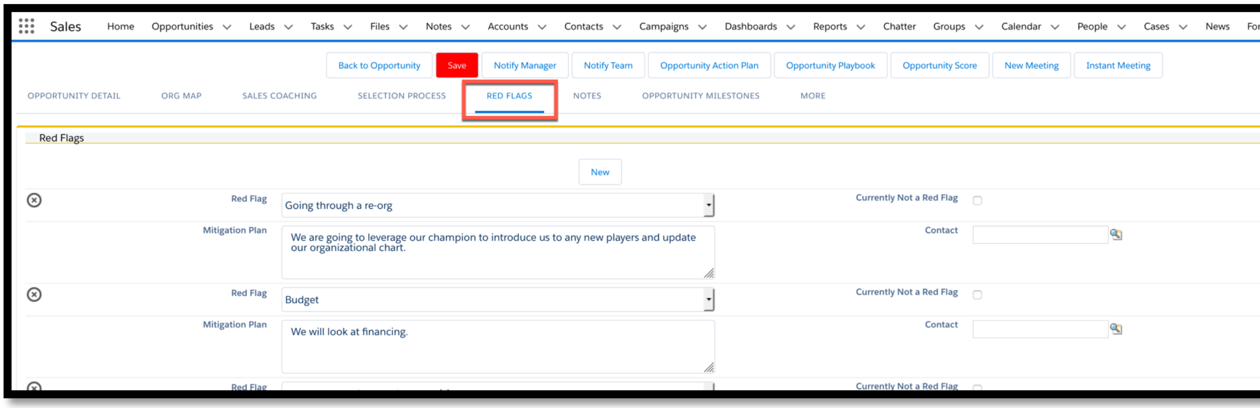


Figure 159

Note: In the event the Red Flag has not been encountered, click on Currently Not a Red Flag.

29. Select the Red Flag from the dropdown, enter in your mitigation plan (figure 160). Click Save.

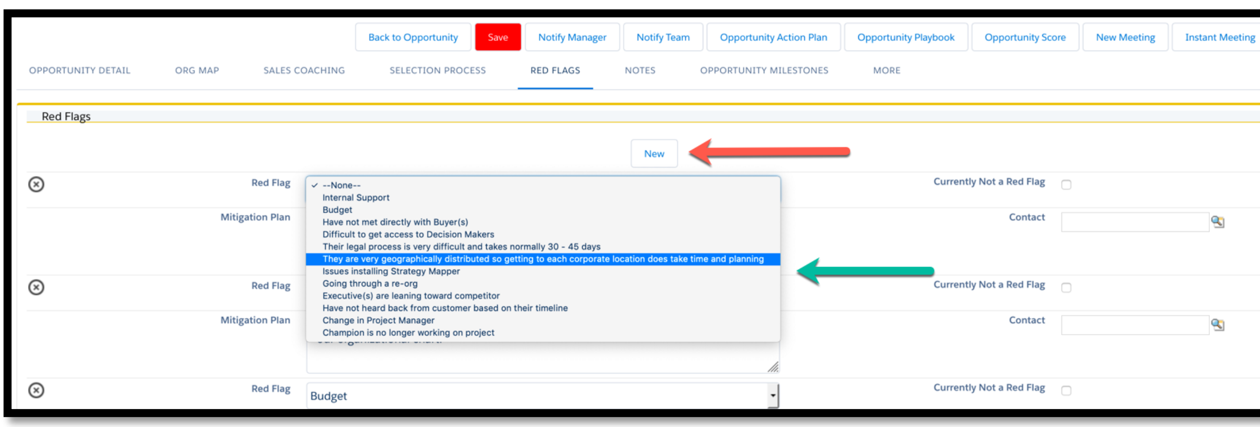


Figure 160

Note: You can enter in your mitigation plan at any time.

Once you have created the Red Flag and your mitigation plan you can link a customer contact to the Red Flag. This contact can be the person that informed you of the Red Flag or the contact that is causing the Red Flag.

30. Click on the search icon, select the contact (figure 161).

Note: You can select any contact it doesn't have to be from the account. This is useful when a partner informed you of the Red Flag and can assist in mitigating it.

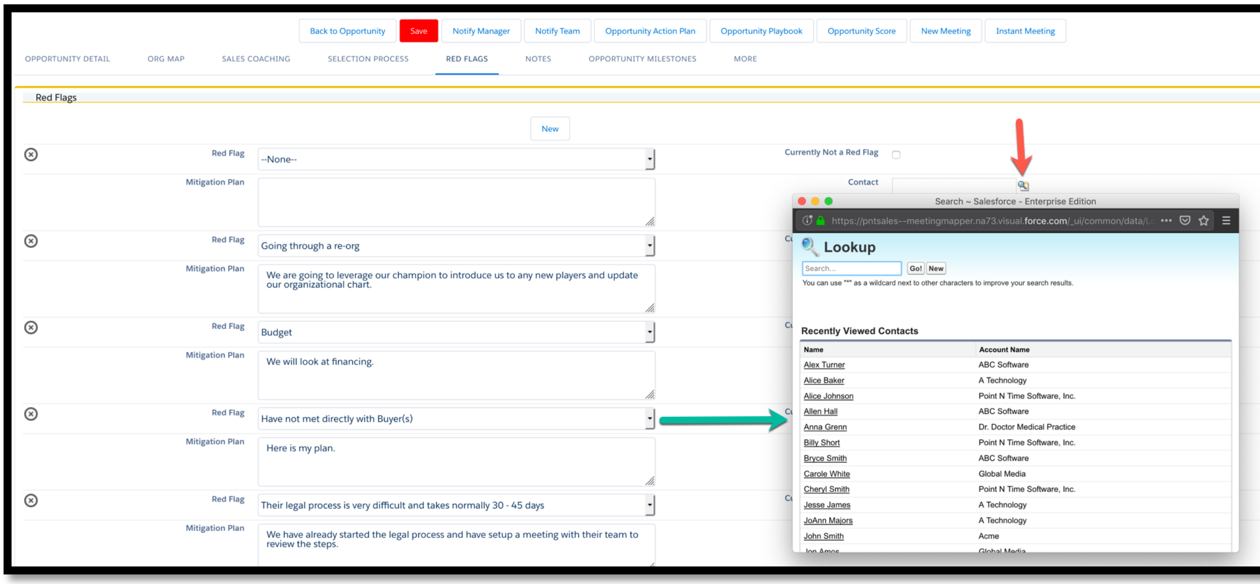


Figure 161

Notes

Notes provide a way to link important short conversations and record activity within the account (figure 162).

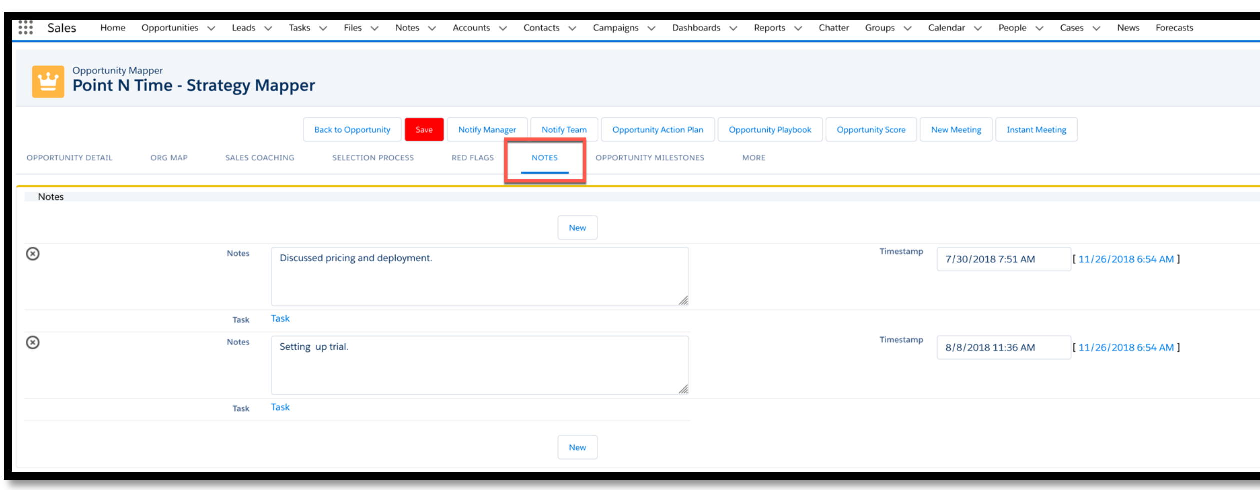


Figure 162

31. Click on Notes, select new, enter in the information, click Save (figure 163).

Note: The note will be timestamped when you create it. This can be changed, for example you had a call the day before but just entered the information, you can select the date and time to reflect this.

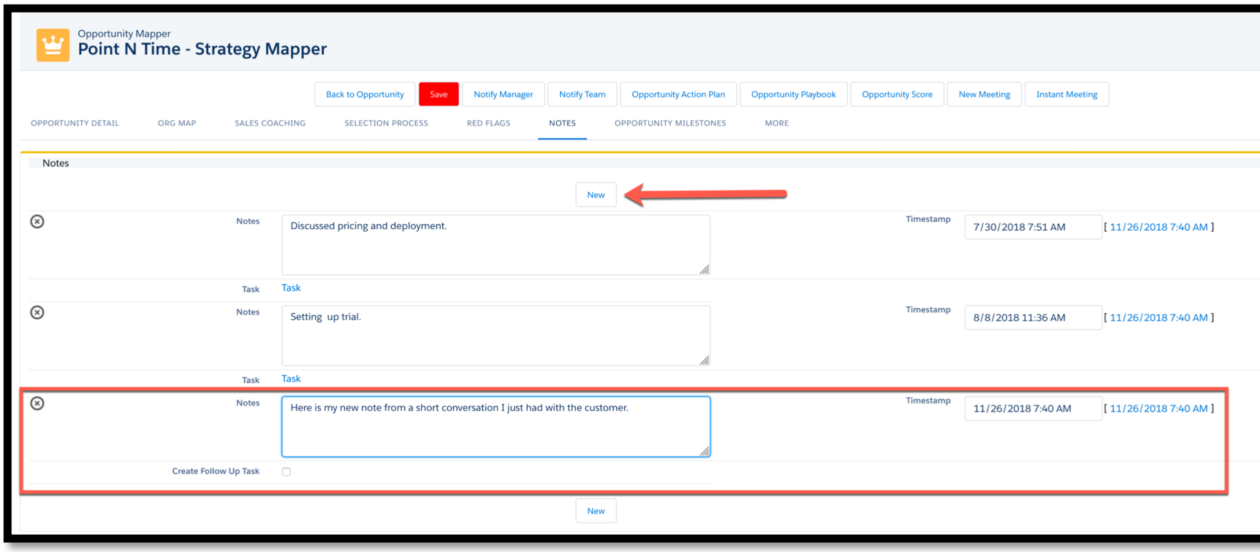


Figure 163

32. To create a follow up task, click on the Create Follow Up Task box, complete the information or select from the dropdown list, click Save (figure 164 & 165). Ensure you enter a Reminder Date and a Due date.
33. Click Save.

Figure 164

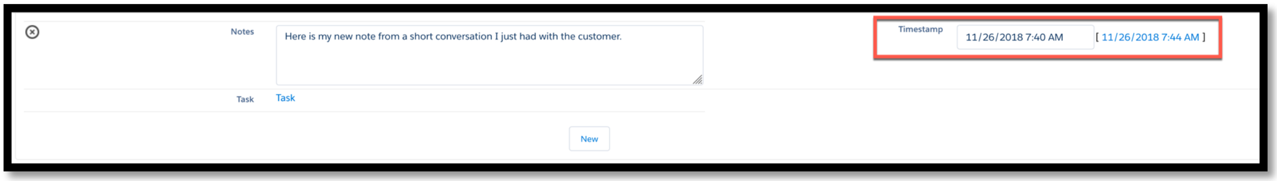


Figure 165

Opportunity Milestones

Milestones provide you and your team the tasks that need to be completed for a successful opportunity. These are template based and can different in each template.

Note: The Opportunity Milestones tab will only display if there are milestones created in the template.

What is the Value to Me and My Team?

Opportunity Milestone list in order what must be accomplished in the opportunity. They allow you to assign to team members and track the progress. Being able to assign future tasks to team members is critical for success.

Depending on your template there can a number of milestones to accomplish for this particular type of opportunity (figure 166). A milestone consists of the following:

- **Nam**e – This is the name or title for the milestone
- **Status** – Current Status Green = Completed, Yellow = Not Completed or Issues and Red = Show Stopper
- **Projected Completion Date** – When the milestone should be completed
- **Comments** – Additional information regarding the milestone, this information will be part of the information in the task
- **Assigned To** – Who is responsible to complete the milestone
- **Stage** – What selling stage is the milestone linked to
- **Date Completed** – Date the milestone was complete
- **Task** – Hyperlink to the task itself

A milestone can be assigned as a Gate, this is a significant milestone. If a milestone assigned as a Gate is Red, the Opportunity Milestone tab will be Red. This indicates and focuses your attention on a potential "show stopper".

Note: When a milestone is assigned it will create a Salesforce task for the Assigned To. The task can be completed on the Opportunity Milestone page or on the task itself. Each milestone is a component of the opportunity scoring.

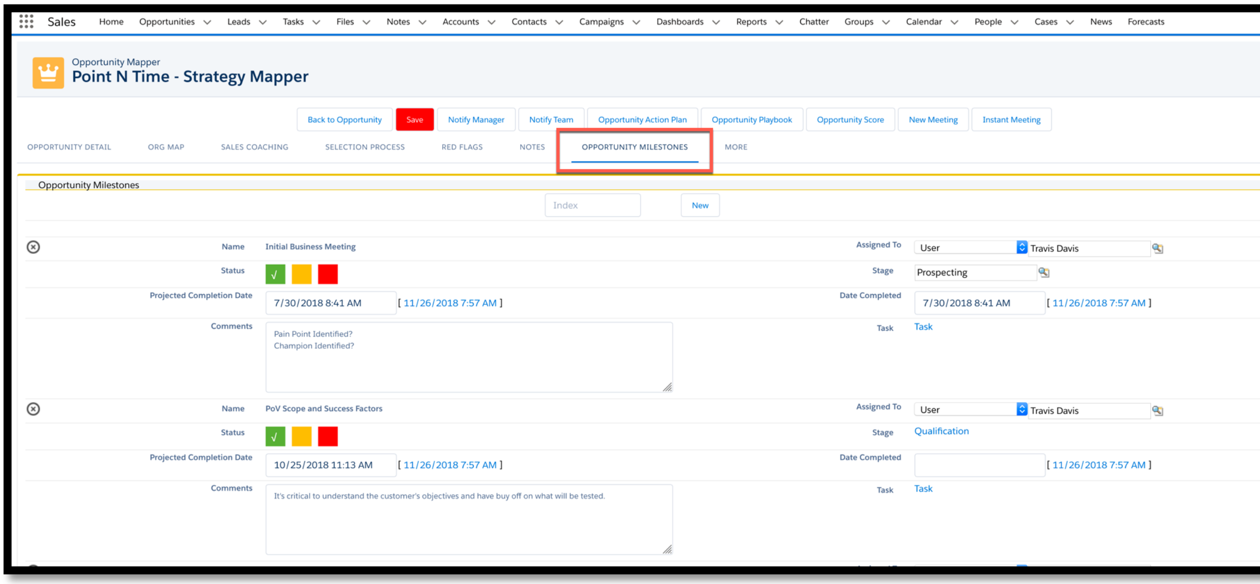


Figure 166

34. To edit a milestone, click on Opportunity Milestones, click on the current status for the milestone (figure 167). Review comments or add new if necessary.

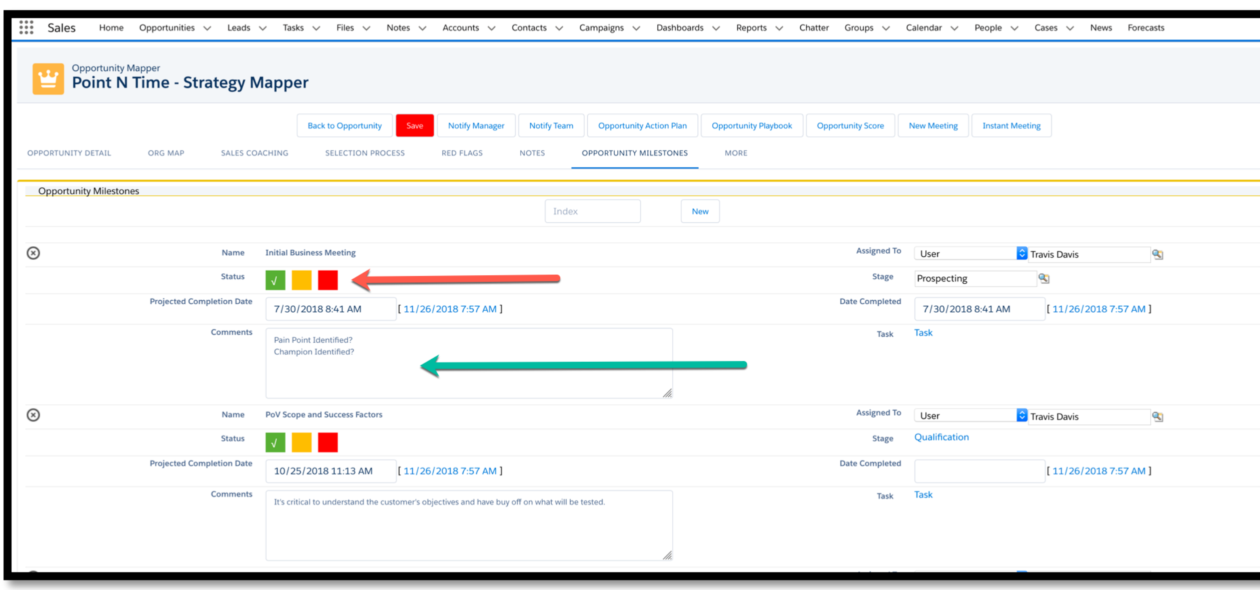


Figure 167

35. Enter in the Projected Completion date, Assigned To if assigning the milestone.

Best Practice
Ensure you assign the task to yourself, if you're the responsible team member to complete the milestone.

36. Enter in complete date, or this will be populated if the task was completed.
37. Click Save.

Customer Requirements

This page displays customer requirements along with the solutions or products that meet the requirements (figure 168). In addition, it displays the score based on your solution and the requirements. This information is gathered using Meeting Mapper.

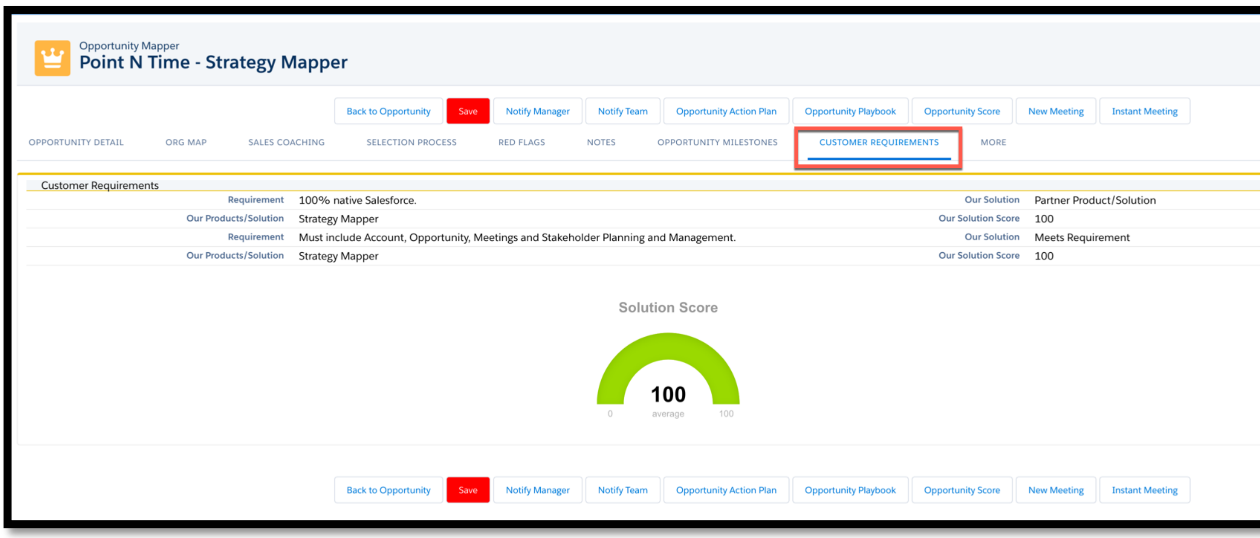


Figure 168

More

38. By click on More it will display additional tabs (pages) (figure 169).

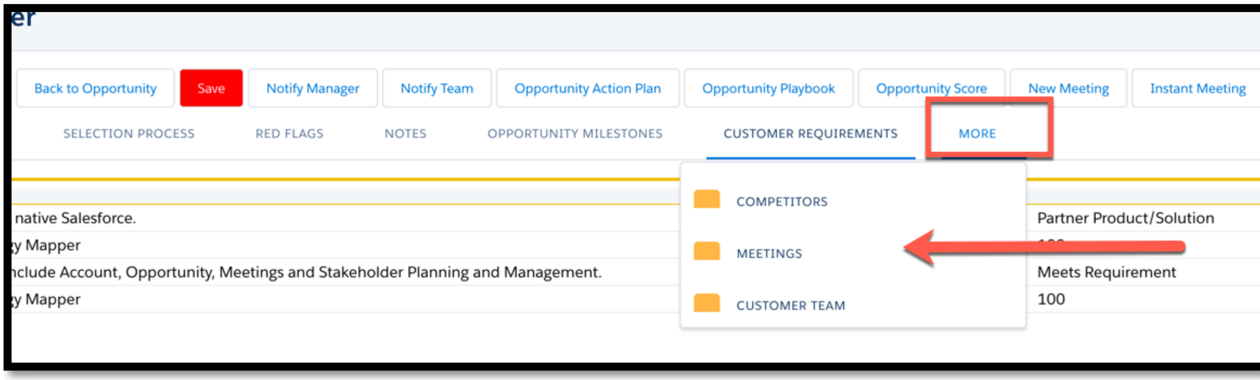


Figure 169

Competitors

Displays the current competitors in the opportunity. Along with any identified strengths and weaknesses (figure 170).

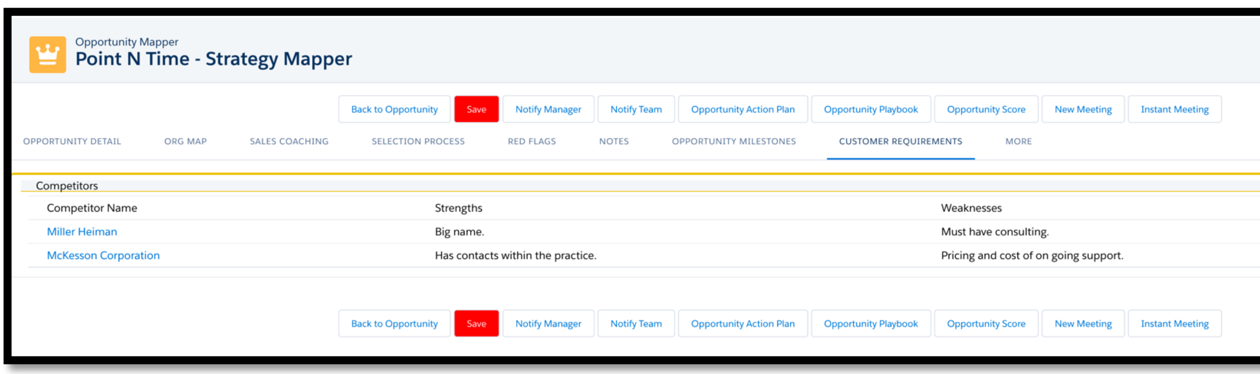


Figure 170

Meetings

The most current meeting conducted using Meeting Mapper will be displayed. This allows you to review the meeting, attendees, notes and sales intelligence (figure 171). The meeting page will also display previous and scheduled meetings.

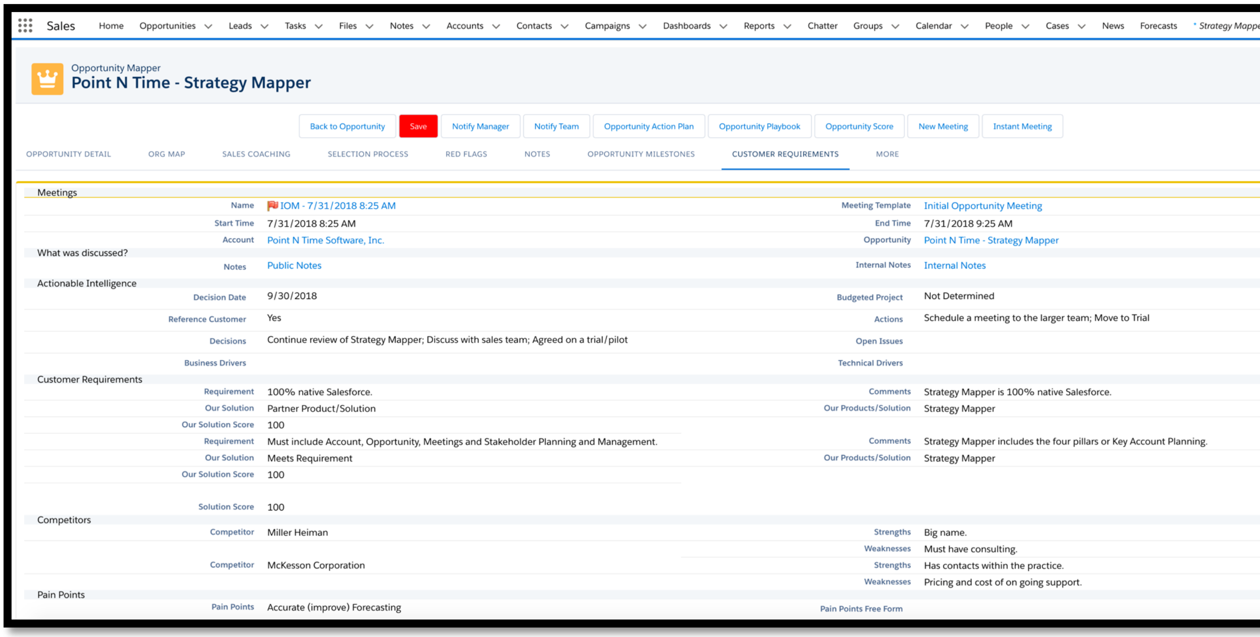


Figure 171

39. To view the raw meeting click on the hyperlink to edit the meeting itself (figure 172).

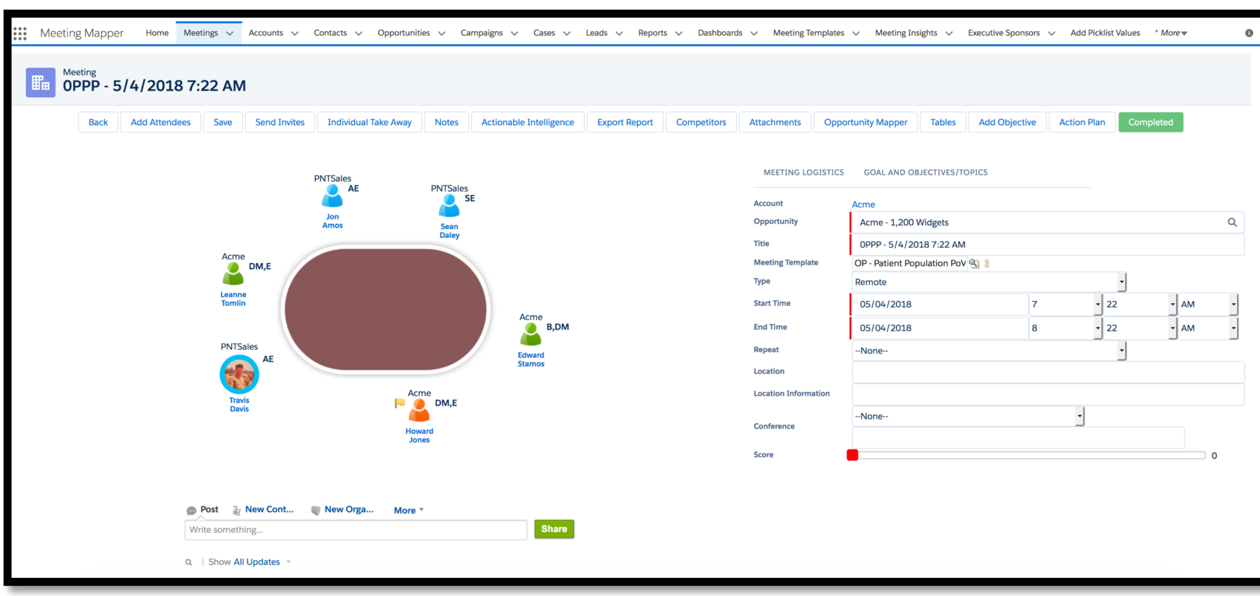


Figure 172

Customer Team (Buying Center)

Customer team visually displays who has attended meeting either using Meeting Mapper or manually added by clicking on Add Attendees (figure 174).

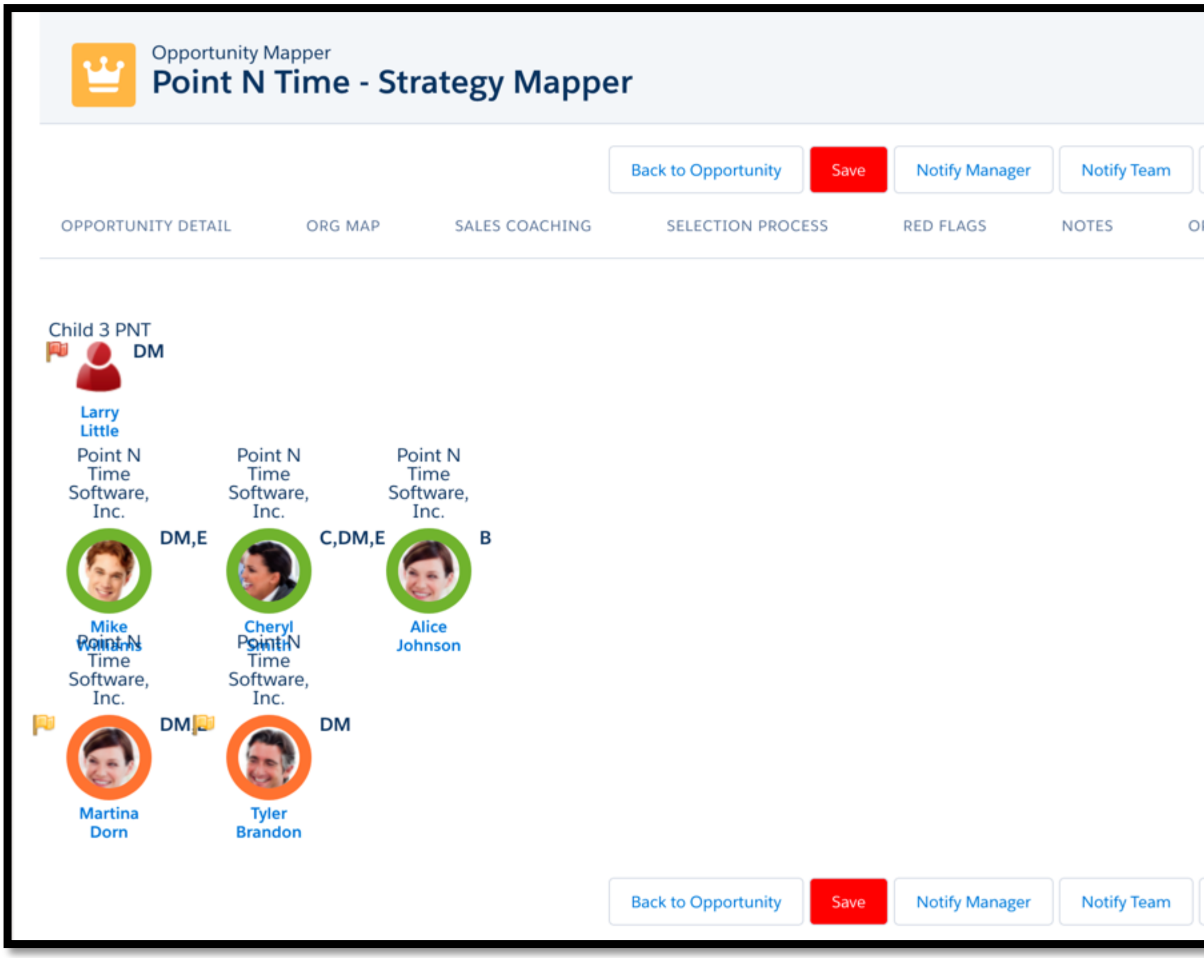


Figure 173

40. Clicking on the attendee's name, you can change their information (figure 175). This is very useful if for example, you talked to a contact and their role or stance has changed. They change can be easily modified on this page.

Note: Contact's Role and Stance will automatically be updated when they attend a meeting.

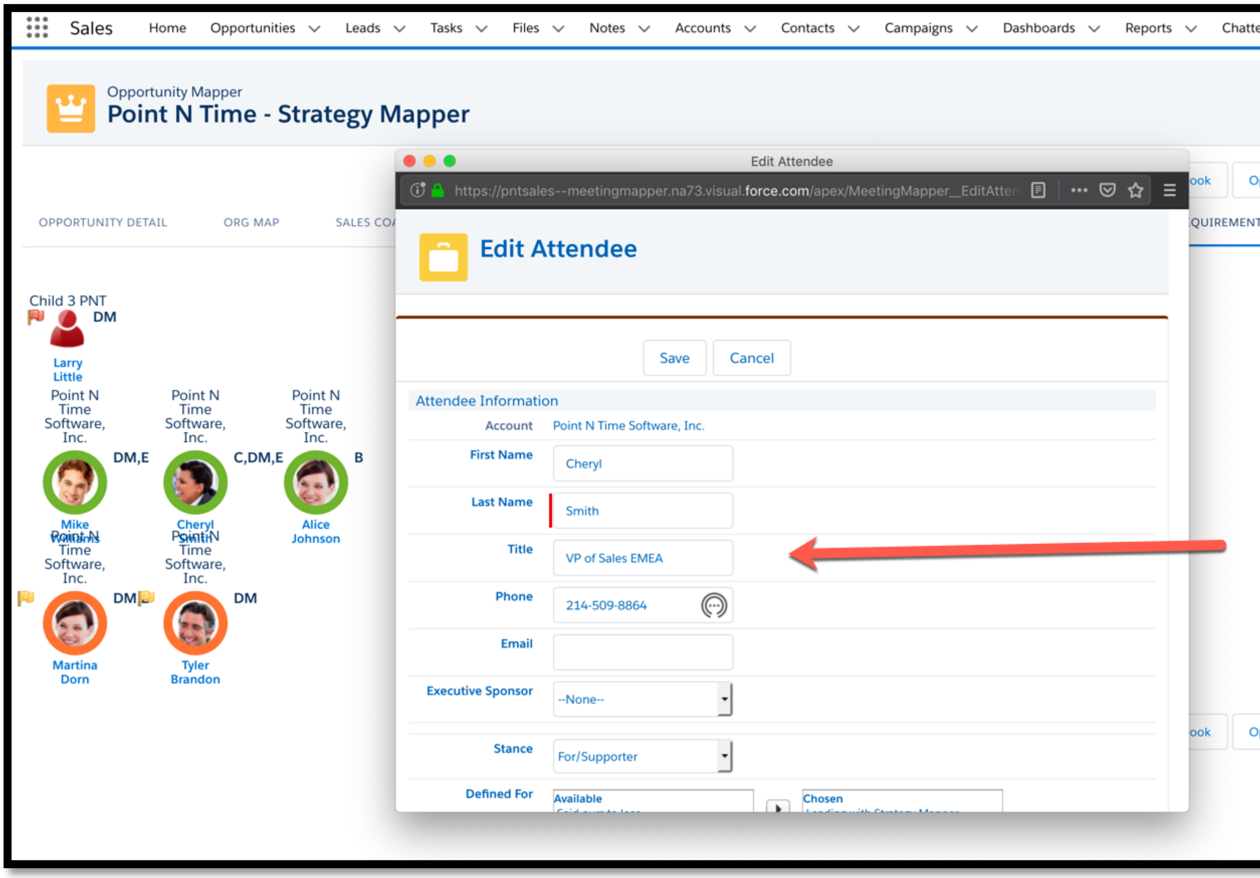


Figure 174

Buttons

Depending on the template buttons will populate on the top of the opportunity plan (figure 171). There are 10 potential buttons take can be displayed on the Opportunity Mapper page.

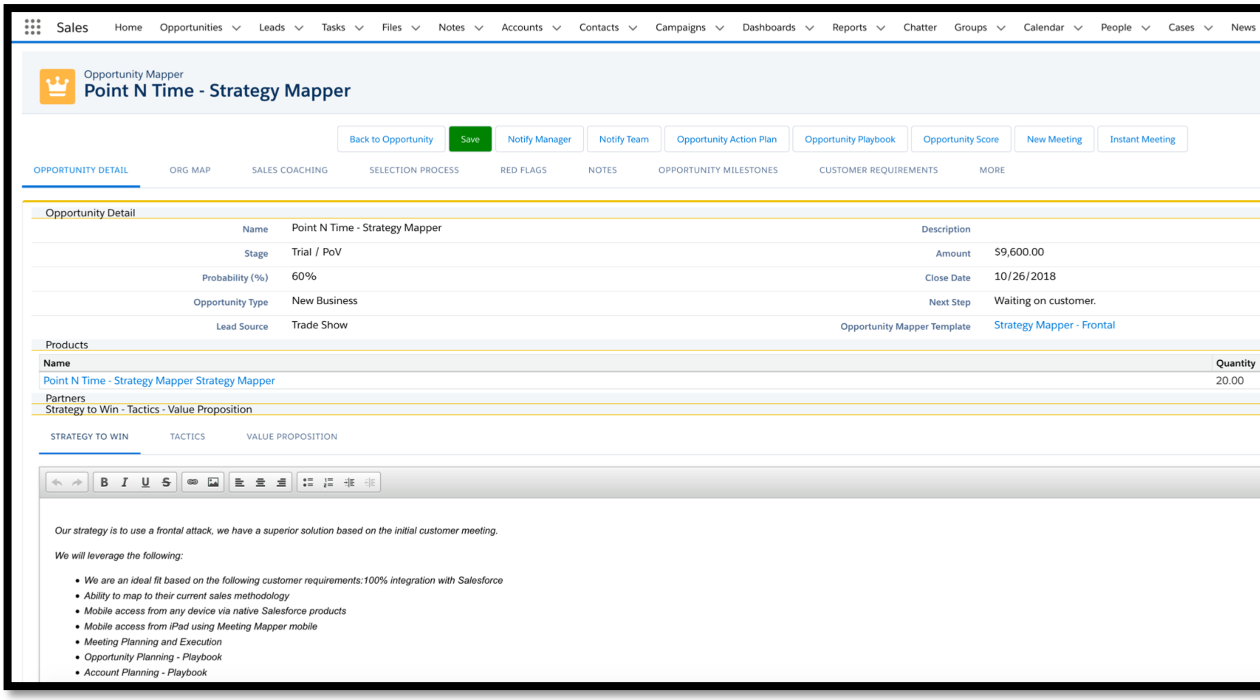


Figure 175

- **Back to Account** - Back to Account will take you back into the account itself.
- **Save** – Save the current plan.
- **Notify Manager** – Send notification to manager(s) to review plan.
- **Notify Team** – Send notification to team members to review plan.
- **Opportunity Action Plan** - Account Action Plan

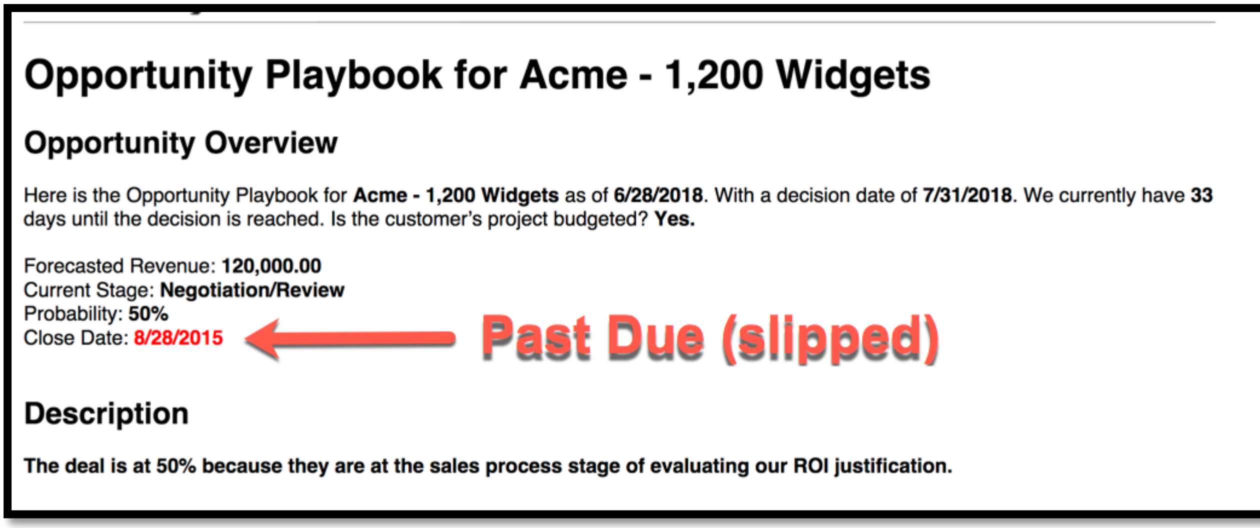
The Action Plan is a condensed version of the Opportunity Playbook that provides the user with the most important information to ensure success and revenue in the account. The Action Plan consists of the following:

- Sales Coaching based on the current and next stage.
- Selection Processes not Completed.
- List of the Red Flags along with mitigation plan for each, if a Red Flag does not have a mitigation plan the Red Flag will be marked in red.
- Opportunity Milestones not completed and current status (percent completed).
- List of Key Players, as defined by the roles below, in the Account along with their Stance.
    - Champion
    - Decision Maker(s)
    - Buyer(s)
- Weaknesses
- Obstacles
- Objections
- List of Open Activities

✓ **Playbook**

In the Opportunity Playbook the following sections were added (figure 178): This is a snapshot of an Opportunity Playbook, to see a complete playbook click on this link: [Opportunity Playbook]

- Opportunity Overview – Displays current information regarding the opportunity.
- Description – Description for the opportunity.



Opportunity Playbook for Acme - 1,200 Widgets

Opportunity Overview

Here is the Opportunity Playbook for **Acme - 1,200 Widgets** as of **6/28/2018**. With a decision date of **7/31/2018**. We currently have **33** days until the decision is reached. Is the customer's project budgeted? **Yes.**

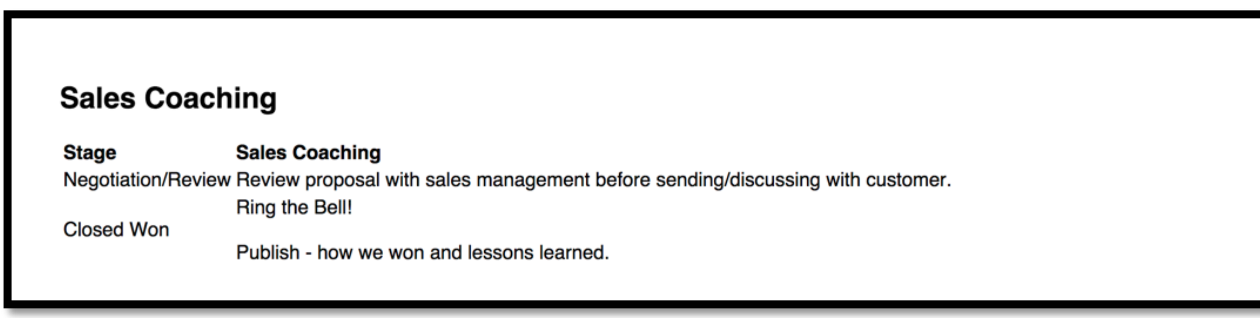
Forecasted Revenue: **120,000.00**
Current Stage: **Negotiation/Review**
Probability: **50%**
Close Date: **8/28/2015**

Description

The deal is at 50% because they are at the sales process stage of evaluating our ROI justification.

Figure 176

Sales Coaching – Current and next stage (figure 179)



Sales Coaching

Stage	Sales Coaching
Negotiation/Review	Review proposal with sales management before sending/discussing with customer.
Closed Won	Ring the Bell! Publish - how we won and lessons learned.

Figure 177

Situational Awareness provides information to be more and better prepared with meeting with customer (figure 180).

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
Teams Not Practicing Sales Methodology

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

Competitors	Strengths	Weaknesses
Axiom	Resources in many geos.	Legacy interface and lack of integration with SFDC.

The most typical Objection(s) to move forward and winning are:

Objections
Not funded (no budget)

The possible Obstacle(s) to moving forward and winning are:

Obstacles
Gatekeeper is blocking access to DM

Our Strengths are:

Strengths
Account Management
Opportunity Planning

Figure 178

- **Opportunity Milestones** – List all milestones and current status (figure 181).

Products/Solutions Sold Into This Account:

Name
Davis Sporting Goods MM SLA: Platinum

New Years 2016 - Update Strategy Mapper
New Years 2016 Strategy Mapper

Figure 179

- **Opportunity Score**

There are two levels in Opportunity Scoring:

The top level is Opportunity Health, it's comprised of information gathered in the opportunity plan, Sales Intelligence and Solution Scoring. This is an overall health of the opportunity.

The second level is comprised only of information gathered in the Opportunity Plan and the other feeds into the plan. In addition, we have separated out the different components (figure 182):

- **Opportunity Score** – The score based on Information gathered in the Opportunity Plan (what has the user accomplished in the plan)
- **Sales Intelligence** – The score based on Information gathered in Meeting Mapper
- **Solution Average Score** – How your solutions match up to the customer requirements

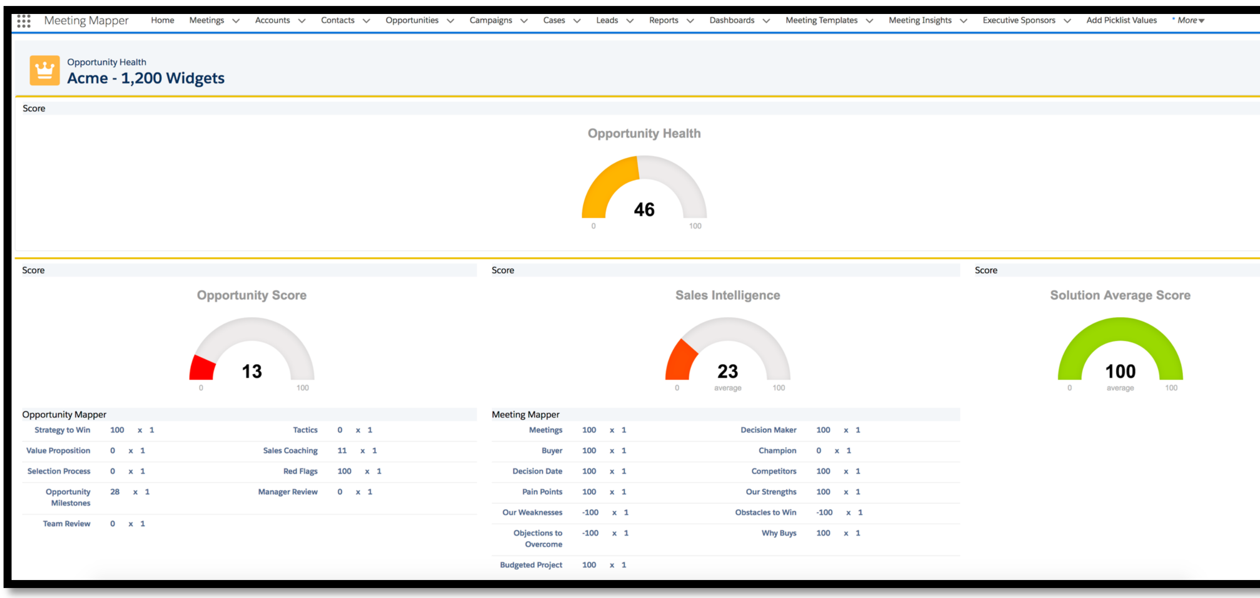


Figure 180

- **New Meeting**

Create and schedule a meeting with Meeting Mapper

✓ **Instant Meeting**

Launch a meeting with Meeting Mapper

✓ **Org Map**

41. Click on Org Map to display the org map for the account (figure 183). By default, the org map is populated from meeting attendees (contacts). It will also display the reporting structure of the contact. For example, if you had a meeting with Jon and if Jon Reports To is Geoff, Geoff will automatically display on the Org Map.

Figure 181

Adding a Contact to the Org Map

42. Click on Add Contacts, either select from the pre-populated list or search for the contact (figure 184). Click Add next to the contact.

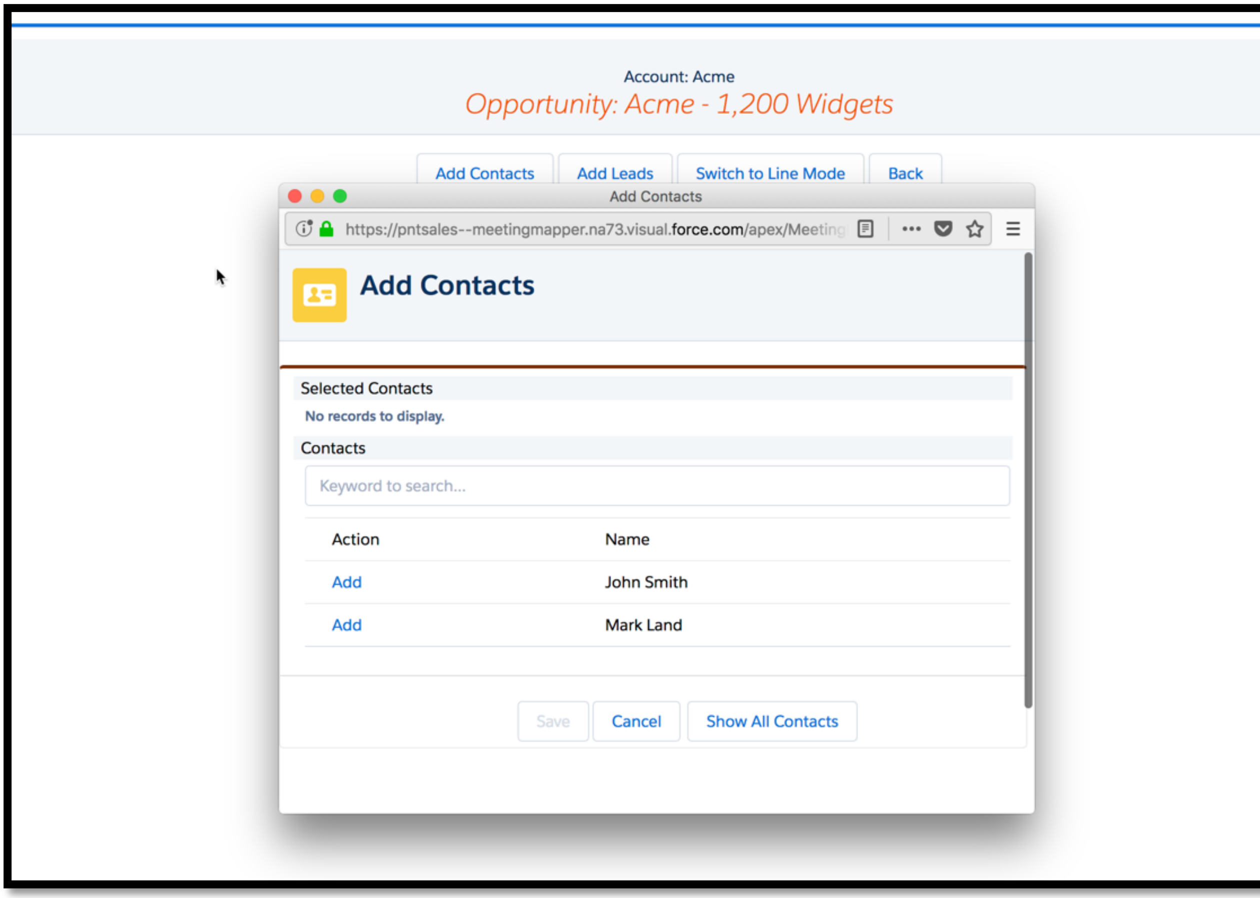


Figure 182

43. Click Save (figure 185).

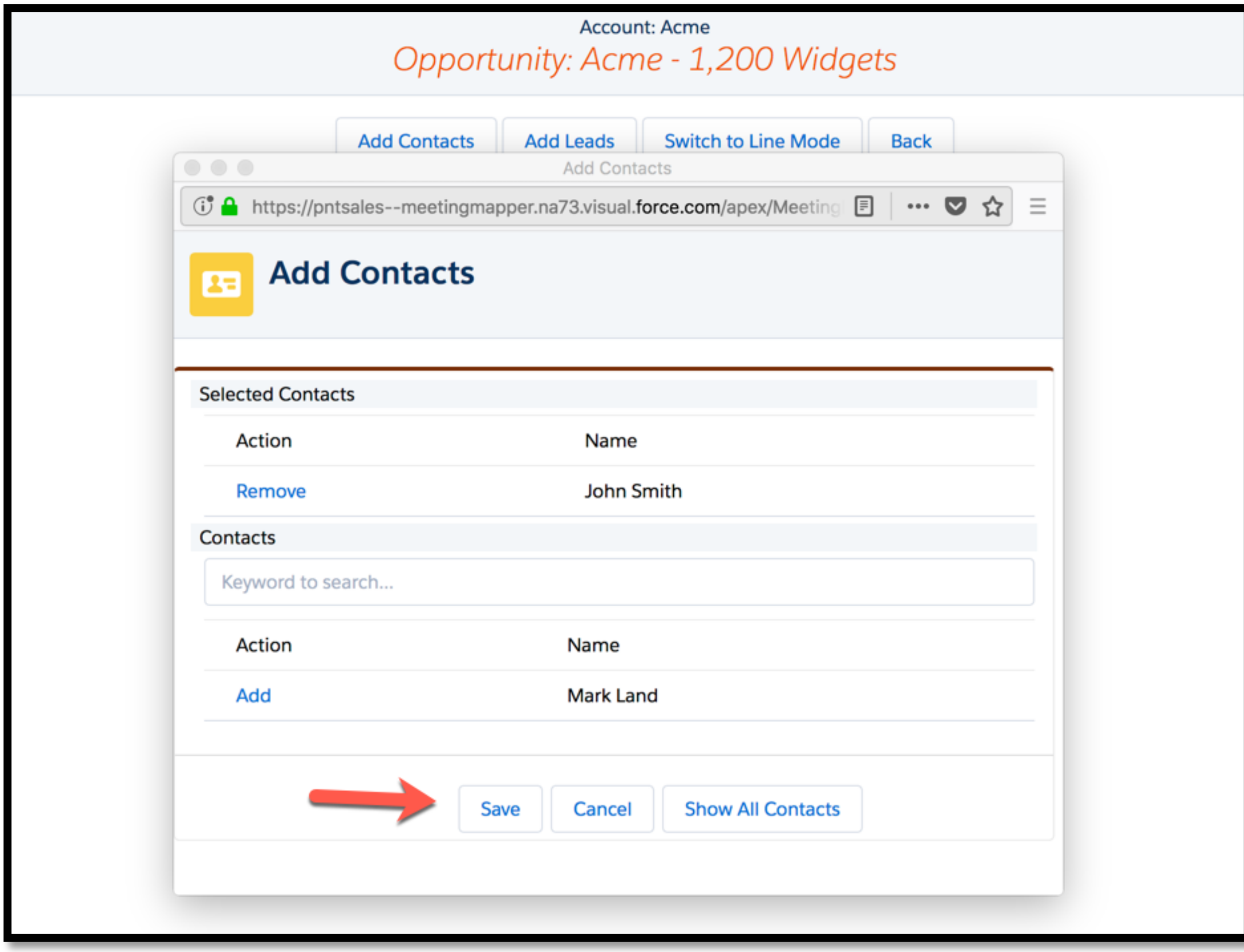


Figure 183

✓ New contact will display on Org Map (figure 186).

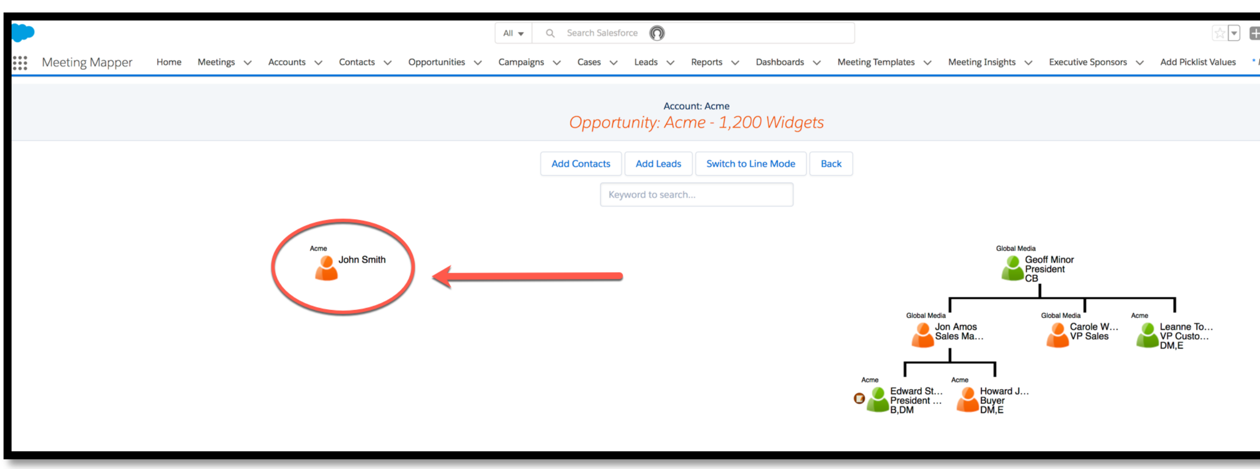


Figure 184

44. Re-align by holding the left mouse key over the contact icon and move contact icon to org structure (figure 187). Edit contact information as outlined above.

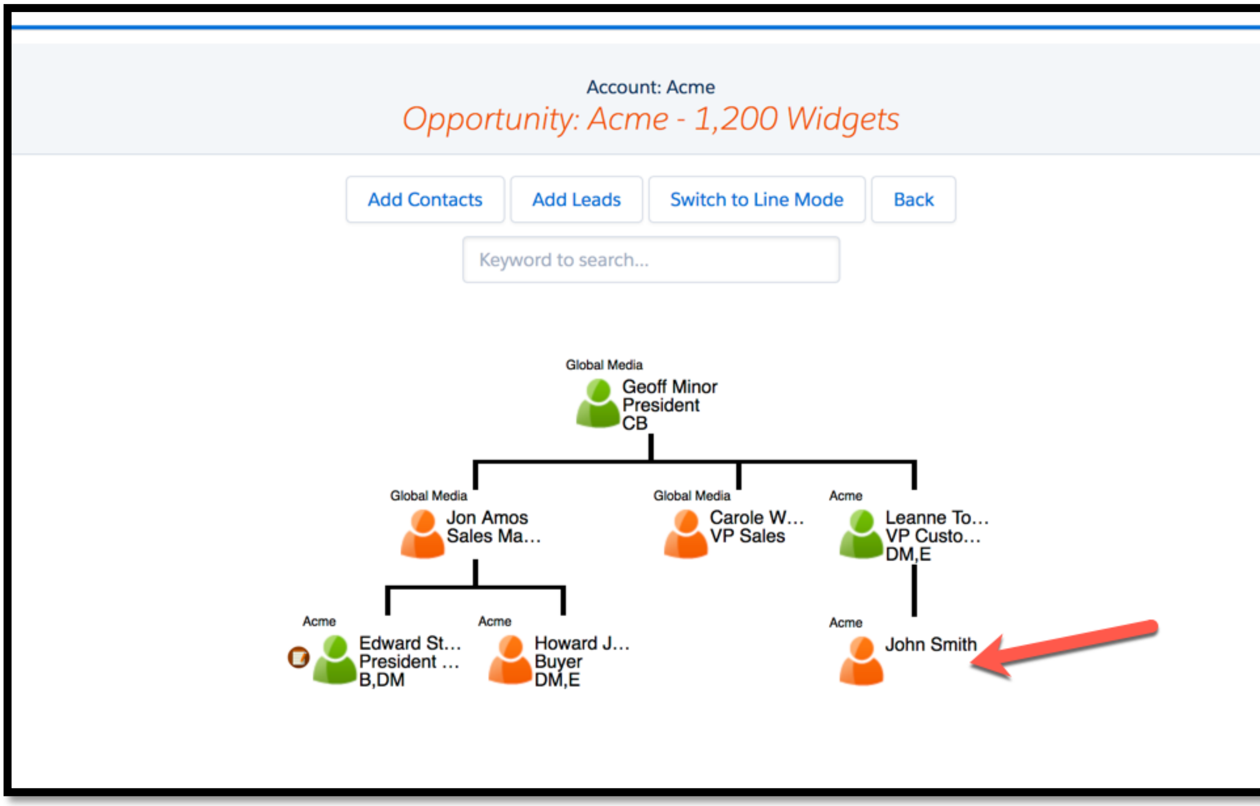


Figure 185

45. To move or realign the org map, click on a user and move with holding down your mouse key to realign the contact (figure 188).

Figure 186

46. Right mouse click on a contact to perform the following actions (Figure 189).

- **Stance** - Change current Stance
- **Role** – Change current Role
- **Executive Sponsor** – Assign an executive from your company to reach out this this contact
- **Attendee Notes** – Create individual notes for this contact (when a note is created the note icon will be displayed next to the contact icon, click on the icon to review the notes.
- **Reports To** – Change the Reports To, it's recommended just move the contact icon to the new reports to on the org map
- **Remove** – Removes the contact from the org map, can be added later at anytime
- **Realign** – Will remove the contact from the reporting structure, will remain on the org map page.

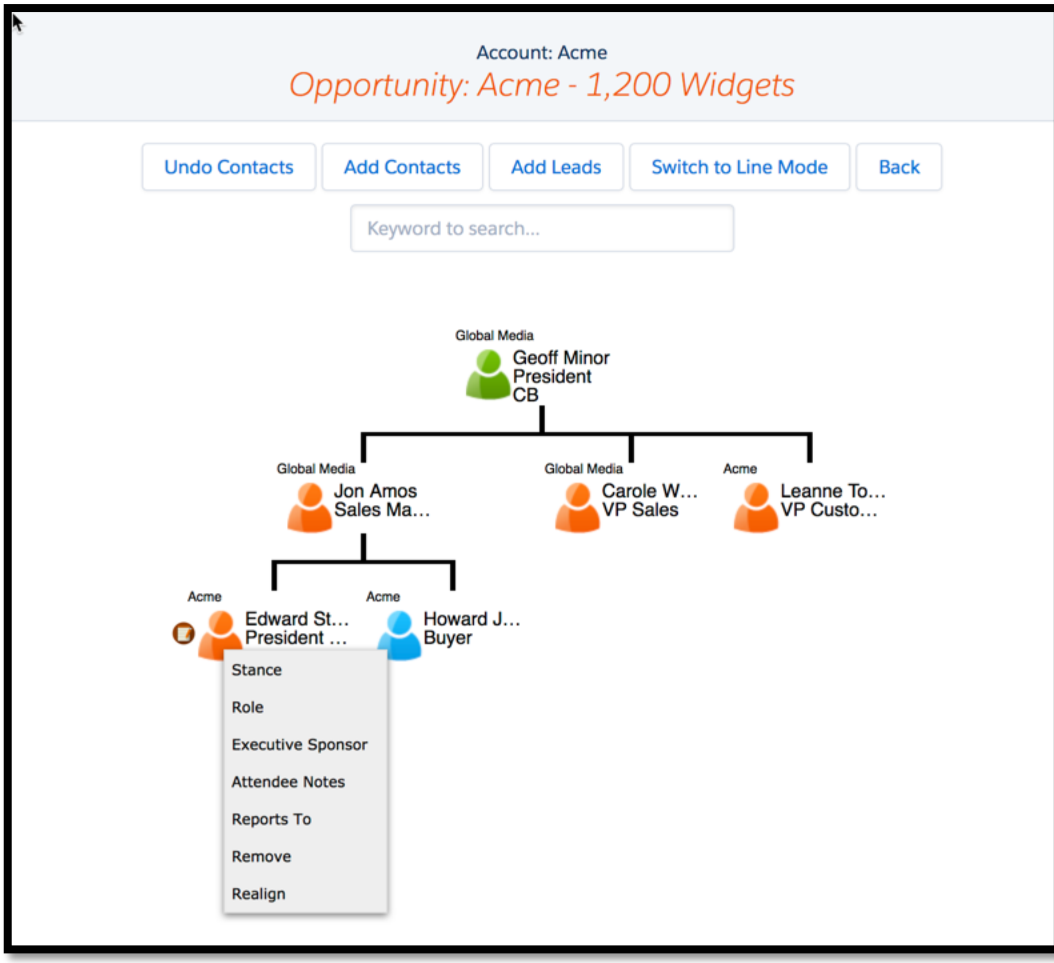


Figure 187

In the event your org map is large and complex, and you can't see a contact, enter in the name of the contact in the search field, the org map will shift to display and highlight the contact (figure 190).

Figure 188

Line Mode allows you to build lines of relationships between contacts (figure 191).

Note: The org map can't be collapsed in Line Mode.

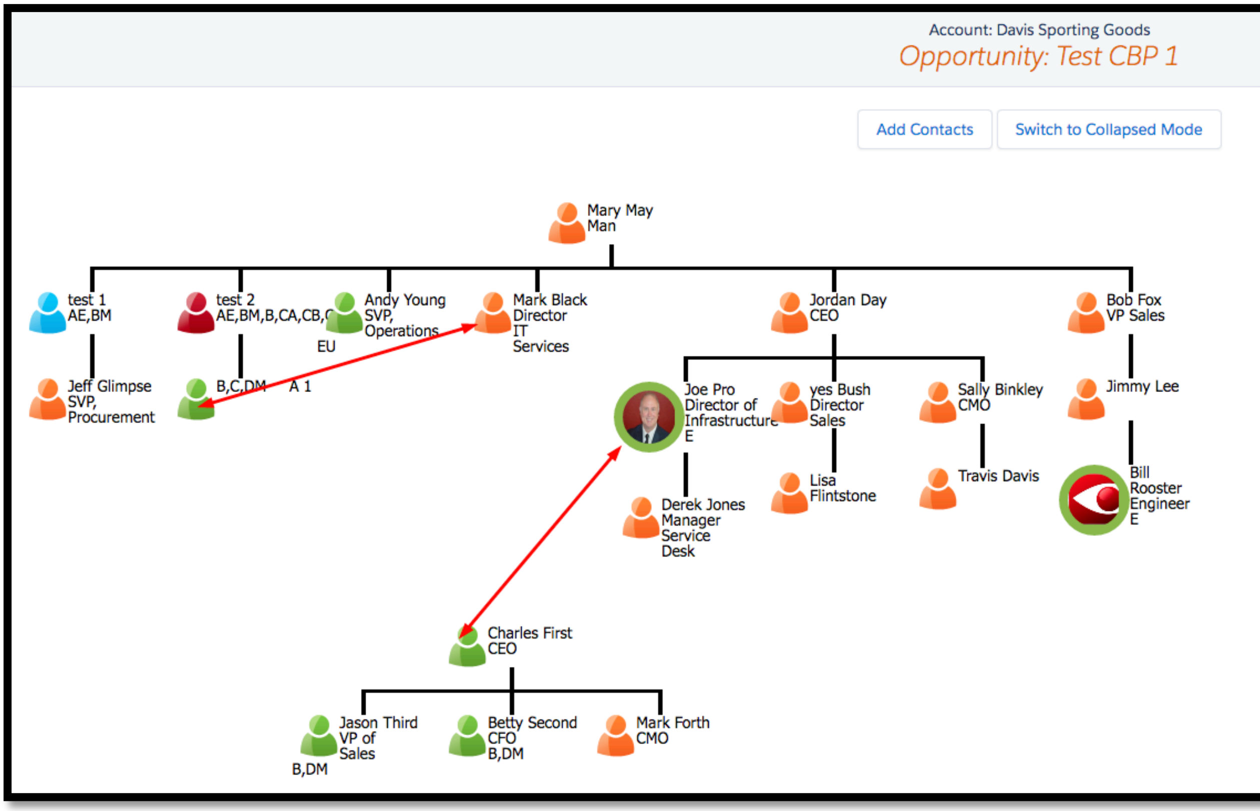


Figure 189

47. Verify you're in Line Mode, left mouse click on the first contact, then left mouse click on the second contact. This will draw a line connecting them.
48. Click on the line to add information why the relationship (figure 192). Left mouse click to review the information regarding the connection.

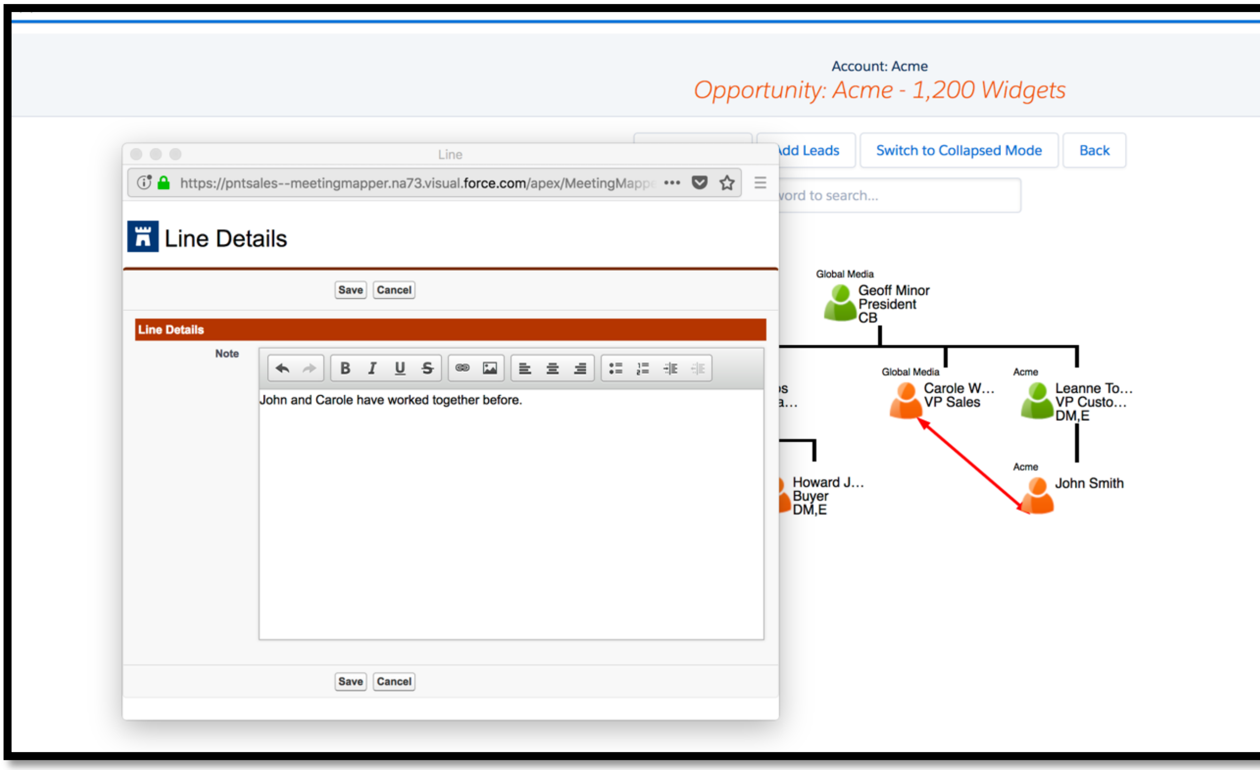


Figure 190

49. To delete the relationship, right mouse click on the line and click Ok (figure 193).

Figure 191

Note: The Org Map as the ability to create an org map based on Leads. However, a lead can't report to a contact or a contact report to a lead. The steps and procedures are the same for lead and contacts

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Using Meeting Mapper

The examples used in this section will walk you through create and execute a meeting using Meeting Mapper. The meeting will be based on a template and linked to an account. It's important to know that the steps detailed are the same no matter which, object the meeting is linked to. The interface is the same for each meeting and whether your using Classic or Lightning version of Salesforce.

Two Meeting Types

There are two meeting types in Meeting Mapper:

Instant Meeting – Normally this type of meeting is used for example when you're on the phone with a customer and want to document it as a meeting.
New Meeting – A meeting that is scheduled in advance.

The only difference between the two are how you get to the meeting page. For an instant meeting click the Instant Meeting link, select a template and you are brought into the meeting page. A New Meeting requires more steps to the meeting page. For this example, New Meeting will be used.

Creating a New Meeting

1. Click on an account, click on New in the section called Meetings (figure 194).

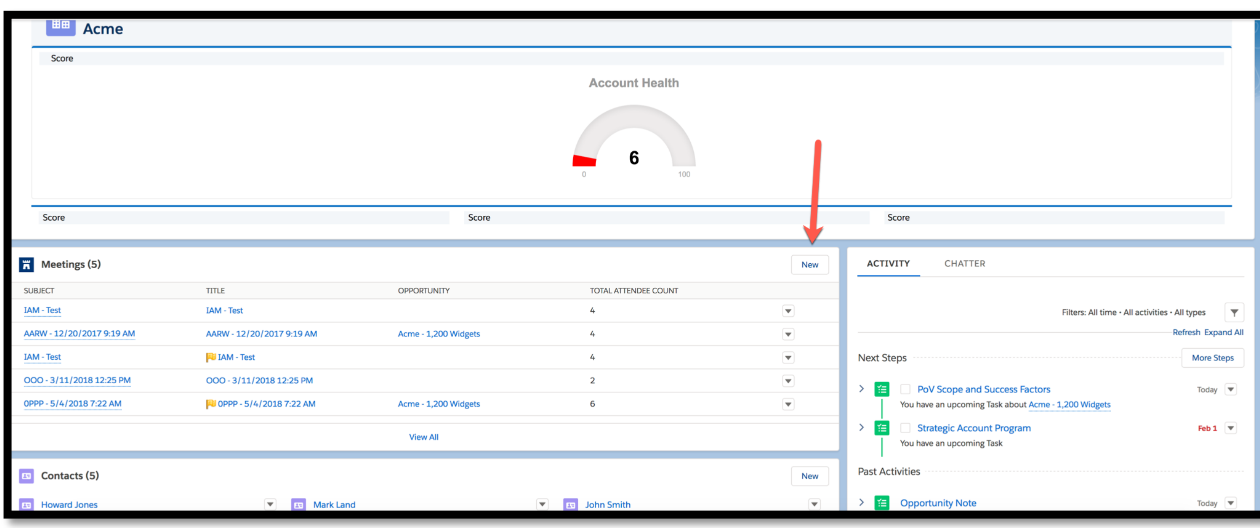

Figure 192

2. Enter in a subject for the meeting, select the template from the Meeting Template dropdown list (figure 195).

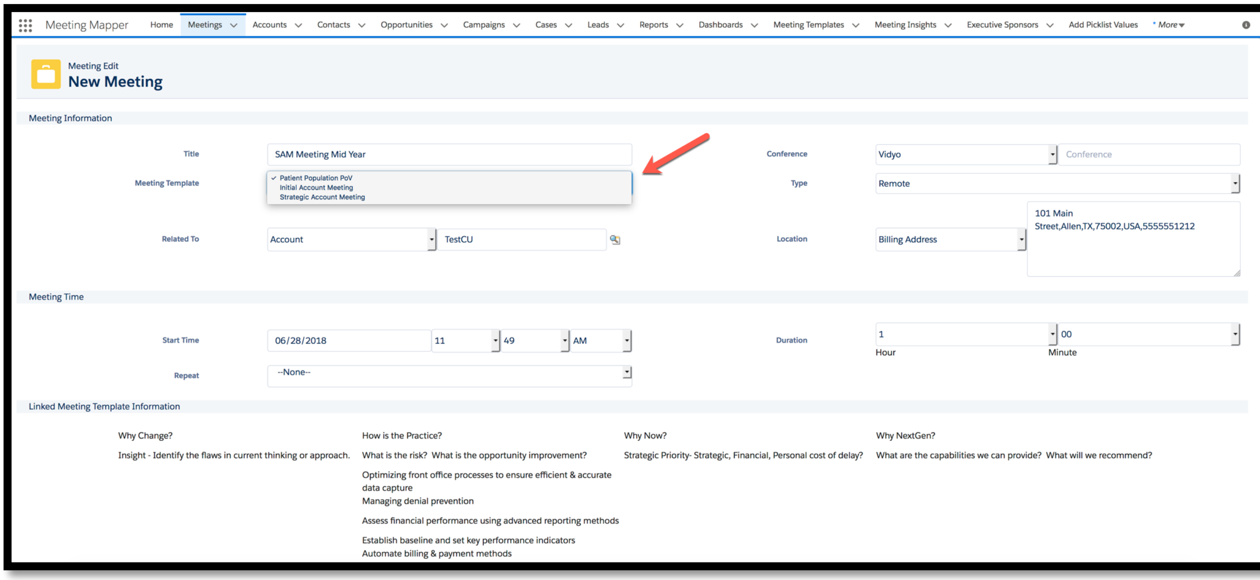

Figure 193

3. Select the Conference Type, Type (meeting on-site, remote, etc.) from the picklist (figure 196).

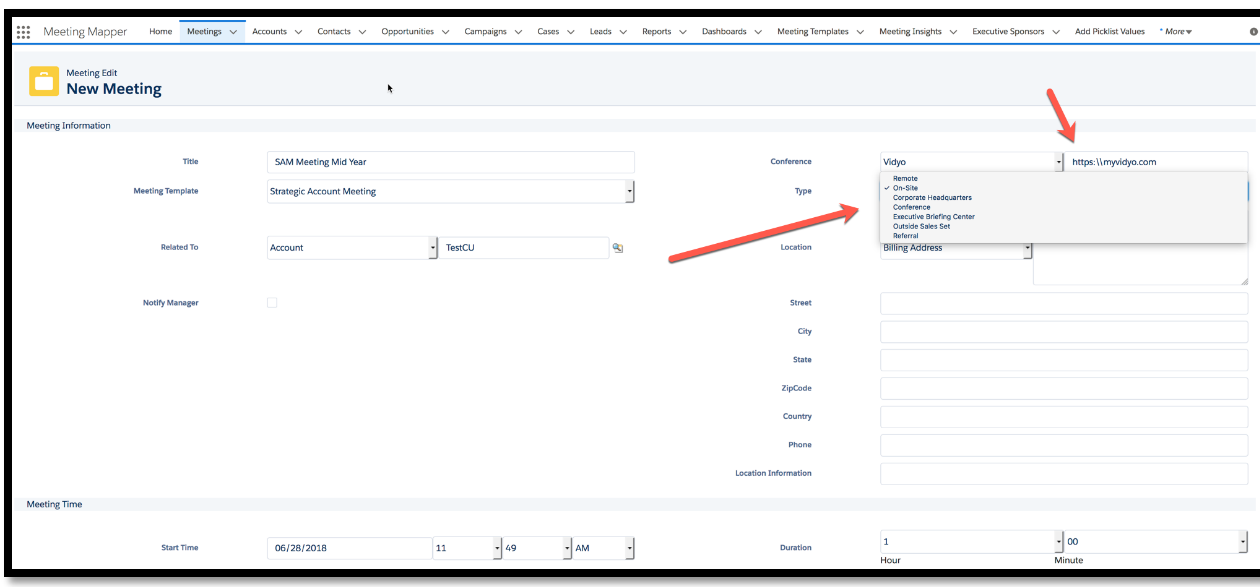

Figure 194

4. In the location field, select the location. This will pre-populate based on information on the account record. If the address is not listed select, enter in the address information and other location information (figure 197).

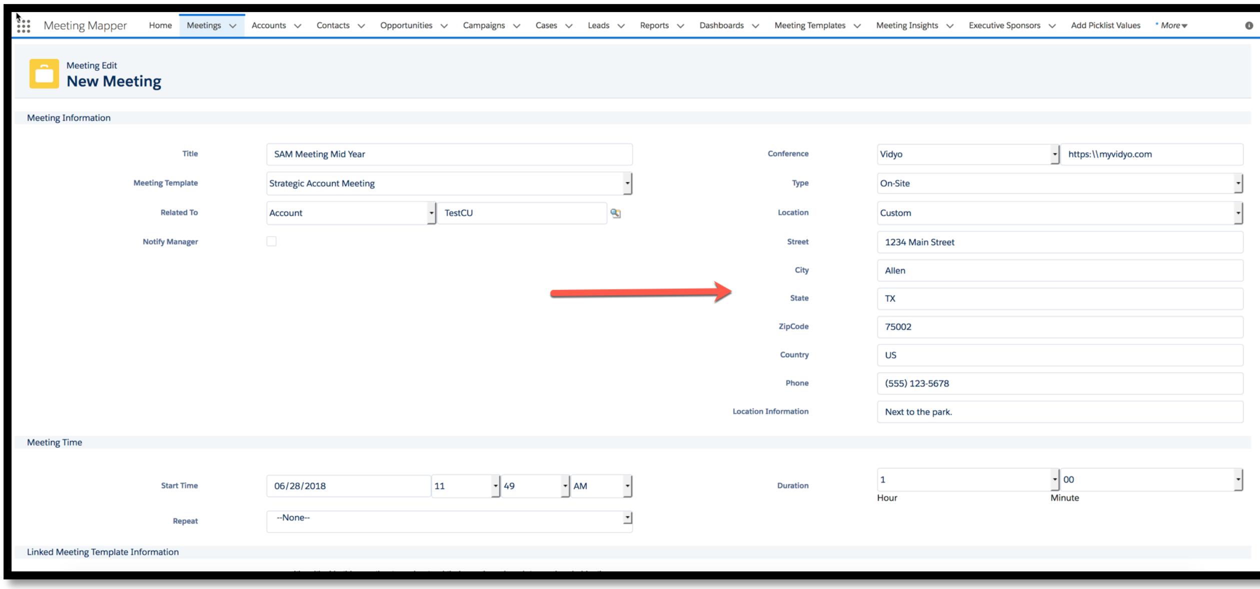

Figure 195

5. In the Meeting Time section select the date and start time and the duration (figure 198).

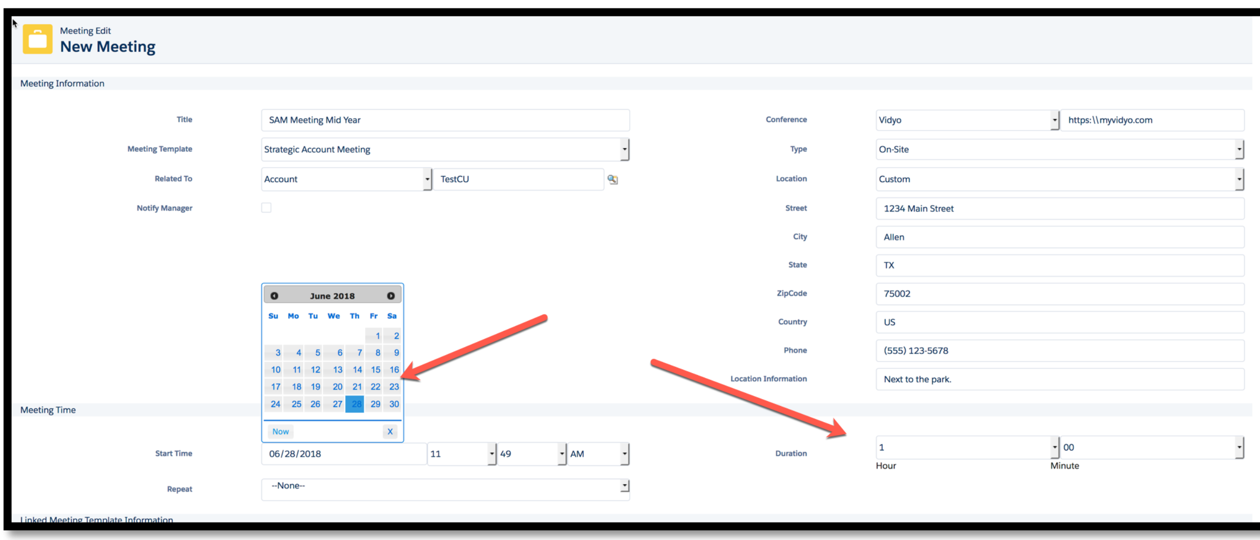

Figure 196

As you scroll down, there may be some information in the Internal Notes section.

6. Click Save. This will launch the meeting page.

If this is a subsequent meeting the meeting attendees from the previous meeting are auto-populated on the meeting page (figure 199). The meeting attendees will have the Stance and Role defined in the previous meeting in the current meeting.

In the event this is the initial meeting, the only meeting participant will be the organizer of the meeting.

Note: The Send Invites and Export Report are grayed out and can't be used until the meeting in initially saved.

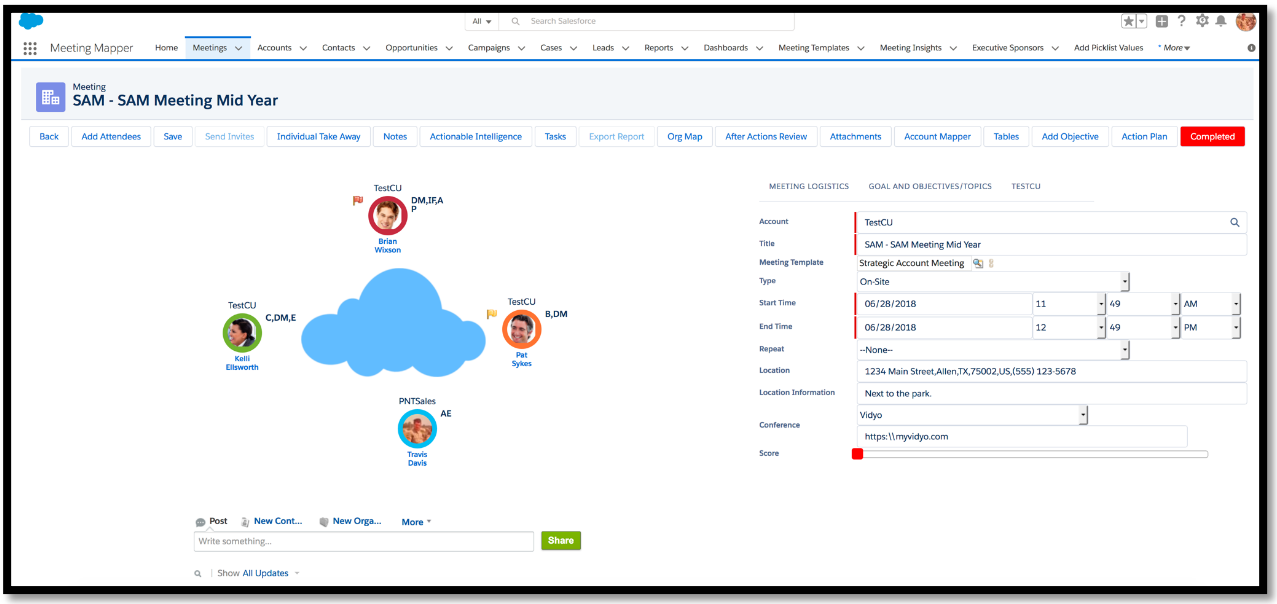

Figure 197

Working in the Meeting Page

The meeting page is comprised of (figure 200):

Note: Not all of the buttons listed below are used in this example based on the template selected.

- Buttons – Allow you to perform certain functions and activities in the meeting. The buttons displayed is based on the meeting template.
    - **Back -** Takes you back to the associated Salesforce object (e.g. Opportunity)
    - **Save -** Saves the current meeting information
    - **Notes -** Allows you to take meeting notes and view notes from previous meetings (public and internal).

  - **Tasks -** Allows you to assign tasks to meeting attendees. These are standard Salesforce tasks.
  - **Org Map -** Gives the ability to display and manipulate the organizational hierarchy of the customer/partner organizations.
  - **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.
  - **Table –** Allows you to specify the table displayed on the meeting page, by default no table is displayed on the meeting page.
  - **Add Attendee -** Add an attendee to the meeting, both contacts (customer team) and users (account team).
  - **Send Invites -** Allows you the ability to send meeting invitations and include meeting agendas.
  - **Individual Take Away -** Allows you to specify "Take Away" for each meeting attendee.
  - **Actionable Intelligence -** Allows you to collect sales intelligence.
  - **Add Objectives –** Allows you to add objectives for a successful meeting.

Note: Sales Intelligence is a component of the Account and Opportunity Plans scoring.

  - **Export Report -** Allows you to export a public and internal meeting report.
  - **Related Object Settings -** Allows the ability to populate fields.
  - **Sync Attendee Events -** This pulls forward tasks from previous meetings that have not been completed.
  - **Attachments -** Allows you to attach items as part of the meeting record.
  - **After Actions Review -** 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 Area - Portion of the meeting page to add meeting attendees and table types.
- Meeting Logistics, Goals and Objectives/Topic and Related List - Useful information regarding logistics, goals, objectives and fields from the related object that can be updated in the meeting.
- Chatter – Real-time collaboration.

Figure 198

Add Meeting Attendees

7. Click on Add Attendees, the default page is User Attendees. These are meeting attendees from your organization (team). Click Add next to their name (figure 201).

Note: In the event you need to search for a user, contact or lead, start typing their name in the search field (figure 200). There is no limit on the number of meeting attendees, just real estate in the meeting area.

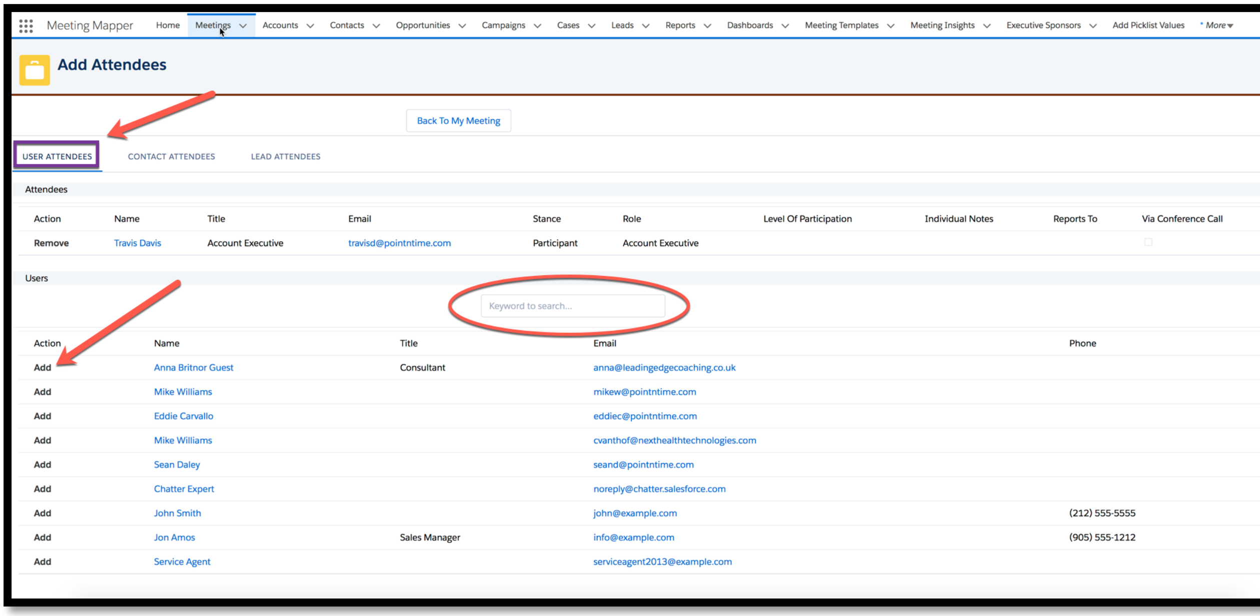

Figure 199

8. Click on Contact Attendees to add contacts from the account or partners, click Add next to their name (figure 202). To remove a contact from the meeting, click remove next to their name.

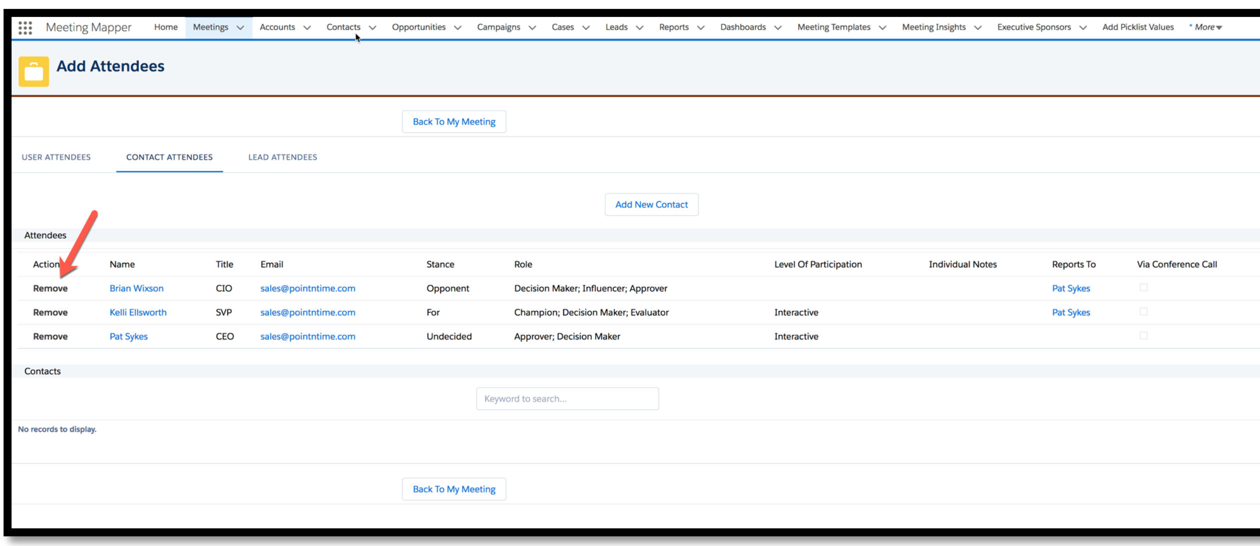

Figure 200

Add New Contact

On the Contact Attendees you can also add a new contact to the account.

9. Click on Add New Contact, complete the information for the contact (figure 203).
10. Click Save, the new contact will be added to the meeting.

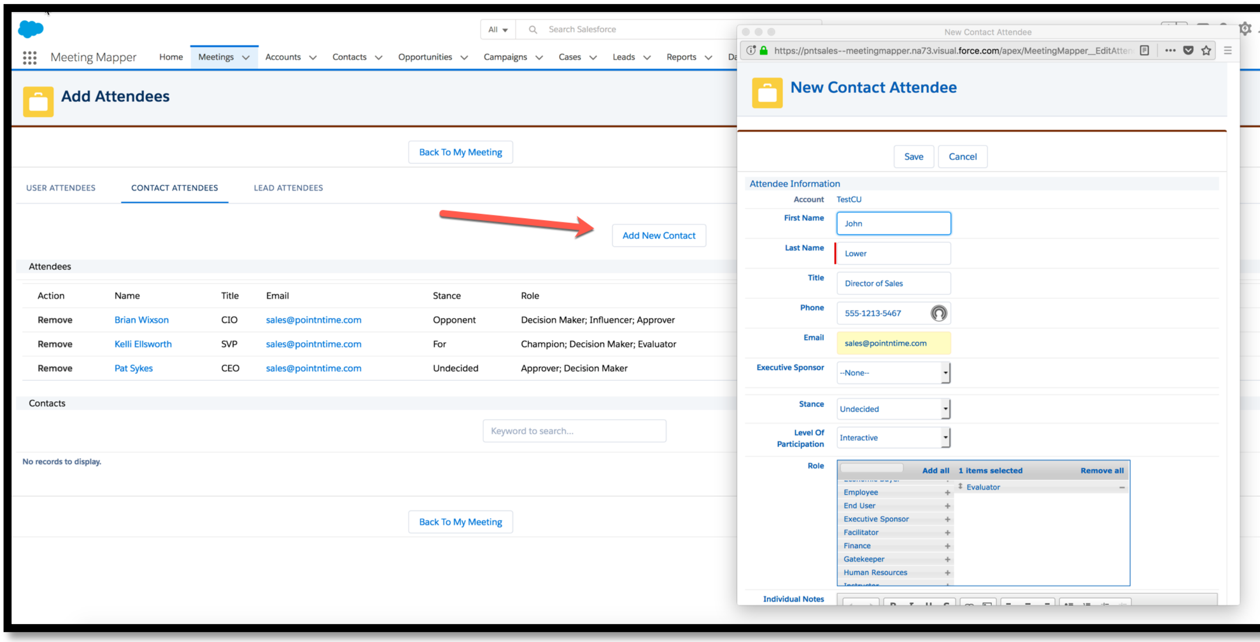

Figure 201

Add Lead to a Meeting

Meeting Mapper allows you to add Leads to any meeting.

11. Click on Lead Attendees, select a lead from the list or Add a new lead (figure 204).

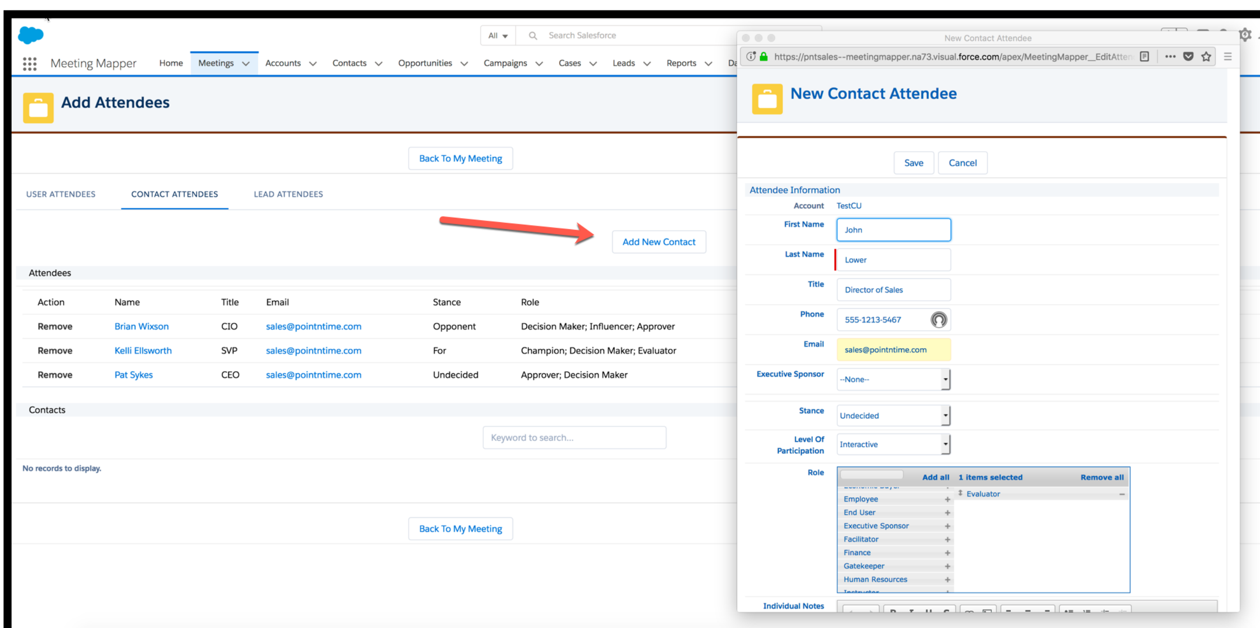

Figure 202

12. Once you have added all your attendees, click on Back to My Meeting (figure 205).

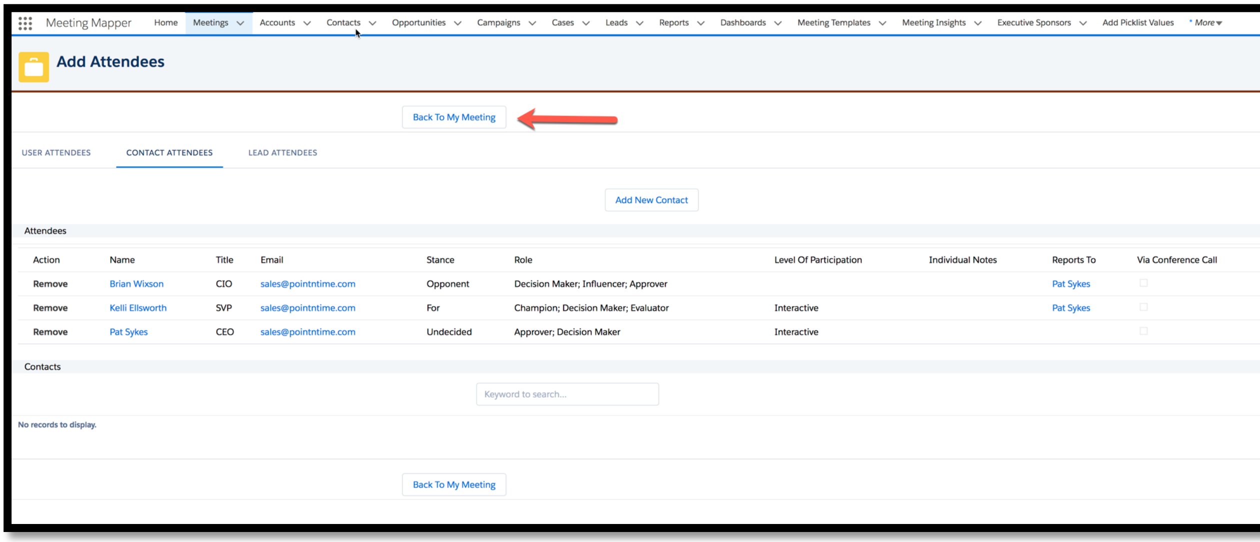

Figure 203

13. Click Save, all the new meeting attendees are displayed on the meeting page (figure 206).

Note: Once the meeting is Saved, the Send Invites and Export Report are not grayed out and are clickable.

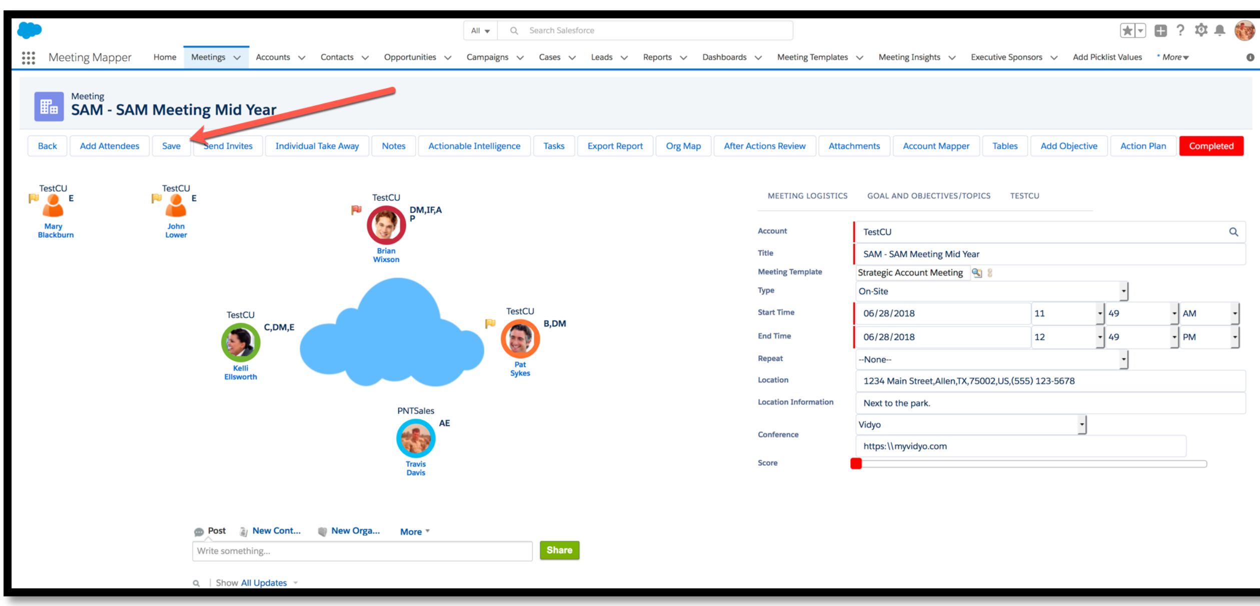

Figure 204

14. To rearrange the meeting attendees, hold your mouse over the attendee icon, left mouse hold and drag the icon to any position in the meeting area (figure 207).

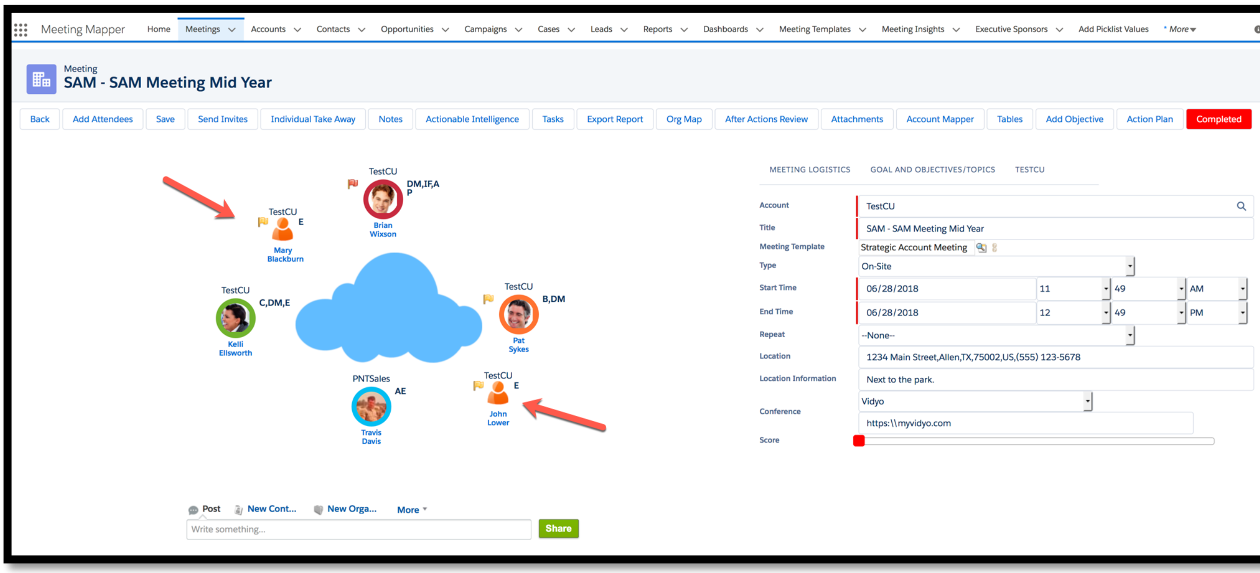

Figure 205

Edit Meeting Attendee's Details

There are two ways to edit a meeting attendee's details:

- Left mouse click on the attendee's name – can edit all setting in one window
- Right mouse click on the attendees icon – can select single item to edit

The Edit Attendee window allows you to edit (figure 208):

- First Name
- Last Name
- Title
- Phone
- Email
- Stance
- Level of Participation
- Main Influencing Factor 1st and 2nd
- Role
- Individual Notes – when individual notes are added the notes icon will display in the org map next to the contact icon.
- Via Conference Call – select if meeting attendee is joining via a conference call

Best Practice
This is checked if a meeting attendee (remote employee) is joining a meeting via a conference call and the other meeting attendees are attending in person.

- Reports To
- Add Event

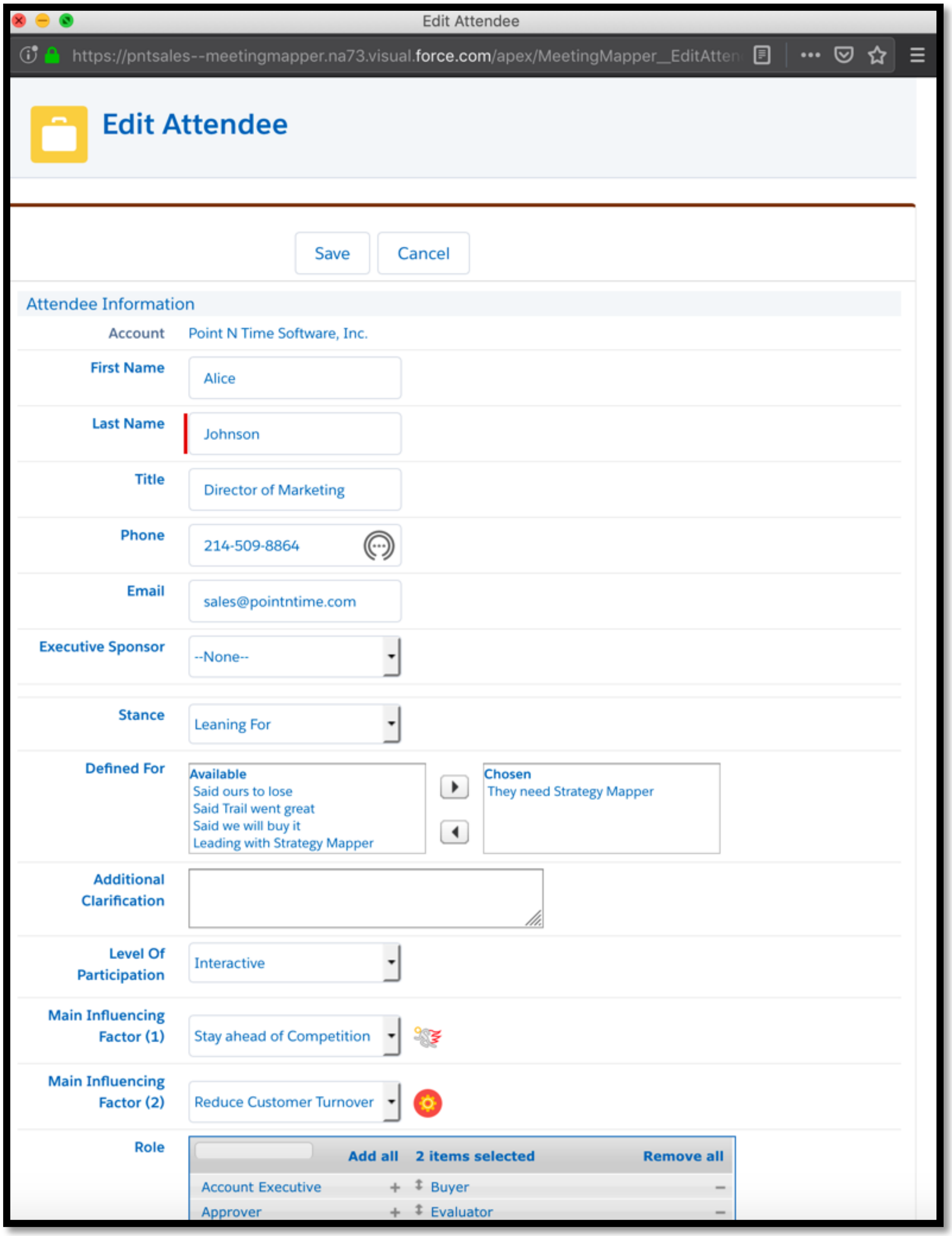

Figure 206

15. To edit all setting on one window left mouse click on an attendee, edit attendee details, click on Save (figure 209). This will close the window and return to the meeting page.

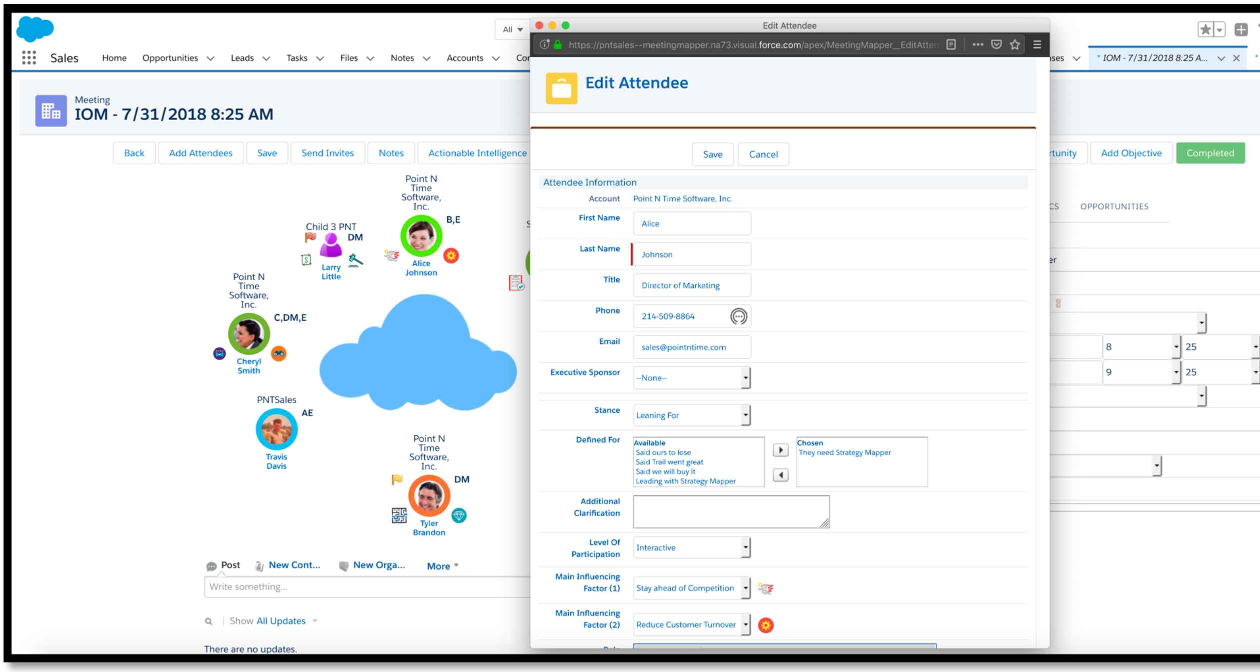

Figure 207

Attendee Stance

There are eight default Stance:

- For – Green
- Against – Red
- Leaning For – Light Green
- Leaning Against - Purple
- Undecided – Orange
- Neutral – Yellow
- Participant – Blue
- No Show – Pink

The attendee icon will either be the Stance color or if the icon has been replaced with a photo, the Stance color is around the photo.

Additional information can be linked to the following Stances (figure 210):

- For – select the reason the meeting attendee is For (justification)
- Against – select the reason the meeting attendee is Against (justification)
- Leaning For - select the reason the meeting attendee is For (justification)
- Leaning Against – select the reason the meeting attendee is Against (justification)

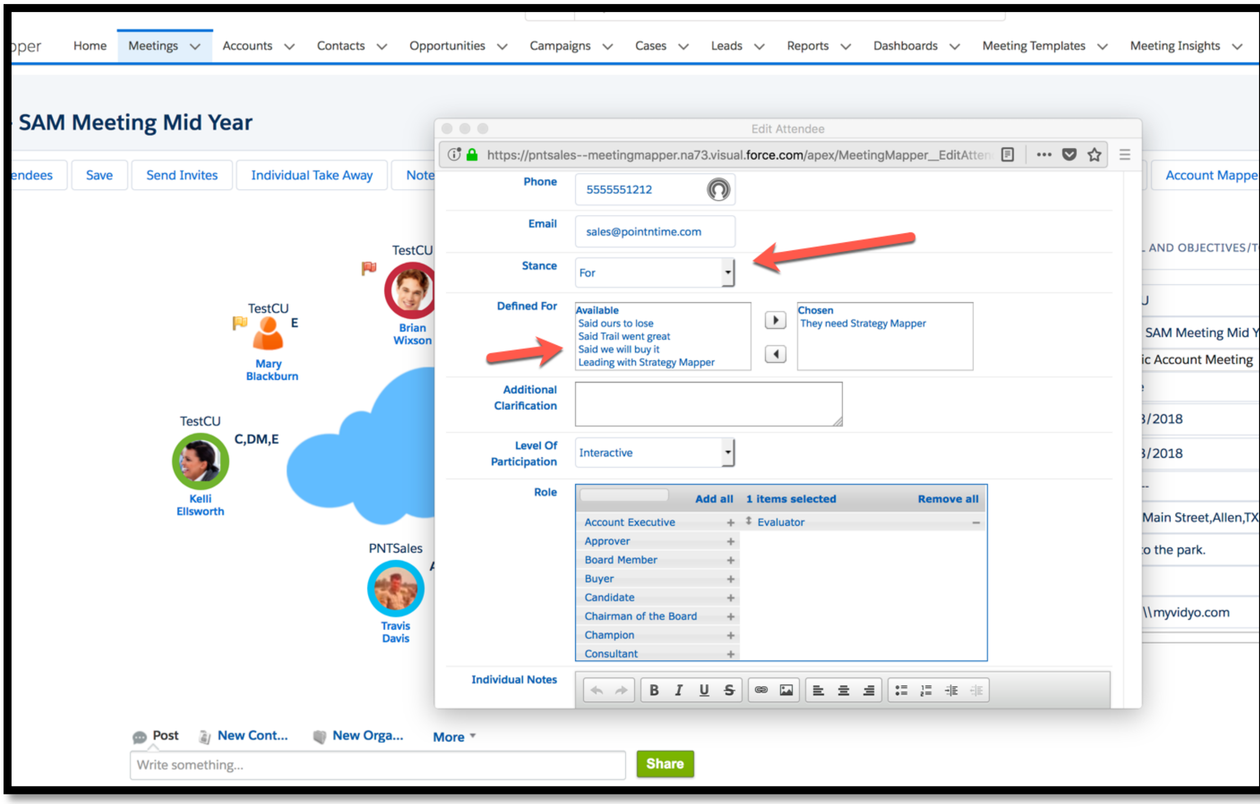

Figure 208

Note: The default color for a new meeting attendee is Blue, if they have never been in a meeting. In the event, they have been in a meeting they will display the last Stance.

Attendee Roles

There are over 30 default attendee roles, when a role or roles are assigned the one or two letter code is displayed to the right of the icon (figure 209). In this example Martina's Stance is Undecided and his Roles are: Decision Maker and Evaluator. Martina also has a 'Yellow' flag next to her, this indicates that her stance and role are negatively impacting the account or opportunity. Two Main Influencing Factors have also been identified. Hover over each to reveal the text (figure 210).

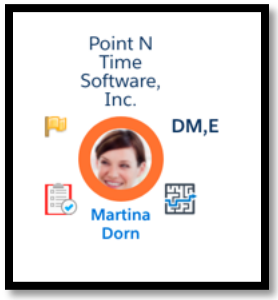

Figure 209

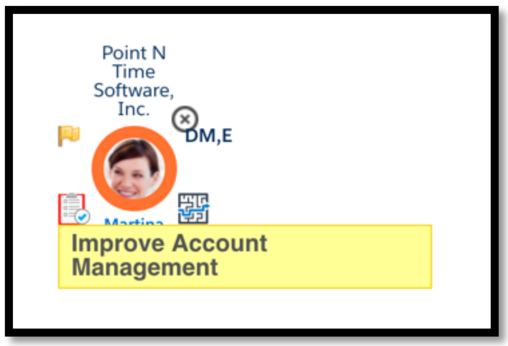

Figure 210

Note: You can also notice Martina has a 'Yellow Flag' These are based on the Stance and Role of the meeting attendee. There is an algorithm to determine no flag or flag color. Martina's is yellow because he is a Decision Maker that is against.

Replacing Attendee Icon with Image

The attendee icon can be replaced with an image.

Best Practice
LinkedIn is a great place to get public images for your contacts.

16. Click on the attendee icon (figure 211).

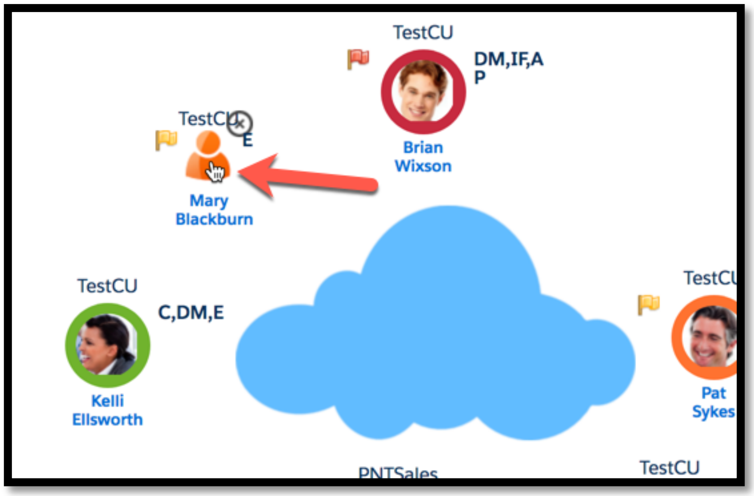

Figure 211

17. Click on file selected (figure 212).

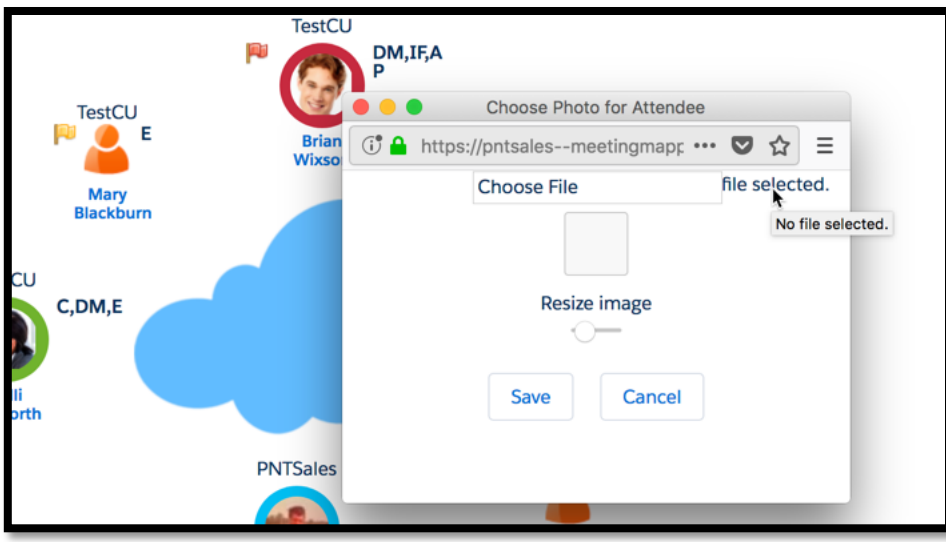

Figure 212

18. From the file storage on your computer select an image (figure 213), click Open.

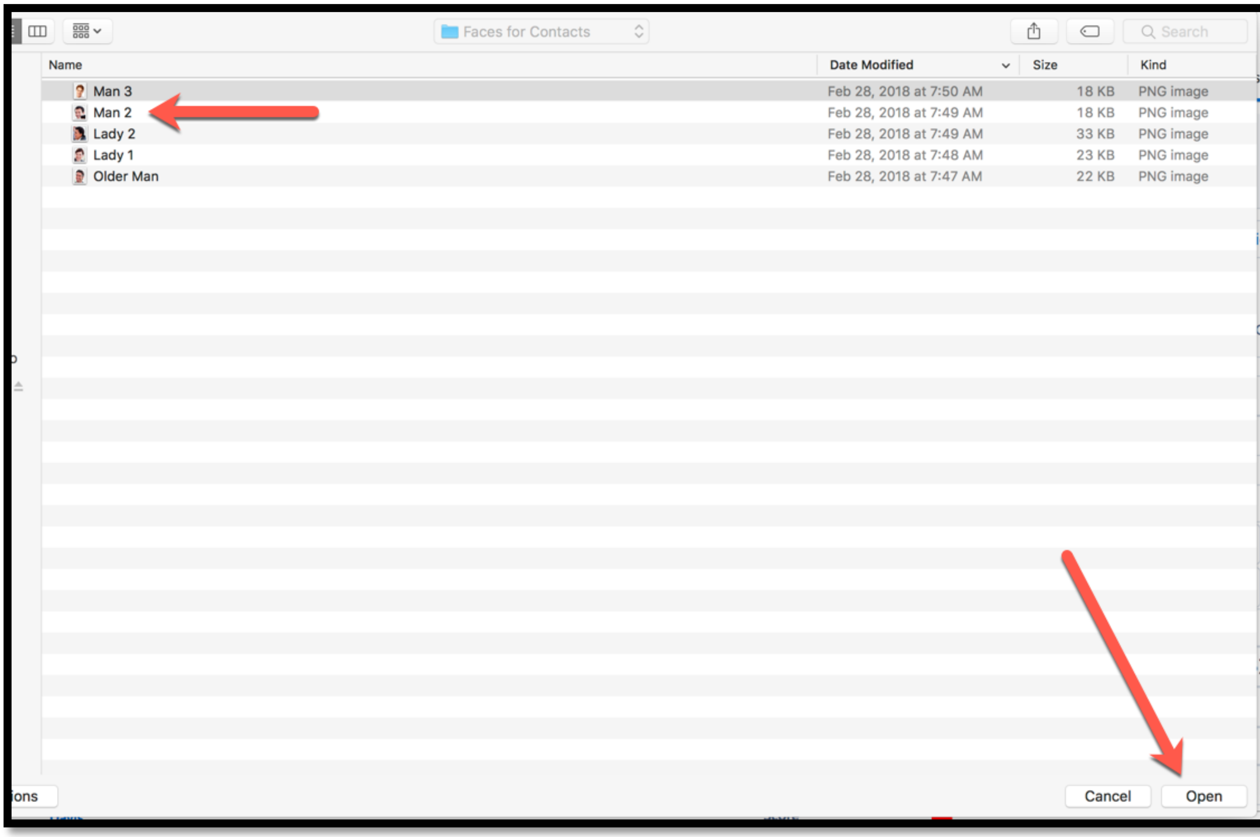

Figure 213

19. Size and position the image and click Save (figure 214).

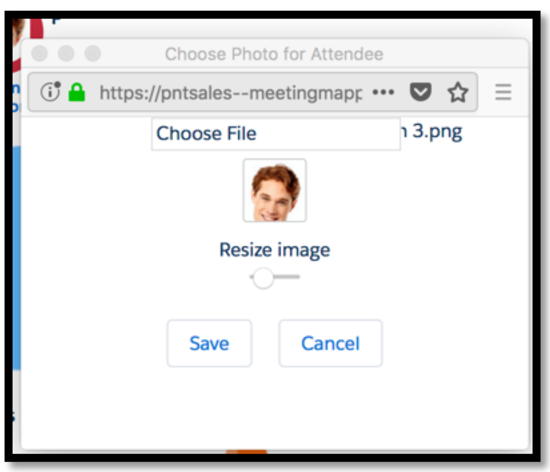

Figure 214

20. Attendee icon is now replaced with an image (figure 215).

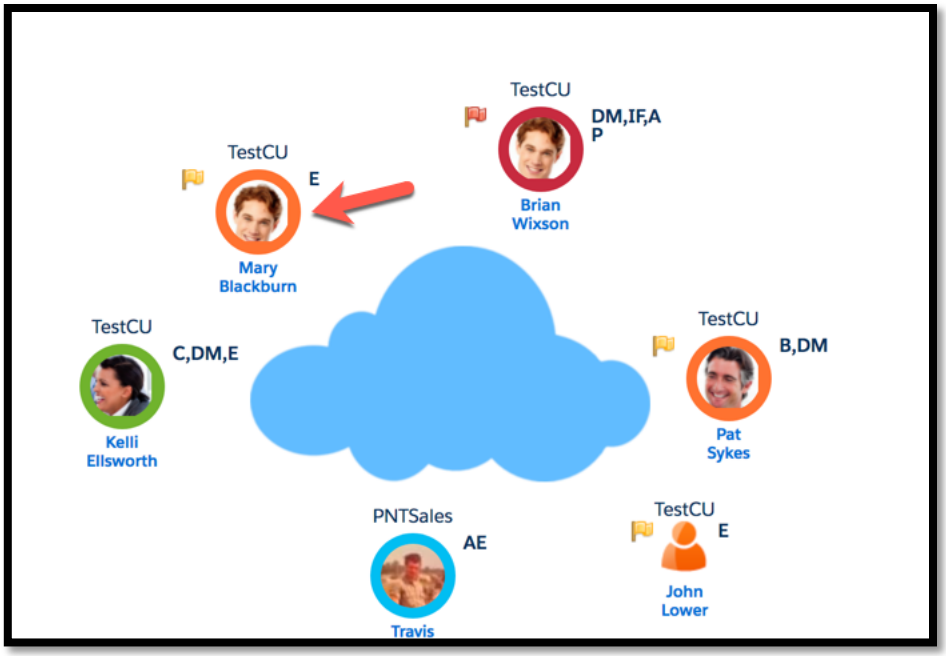

Figure 215

Working with Meeting Buttons

At the top of the meeting page there is a row of buttons, depending on the template your buttons can be different (figure 216). For this example, we will move through each of the buttons displayed and explain each.

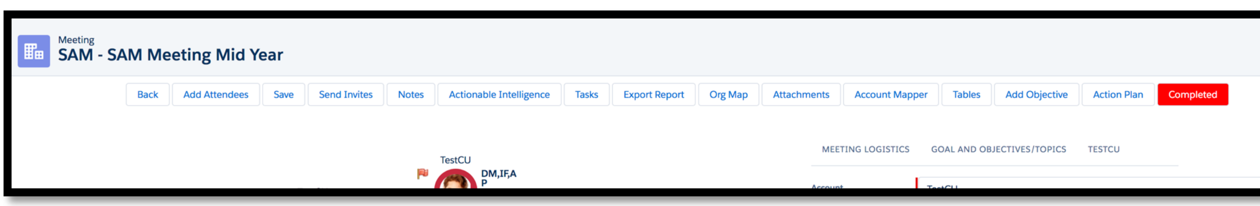

Figure 216

21. Back – clicking on the back button will take you back to the object the meeting is linked to. Since this meeting is linked to an account, clicking on it will move back to the account page. For meetings linked to an opportunity, clicking on the Back button will display a choice where to navigate to, either to the account or the opportunity (figure 217).

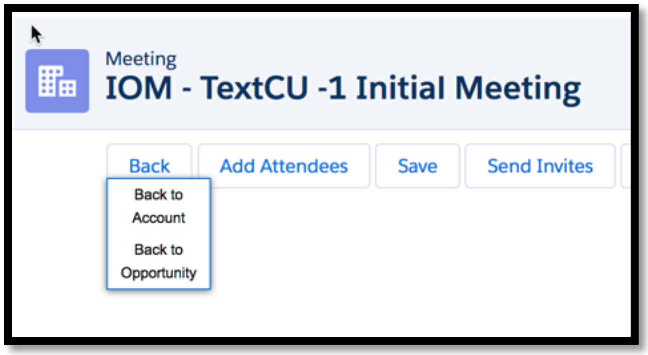

Figure 217

Add Attendees – was detailed in previous section.
Send Invites – allows you to send invitations, agendas and files to meeting attendees. To send invites follow these steps.

Note: Invites can be sent at any time, however once an invite has been sent to a meeting attendee you can't send another unless the date or time of the meeting has changed. This will be explained in further in the Logistics section in the guide.

---

22. Click on Send Invites, a pop-up window asking to verify the date and time of the meeting will display. The window will only display on the initial click on Send Invites or you click No. If you select No, the window will close and display the meeting page.
23. Click Yes (figure 218).

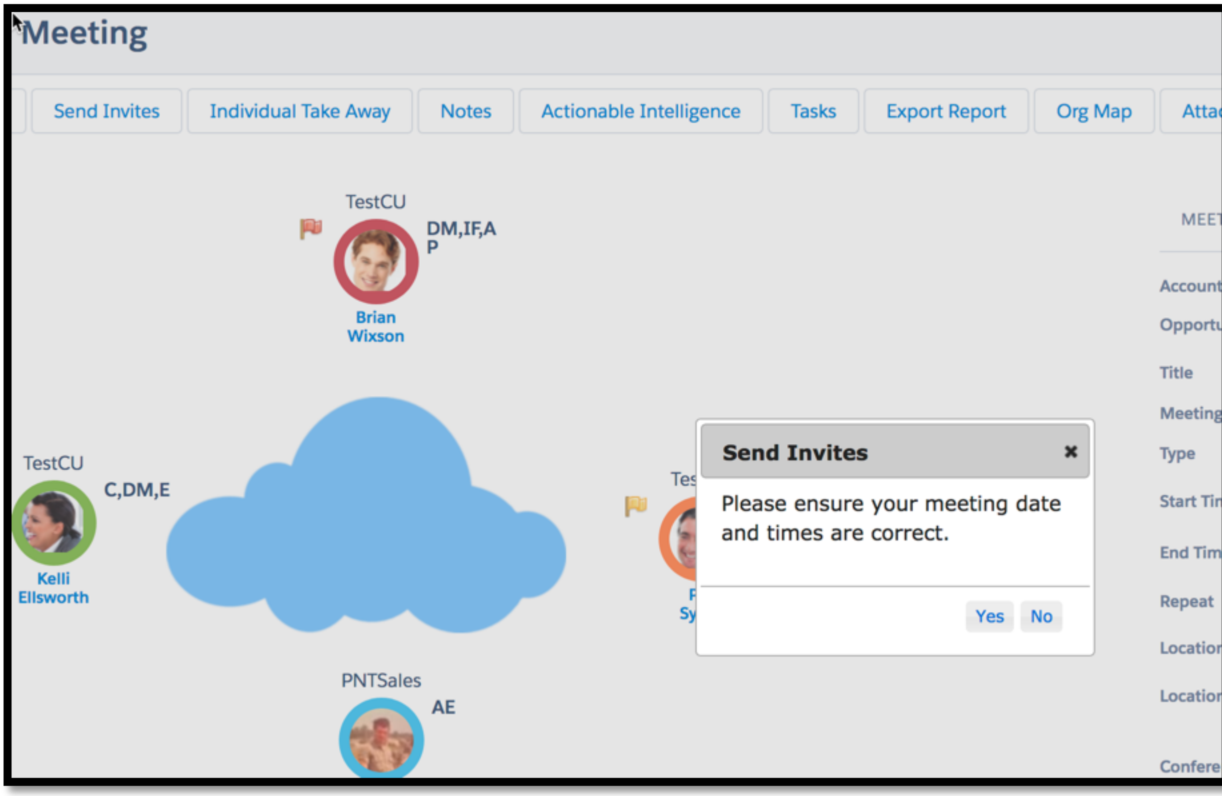

Figure 218

24. The Send Invite Page allows you to (figure 219):

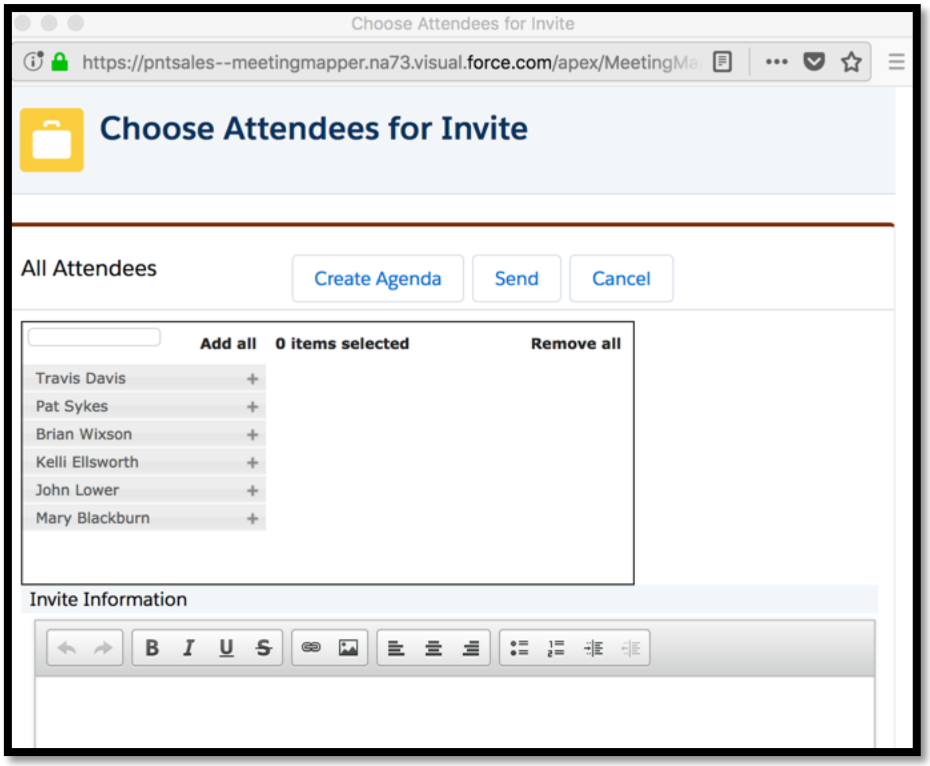

Figure 219

- Select the meeting attendees to send the invite to
- Add additional information in the invite
- Attach a file
- Send invites to individuals not in the meeting (useful if you want to invite your manager)
- Create Agenda

25. Select the meeting attendee, complete other sections, in this example an agenda will be attached, click Create Agenda (figure 220).

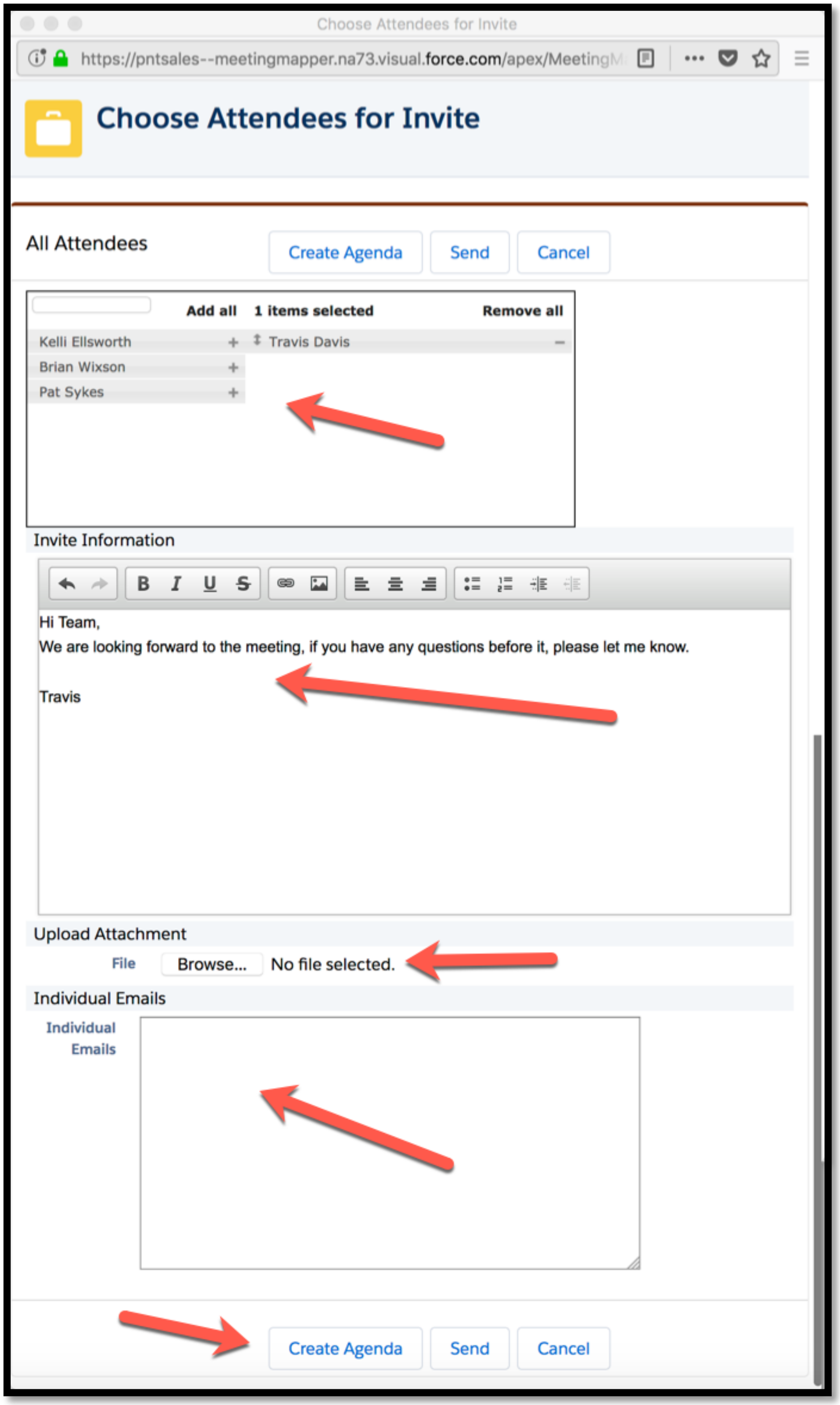
Choose Attendees for Invite
https://pntsales--meetingmapper.na73.visual.force.com/apex/MeetingM
Choose Attendees for Invite
All Attendees
Create Agenda
Send
Cancel
Add all
1 items selected
Remove all
Kelli Ellsworth
Brian Wixson
Pat Sykes
Travis Davis
Invite Information
Hi Team,
We are looking forward to the meeting, if you have any questions before it, please let me know.
Travis
Upload Attachment
File
Browse...
No file selected.
Individual Emails
Individual Emails
Create Agenda
Send
Cancel

Figure 220

26. Complete the sections and click Save (figure 221). The agenda will be attached to the meeting invite. To edit the agenda, click on the hyperlink (figure 222).

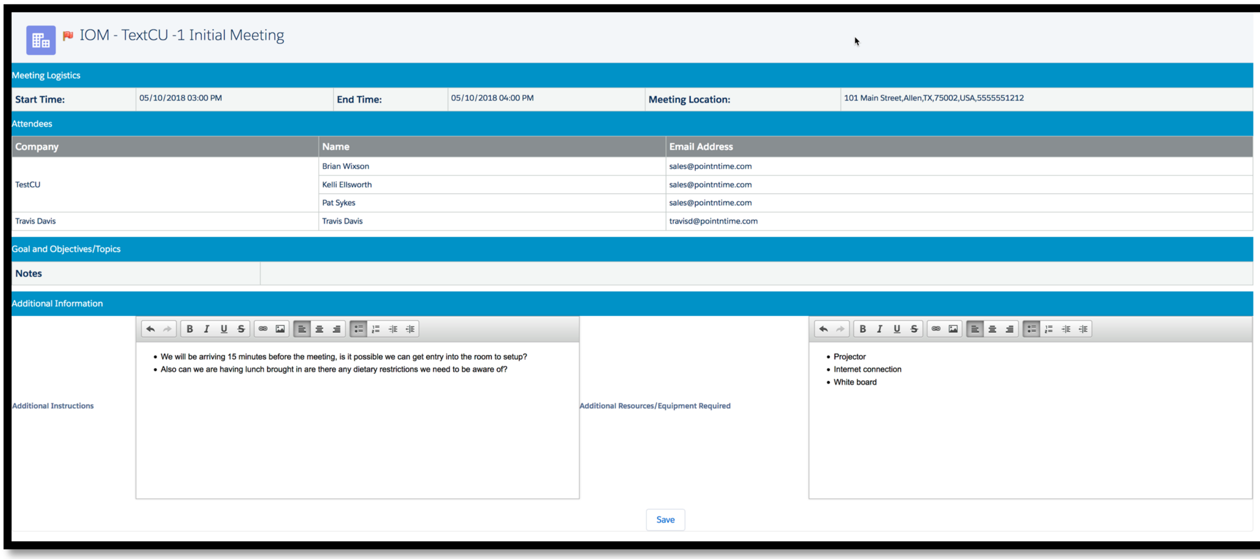

Figure 221

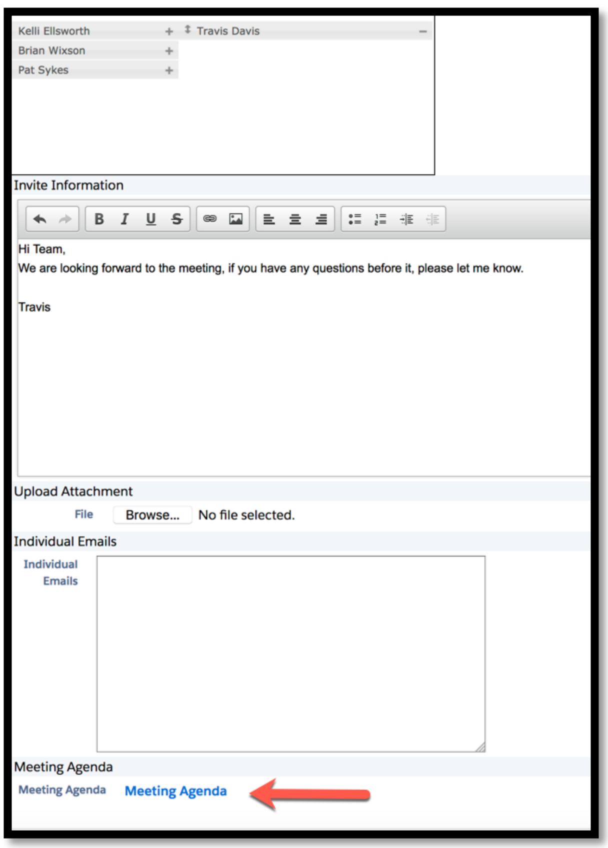

Figure 222

27. Click Send (figure 223).

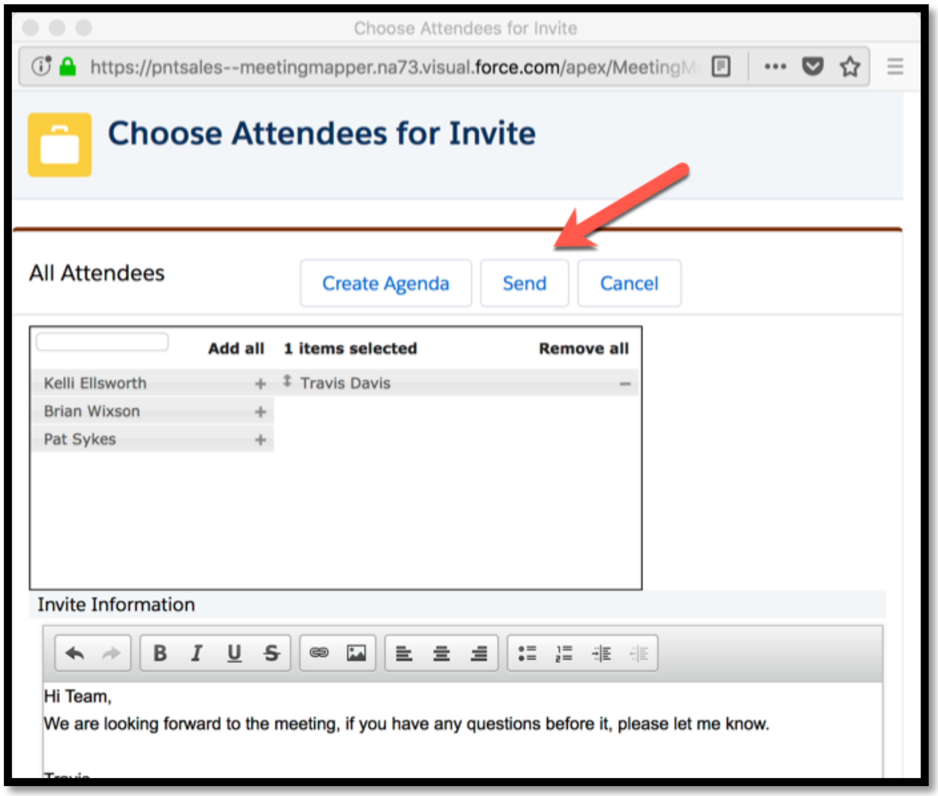

Figure 223

Meeting attendees sent the email will receive the following email format (figure 224). Recipients click on the .ics file to accept.

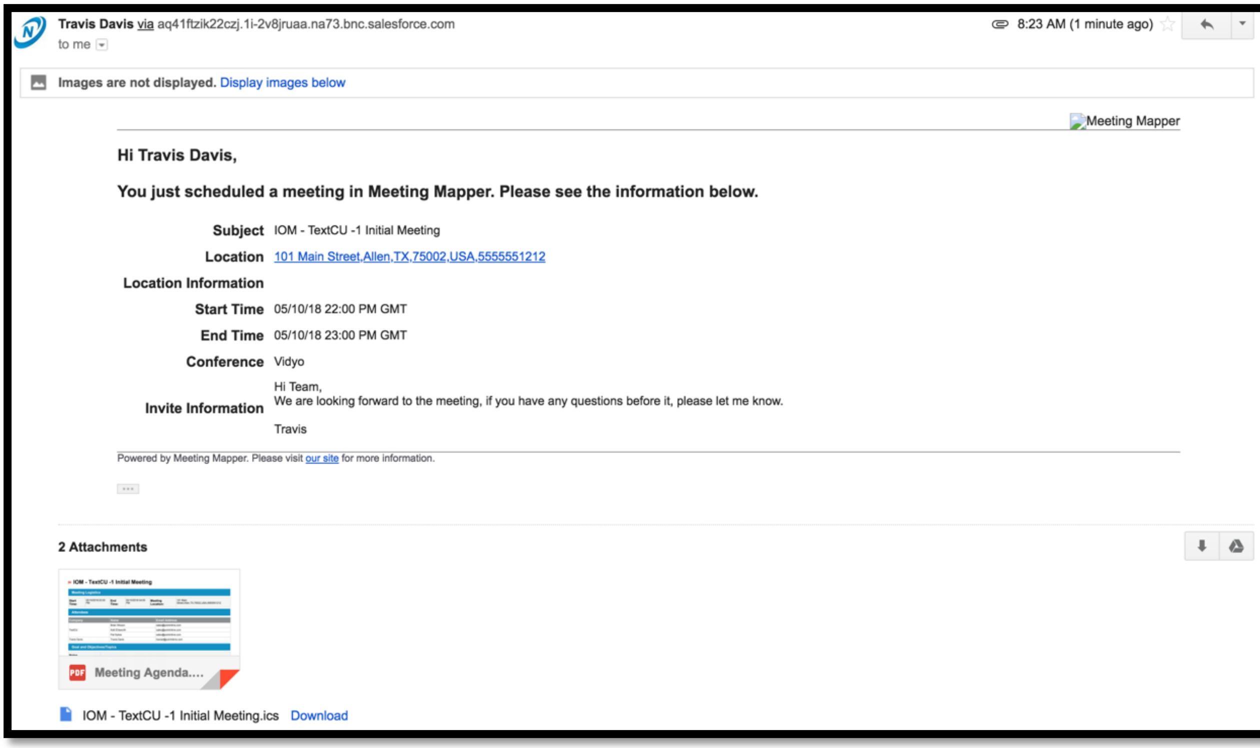

Figure 224

Notes

Taking notes is easy, there are two type of meeting notes:

- Public – consummation for everyone
- Internal – only for team members

The notes pages are 'Rich Text' there is formatting and ability to add images to notes.

Note: For testing a 77-page document with text and images was pasted in the notes fields. There is ample room for taking great notes.

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28. Click on Notes, the Meeting Note window is displayed. The Red highlight indicated what notes field you're editing. For example, current meeting and public notes. When you click on another meeting notes or internal notes the tabs will turn Red (figure 225). To view previous meeting notes, click on the tab for the meeting to review.

Note: Notes from previous meetings can only be viewed they can't be edited in the current meeting. They can be edited in the original meeting.

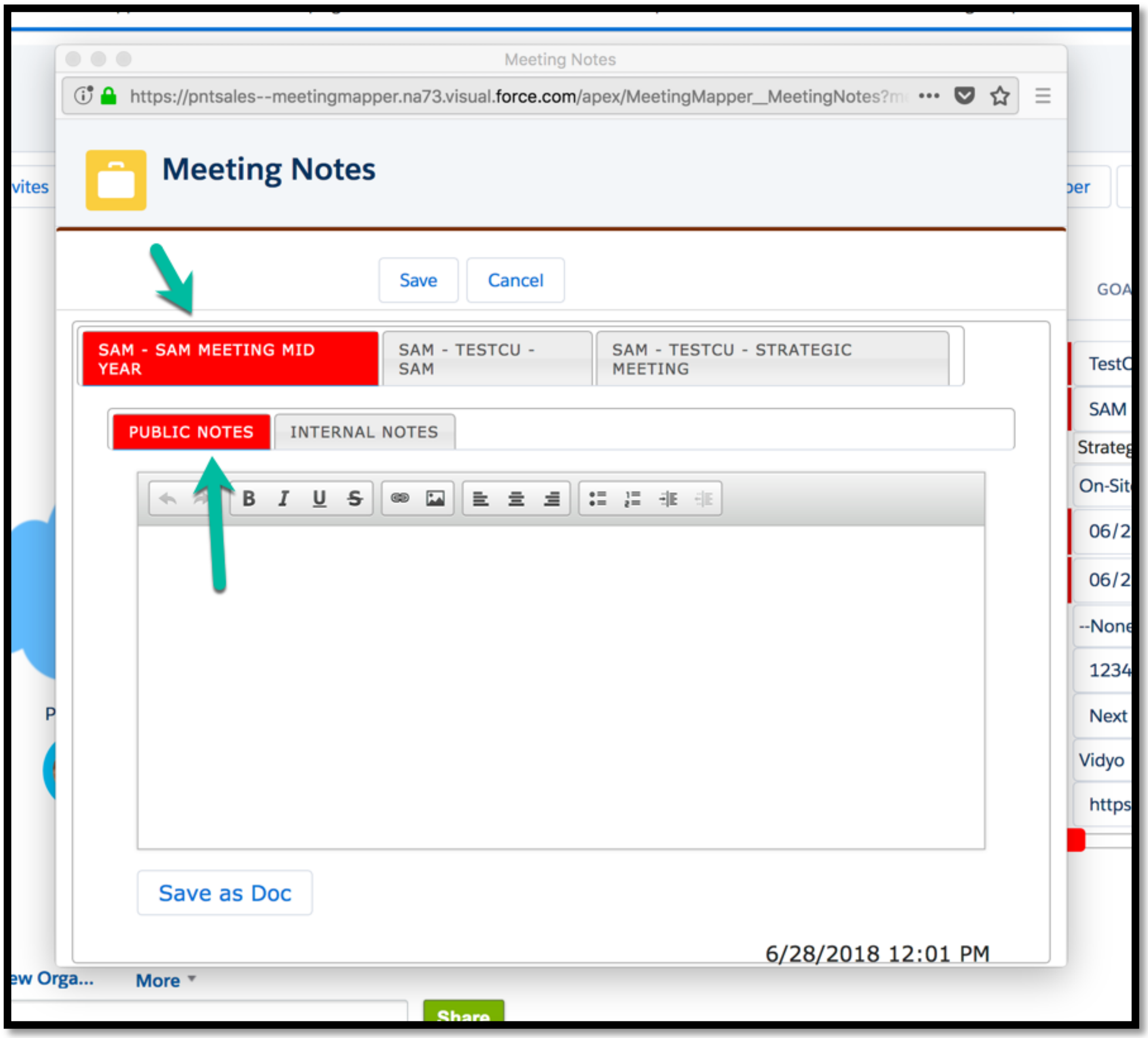

Figure 225

Note: The Internal Notes section maybe pre-populated with information based on the template selected for the meeting.

29. Click Save.

Best Practice
Save Often!

Actionable Intelligence

The Actionable Intelligence is a very robust and easy way to gather sales intelligence in a meeting. Clicking on the button will open up the Actionable Intelligence window.

Note: Almost all of the information can be gathered using picklist and dropdown picklist. This ensures reduced administrative overhead of documenting a meeting and also allows for robust reporting.

Actionable Intelligence consist of the following (figure 226):

- **Actionable Intelligence Page**
  - Decision Date – when will the customer make the decision, not the close date (date pick)
  - Budgeted Project – status of budgeting (picklist).
  - Customer Reference – is the customer a potential reference account (picklist).
  - Actions – what actions have been agreed upon in the meeting (multiple picklist).
  - Decisions – what decision have been agreed upon in the meeting (multiple picklist).
  - Business Drivers – business requirements (text field)
  - Technical Requirements – overview of technical requirements (text field).
  - Reference Contact – who in the account will be the reference contact (picklist)
- **Customer Requirements** – map the customer requirements to your products and solutions and to what degree they meet the requirements (picklist and text field).
- **Competitors** – the competitors engaged in the account/opportunity.
- **Pain Points** -why is the customer even meeting with you (multiple picklist and text field).
- **Strengths** -what are your strengths (multiple picklist and text field).
- **Weaknesses** – what are your potential weaknesses from your prospective and customers (multiple picklist and text field).
- **Obstacles** – obstacles encountered (multiple picklist and text field).
- **Objections** – objections encountered (multiple picklist and text field).
- **Why Buys** – why buy now, what happens if they do nothing, etc… (multiple picklist and text field).

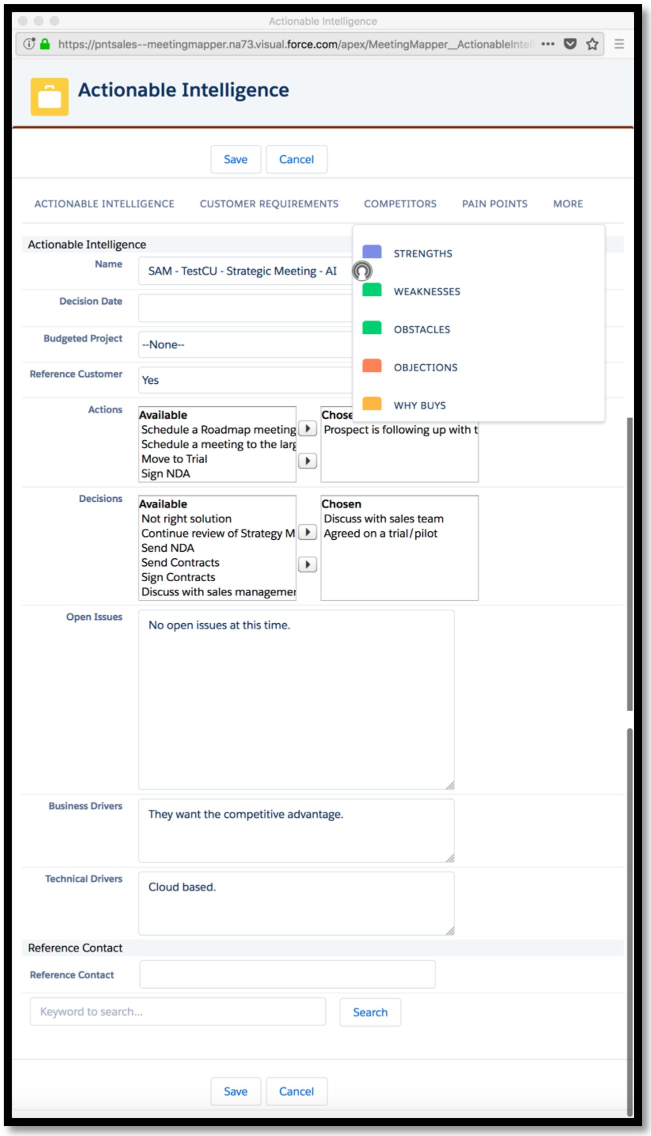

Figure 226

Note: Information gathered in previous meetings will be displayed, this is to ensure conversations start where they left off and you maintain the competitive advantage.

---

30. Click on Actionable Intelligence button, the default screen is Actionable Intelligence, review any previous sales intelligence. To modify any items on this page either click on the dropdown arrow, select from the picklist or type in the information in the fields.
31. Click on Customer Requirements, click New (figure 227).

Note: New requirements are added to the bottom of the list.

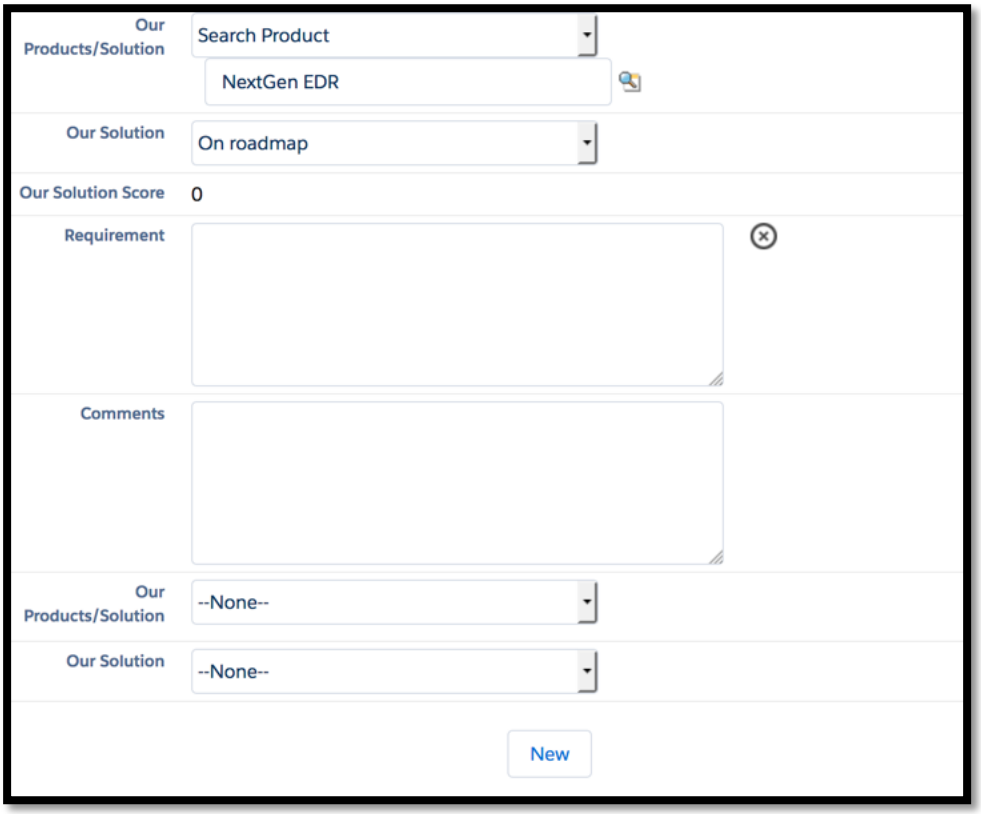

Figure 227

32. Enter in the requirement any comments, click on the dropdown arrow and select from the following (figure 228):

Note: In the example, Search Products is selected. Based on my input a list of products from the product catalog will display.

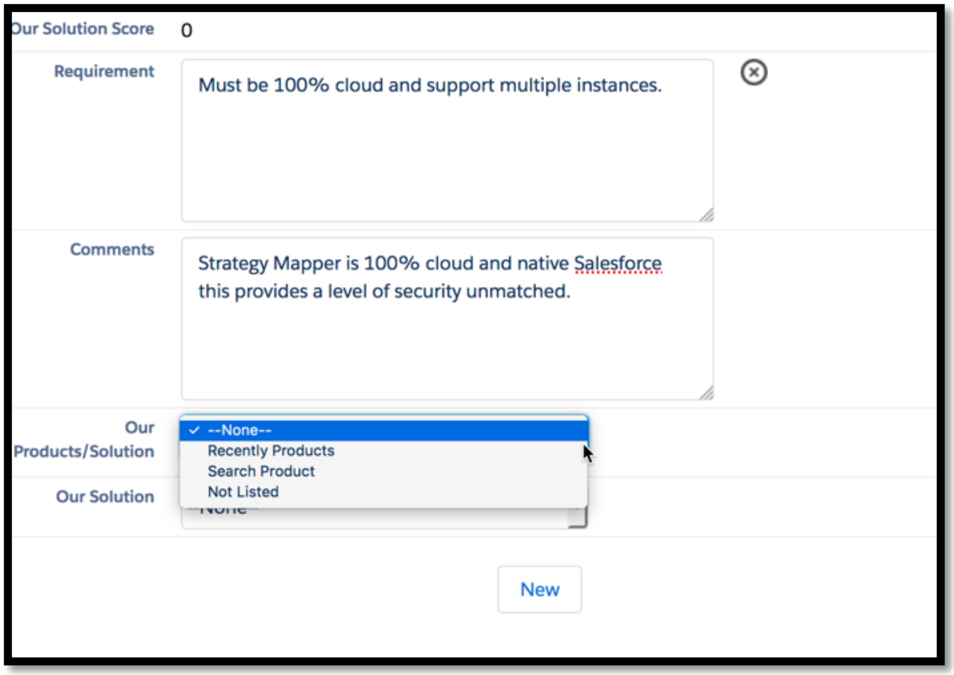

Figure 228

33. In this example Search Product is selected, click on the search icon, enter in the name of the product, click enter key and select product (figure 229).

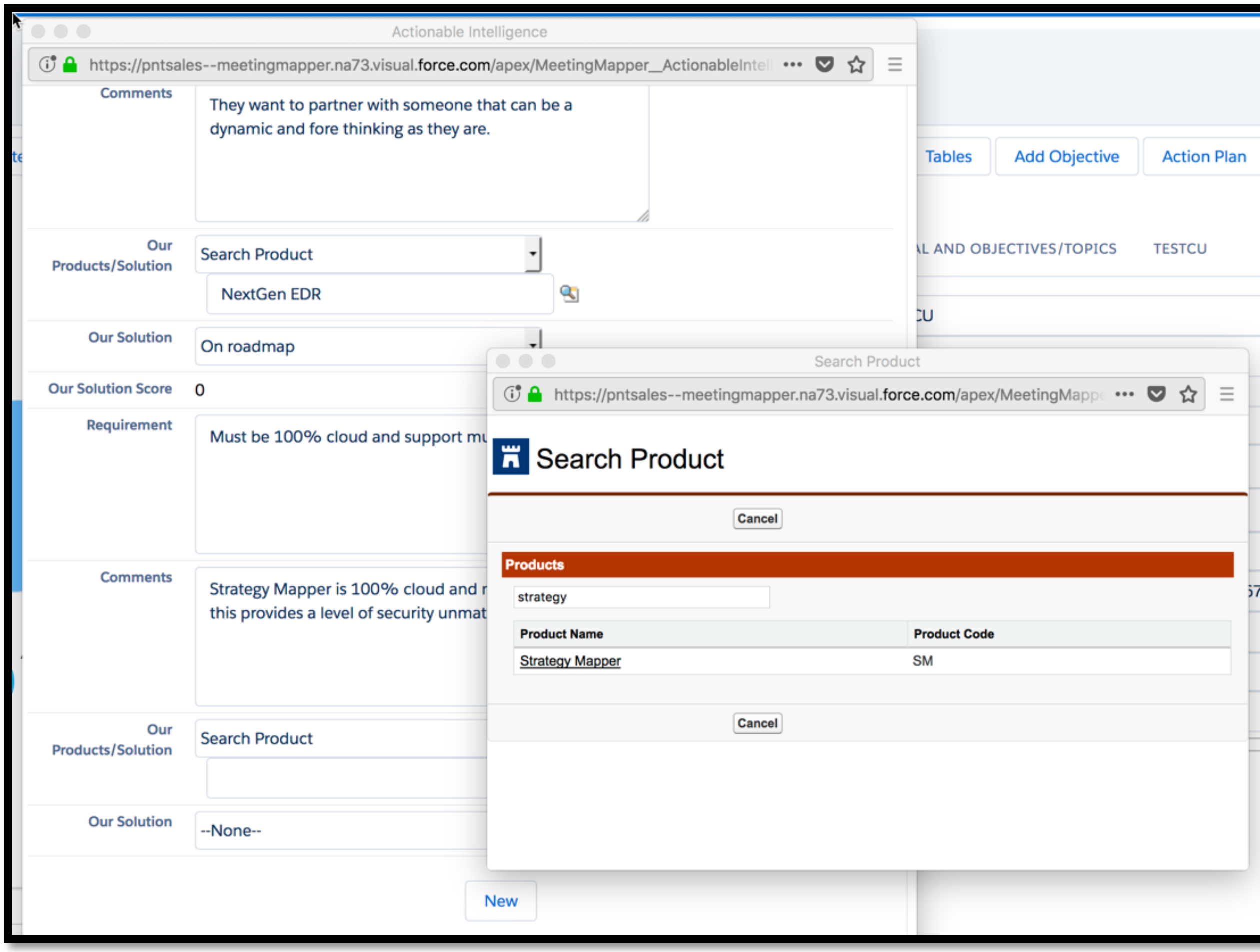

Figure 229

34. Click the dropdown arrow for Our Solution, select the response (figure 230):

Each selection has a different score associated:

- **Partner Product/Solution** = 100, select if a partner can meet 100% of the requirement
- **Meeting Requirement** = 100, select if your product(s)/solution(s) meet 100% of the requirement
- **Partially meets requirement** = - 50, select if your product(s)/solution(s) partially meets requirement
- **On Roadmap** = 25, select if product(s)/solution(s) that will fully meet or partially meet requirement
- **Does not meet requirement(s)** = 0, select if your product(s)/solution(s) meet none of the requirement

Note: The overall Solution Score is derived from all scores based on the selection and divided by the number of requirements.

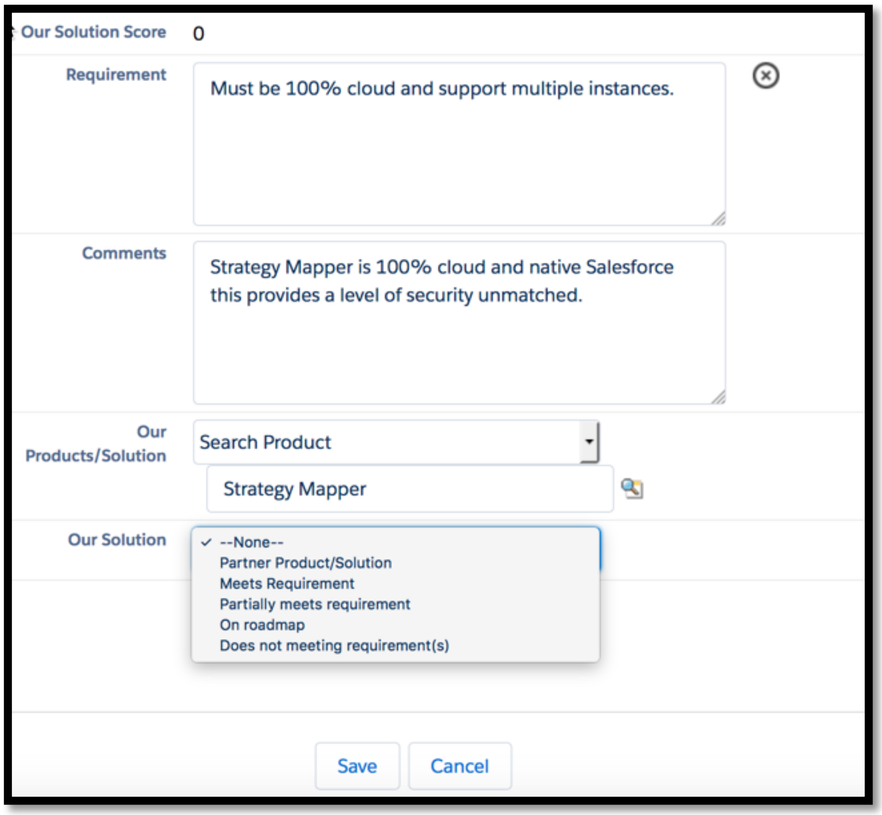

Figure 230

35. Based on the selection Meets Requirement, Our Solution Score for this requirement is 100 (figure 231).

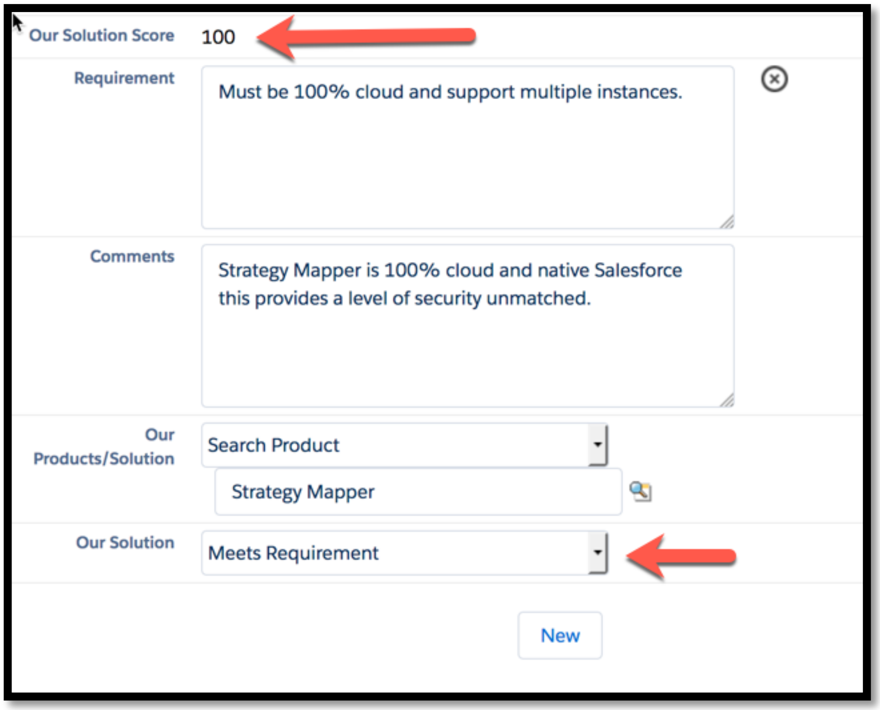

Figure 231

36. Once you have completed the requirements, click on Competitors.
37. Click New, click on the dropdown arrow and select from the list of competitors (figure 232).

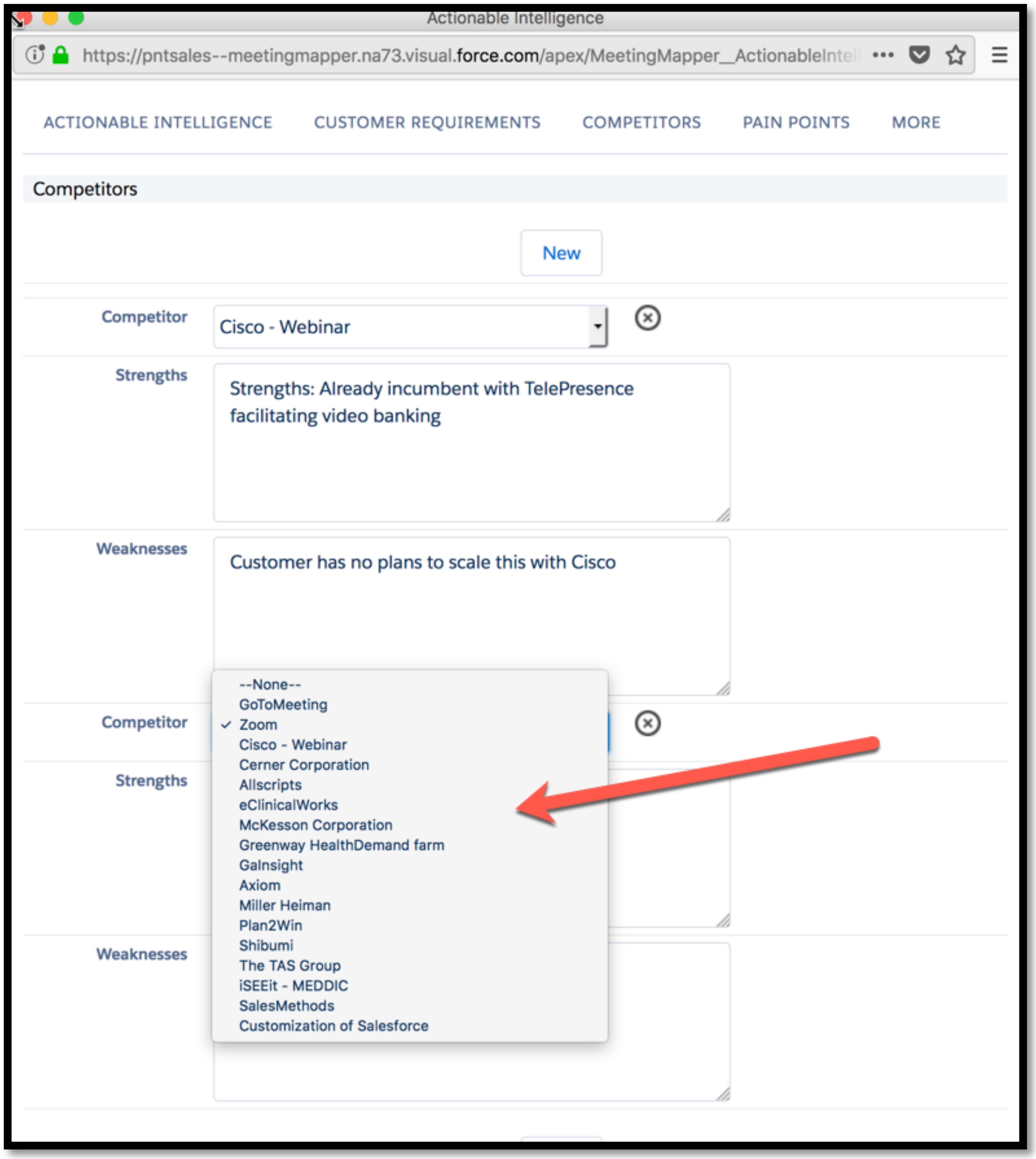

Figure 232

Note: If a strength or weakness has be previously identified they will auto-populate for the competitor.

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38. Enter in any Strengths or Weaknesses (figure 233). Click Save.

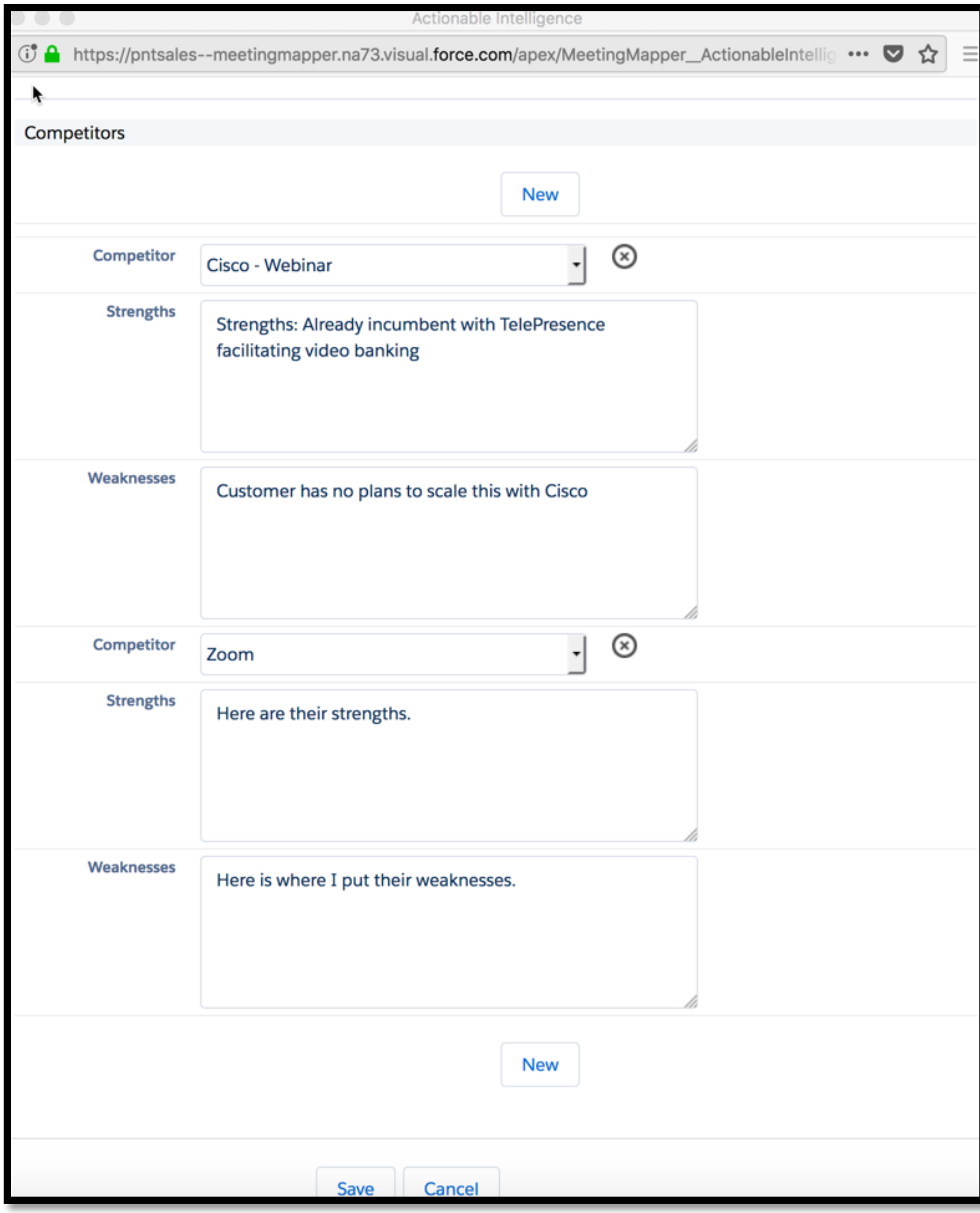


Figure 233

39. Click on Pain Points, click on New, select the Pain Point from the list (figure 234).

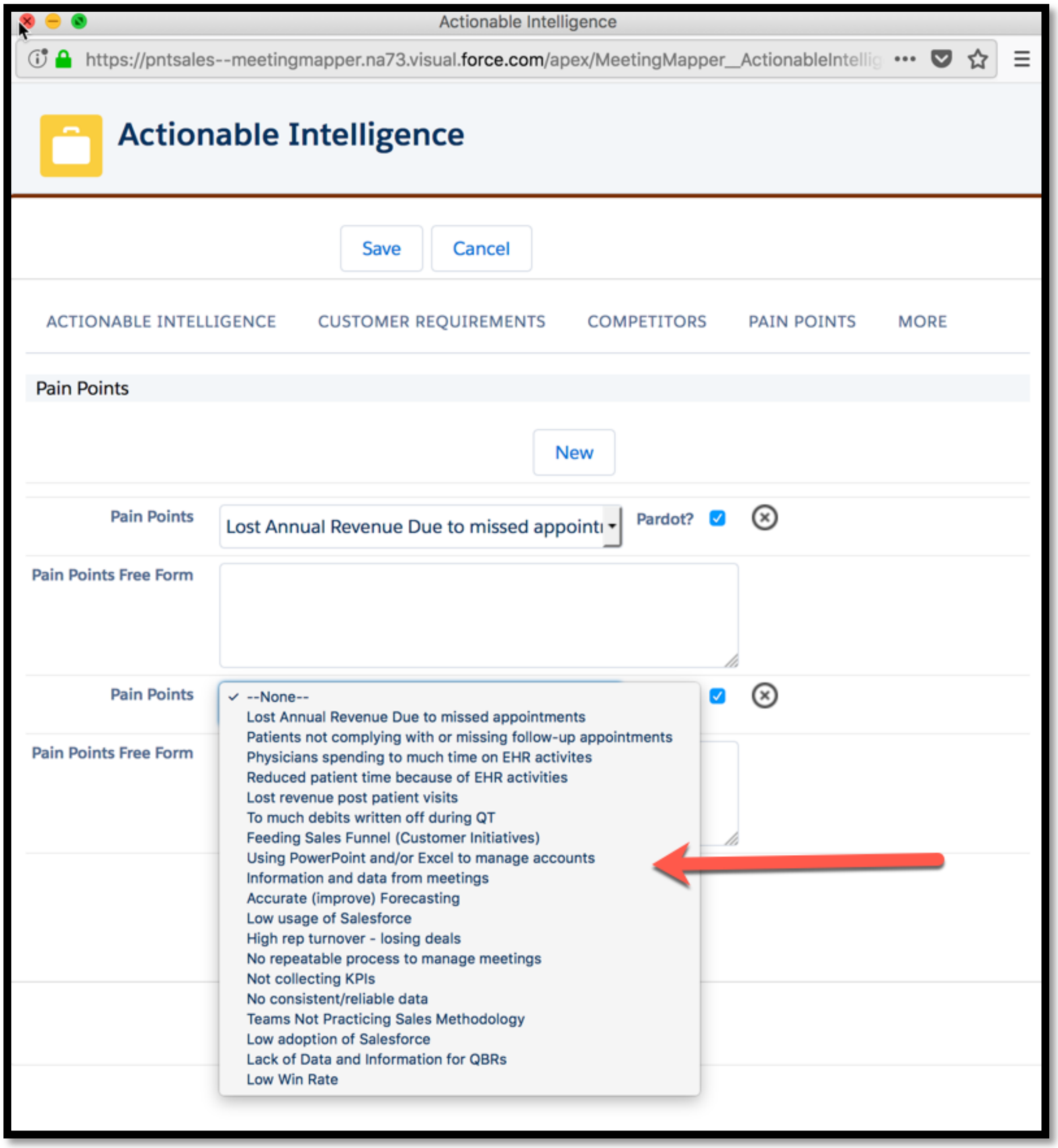


Figure 234

40. Enter in any additional information in the Free From text field. Click Save when completed (figure 235).

Note: The Pardot check box, allows this Pain Point to be leveraged in marketing automation. To see how Strategy Mapper integrates with Pardot, please watch this video: [Knowledge Driven Marketing]

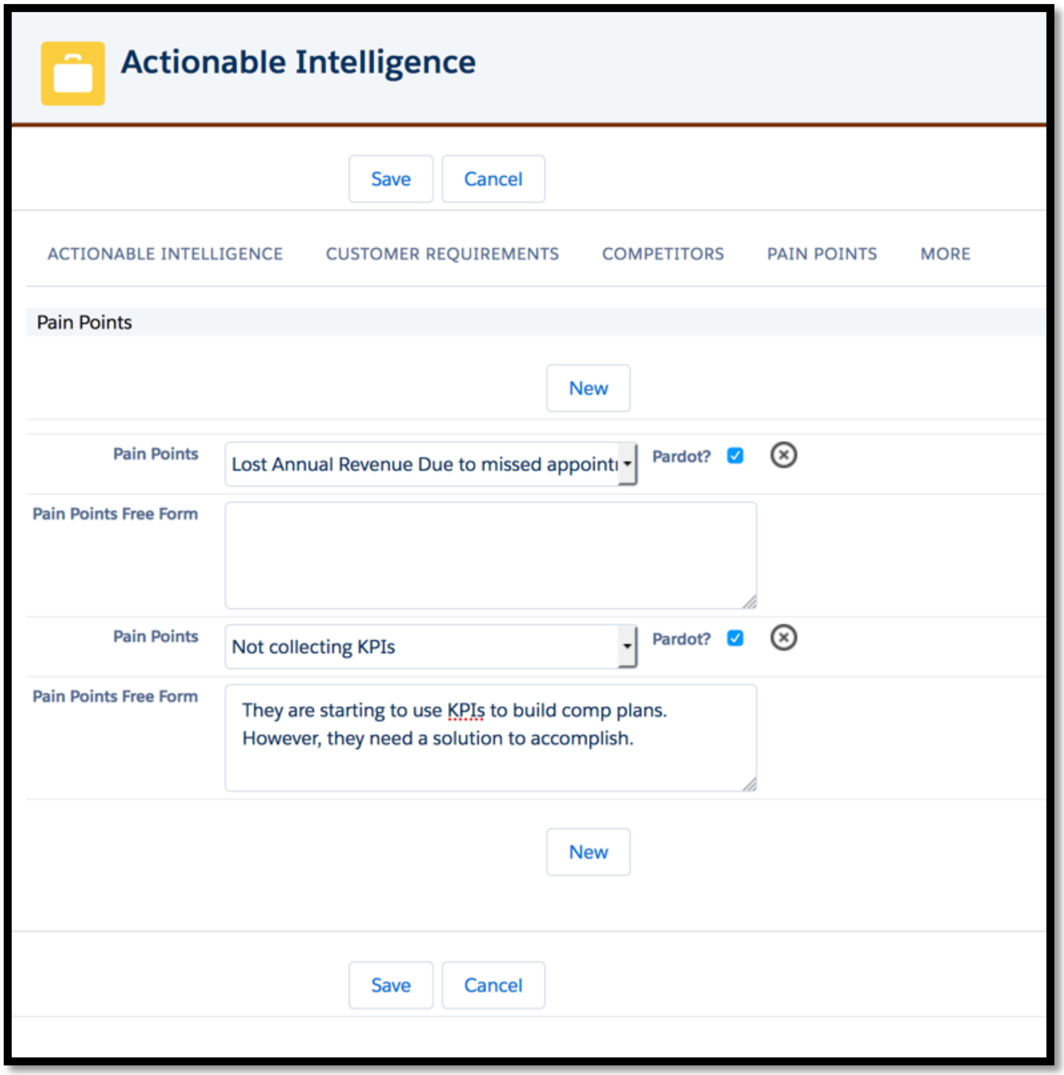


Figure 235

41. Click on More to display the other components of Actionable Intelligence.
42. Follow the same steps outline above to complete the remaining components.
43. When completed close the Actionable Intelligence window.

Tasks

To create and assign a task(s) in a meeting click on Tasks button.

44. Click on Add Task (figure 236).

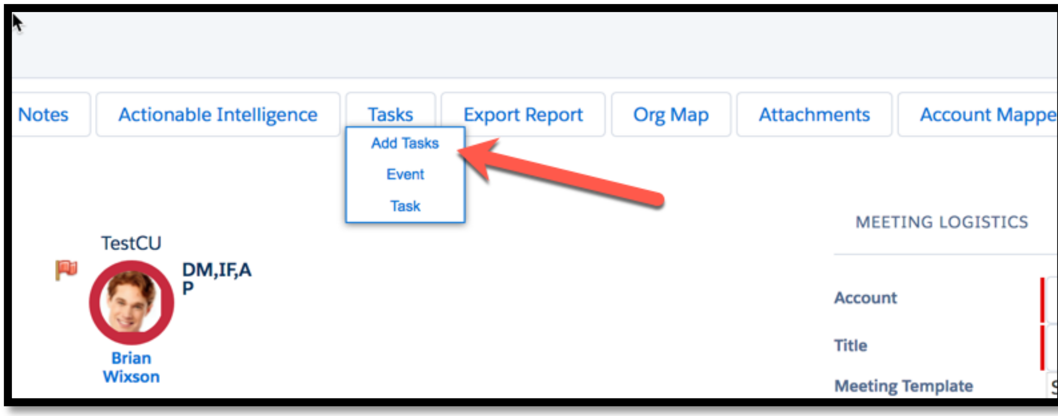


Figure 236

45. The Meeting Task window will display (figure 237).

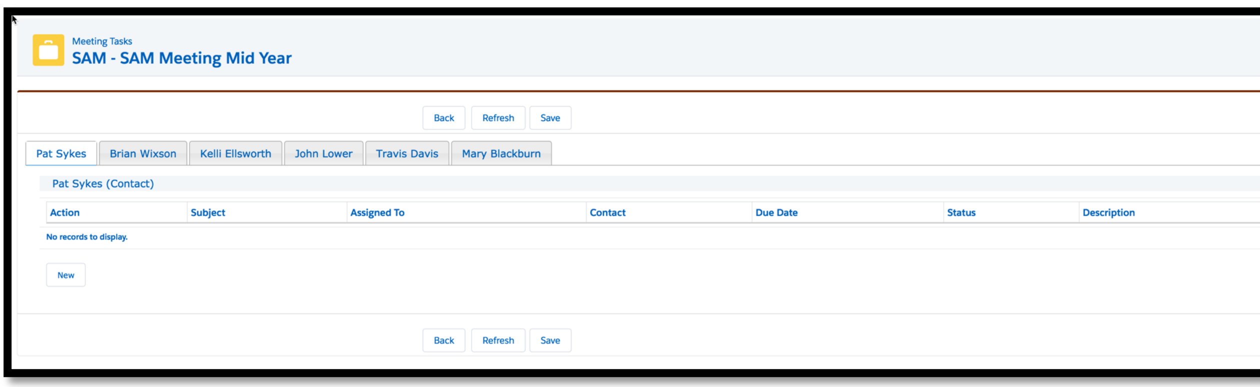


Figure 237

46. Select a meeting attendee. If there are tasks assigned to the meeting attendee selected, they will be listed (figure 238). For example, Travis has tasks assigned to him, these tasks can be updated in this window.

Note: By default, all tasks created will be assigned to the meeting organizer. However, any task can be resigned to a user when it's created. A contact can't be assigned a Task they can only be listed as the contact.

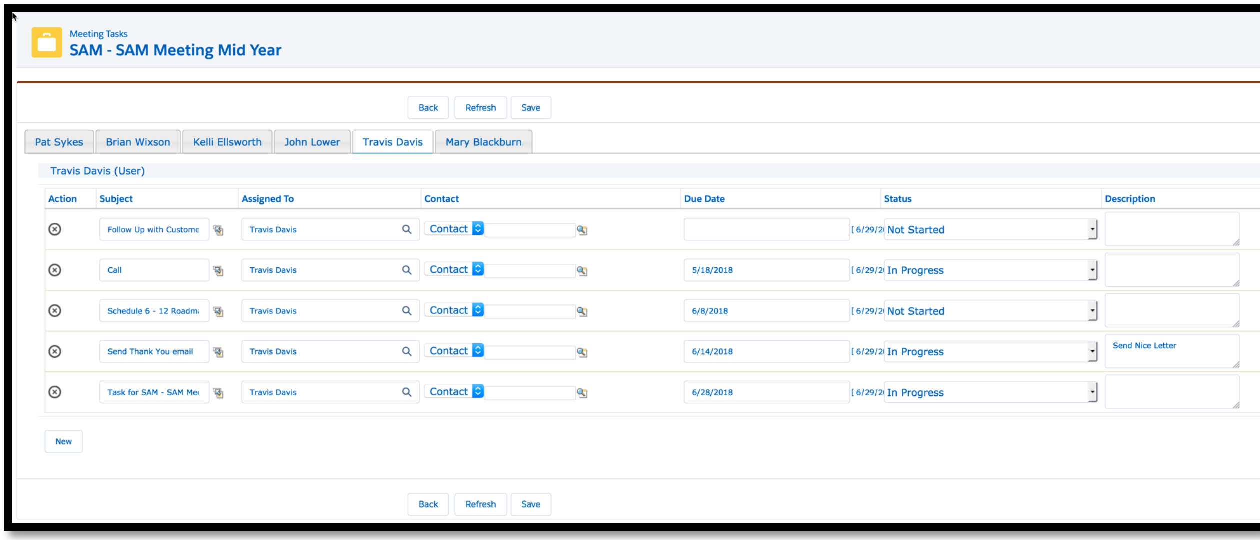


Figure 238

47. Click New, if needed scroll down to the user the, click the search icon and select the desired task to be completed. You can resign the task to another user for example someone on your team, link a contact to the task, select a due date, update status and add any additional information (figure 239 & 240).

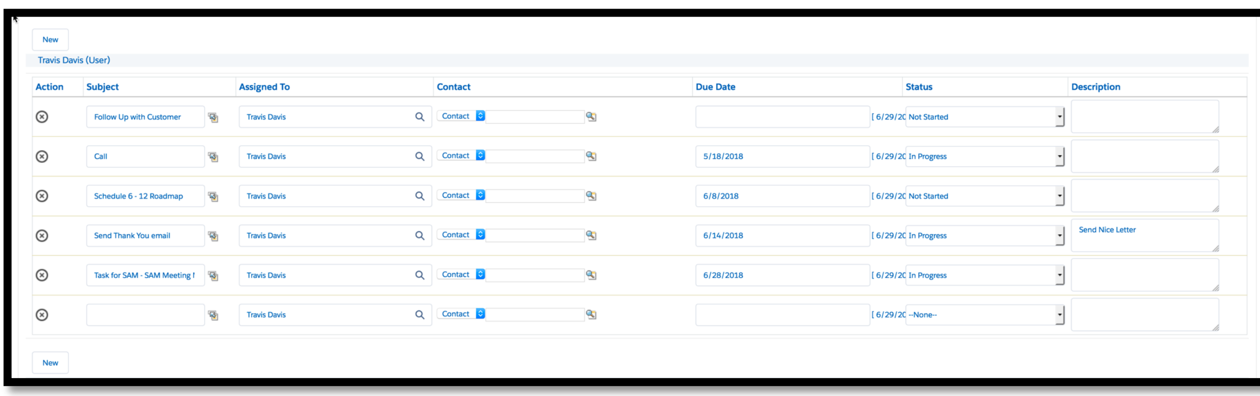


Figure 239

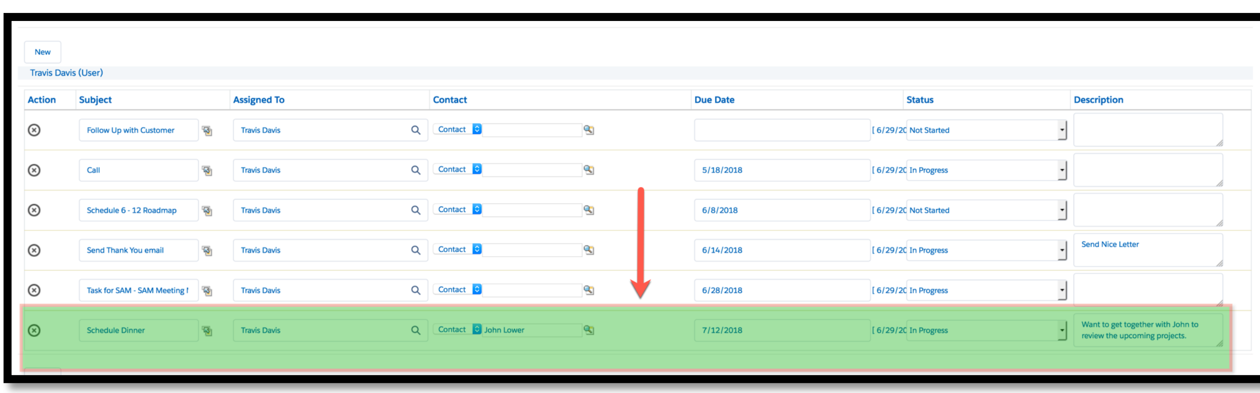


Figure 240

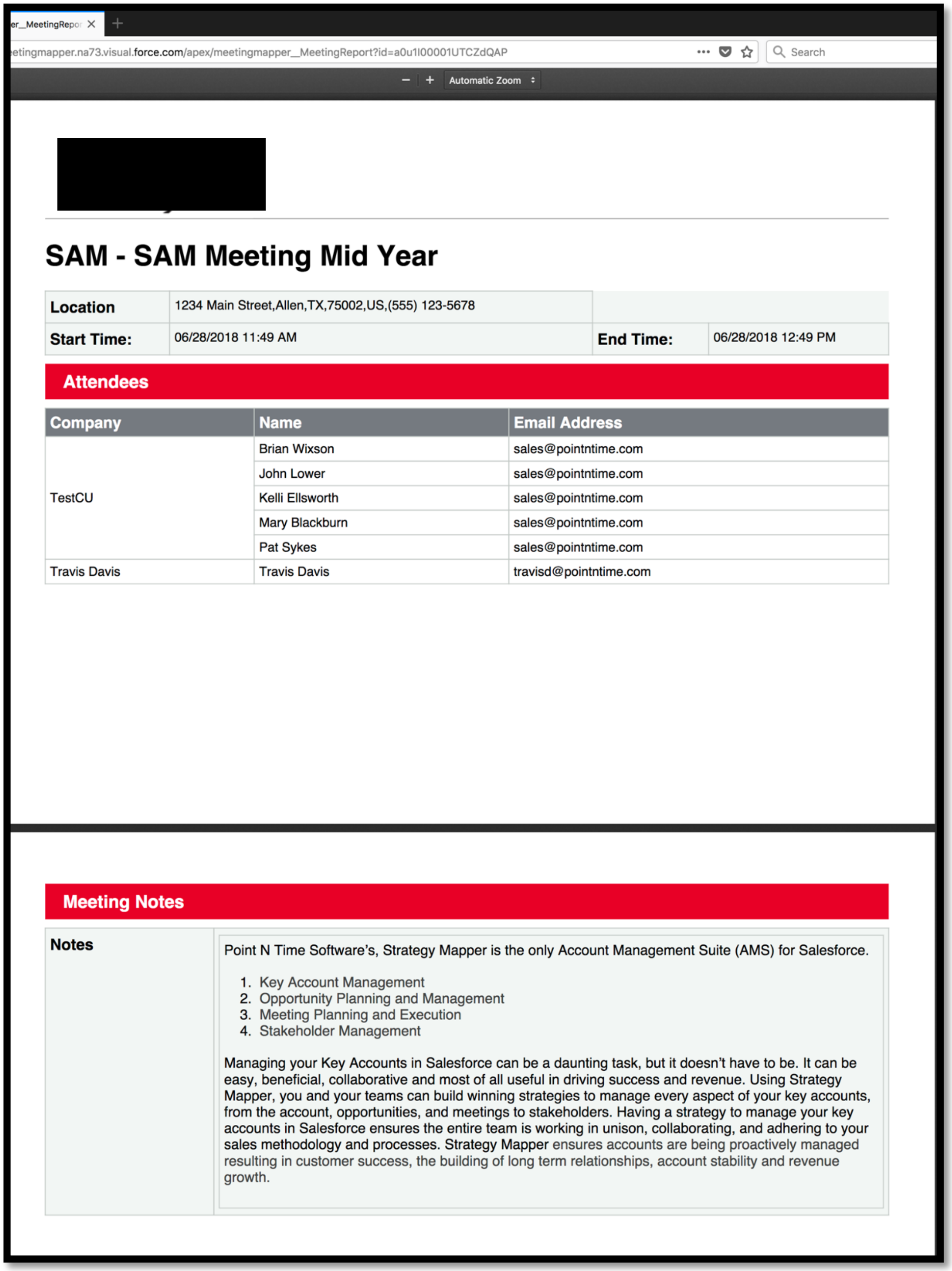
48. When completed click Save, click Back to return to the meeting page.

Export Report

Sending meeting notes to meeting attendees is simple with Strategy Mapper. There are two types of Exports:

- **Export Public Report** – Send to all meeting attendees, contains attendees, email address, company and public notes.
- **Export Private Report** – Only send to team member, contains everything even Actionable Intelligence.
- **Export Private Report with Chatter –** Includes all the information in Private along with any Chatter communications.

49. Click on Export Public Export to review meeting notes (figure 241).



er__MeetingRepo

etingmapper.na73.visual.force.com/apex/meetingmapper__MeetingReport?id=a0u1I00001UTCZdQAP

Automatic Zoom

[redacted]

SAM - SAM Meeting Mid Year

Location	1234 Main Street,Allen,TX,75002,US,(555) 123-5678		
Start Time:	06/28/2018 11:49 AM	**End Time:**	06/28/2018 12:49 PM

Attendees

Company	Name	Email Address
TestCU	Brian Wixson	sales@pointntime.com
	John Lower	sales@pointntime.com
	Kelli Ellsworth	sales@pointntime.com
	Mary Blackburn	sales@pointntime.com
	Pat Sykes	sales@pointntime.com
Travis Davis	Travis Davis	travisd@pointntime.com

Meeting Notes

Notes

Point N Time Software's, Strategy Mapper is the only Account Management Suite (AMS) for Salesforce.

1. Key Account Management
2. Opportunity Planning and Management
3. Meeting Planning and Execution
4. Stakeholder Management

Managing your Key Accounts in Salesforce can be a daunting task, but it doesn't have to be. It can be easy, beneficial, collaborative and most of all useful in driving success and revenue. Using Strategy Mapper, you and your teams can build winning strategies to manage every aspect of your key accounts, from the account, opportunities, and meetings to stakeholders. Having a strategy to manage your key accounts in Salesforce ensures the entire team is working in unison, collaborating, and adhering to your sales methodology and processes. Strategy Mapper ensures accounts are being proactively managed resulting in customer success, the building of long term relationships, account stability and revenue growth.

Figure 241

50. Click on the other export so review. Again, the private export is only intended for team members, it contains the entire meeting notes, meeting attendees (stance and role), tasks, actionable intelligence.

51. To send exports click on the Export Public Report, a new window is displayed. It's pre-populated with the meeting attendees, select the meeting attendees to send the export, click send. You can also send to non-meeting attendees, by adding Individual Email addresses (figure 242). Click Send.

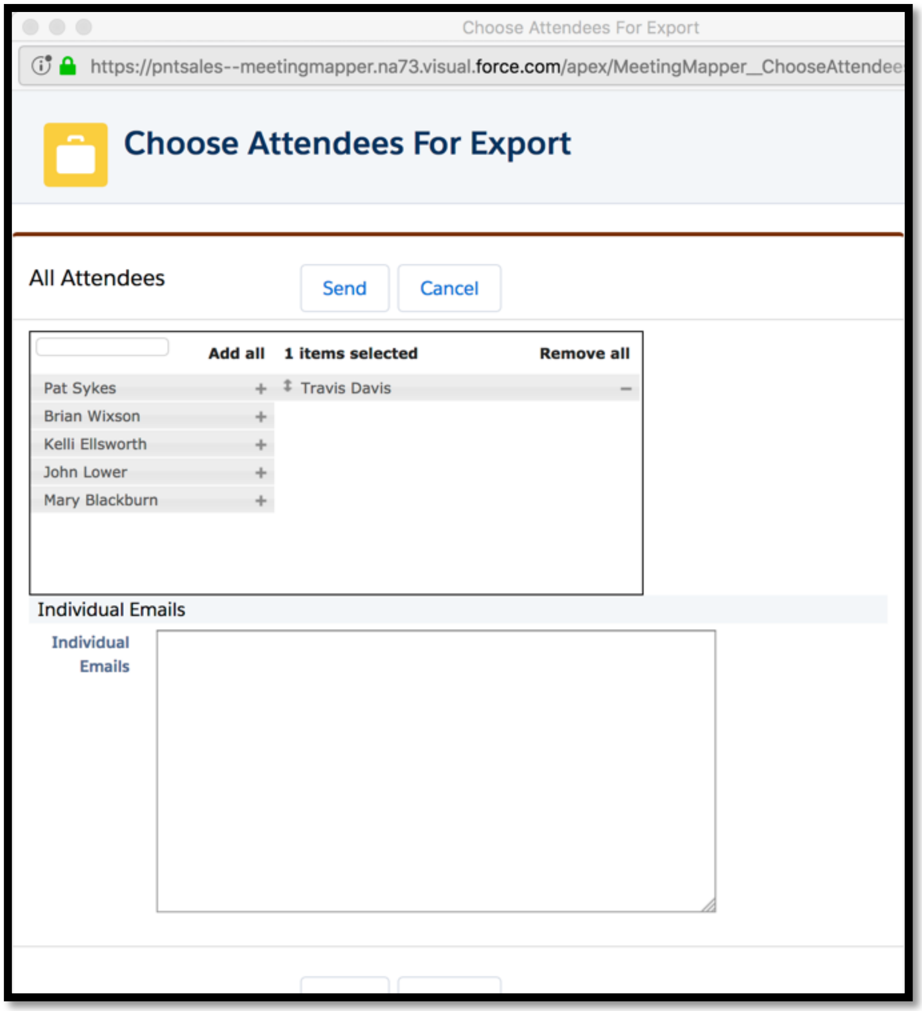


Figure 242

52. Click on Export Private Report, a new window will display. It only displays the meeting attendees with the email address of our company. This is to prevent sending the private export to non-company personal (figure 243). Click Send.

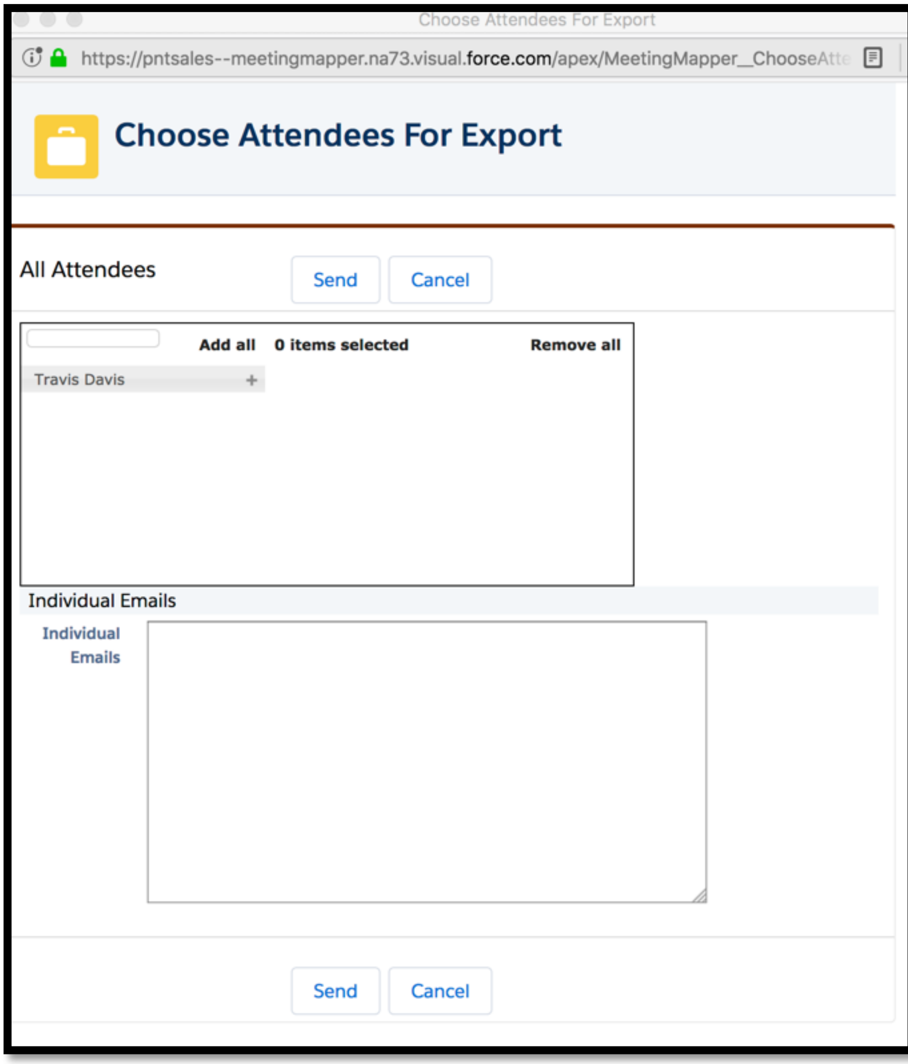


Figure 243

Org Map

To display the org map, click on Org Map. The org map is detailed in both the Account Mapper and Opportunity Mapper section of the guide.

Attachment

53. Click on Attachment to add documents to the meeting.

Note: There is a 2MB limit on file size, this is a Salesforce limit.

Account Mapper

54. Click Account Mapper to launch the Account Plan. In the event this meeting was linked to an opportunity, Opportunity Mapper button would be displayed.

Tables

55. Click on Tables to change the table icon on the meeting page. There are five table types:

- Cloud
- Circle
- Oval
- Rectangle
- No Table

Table types can be changed at any time and you can move the meeting attendee icons accordingly.

Add Objective

56. Click Add Objective, the Goal and Objectives/Topics will be displayed. The Goal and Objectives can be pre-populated based on the template. Add your objective (figure 244).

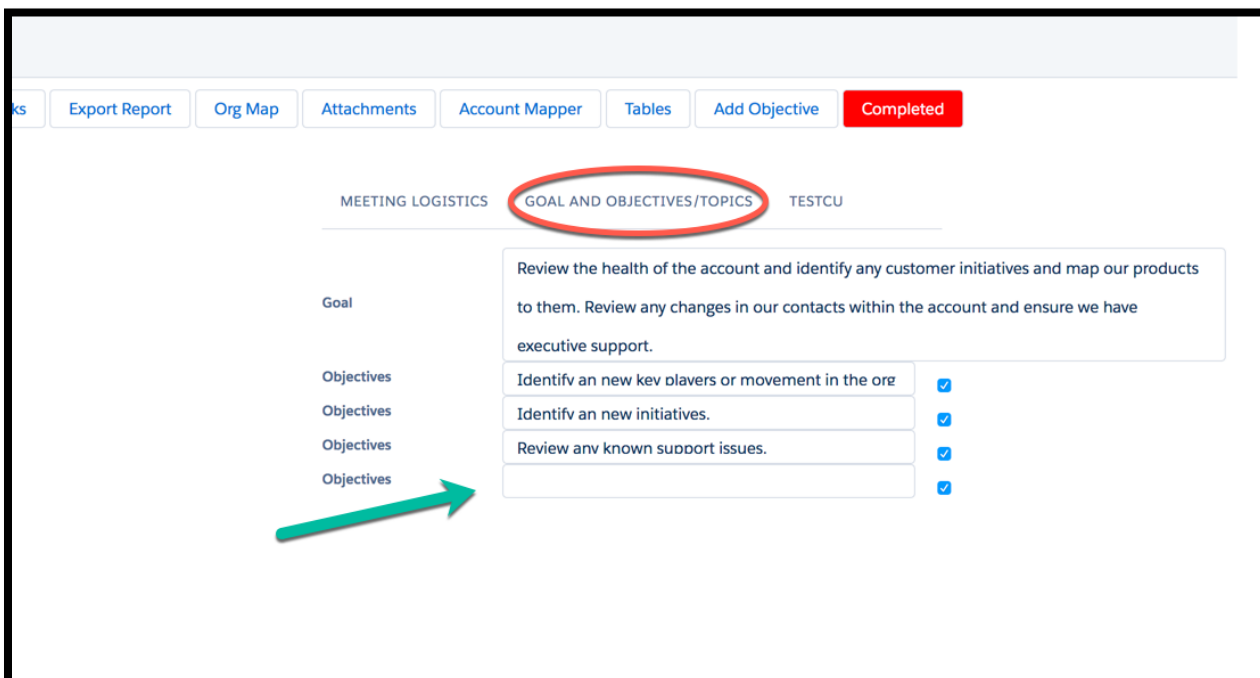


Figure 244

Complete

57. Click Complete when the meeting is concluded or when the edits are completed. Even after the Completed button is selected, the meeting can still be updated and modified. Clicking the Completed button is a trigger to update either the Account or Opportunity plan depending on what object the meeting is linked to. The button will turn Green after it is selected.

Meeting Logistics

Meeting Logistics display all the information inputted when the meeting was created. It can be changed at any time. For example, is the date and time has changed (figure 245).

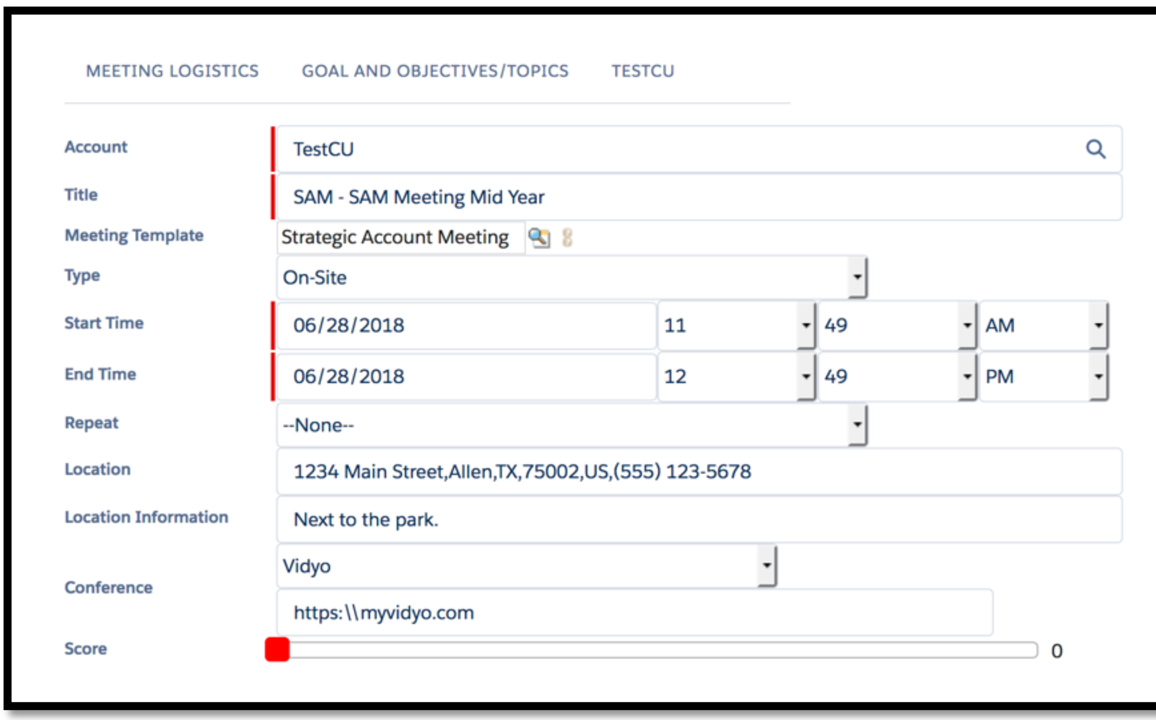


Figure 245

Related List

The related list name will reflect the name of the account, opportunity, lead, contact, case or campaign the meeting is linked to. The related list is pre-populated based on the template, fields can’t be added or deleted in the meeting.

In this example the Related List title is TESTCU, reflecting the account the meeting is linked (figure 246).

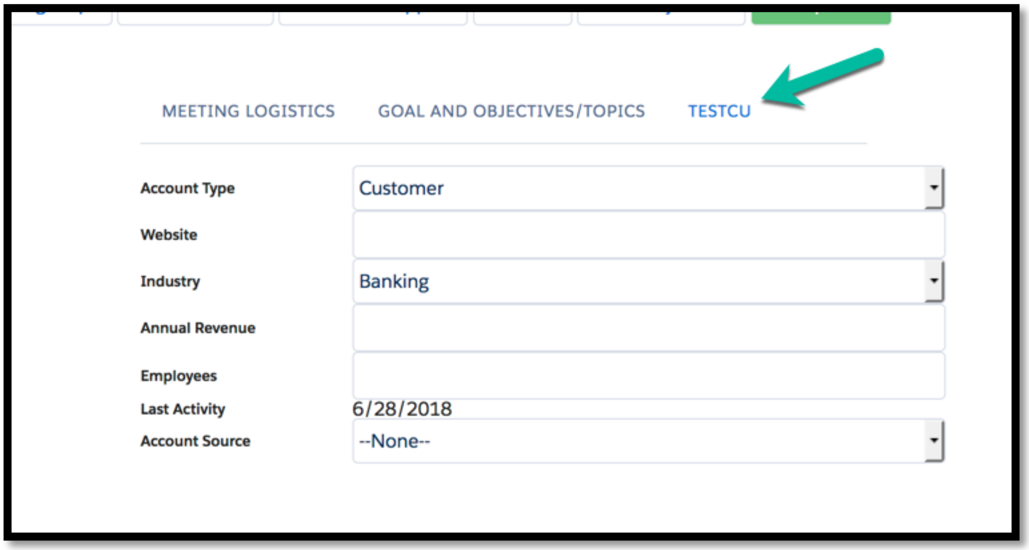


Figure 246

58. Click on any field displayed to change or modify (figure 247). The corresponding field in the account for example will be updated. Click Save, when completed making edits to the fields.

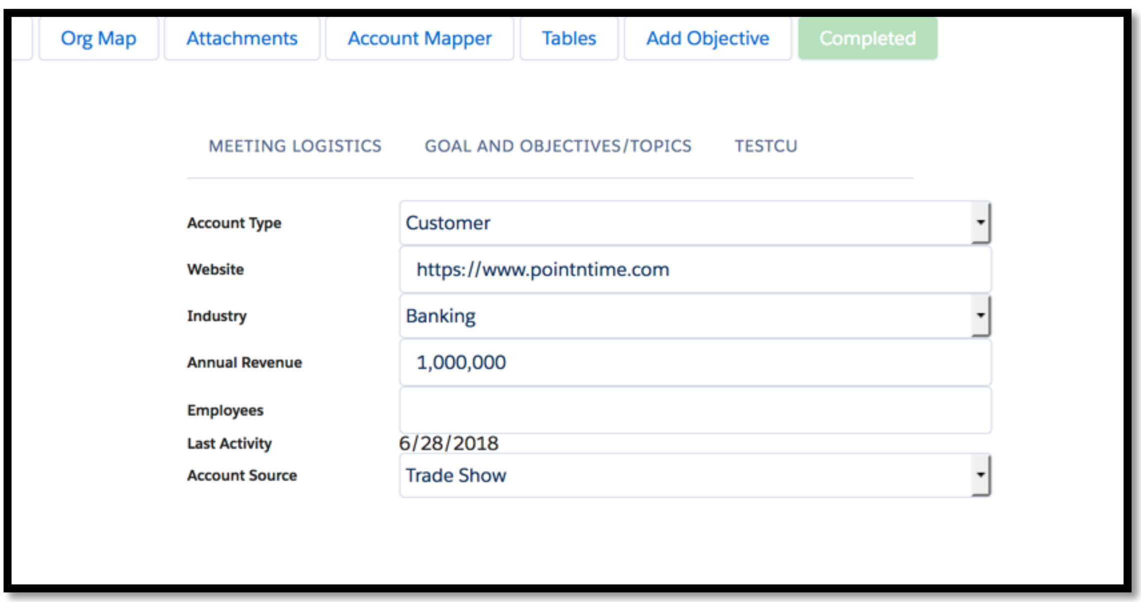


Figure 247

Frequently Ask Questions/Troubleshooting

1. Do I have to use all three components of Strategy Mapper? No, they work together, mix or independently.

2. Is there any backend integration that needs to be completed for the components to work together? No, the integration is completed as part of the solution.

3. Is there a max limit of templates that can be created? No, there is no limit however, it's best to only create the ones needed to accomplish the goal and objectives.

4. What happens if I select the wrong template for my account or opportunity plan? You can have your Salesforce administrator delete it, next time you click on Account Mapper for example, you will be prompted to select a template.

5. When I remove a meeting attendee from a meeting, does it remove all the meeting history for the user? No, the meeting history is preserved. The next time you add the contact to a meeting, their Stance and Role will display.

6. I had a meeting with a customer, but when I review my account plan there are no updates? Verify that you clicked on the Complete button (should be green). If not, click on the Complete button and the plan will be updated.

7. I had my administrator create a meeting template for me, but I don't see it in the list of available templates? Verify with the administrator the template is active and linked to the right object. For example, if you want to link a meeting to an account, ensure the template is linked to the account object.

8. I want to start an Instant meeting but the template I want to use is not in the list? Verify with the administrator that Instant Meeting is checked in the template.

9. I have completed most of my opportunity plan and have some a good score in both Sales Intelligence and Solution Score, why is my Opportunity Health still low? Review the Opportunity Playbook, if you have anyone on the customer team with a Red or Yellow flag, these weigh heavily on the score.

10. I just received notice that the account templates are going to be updated and revised, what effect will this have on my plans? The only effect will be the buttons or pages. The revisions will not affect any information you, your team or managers have added on the Account Detail's page. This is true for revisions to Opportunity templates.

11. Can I have multiple opportunity plans within an account? Yes, you can have an opportunity plan for each opportunity. They all will feed into the account plan.

12. Can I update multiple opportunities from a single meeting? Yes, when a meeting is linked to an opportunity and there are multiple opportunities in the account, you can add them using the 'Related Opportunity' button (figure 248).

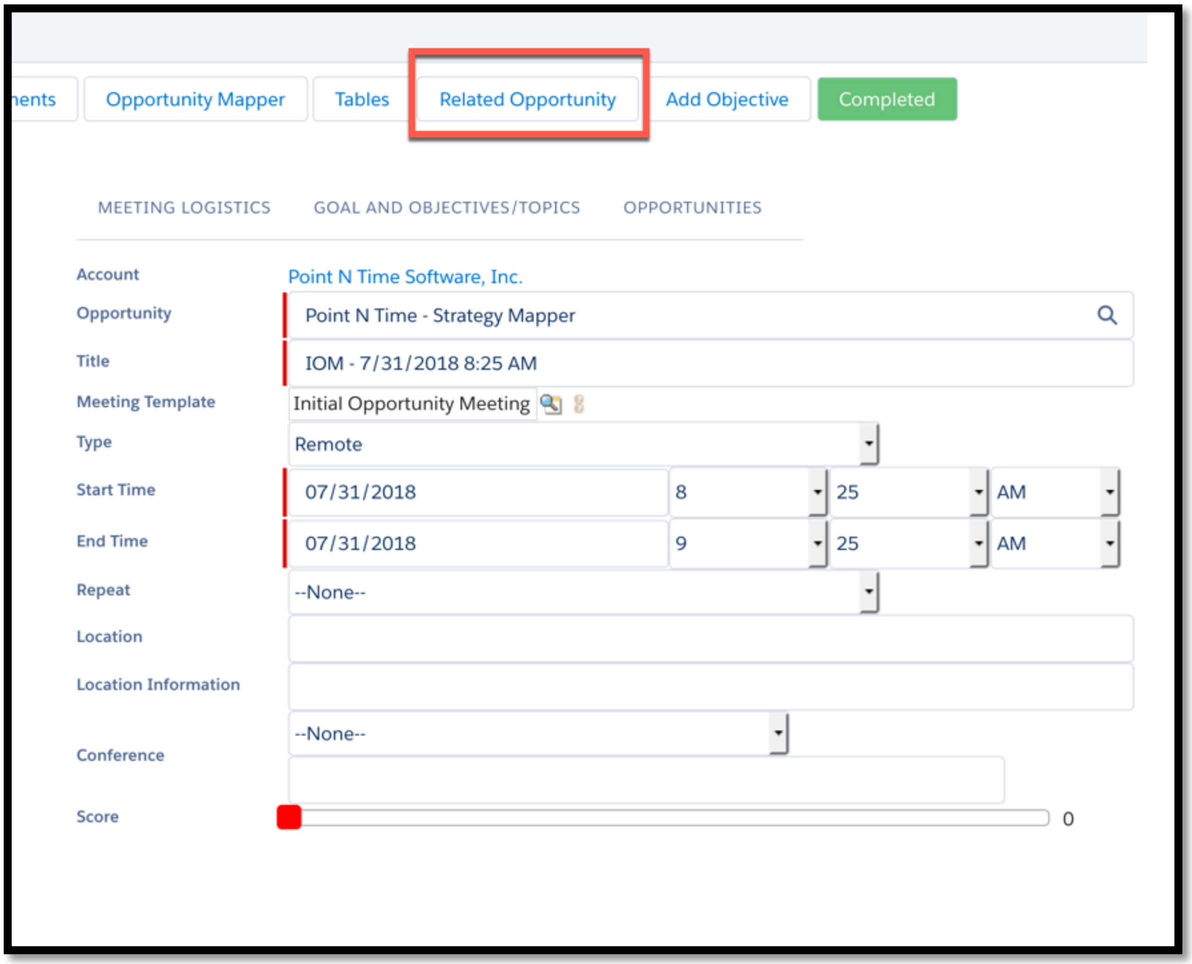


Figure 248

Select the opportunity or opportunities and click Save (figure 249).

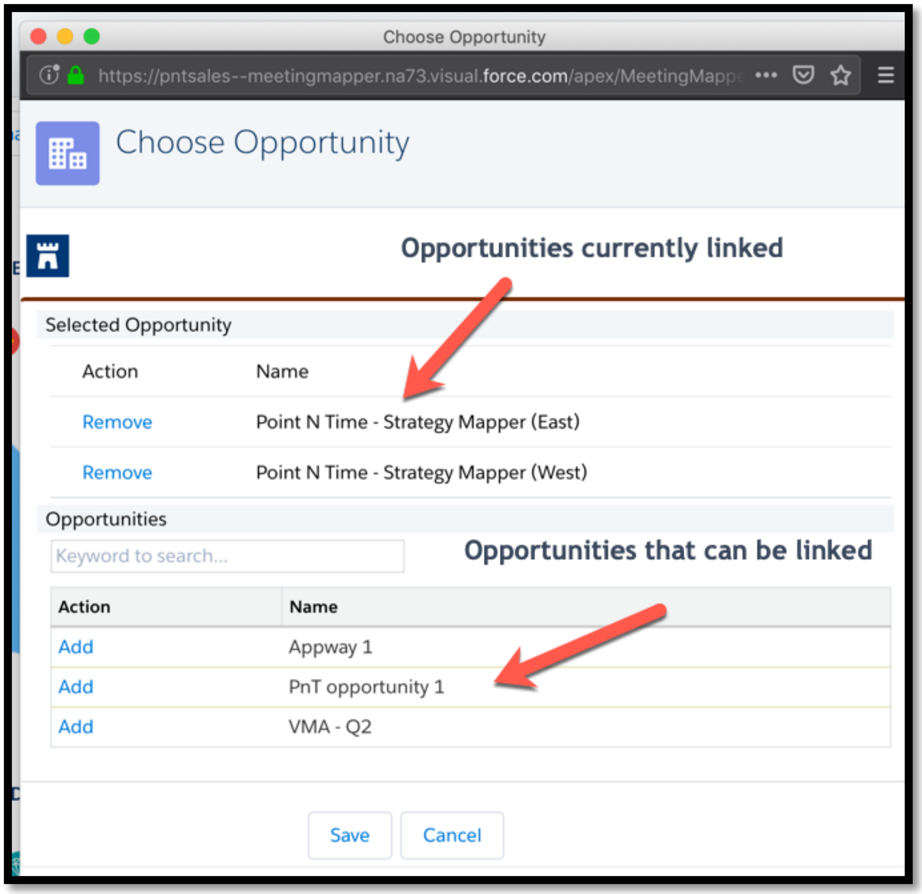


Figure 249

They will display in the Opportunities tab (figure 250).

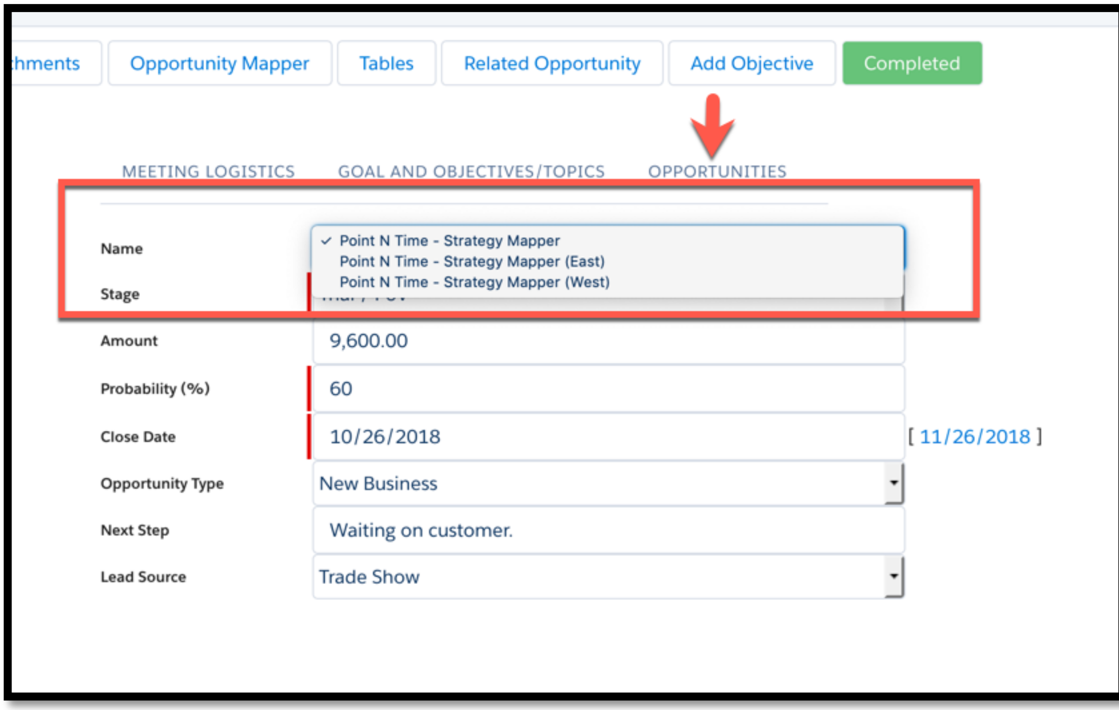


Figure 250

13. I created a new Customer Initiative, but the dashboard is missing the new initiative, what is causing this? Ensure you have selected the customer type of Customer or Prospect (figure 252).

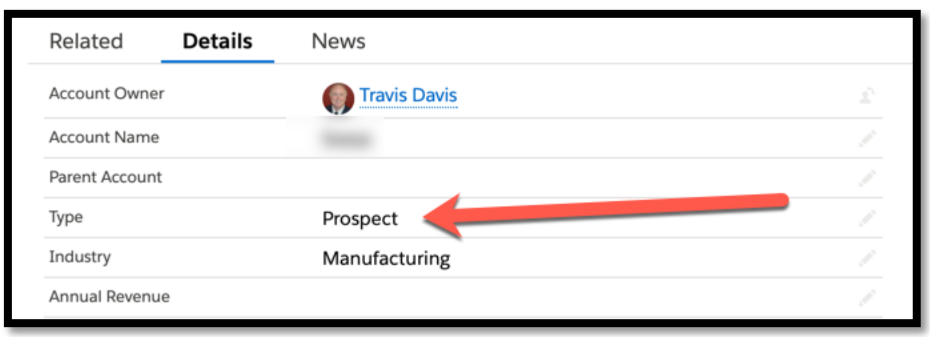


Figure 251