



**StrategyMapper**

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# Strategy Mapper Product Overview – Sept 2019

## Overview

Strategy Mapper is the only native Salesforce.com application that combines Key Account Management, Opportunity Planning, Meeting Planning, Execution and Stakeholder Management in a single customizable solution for Salesforce customers.

Managing 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. Strategy Mapper ensures you can manage all your key account within Salesforce.

## Key Features and Benefits

1. Configurable to your sales processes and methodology to meet **your requirements**
2. 100% Native Salesforce
3. Template based for ease of use and consistency
4. Deployable in phased approach (crawl, walk, run)
5. Complete solution to successfully manage key accounts (no add-ons required)
6. Fast and continuous ROI

## Why Managing Your Key Accounts with Strategy Mapper

1. It's easy to use
2. It allows the entire team to work together (Account Executive, Sales Engineer, Marketing, Sales Leadership)
3. It's configurable to map to your customer base and products/solutions
4. It utilizes your sales process and methodology
5. Its results driven (KPIs)
6. It's dynamic (can change with your customers)
7. Everything is created, modified and stored in Salesforce

Having your key account plans in Salesforce ensures the entire team is working in unison, collaborating and in the event of flux in the account team, there is no loss of momentum, allowing competitors to gain a beachhead.



### Four Key Aspects to Managing Key Accounts

There are four key aspects of managing key accounts in Salesforce to ensure success, long term relationships, stability and revenue growth.

They are (figure 1):

1. Management of the Account
2. Management and Planning of Opportunities
3. Planning and Execution of Meetings
4. Stakeholder Management

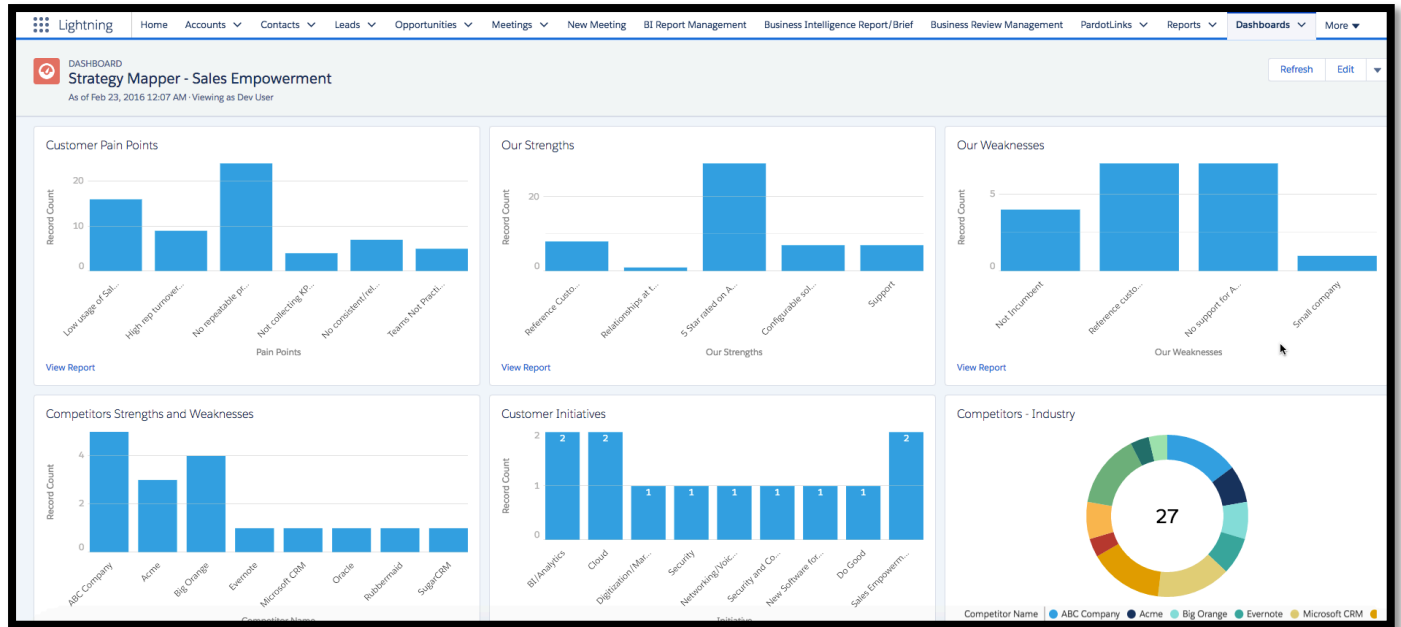


Figure 1

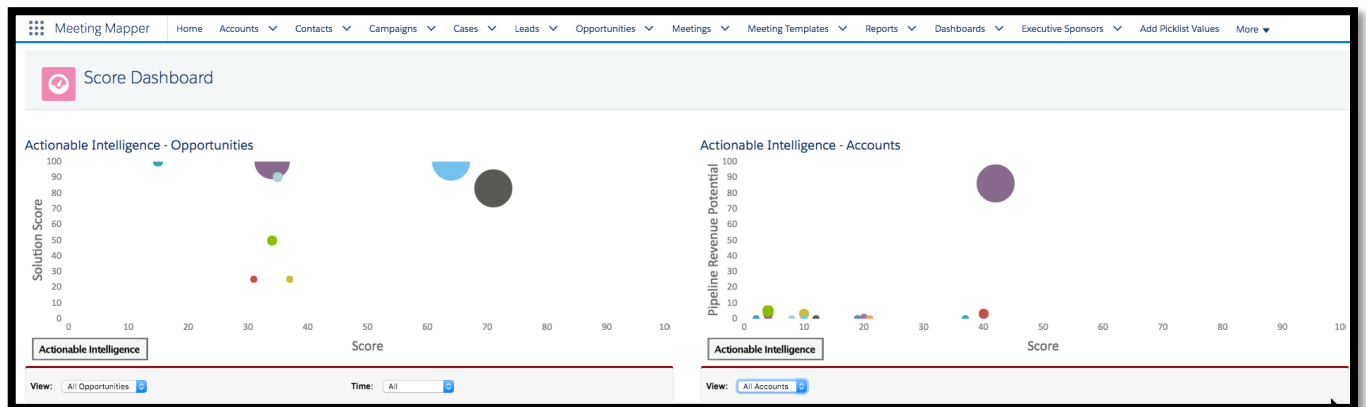
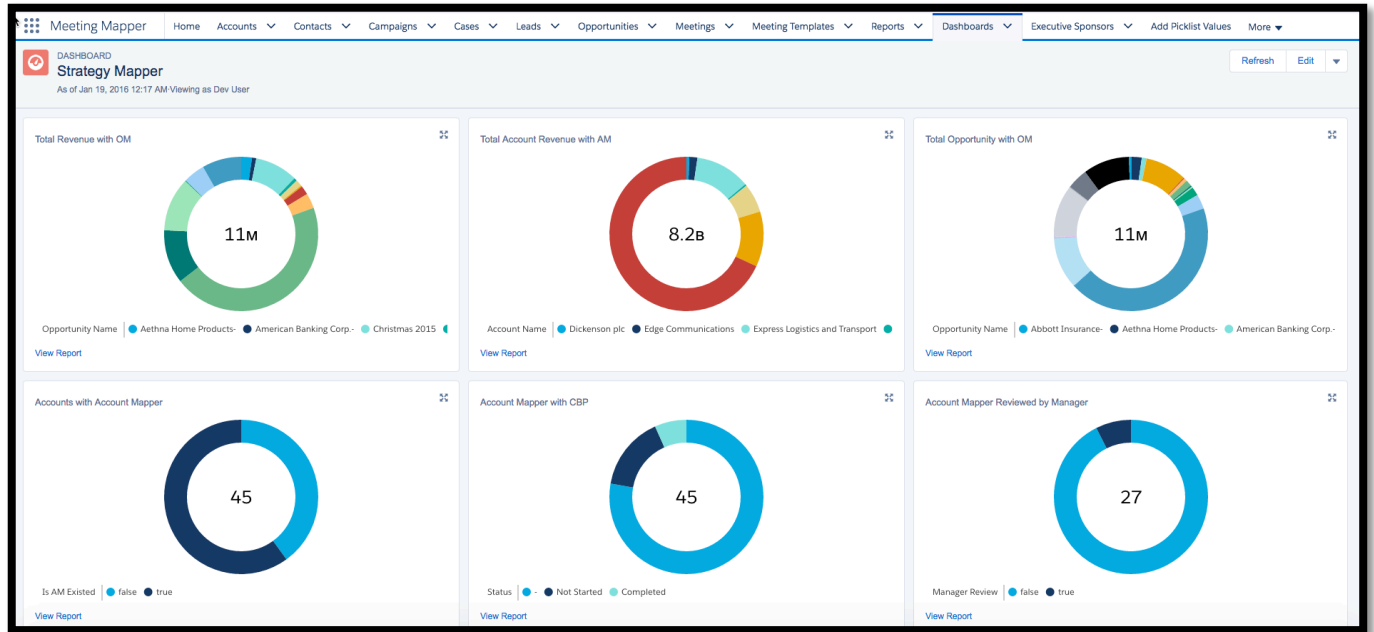
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## Dashboards

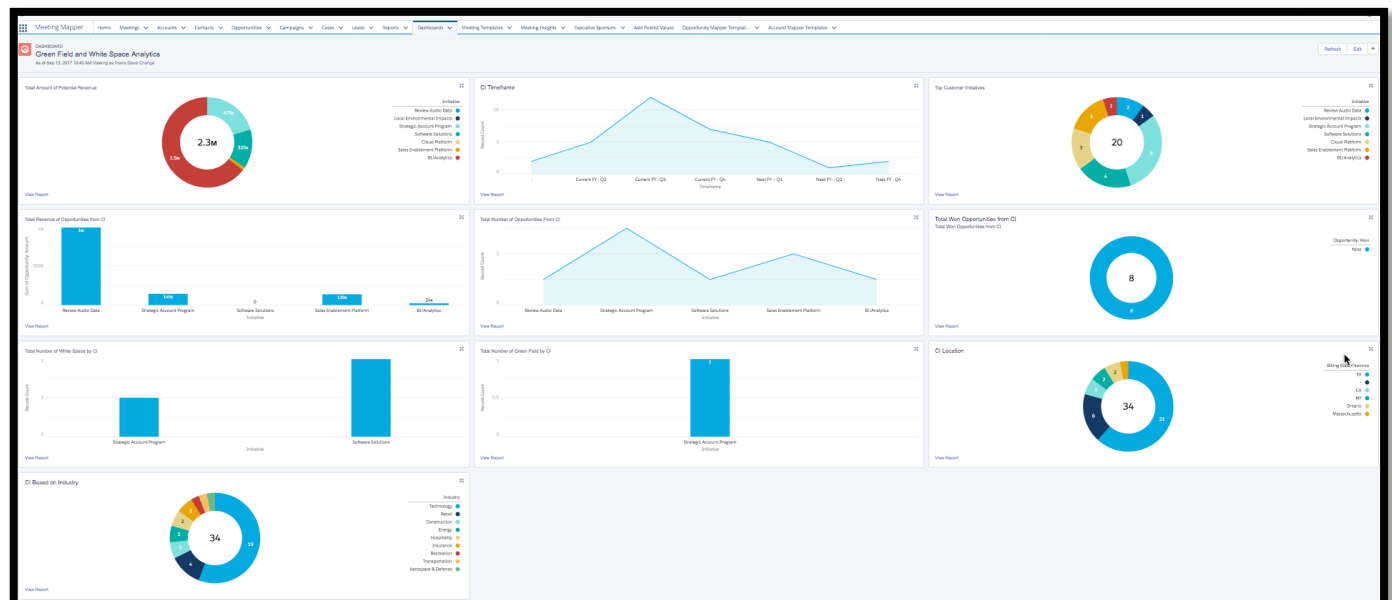
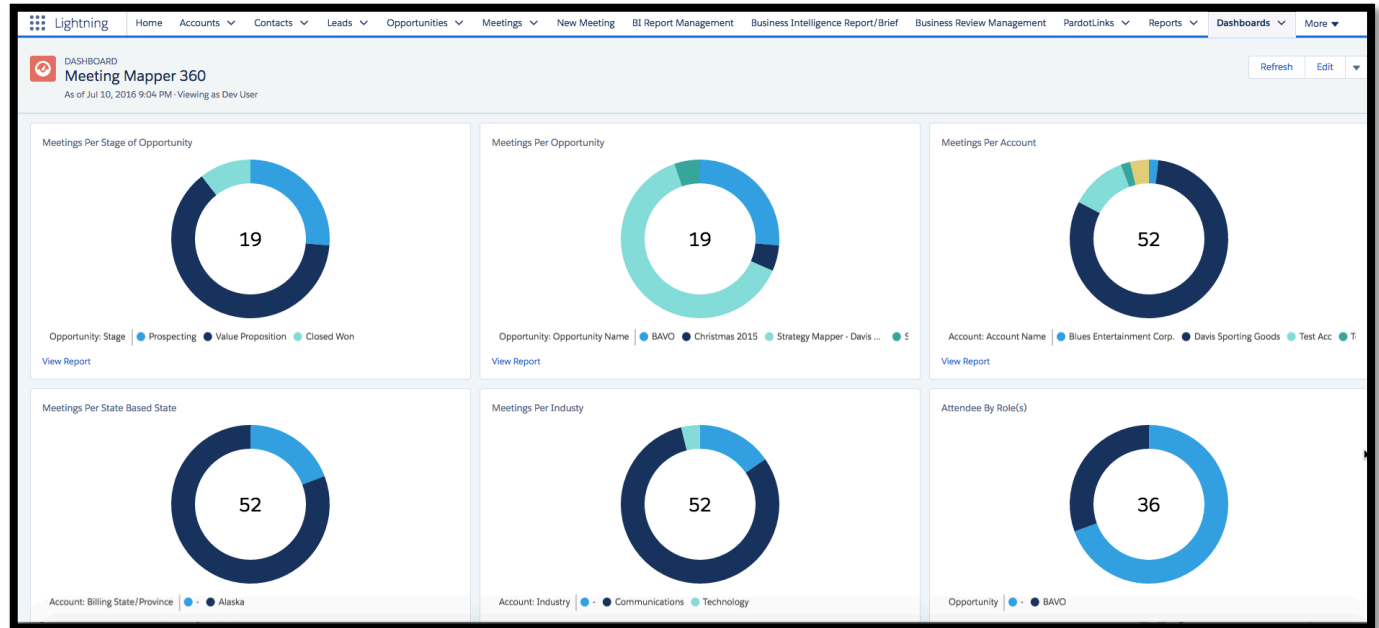
Strategy Mapper™ provides sales leadership real-time visibility of Account and Opportunity status so timely adjustments can be made to all aspects of your sales and marketing efforts.



## Strategy Mapper Product Overview – Sept 2019



# Strategy Mapper Product Overview – Sept 2019



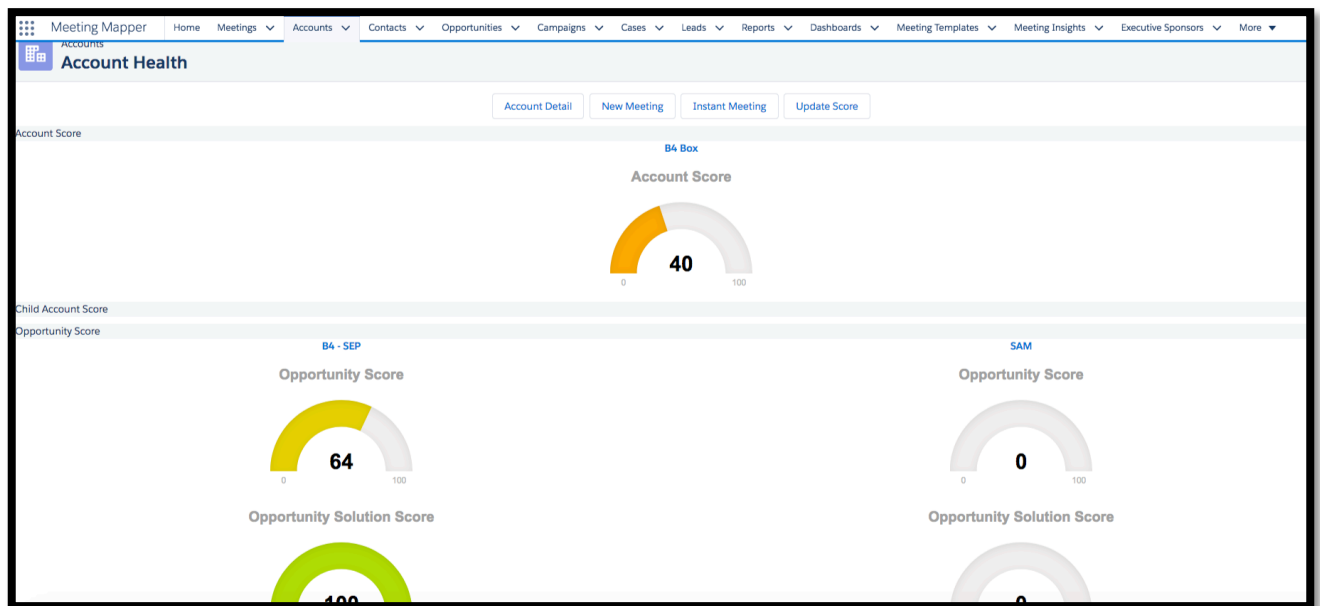
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### Account Mapper

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

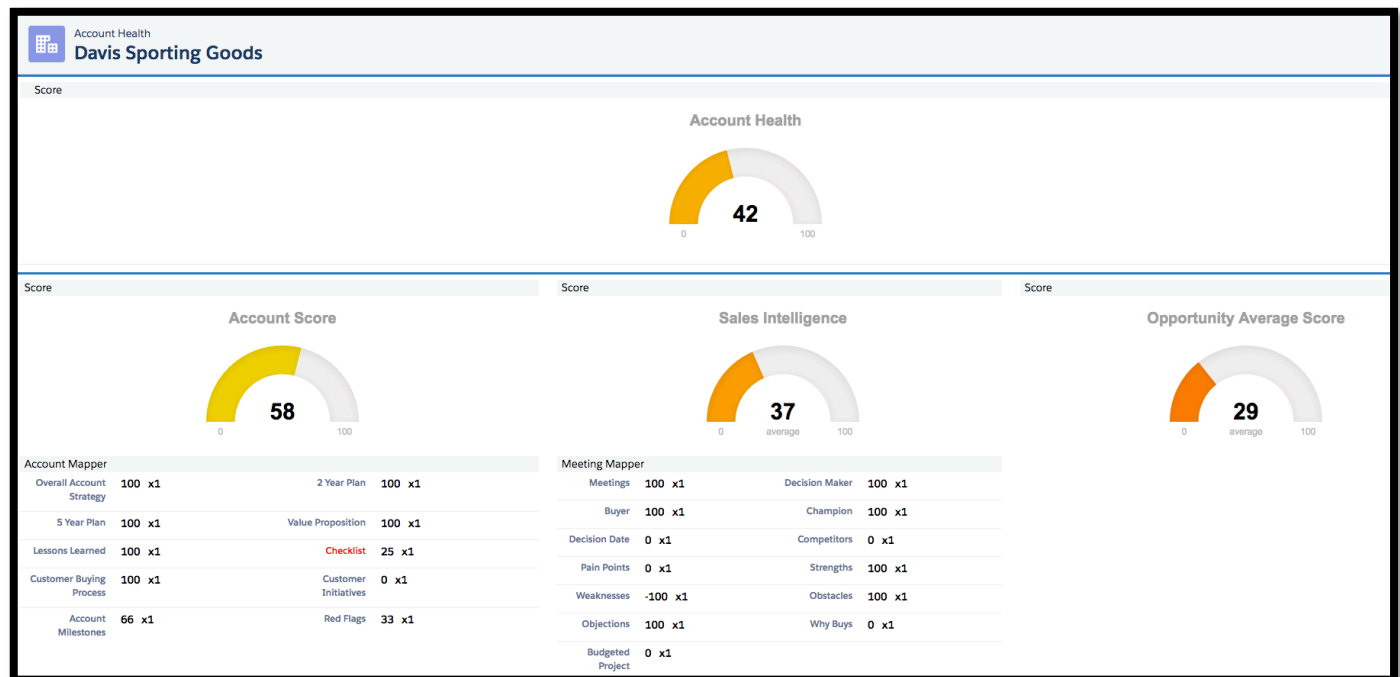
### Account Health

This is a snapshot view of the overall health of the account. Based on three components:



## Strategy Mapper Product Overview – Sept 2019

Account Health real-time overall health of the account. This score is based the score of the account, sales intelligence and average opportunity score. The Account Score is based on only the plan for this account, Sales Intelligence is based on information gather in interactions with customers using Meeting Mapper. Opportunity Average Score is all the opportunities scores averaged out.



# Strategy Mapper Product Overview – Sept 2019

## Account Details

The account strategy, 6, 12 month plan, value proposition, lessons learned and much more. The labels can be changed to better depict your taxonomy or sales terminology.

**Note: these values can be changed to match your sales taxonomy.**

The screenshot shows the 'Account Detail' page in the Strategy Mapper application. The page is titled 'Account Mapper' and 'Point N Time Software, Inc.'. It features a navigation bar with various tabs like 'Home', 'Meetings', 'Accounts', 'Contacts', etc. The main content area is divided into sections for 'Account Detail', 'Org Map', 'Revenue Trending', 'Product(s) / Solution(s) Matrix', 'Initiatives', 'White Space', 'Account Milestones', 'Red Flags', and 'More'. The 'Account Detail' section is currently active, displaying a table with fields such as 'Account Type', 'Industry', 'Account Description', 'Last Activity', 'Primary Contact', 'Billing City', 'Billing Zip/Postal Code', 'Account Source', 'Billing Street', 'Billing State/Province', 'Billing Country', 'Account Mapper Template', and 'Account Hierarchy'. Below this table, there is a section for 'Partners' with a heading 'What Are the Customer's Goal and Objectives?' and a sub-section 'WHAT ARE THE CUSTOMER'S GOAL AND OBJECTIVES?' containing a text area for notes. The text area contains the following content: 'Point N Time is wanting to expand their footprint worldwide. Here are the markets they want to enter in order, along with what they believe are their strengths. 1. EMEA - They have named accounts in the US that have a big presence in the UK, Germany and France.'

Account Type	Customer	Industry	Shipping
Account Description	A software company based out of Allen, TX. They are a Salesforce ISV partner with a native app Strategy Mapper. Strategy Mapper is the only Account Productivity Suite for Salesforce users. It's a framework allowing account teams to plan, management and execute sales activities in Salesforce.		Last Modified Date 9/9/2019 6:34 AM
Last Activity	7/1/2020	Account Source	Trade Show
Primary Contact		Billing Street	405 Wolverley Lane
Billing City	Allen	Billing State/Province	TX
Billing Zip/Postal Code	75002	Billing Country	
Account Mapper Template	Strategic Account	Account Hierarchy	Account Hierarchy

**Partners**  
What Are the Customer's Goal and Objectives? - Strategy - Client Relationship - Execution Plan - Are We Moving in the Right Direction, What Successes Have we Had?

WHAT ARE THE CUSTOMER'S GOAL AND OBJECTIVES?

What are the customer's Goals and how can we ensure they meet them?

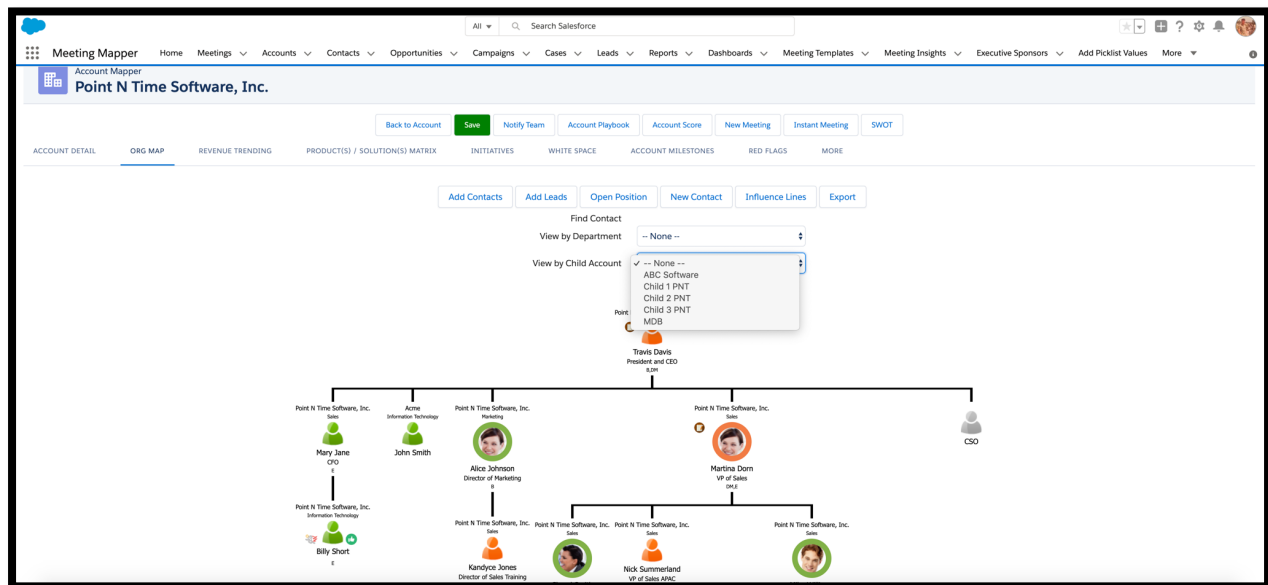
Point N Time is wanting to expand their footprint worldwide. Here are the markets they want to enter in order, along with what they believe are their strengths.

1. EMEA - They have named accounts in the US that have a big presence in the UK, Germany and France.

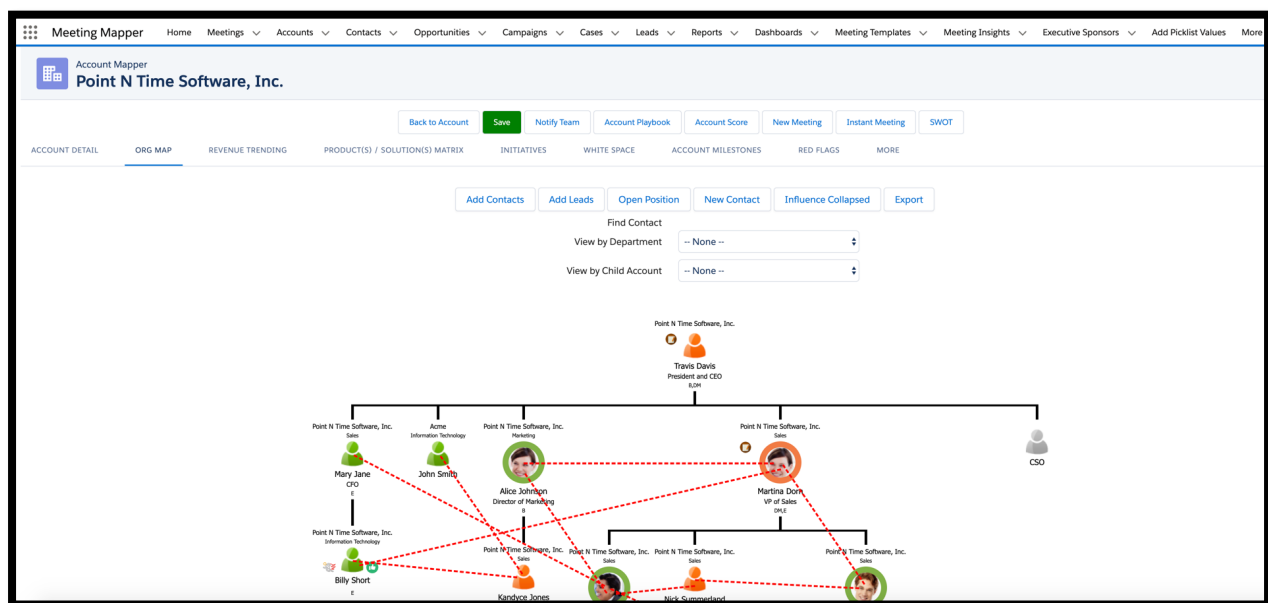
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## Org Map

An Org Map can be created for each Account and Strategic Business Unit. An Org Map can be filtered on Department or Region or both. Child account's org map can also be viewed from the parent. Contacts in an org map can be realigned in real-time by dragging and dropping. A contacts Stance, Role and Main Influencing Factors are displayed on the org map. Empty positions can also be added to the org map. The org map can also be exported.



The Org Map can also display influence lines between contacts. Hovering over the line will give details regarding the link.

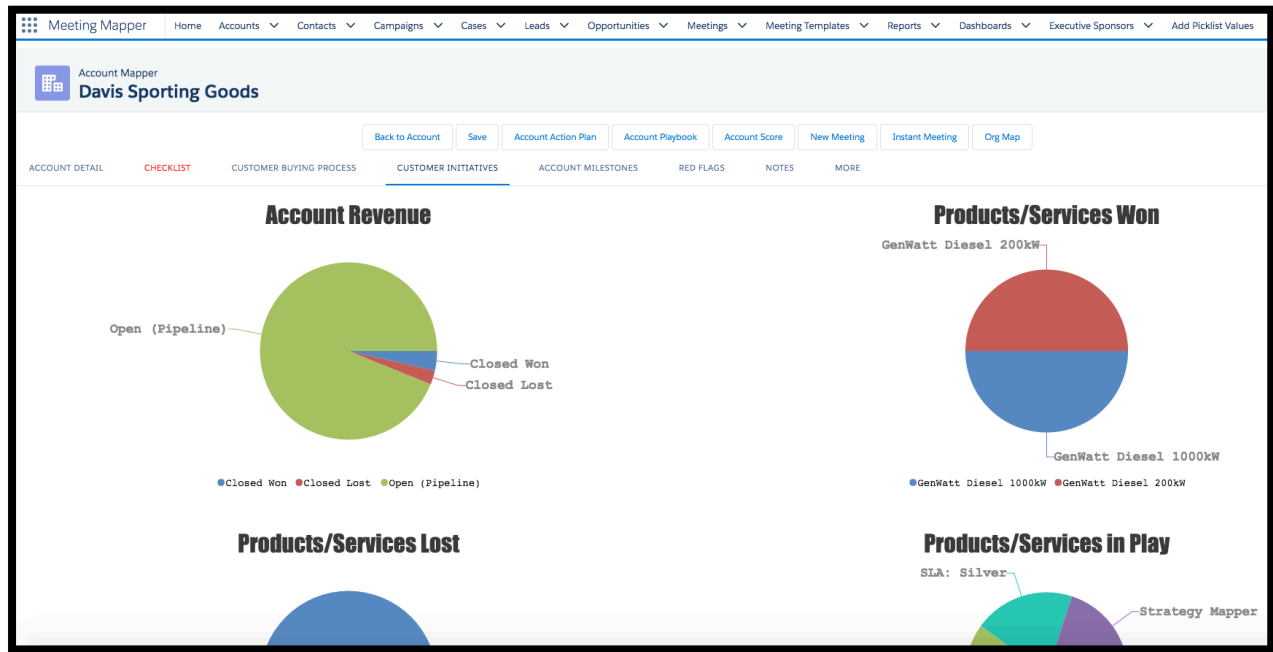




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### Revenue Trending

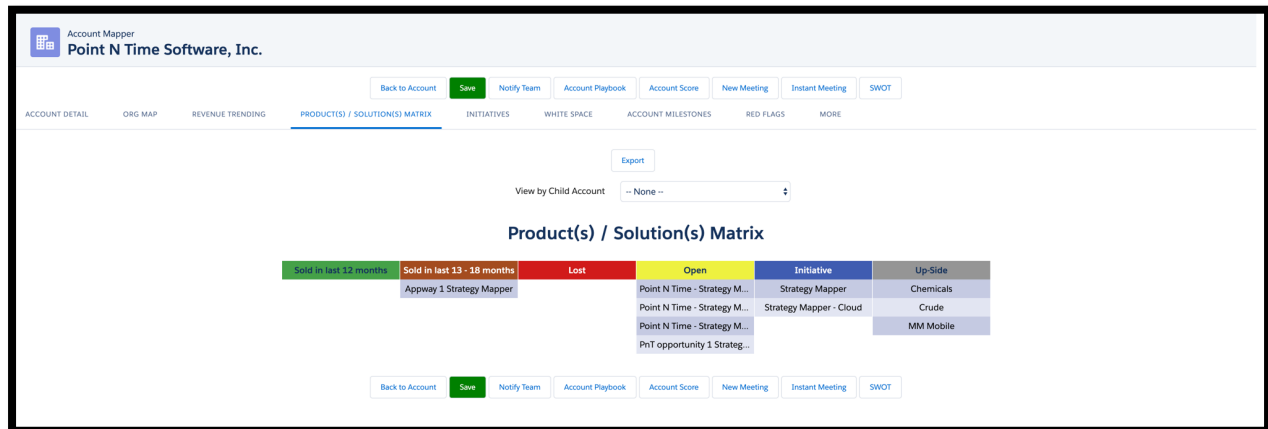
See in real-time review trending and what products/solution are in play in opportunities. Child account information can also be viewed from the parent. This chart can be exported. Past performance is also depicted in this chart, along with revenue lost.



## Strategy Mapper Product Overview – Sept 2019

### Product(s) / Solution(s) Matrix

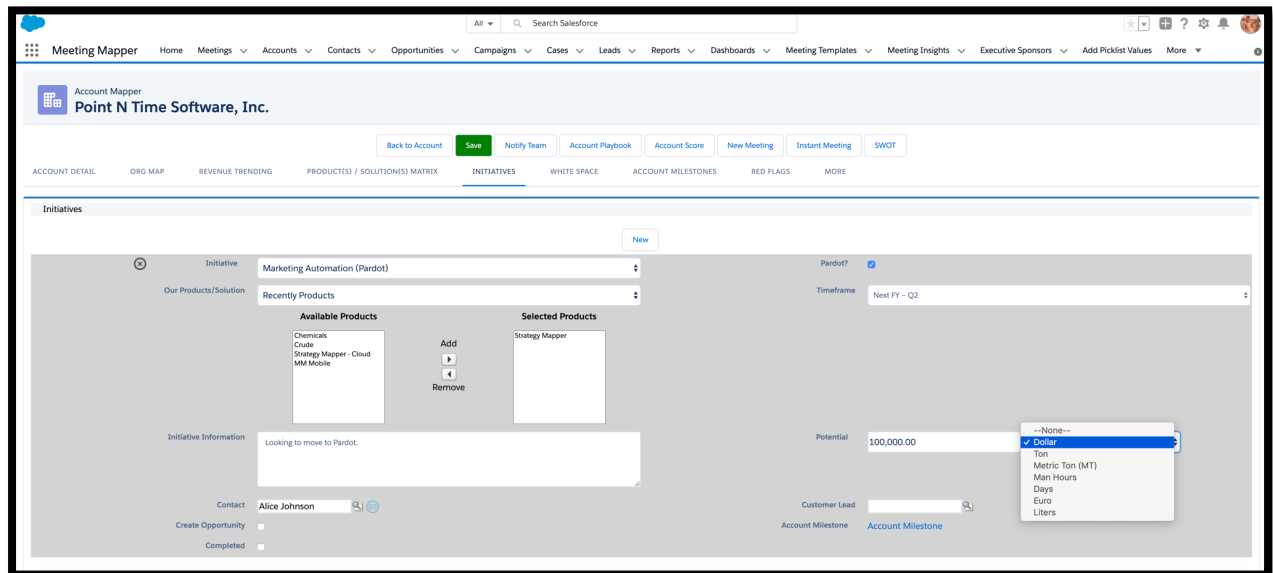
See in real-time the mix of products or solutions sold, lost, positioned or up-side. This information is based on details in opportunities and customer initiatives. Child account information can also be viewed from the parent. This chart can be exported.



## Strategy Mapper Product Overview – Sept 2019

### Customer Initiatives

Identify customer initiatives to build pipeline and build momentum against your competitors. Link products/solutions, add a potential (select from dropdown), assign a customer contact. Build Green Field and White Space selling with Customer Initiatives.



### White Space / Green Field

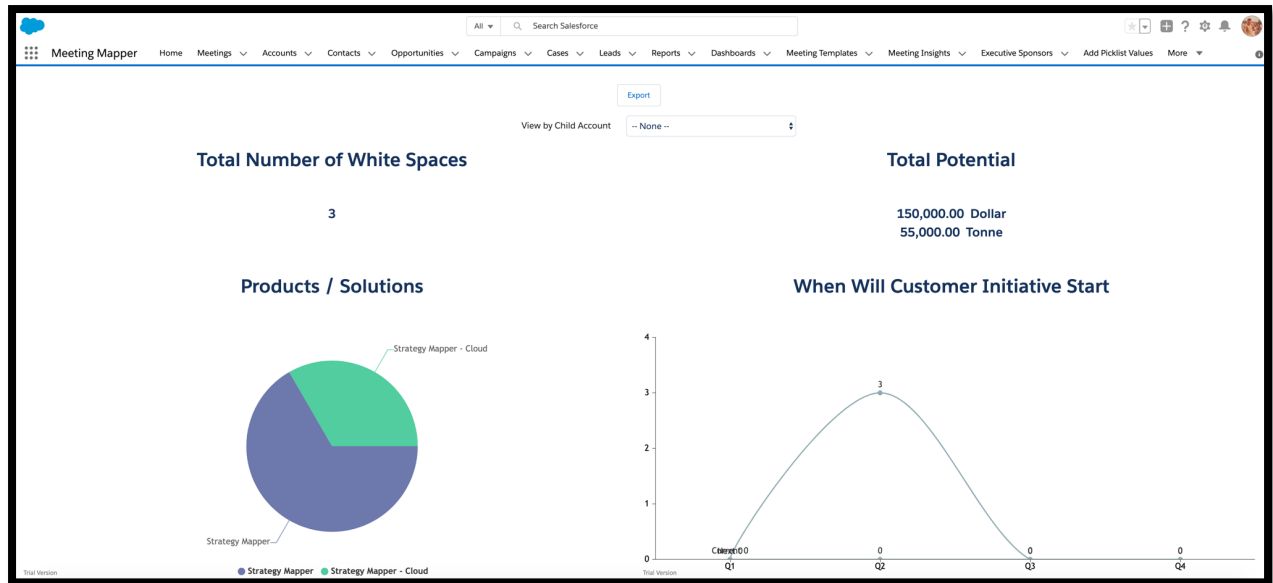
Based on the Customer Initiatives this page depicts that information. Child account information can also be viewed from the parent. This chart can be exported.

The title of the chart is dependent on the Account Type in Salesforce.

**Green Field** – Account Type is Prospect

**White Space** – Account Type is Customer

## Strategy Mapper Product Overview – Sept 2019



## Account Milestones

Create and track critical Tasks or Events set a due date and assign to team members. Milestones can create a task, event or both. The task can be update in Account Milestones.

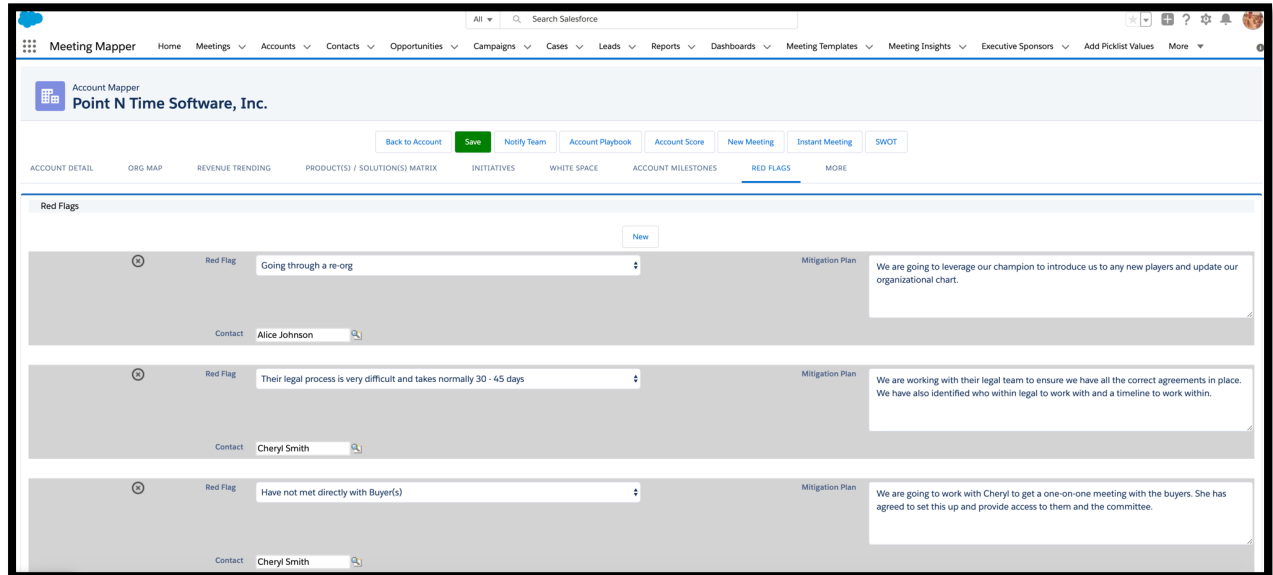
The screenshot shows the Account Mapper interface for "Point N Time Software, Inc." with the "ACCOUNT MILESTONES" tab selected. The interface includes the following elements:

- Account Detail:** Displays the account name "Point N Time Software, Inc." and a "New" button.
- Account Milestones List:** A table of milestones with columns for Title, Assigned To, Description, Customer Initiative, Task, Status, and Email Notification.
- Milestone 1:**
  - Title: Picklist
  - Assigned To: User (Travis Davis)
  - Description: Looking to move to Pardot.
  - Customer Initiative: ☒
  - Task: Marketing Automation (Pardot)
  - Status: In Progress
  - Email Notification: ☒
- Milestone 2:**
  - Title: Schedule 6 - 12 Roadmap
  - Assigned To: User (Travis Davis)
  - Description: Here is where I can put a lot of stuff.
  - Customer Initiative: ☐
  - Task: (empty)
  - Status: (empty)
  - Email Notification: ☒

## Account Red Flags

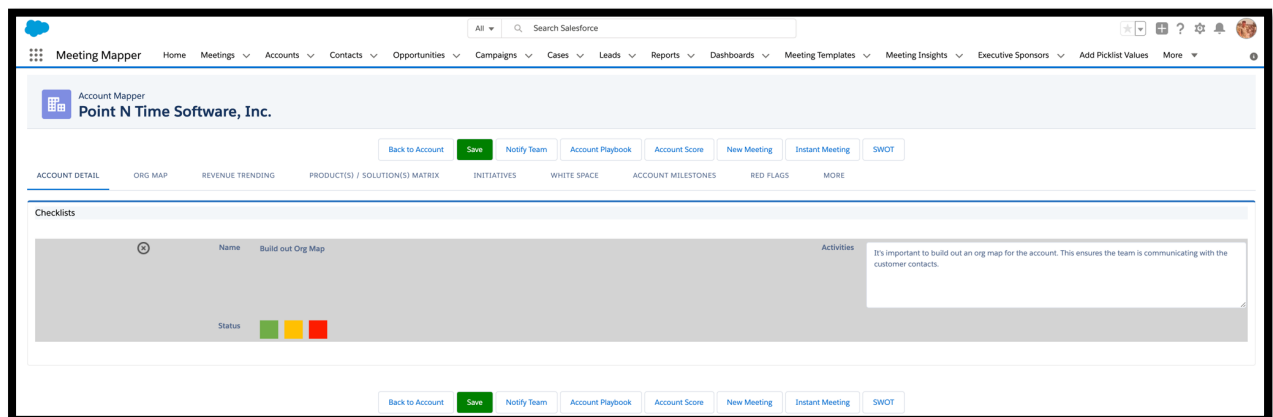
## Strategy Mapper Product Overview – Sept 2019

Document red flags that can prevent business closing in the account. Once identified create your mitigation plan. A contact can also be linked to the Red Flag. Red Flags are sync'd with opportunity plans created with Opportunity Mapper.



## Checklist

Checklist is template based, not all plans will have a Checklist. Checklist ensures major tasks are completed and is based on a color-coded system to identify items which, require attention. In addition, a list of activities can be provided for each item to ensure the user understands what much be accomplished and any best practices.



## Strategy Mapper Product Overview – Sept 2019

### Buying Process

Document the customer's buying process and identify customer contacts responsible to accomplish. This process will be utilized (in the Selection Process) in all opportunity plans created with Opportunity Mapper.

The screenshot displays the 'Account Mapper B2 Squared' interface. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and Meetings. Below this, the 'Account Mapper B2 Squared' header is visible, followed by a row of action buttons: Back to Account, Save, Notify Manager, Notify Team, Account Action Plan, Account Playbook, Account Score, New Meeting, Instant Meeting, Org Map, and SWOT. The main navigation tabs include ACCOUNT DETAIL, OUR OBJECTIVES, BUYING PROCESS (selected), INITIATIVES, ACCOUNT MILESTONES, RED FLAGS, NOTES, and MORE. The 'Buying Process' section features a table with columns for Process and Contact. The table lists seven processes: Identify the Problem, Review Options, Bring in top 3 vendors, Initial Demonstration/Presentation, Narrow down the possible solutions, Pilot/Trial selected vendor, and Sign contracts. Each process is associated with a contact: Betty Blue, Betty Blue, Bill Newby, Bill Newby, Bill Newby, Jame Brown, and John Brown. A 'Status' dropdown menu is set to 'Completed'. A 'New' button is located at the bottom right of the table. The bottom of the interface features the same row of action buttons as the top.

Process	Contact
Identify the Problem	Betty Blue
Review Options	Betty Blue
Bring in top 3 vendors	Bill Newby
Initial Demonstration/Presentation	Bill Newby
Narrow down the possible solutions	Bill Newby
Pilot/Trial selected vendor	Jame Brown
Sign contracts	John Brown

## Strategy Mapper Product Overview – Sept 2019

### Marketing and Business Development

Add your marketing and business development plans. The input fields are rich text so, you can add pictures, diagrams, and hyperlinks.

The screenshot displays the 'Account Mapper' interface for 'Davis Sporting Goods'. The top navigation bar includes buttons for 'Back to Account', 'Save', 'Notify Manager', 'Notify Team', 'Account Score', 'Account Playbook', 'New Meeting', 'Instant Meeting', and 'Org Map'. Below this, a horizontal menu lists various account management categories: 'ACCOUNT DETAIL', 'CUSTOMER BUYING PROCESSES', 'CUSTOMER INITIATIVES', 'ACCOUNT MILESTONES', 'RED FLAGS', 'MARKETING / BIZ DEV' (which is currently selected), 'NOTES', and 'MORE'.

The main content area is divided into two sections: 'Marketing' and 'Business Development'. The 'Marketing' section is active and shows a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, and table. The text area contains a bulleted list of marketing activities:

- We have our upcoming user conference in June 2016, starting to send out 'Early Bird' announcements
- Marketing is Preparing some new 'Slicks' regarding new product line, will send out when completed
- Working on a 'Case Study' for Q2 FY16
- Press Release for Q3 FY16

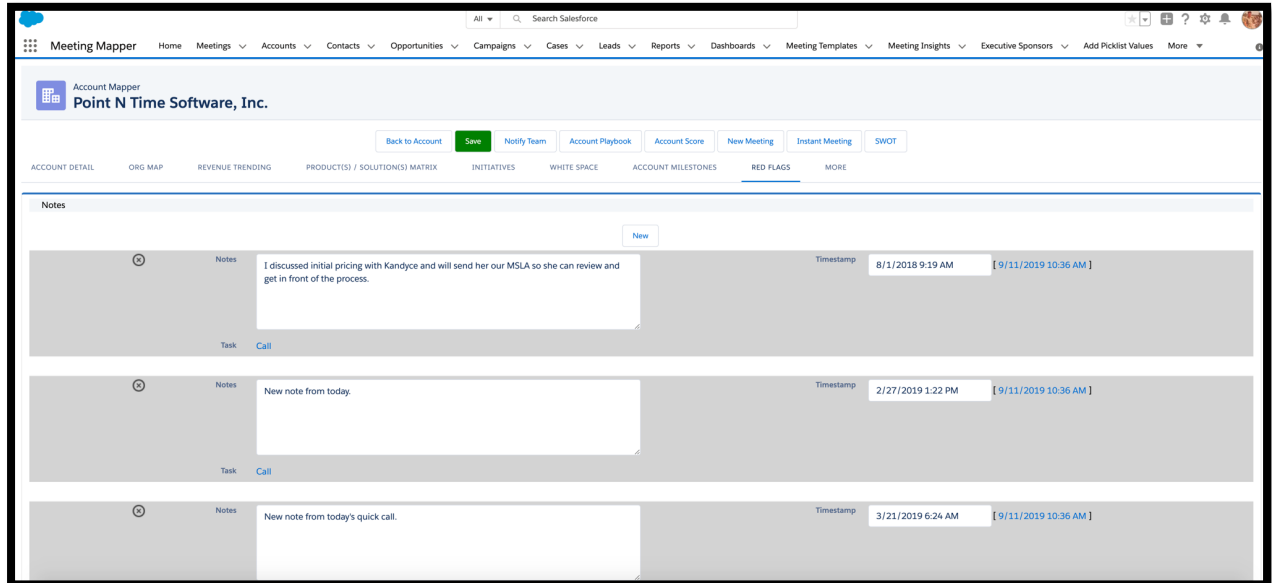
Below the Marketing section, there is a dropdown menu labeled 'Completed' with a downward arrow. The 'Business Development' section is partially visible below the dropdown and contains a single bullet point:

- Inviting their CEO to a golfing event and discuss some co-branding

## Strategy Mapper Product Overview – Sept 2019

### Notes

Add additional notes or conversations with customer. Time stamp the notes to be included in the account activity history. Create individual task for each note.





## Strategy Mapper Product Overview – Sept 2019

### SWOT Analysis+

The SWOT Analysis+ in Strategy Mapper adds additional information that is different from legacy SWOT Analysis. It includes the traditional Strengths, Weaknesses, Opportunities and Threats. It also includes, Obstacles, Objections, Red Flags and Competitors.

**SWOT B2 Squared**

[Back](#)

Strengths	
<b>Our Strengths</b>	<b>Strengths Free Form</b>
Strong Brand	
Relationships at the C-Level	

Weaknesses	
<b>Our Weaknesses</b>	<b>Weaknesses Free Form</b>
Rely heavily on brand name & past success	

Obstacles	
<b>Obstacles to Win</b>	<b>Obstacles Free Form</b>
Budget	

Objections	
<b>Objections to Overcome</b>	<b>Objections Free Form</b>
Don't see a need at this time	

Opportunities	
<b>Opportunities</b>	
They are looking at expanding their footprint in EMEA. We have a strong presence there and want to leverage our reference customers.	

Threats	
<b>Threats</b>	
The competition seems to be gaining some support in the account.	

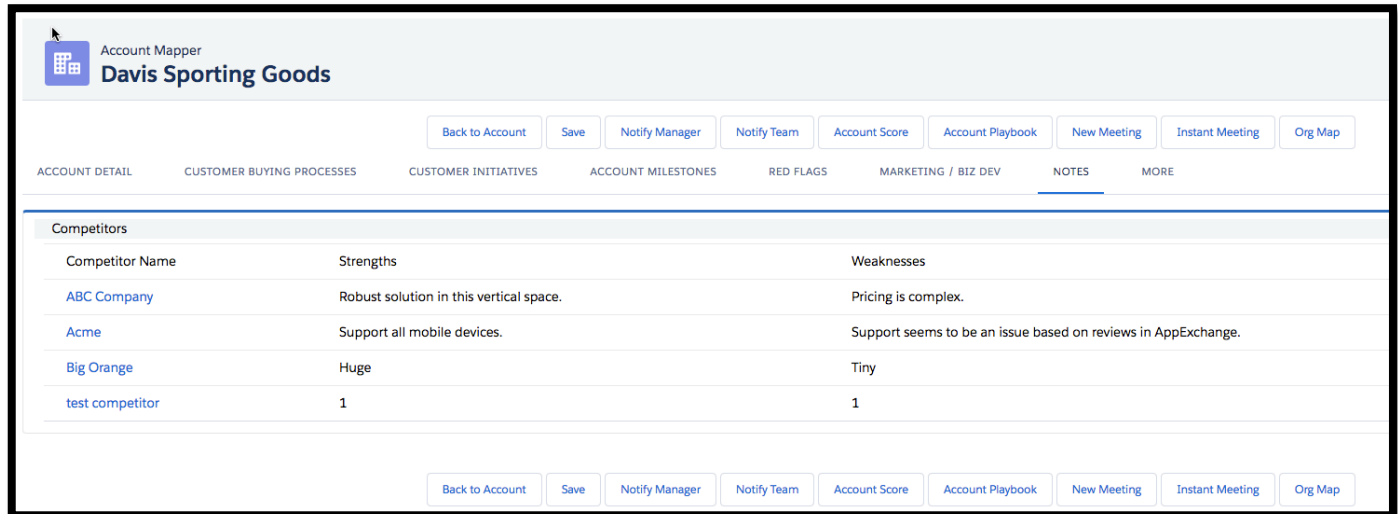
Red Flags	
<b>Red Flag</b>	<b>Mitigation Plan</b>
Difficult to get access to Decision Makers.	Review ZoomInfo, look for other contacts.
Their legal process is very difficult and takes normally 30 - 45 days.	You have to start the legal process at least 45 days out to when the close date is.

Competitors		
<b>Competitor Name</b>	<b>Strengths</b>	<b>Weaknesses</b>
Adobe Systems	Big Company	Hard to work with.
ABC Company		

## Strategy Mapper Product Overview – Sept 2019

### Competitors

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



The screenshot displays the 'Account Mapper' interface for 'Davis Sporting Goods'. The top navigation bar includes a grid icon, the text 'Account Mapper', and the account name 'Davis Sporting Goods'. Below this, a secondary navigation bar contains buttons: 'Back to Account', 'Save', 'Notify Manager', 'Notify Team', 'Account Score', 'Account Playbook', 'New Meeting', 'Instant Meeting', and 'Org Map'. A third navigation bar lists tabs: 'ACCOUNT DETAIL', 'CUSTOMER BUYING PROCESSES', 'CUSTOMER INITIATIVES', 'ACCOUNT MILESTONES', 'RED FLAGS', 'MARKETING / BIZ DEV', 'NOTES' (which is underlined), and 'MORE'. The main content area is titled 'Competitors' and contains a table with three columns: 'Competitor Name', 'Strengths', and 'Weaknesses'. The table lists four competitors: 'ABC Company', 'Acme', 'Big Orange', and 'test competitor'. Each competitor has associated strengths and weaknesses noted. At the bottom of the interface, there is another set of buttons identical to the ones in the top navigation bar.

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

## Strategy Mapper Product Overview – Sept 2019

### Track Meetings

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

Account Mapper

Davis Sporting Goods

Back to Account

Save

Notify Manager

Notify Team

Account Score

Account Playbook

New Meeting

Instant Meeting

Org Map

ACCOUNT DETAILCUSTOMER BUYING PROCESSESCUSTOMER INITIATIVESACCOUNT MILESTONESRED FLAGSMARKETING / BIZ DEVNOTESMORE

Meeting Detail

Name

Business Review - 10/14/2016 7:51 PM

Meeting Template

Strategy Meeting

Start Time

10/14/2016 7:51 PM

End Time

10/14/2016 8:51 PM

Account

Davis Sporting Goods

What was discussed?

Notes

Public Notes

Internal Notes

Internal Notes

Actionable Intelligence

Decision Date

11/30/2016

Budgeted Project

No

Reference Customer

Yes

Actions

Produce test template; Complete Product RFI/RFP; Install in Production

Decisions

Move forward; Evaluate other vendors

Open Issues

Business Drivers

Technical Drivers

Customer Requirements

Requirement

Customer Sat and notification of service due.

Comments

Our Solution

Meets Requirement

Our Products/Solution

Strategy Mapper

Our Solution Score

100

Comments

Requirement

100% cloud

Comments

Our Solution

Meets Requirement

Our Products/Solution

Our Solution Score

100

Comments

Requirement

Phone support

Comments

Our Solution

Partially meets requirement

Our Products/Solution

Our Solution Score

50

Comments

Solution Score

83

## Strategy Mapper Product Overview – Sept 2019

### Account Timeline

Monitor the progress of the account. Visually see how customer contacts are involved in the critical business meetings.

The screenshot displays the 'Account Mapper' interface for 'Davis Sporting Goods'. The top navigation bar includes a logo and a title. Below it, a secondary navigation bar contains buttons for 'Back to Account', 'Save', 'Notify Manager', 'Notify Team', 'Account Score', 'Account Playbook', 'New Meeting', 'Instant Meeting', and 'Org Map'. The main content area is divided into several tabs: 'ACCOUNT DETAIL', 'CUSTOMER BUYING PROCESSES', 'CUSTOMER INITIATIVES', 'ACCOUNT MILESTONES', 'RED FLAGS', 'MARKETING / BIZ DEV', 'NOTES', and 'MORE'. The 'NOTES' tab is currently selected, showing a meeting titled 'Meeting 3' with the subject 'CS - Ill's' and a date range of '7/19/2016 1:59 PM-7/23/2016 3:59 PM'. Below the meeting title, there are two sections: 'Account Contacts' and 'Sales Team'. The 'Account Contacts' section displays four contact cards: Bob Fox, Jordan Day, Sally Binkley, and yes Bush. The 'Sales Team' section displays four user cards: Chatter Expert, Admin User, Dev User, and Travis Davis. Each card features a profile picture and a name. The bottom of the interface has a footer bar with the same set of navigation buttons as the top.

## Strategy Mapper Product Overview – Sept 2019

### Customer Team

See who the sales team has met with, their current stance and role. Also, see who they need to meet with to fully capture the account landscape.

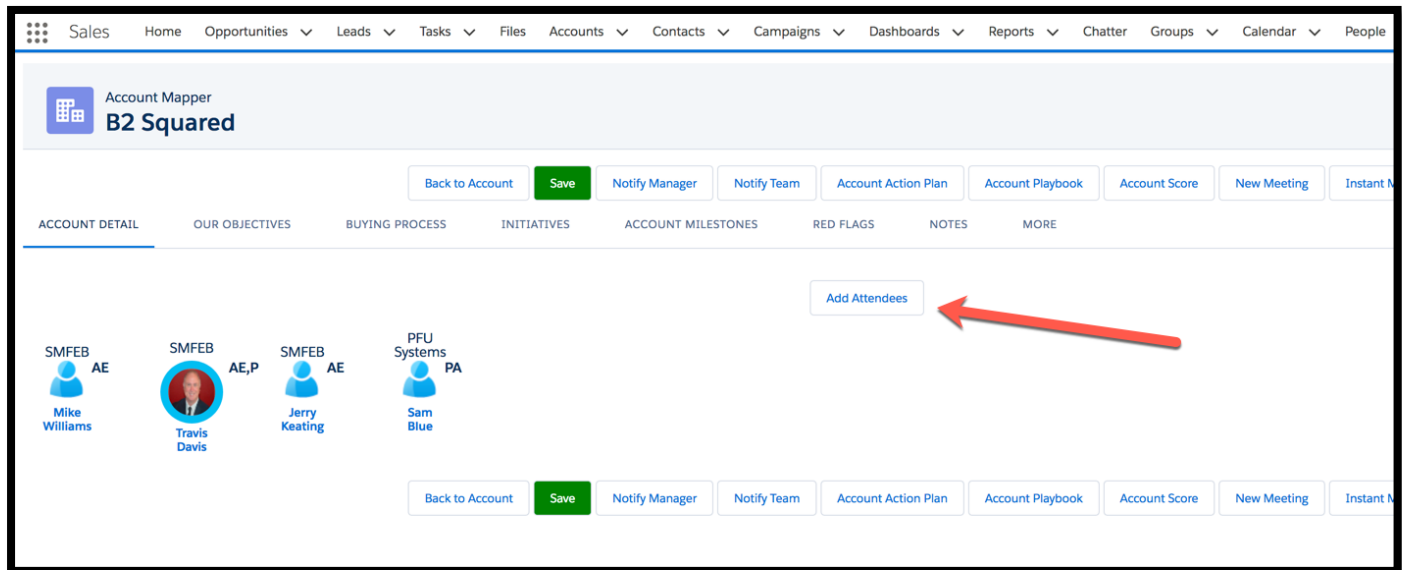
The screenshot displays the 'Account Mapper' interface for 'B2 Squared'. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and Calendar. Below the navigation bar, the 'Account Mapper' section for 'B2 Squared' is visible, featuring buttons for 'Back to Account', 'Save', 'Notify Manager', 'Notify Team', 'Account Action Plan', 'Account Playbook', 'Account Score', and 'New Meeting'. The main content area is divided into tabs: ACCOUNT DETAIL, OUR OBJECTIVES, BUYING PROCESS, INITIATIVES, ACCOUNT MILESTONES, RED FLAGS, NOTES, and MORE. The 'ACCOUNT DETAIL' tab is active, showing a list of team members with their names, roles, and stances. A red arrow points to the 'Add Attendees' button in the top right corner of the list.

Name	Role	Stance
Sam Money	DM	B2 Squared
Jim Satko	DM	B2 Squared
John Brown	C,DM,E	B2 Squared
Lisa Strong	C,DM,E	B2 Squared
Betty Blue	DM,E	B2 Squared
Jame Brown	DM	B2 Squared
Ted Rightway	E	B2 Squared
Ed Barns	DM,E	B2 Squared
Jane Doe	DM	B2 Squared
Aaron Blue		B2 Squared
Lee Scott	E	B2 Squared
Sam Blue	PA	PFU Systems
Rick Wrongway	E	B2 Squared
Bill Newby	E	B2 Squared
James Jonny	E	B2 Squared
Pat Barnes	DM,E	B2 Squared

## Strategy Mapper Product Overview – Sept 2019

### Account Team

See how on your team has been engaged with the customer.



# Strategy Mapper Product Overview – Sept 2019

## Opportunity Overview

This provides easy navigation to Opportunity Plans, Meeting Recaps and an Opportunity Playbook.

<div>Account Mapper</div> <div>Davis Sporting Goods</div> <div><a href="#">Back to Account</a> <a href="#">Save</a> <a href="#">Notify Manager</a> <a href="#">Notify Team</a> <a href="#">Account Score</a> <a href="#">Account Playbook</a> <a href="#">New Meeting</a> <a href="#">Instant Meeting</a> <a href="#">Org Map</a></div>								
<div>ACCOUNT DETAIL</div> <div>CUSTOMER BUYING PROCESSES</div> <div>CUSTOMER INITIATIVES</div> <div>ACCOUNT MILESTONES</div> <div>RED FLAGS</div> <div>MARKETING / BIZ DEV</div> <div>NOTES</div> <div>MORE</div>								
Opportunities								
Name	Description	Stage	Next Step	Probability (%)	Lead Source	Opportunity Mapper	Meeting Recap	Opportunity Playbook
Strategy Mapper - Salesforce	Salesforce is looking for a solution to enable their sales teams to generate Account and Opportunity plans, with the final product of a "Playbook".	Negotiation/Review	Select Trial Users	90%	Web	<a href="#">Opportunity Mapper</a>	<a href="#">Meeting Recap</a>	<a href="#">Opportunity Playbook</a>
Strategy Mapper - Martina	They are looking for a sales enablement solution that is 100% native to Salesforce.	Proposal/Price Quote	Start a Trial.	75%	Web	<a href="#">Opportunity Mapper</a>	<a href="#">Meeting Recap</a>	<a href="#">Opportunity Playbook</a>
Strategy Mapper - Davis Sporting	DSG is looking for a strategic selling solution to enable their sales teams to utilize the current sale process and methodology.	Value Proposition	Demo	50%	Web	<a href="#">Opportunity Mapper</a>	<a href="#">Meeting Recap</a>	<a href="#">Opportunity Playbook</a>
Benz - Security		Prospecting		10%		<a href="#">Opportunity Mapper</a>	<a href="#">Meeting Recap</a>	<a href="#">Opportunity Playbook</a>
BAVO	BAVO is a looking to add functionality to Salesforce to ensure their sales teams are capturing the right information and working the opportunities and accounts to generate revenue.	Prospecting		10%	Web	<a href="#">Opportunity Mapper</a>	<a href="#">Meeting Recap</a>	<a href="#">Opportunity Playbook</a>
Boom		Prospecting		10%		<a href="#">Opportunity Mapper</a>	<a href="#">Meeting Recap</a>	<a href="#">Opportunity Playbook</a>

## Strategy Mapper Product Overview – Sept 2019

### Child Accounts

This provides easy navigation to Child Accounts, account plan, any opportunity, their playbook and Meeting Recap.

Account Mapper  
B2 Squared

[Back to Account](#)[Save](#)[Notify Manager](#)[Notify Team](#)[Account Action Plan](#)[Account Playbook](#)[Account Score](#)[New Meeting](#)[Instant Meeting](#)[Org Map](#)

[ACCOUNT DETAIL](#)[CHECKLIST](#)[CUSTOMER BUYING PROCESS](#)[CUSTOMER INITIATIVES](#)[ACCOUNT MILESTONES](#)[RED FLAGS](#)[NOTES](#)[MORE](#)

B4 BOX

Account Detail

Name	B4 Box	Account Mapper	Account Mapper
		Meeting Recap	Meeting Recap

Opportunities

Name	Stage	Amount	Probability (%)	Opportunity Type	Next Step	Lead Source	Opportunity Mapper	Meeting Recap	Opportunity Playbook
B4 - SEP	Negotiation/Review	\$90,000.00	90%	New Business	Schedule Initial Meeting	Customer Initiative	<a href="#">Opportunity Mapper</a>	<a href="#">Meeting Recap</a>	<a href="#">Opportunity Playbook</a>
WAVE Op	Prospecting	\$23,980.00	10%	New Business		Customer Initiative	<a href="#">Choose a template</a>	<a href="#">Meeting Recap</a>	<a href="#">Opportunity Playbook</a>
B5 - SEP	Closed Won	\$90,000.00	100%	New Business	Schedule Initial Meeting	Customer Initiative	<a href="#">Choose a template</a>	<a href="#">Meeting Recap</a>	<a href="#">Opportunity Playbook</a>
SAM	Proposal/Price Quote	\$36,000.00	75%	New Business		Customer Initiative	<a href="#">Opportunity Mapper</a>	<a href="#">Meeting Recap</a>	<a href="#">Opportunity Playbook</a>

[Back to Account](#)[Save](#)[Notify Manager](#)[Notify Team](#)[Account Action Plan](#)[Account Playbook](#)[Account Score](#)[New Meeting](#)[Instant Meeting](#)[Org Map](#)



# Strategy Mapper Product Overview – Sept 2019

## Strategic Business Units

Strategy Mapper provides the ability to create Strategic Business Units as children of an account. There is only basic functionality, however you can create Strategic Business Unit plans using the same type of information in Account Mapper.

Strategic Business Units (2)		New
STRATEGIC BUSINESS UNIT NAME	ADDRESS	
Human Care		▼
Travis Test	101 Main Street Allen, TX 75002	▼
		View All

Meeting Mapper

HomeAccountsContactsCampaignsCasesLeadsOpportunitiesMeetingsMeeting TemplatesReportsDashboardsExecutive SponsorsAdd Picklist ValuesMore

Strategic Business Unit Mapper

Davis Sporting Goods

BackSave

STRATEGIC BUSINESS UNIT DETAILCHECKLISTCUSTOMER BUYING PROCESSCUSTOMER INITIATIVESSTRATEGIC BUSINESS UNIT MILESTONESRED FLAGSMORE

Strategic Business Unit Detail

Strategic Business Unit Name

Human Care

Address

Account Mapper Template

Retail Accounts

Account Detail

Account Name

Davis Sporting Goods

Industry

Communications

Account Description

Davis Sporting Goods is a new customer, they are growing at a rate of 35% per year. They are opening a new store every 45 days and looking to expand to other markets.

Owner ID

Dev User

Website

Account Type

Customer - Direct

Overall Account Strategy - 2 Year Plan - 5 Year Plan - Value Proposition - Lessons Learned

OVERALL ACCOUNT STRATEGY

2 YEAR PLAN

5 YEAR PLAN

VALUE PROPOSITION

LESSONS LEARNED

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

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

## Strategy Mapper Product Overview – Sept 2019

### Cases

If Salesforce Service Cloud is used to track incidents (Cases). Cases linked to an account will be populated in this section.

The screenshot shows the Meeting Mapper interface for the account 'Davis Sporting Goods'. The 'CUSTOMER INITIATIVES' tab is selected, and the 'Cases' section is active. A table displays a single case record.

Case	Contact Name	Subject	Priority	Date Opened	Status	Owner
00004626	Jordan Day	Lights not bright enough in office.	Medium	2/14/2017 9:41 PM	New	Dev User

### Custom Data


Strategy Mapper allows you to add in any custom data you require in your plans. This can be Salesforce objects/related list(s), custom objects you created or 3<sup>rd</sup> party objects (Applications).

The screenshot shows the Meeting Mapper interface for the account 'Davis Sporting Goods'. The 'CUSTOMER INITIATIVES' tab is selected, and the 'Contract' section is active. A table displays a single contract record.

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

## Account Play Book

This provides current account information and tips to increase your chances of driving revenue and building and maintaining a strong relationship. Playbooks can be configured in the Account Mapper Template, this allows you to determine what is displayed in the Playbook.



### 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	

#### Description

**Davis Sporting Goods** is a new customer, they are growing at a rate of 35% per year. They are opening a new store every 45 days and looking to expand to other markets.

#### Revenue Information

The estimated total revenue potential: **1,250,000.00**

Total pipeline revenue potential: **2,954,000.00**

Won: **0.00**


Lost: **106,000.00**

Delta: **1,704,000.00**

#### Opportunities

## Real-Time Action Plan

This provides current action plan for the account.



---

### Account Action Plan for Davis Sporting Goods

25% of the Account Checklist is completed, currently the status of the checklist is **Red**.

#### Open Account Checklists

Name	Coaching	Status
Initial Demo and Presentation	Ensure the demo and presentation highlight how Strategy Mapper meets their requirements.	<div></div>
Decision Makers Identified	Decision Makers must be identified to progress the account.	
Have the Buyer(s) been identified?	Who are the buyers are there different buyers for each business unit?  Is there a requirement to have POs x amount of days to ensure they are processed before end of month, QT or FY?	

#### Open Account Milestones

Title	Due Date	Assigned To	Description
CRM			
Schedule a Health Check	10/31/2016	<a href="#">Admin User</a>	Here is some additional information.

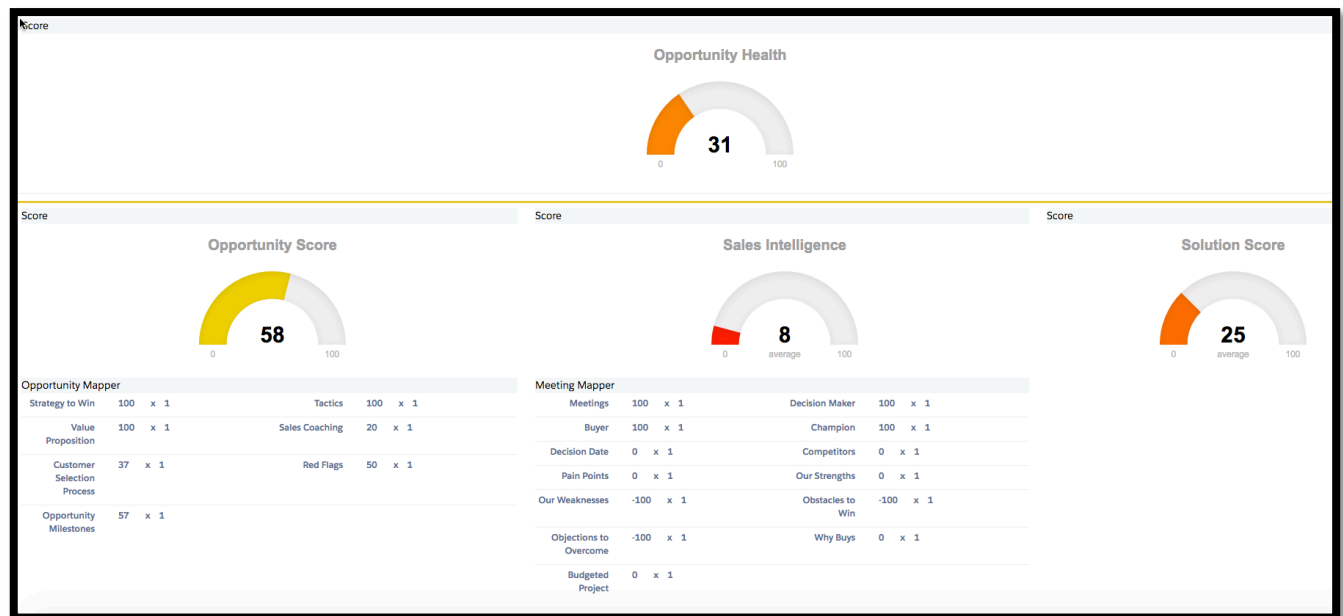
#### Red Flags

--	--

## Opportunity Mapper

### Opportunity Scoring

The opportunity score is comprised of the Opportunity Health, overall view of the health of the opportunity. It includes Opportunity Score, this takes into what has been completed in the opportunity plan. Sales Intelligence Score is driven but what has been gathered in customer meetings using Meeting Mapper. The Solution Score is gathered in Actionable Intelligence in Meeting Mapper.



## Opportunity Details

**Note: these values can be changed to match your sales taxonomy.**

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## Strategy Mapper Product Overview – Sept 2019

### Sales Coaching

Coach your team through every selling stage. Provide coaching and best practices in every stage. The coaching is template based and be varied based on the type of opportunity or product being sold.

The screenshot displays the 'Strategy Mapper - Salesforce' interface. The top navigation bar includes buttons for 'Back to Opportunity', 'Save', 'Opportunity Action Plan', 'Opportunity Playbook', 'Opportunity Score', 'New Meeting', 'Instant Meeting', and 'Org Map'. Below this, a horizontal menu shows 'SALES COACHING' as the active tab, with other tabs like 'OPPORTUNITY DETAIL', 'CUSTOMER SELECTION PROCESS', 'RED FLAGS', 'NOTES', 'OPPORTUNITY MILESTONES', and 'MORE'. The main content area is titled 'Prospecting' and features a rich text editor with a toolbar. Below the editor, a section titled 'Probing Questions:' lists six questions. A table follows, detailing meeting history with columns for Title, Date Time, and End Time. At the bottom, a list of sales stages is shown, each preceded by a checkmark icon.

**Probing Questions:**

1. What are your revenue goals this year and what are your strategies and tactics to achieve them?
2. Are you a Salesforce customer?
3. What do you think would give you the competitive advantage?
4. Are your sales team turn over a concern?
5. Have you lost revenue because an account member quit in the middle of an opportunity that was forecasted?
6. Do they currently utilize a sales management solution in Salesforce?

Title	Date Time	End Time
QM - 2/17/2017 9:29 PM	2/17/2017 9:29 PM	2/17/2017 10:29 PM
QM - 2/21/2017 10:06 AM	2/21/2017 10:06 AM	2/21/2017 11:06 AM
IMO - 2/21/2017 10:06 PM	2/21/2017 10:06 PM	2/21/2017 11:06 PM
QM - 2/22/2017 1:47 AM	2/22/2017 1:47 AM	2/22/2017 2:47 AM

- Qualification
- Needs Analysis
- Value Proposition
- Id. Decision Makers
- Perception Analysis
- Proposal/Price Quote
- Negotiation/Review
- Closed Won
- Closed Lost

## Strategy Mapper Product Overview – Sept 2019

### Selection Process

Leverage the customer buying process identified in Account Mapper or create an individual customer selection process and assign account contacts responsible for completing the process. In addition, track selection process with stage of opportunity.

The screenshot displays the 'Customer Selection Process' section within the Opportunity Mapper application. The interface includes a top navigation bar with a crown icon, the text 'Opportunity Mapper B4 - SEP', and a series of buttons: 'Back to Opportunity', 'Save' (highlighted in red), 'Notify Manager', 'Notify Team', 'Opportunity Action Plan', 'Opportunity Playbook', 'Opportunity Score', 'New Meeting', 'Instant Meeting', and 'Org Map'. Below this is a horizontal menu with tabs: 'OPPORTUNITY DETAIL', 'SALES COACHING', 'CUSTOMER SELECTION PROCESS' (which is underlined), 'RED FLAGS', 'NOTES', 'OPPORTUNITY MILESTONES', 'CUSTOMER REQUIREMENTS', and 'MORE'. The main content area is titled 'Customer Selection Process' and features a counter showing '0' with a 'New' button. A table lists six processes, each with a status icon (a circle with a checkmark or an 'X'), a checkbox, a process name, a dropdown menu, and a 'Customer Contact' field with a search icon and a smiley face icon. The processes and their assigned contacts are: 'Identify the Problem' (Joh Gill), 'Review Options' (Joh Gill), 'Bring in top 3 vendors' (Ginger Gillan), 'Pilot/Trial selected vendor' (Larry Powers), 'Initial Demonstration/Presentation' (Larry Powers), and 'Sign contracts' (Matt Mays). A 'New' button is located at the bottom of the table. The bottom navigation bar is identical to the top one.

Status	Process	Customer Contact
☑	<input checked="" type="checkbox"/> Process Identify the Problem	Joh Gill
☑	<input checked="" type="checkbox"/> Process Review Options	Joh Gill
☑	<input checked="" type="checkbox"/> Process Bring in top 3 vendors	Ginger Gillan
☑	<input type="checkbox"/> Process Pilot/Trial selected vendor	Larry Powers
☑	<input type="checkbox"/> Process Initial Demonstration/Presentation	Larry Powers
☑	<input type="checkbox"/> Process Sign contracts	Matt Mays



## Strategy Mapper Product Overview – Sept 2019

### Opportunity Red Flags

Red Flags identified in Account Mapper are integrated into Opportunity Mapper. Any new Red Flags particular to this opportunity can be added at any time.

The screenshot displays the 'Opportunity Mapper' interface within a Salesforce environment. The page title is 'Point N Time - Strategy Mapper'. The navigation bar includes tabs for 'Back to Opportunity', 'Save', 'Notify Manager', 'Notify Team', 'Opportunity Action Plan', 'Opportunity Playbook', 'Opportunity Score', 'New Meeting', and 'Instant Meeting'. The 'RED FLAGS' tab is selected, showing a list of four red flags. Each entry includes a 'Red Flag' description, a 'Mitigation Plan', a 'Currently Not a Red Flag' checkbox, and a 'Contact' field.

Red Flag	Mitigation Plan	Currently Not a Red Flag	Contact
Going through a re-org	We are going to leverage our champion to introduce us to any new players and update our organizational chart.	<input type="checkbox"/>	Alex Turner
Budget	We will look at financing.	<input type="checkbox"/>	Bryce Smith
Have not met directly with Buyer(s)	Here is my plan.	<input type="checkbox"/>	Bryce Smith
Their legal process is very difficult and takes normally 30 - 45 days	We have already started the legal process and have setup a meeting with their team to discuss the legal process.	<input type="checkbox"/>	Alex Turner

## Strategy Mapper Product Overview – Sept 2019

### Notes

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

The screenshot displays the 'Opportunity Mapper B4 - SEP' interface. At the top, a navigation bar includes a crown icon and the text 'Opportunity Mapper B4 - SEP'. Below this is a secondary navigation bar with buttons: 'Back to Opportunity', 'Save' (highlighted in red), 'Notify Manager', 'Notify Team', 'Opportunity Action Plan', 'Opportunity Playbook', 'Opportunity Score', 'New Meeting', 'Instant Meeting', and 'Org Map'. A third navigation bar lists tabs: 'OPPORTUNITY DETAIL', 'SALES COACHING', 'CUSTOMER SELECTION PROCESS', 'RED FLAGS', 'NOTES' (selected), 'OPPORTUNITY MILESTONES', 'CUSTOMER REQUIREMENTS', and 'MORE'. The main content area is titled 'Notes' and features a 'New' button. Below this, a note is displayed with the text 'Got an update from the customer, the last meeting went well. They are super excited about Strategy Mapper.' and a 'Timestamp' of '11/29/2016 2:03 PM' with a link '[ 9/14/2017 12:39 PM ]'. Below the note is a 'Task' section with a 'Task' label and a 'New' button. At the bottom, there is another set of buttons identical to the top navigation bar.

## Strategy Mapper Product Overview – Sept 2019

### Opportunity Milestones

Include your selling process in opportunities to track the progress of the opportunity. Create gates for certain milestones. Milestones can be assigned to other team members. Align milestones to stages of the opportunity and track them based on a color-coded system.

The screenshot displays the 'Opportunity Mapper - Salesforce' interface. At the top, there's a navigation bar with the logo and a series of tabs: 'Back to Opportunity', 'Save', 'Opportunity Action Plan', 'Opportunity Playbook', 'Opportunity Score', 'New Meeting', 'Instant Meeting', and 'Org Map'. Below this is a secondary navigation bar with tabs for 'OPPORTUNITY DETAIL', 'SALES COACHING', 'CUSTOMER SELECTION PROCESS', 'RED FLAGS', 'NOTES', 'OPPORTUNITY MILESTONES' (which is active), and 'MORE'.

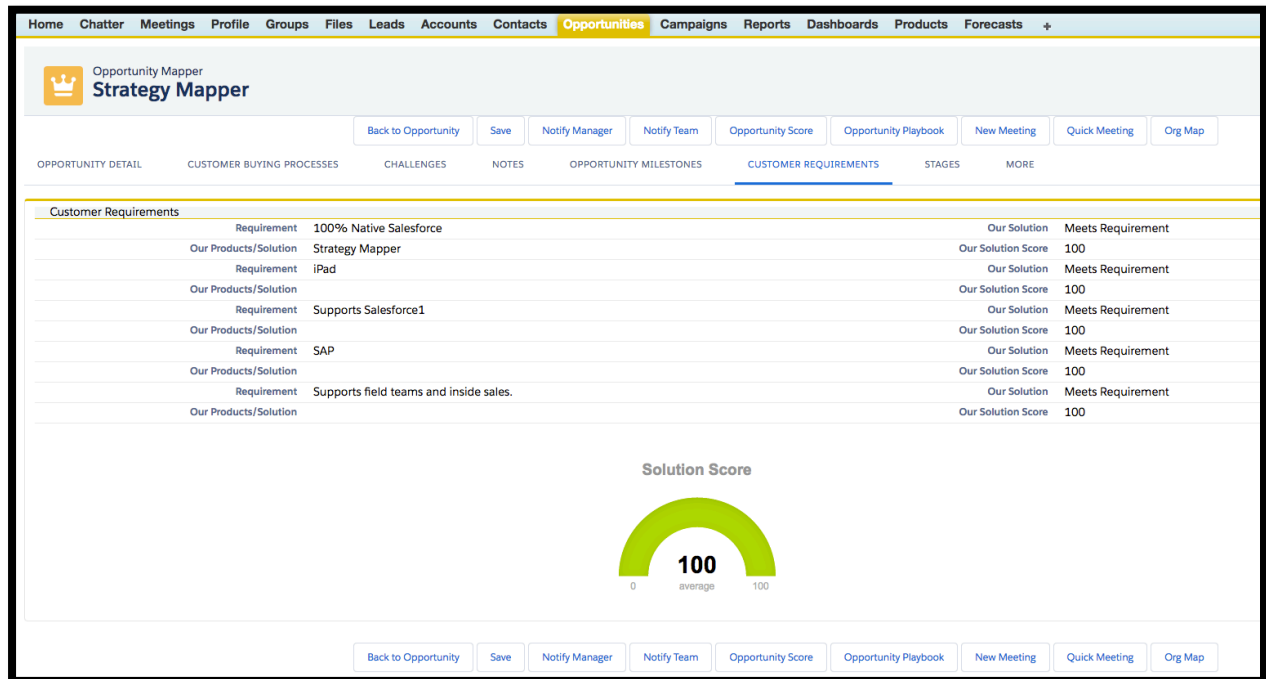
The main content area is titled 'Opportunity Milestones' and lists three milestones. Each milestone entry includes a name, status (indicated by a green checkmark, yellow square, and red square), assigned user, stage, projected completion date, date completed, and a comments section.

Name	Status	Assigned To	Stage	Projected Completion Date	Date Completed	Comments
Customer has confidence in the Sales Person	✓	Travis Davis	Prospecting	2/17/2017 9:34 PM [ 3/3/2017 6:42 AM ]	2/16/2017 9:34 PM [ 3/3/2017 6:42 AM ]	It seems they are engaging with our sale team. They continue to reach out and ask questions.
Customer has confidence in Rev-Trac as a Solution	✓		Qualification	[ 3/3/2017 6:42 AM ]	7/1/2016 1:12 AM [ 3/3/2017 6:42 AM ]	
Customer has confidence in RSC as a Vendor	✓			[ 3/3/2017 6:42 AM ]	7/1/2016 1:11 AM [ 3/3/2017 6:42 AM ]	

## Strategy Mapper Product Overview – Sept 2019

### Customer Requirements

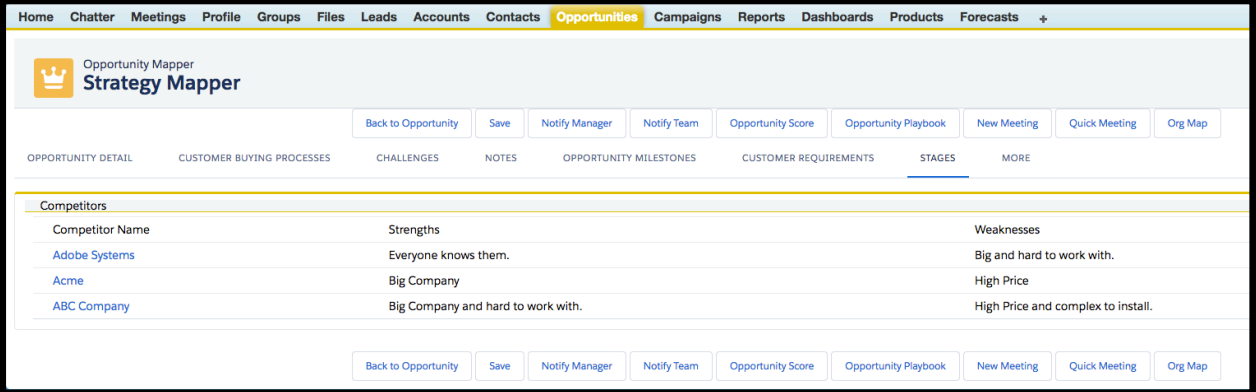
Customer requirements are easily gathered, they are then integrated into the Opportunity Plan resulting in a “Solution Score” that quickly tells you how closely your solution maps to the customer’s requirements.



## Strategy Mapper Product Overview – Sept 2019

### Competitors

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



The screenshot displays the Strategy Mapper interface within a Salesforce environment. The top navigation bar includes links for Home, Chatter, Meetings, Profile, Groups, Files, Leads, Accounts, Contacts, Opportunities (highlighted), Campaigns, Reports, Dashboards, Products, and Forecasts. Below the navigation bar, the Strategy Mapper logo is visible. A secondary navigation bar contains buttons for Back to Opportunity, Save, Notify Manager, Notify Team, Opportunity Score, Opportunity Playbook, New Meeting, Quick Meeting, and Org Map. The main content area features a tabbed interface with tabs for OPPORTUNITY DETAIL, CUSTOMER BUYING PROCESSES, CHALLENGES, NOTES, OPPORTUNITY MILESTONES, CUSTOMER REQUIREMENTS, STAGES (selected), and MORE. The STAGES tab is active, showing a table of competitors. The table has three columns: Competitor Name, Strengths, and Weaknesses. The data rows are as follows:

Competitor Name	Strengths	Weaknesses
<a href="#">Adobe Systems</a>	Everyone knows them.	Big and hard to work with.
<a href="#">Acme</a>	Big Company	High Price
<a href="#">ABC Company</a>	Big Company and hard to work with.	High Price and complex to install.

At the bottom of the interface, there is another set of buttons: Back to Opportunity, Save, Notify Manager, Notify Team, Opportunity Score, Opportunity Playbook, New Meeting, Quick Meeting, and Org Map.

# Strategy Mapper Product Overview – Sept 2019

## Meetings

Meeting Mapper meetings are automatically included in Opportunity Mapper.

Opportunity Mapper  
Strategy Mapper

Back to Opportunity

Save

Notify Manager

Notify Team

Opportunity Score

Opportunity Playbook

New Meeting

Quick Meeting

Org Map

OPPORTUNITY DETAILCUSTOMER BUYING PROCESSESCHALLENGESNOTESOPPORTUNITY MILESTONESCUSTOMER REQUIREMENTSSTAGESMORE

Meetings

Name

DP - Follow Up Demo

Meeting Template

Demo and Presentation

Start Time

8/11/2016 3:00 PM

End Time

8/11/2016 4:00 PM

Account

B2 Squared

Opportunity

Strategy Mapper

What was discussed?

Notes

Public Notes

Internal Notes

Internal Notes

Actionable Intelligence

Decision Date

9/30/2016

Budgeted Project

Yes

Reference Customer

Yes

Actions

Complete Product RFI; Schedule a Demo; General Interest

Decisions

Determine Pilot site; Move forward

Open Issues

Business Drivers

Technical Drivers

Customer Requirements

Requirement

100% Native Salesforce

Comments

Our Solution

Meets Requirement

Our Products/Solution

Strategy Mapper

Our Solution Score

100

Requirement

iPad

Comments

Our Solution

Meets Requirement

Our Products/Solution

Our Solution Score

100

Requirement

Supports Salesforce1

Comments

Our Solution

Meets Requirement

Our Products/Solution

Our Solution Score

100

Requirement

SAP

Comments

Our Solution

Meets Requirement

Our Products/Solution

Our Solution Score

100

Requirement

Supports field teams and inside sales.

Comments

Our Solution

Meets Requirement

Our Products/Solution

Our Solution Score

100

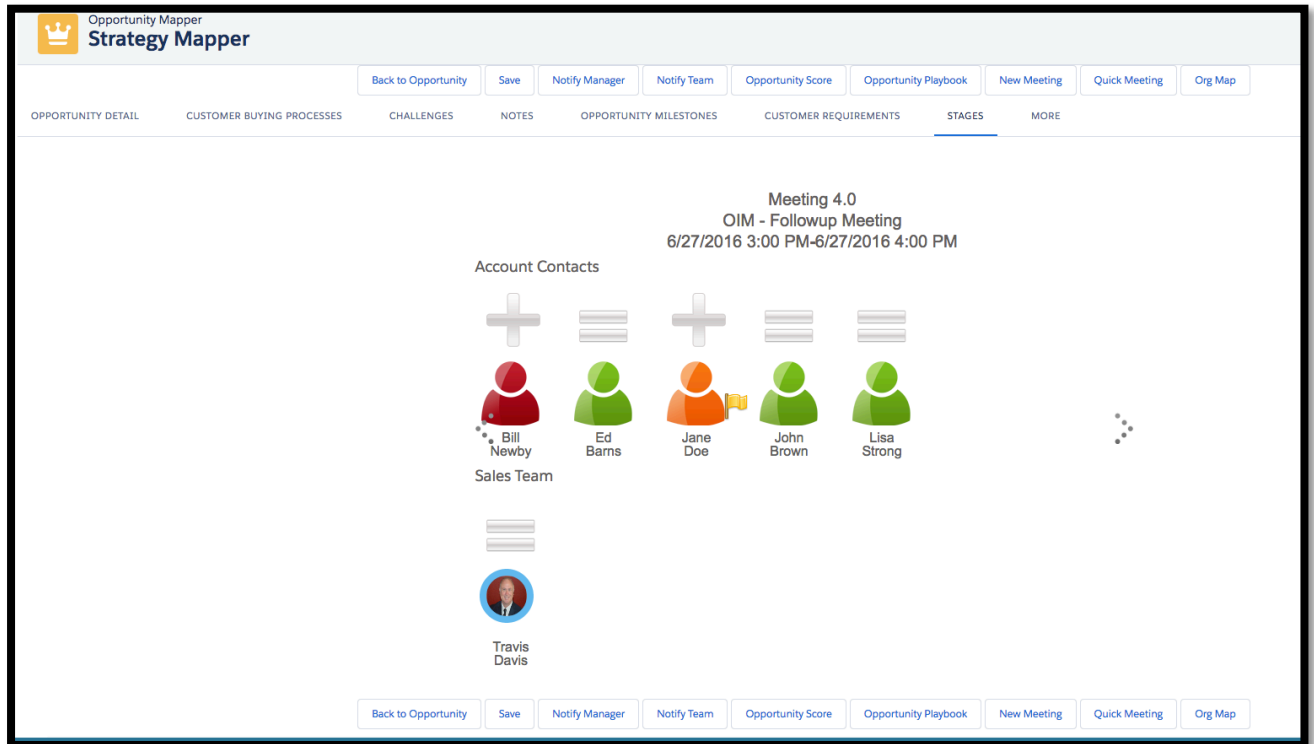
Solution Score

100

## Strategy Mapper Product Overview – Sept 2019

### Opportunity Timeline

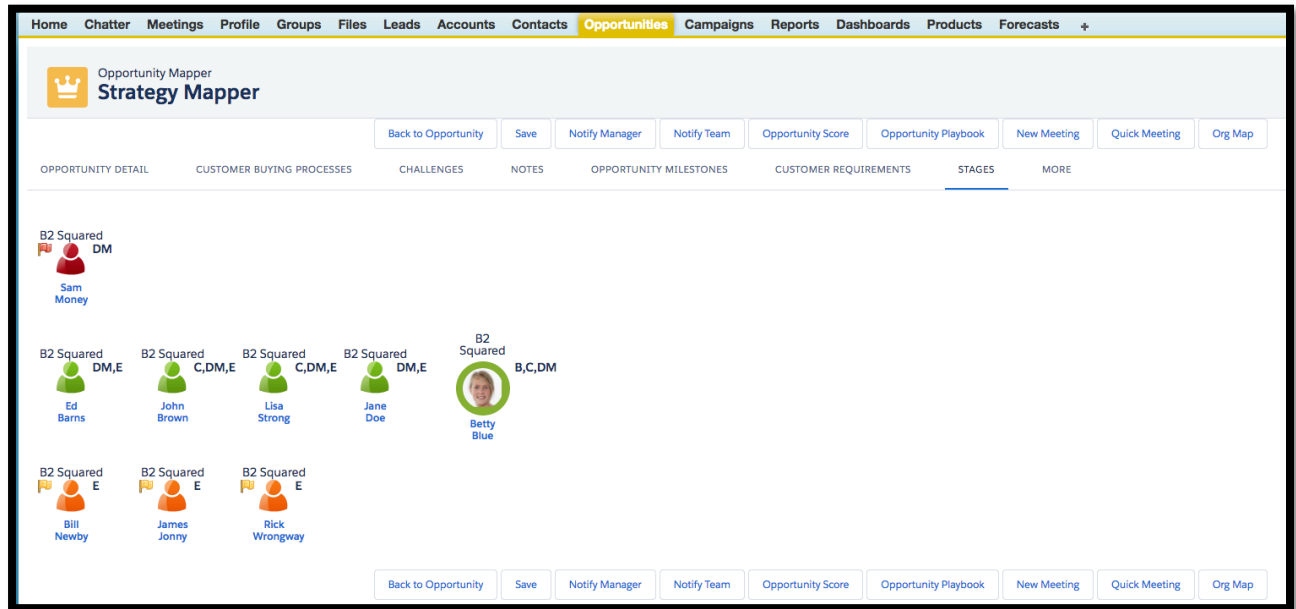
Timeline gives users a visual depiction of the buying personas over the life of the opportunity.



# Strategy Mapper Product Overview – Sept 2019

## Customer Contacts

See all the contacts you've met with, along with their roles and stances.

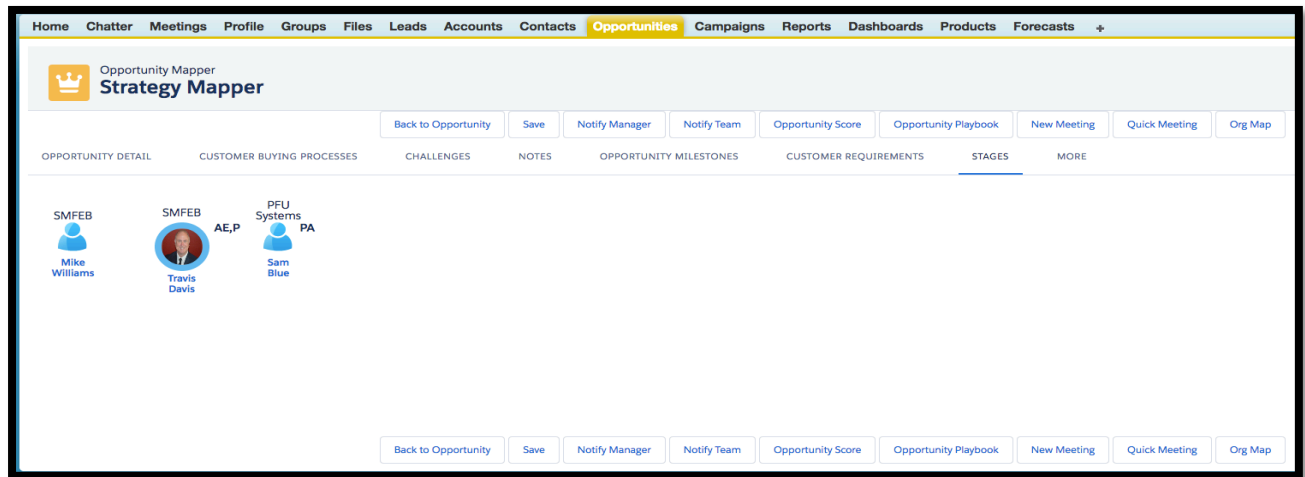




## Strategy Mapper Product Overview – Sept 2019


### Account Team

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



## Opportunity Playbook

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



---

### Opportunity Playbook for Strategy Mapper - Martina

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

Forecasted Revenue: **\$1,250,000.00**  
Current Stage: **Perception Analysis**  
Probability: **70%**  
Close Date: **3/31/2016**

### Situational Awareness

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


The most likely Pain Points of the customer are:

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

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

## Opportunity Action Plan

This provides current action plan for the opportunity.



---

### Opportunity Action Plan for Strategy Mapper - Salesforce

This opportunity is currently in **Prospecting** stage. The close date is **4/30/2017** and there are **58** days to the close date.

#### Sales Coachings(current stage and next stage)

Name	Coaching
Prospecting	<p><b>Probing Questions:</b></p> <ol style="list-style-type: none"><li>1. What are your revenue goals this year and what are your strategies and tactics to achieve them?</li><li>2. Are you a Salesforce customer?</li><li>3. What do you think would give you the competitive advantage?</li><li>4. Are your sales team turn over a concern?</li><li>5. Have you lost revenue because an account member quit in the middle of an opportunity that was forecasted?</li><li>6. Do they currently utilize a sales management solution in Salesforce?</li></ol> <p><b>Helpful links for the prospect:</b></p> <p>Short Strategy Mapper video: <a href="https://youtu.be/AM-sN2Hblj8">https://youtu.be/AM-sN2Hblj8</a> Disaster Recover for Sales video: <a href="https://youtu.be/8_ixLQGyt_Q">https://youtu.be/8_ixLQGyt_Q</a> AppExchange listing: <a href="https://appexchange.salesforce.com/listingDetail?listingId=a0N30000009vnGjEAI">https://appexchange.salesforce.com/listingDetail?listingId=a0N30000009vnGjEAI</a></p>
Qualification	<p><b>Qualification Questions:</b></p> <ol style="list-style-type: none"><li>1. Does Strategy Mapper meet the customer requirements. Is the solutions score above 75%? If not this may not be a winnable opportunity.</li><li>2. Do you currently have a project or initiative around account and/or opportunity planning?</li><li>3. Do you have budget?</li></ol>

#### Not Completed Customer Selection Process

# Strategy Mapper Product Overview – Sept 2019

## Meeting Mapper

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

### An intuitive meeting interface


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

The screenshot displays the Meeting Mapper interface. At the top, a navigation bar includes links for Home, Chatter, Meetings, Profile, Groups, Files, Leads, Accounts, Contacts, Opportunities, Campaigns, Reports, Dashboards, Products, and Forecasts. Below this, a sub-header shows 'Meeting DP - Follow Up Demo'. A toolbar contains buttons: Back, Add Attendees, Save, Send Invites, Notes, Actionable Intelligence, Export Report, Org Map, Attachments, Tables, and Add Objective. The main area features a central circular video placeholder surrounded by attendee avatars and names: Jane Doe (B2 Squared DM,E), Betty Blue (B2 Squared B,C,DM), Lisa Strong (B2 Squared C,DM,E), John Brown (B2 Squared DM,E), Sam Money (B2 Squared DM), Rick Wrongway (B2 Squared E), and Travis Davis (SMFEB AE,P). To the right, a sidebar titled 'MEETING LOGISTICS' contains fields for Account (B2 Squared), Opportunity (Strategy Mapper), Title (DP - Follow Up Demo), Meeting Template (Demo and Presentation), Type (Remote), Start Time (08/11/2016 3:00 PM), End Time (08/11/2016 4:00 PM), Repeat (--None--), Location (200 Main St.,Allen,TX,75001,USA,(955) 555-1212), Conference (GoToMeeting), and a Completed? Score (88). At the bottom, there is a 'Post' button, a text input field 'Write something...', and a 'Share' button.

## Strategy Mapper Product Overview – Sept 2019

### Add meeting attendees

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

 **Add Attendees**

[Back To My Meeting](#)

[Add New Contact](#)

USER ATTENDEES

CONTACT ATTENDEES

Action	Name	Title	Email	Stance	Role	Level Of Participation	Individual Notes	Reports To	Via Conference Call
Remove	Betty Blue		sales@pointntime.com	For	Buyer; Champion; Decision Maker	Very Interactive		Rick Wrongway	<input type="checkbox"/>
Remove	Bill Newby			Undecided	Evaluator	Antagonist		Jane Doe	<input type="checkbox"/>
Remove	Jane Doe			For	Decision Maker; Evaluator	Interactive		Ed Barns	<input type="checkbox"/>
Remove	John Brown	VP Sales	sales@pointntime.com	For	Decision Maker; Evaluator	Interactive		Ed Barns	<input checked="" type="checkbox"/>
Remove	Lisa Strong	Director Sales Enablement	sales@pointntime.com	For	Champion; Decision Maker; Evaluator	Interactive		Ed Barns	<input type="checkbox"/>
Remove	Rick Wrongway		sales@pointntime.com	Undecided	Evaluator	Interactive	Getting a lot of attention.	Ed Barns	<input type="checkbox"/>
Remove	Sam Money	VP Product Development		Against	Decision Maker	Interactive		Ed Barns	<input type="checkbox"/>

Contacts

Keyword to search...

Action	Name	Title	Email	Phone
Add	Jame Brown		sales@pointntime.com	
Add	James Jonny	VP of Ops	sales@pointntime.com	
Add	Ed Barns	VP Sales Ops	sales@pointntime.com	

## Meeting Invitations

Send meeting invitations and agendas, right from Salesforce.com.

The screenshot shows a web browser window with the title 'Choose Attendees for Invite'. The URL is [https://smfeb--meetingmapper.na30.visual.force.com/apex/MeetingMapper\\_ChooseAttendeesForAgenda?mee](https://smfeb--meetingmapper.na30.visual.force.com/apex/MeetingMapper_ChooseAttendeesForAgenda?mee). The page has a header with a yellow folder icon and the title 'Choose Attendees for Invite'.

Below the header, there is a section titled 'All Attendees' with three buttons: 'Create Agenda', 'Send', and 'Cancel'. Below this is a table with the following data:

	Add all	3 items selected	Remove all
John Brown	+	↕ Lisa Strong	-
Jane Doe	+	↕ Sam Money	-
Bill Newby	+	↕ Betty Blue	-
Rick Wrongway	+		

Below the table is a section titled 'Invite Information' with a rich text editor. The editor has a toolbar with buttons for undo, redo, bold, italic, underline, strikethrough, link, unlink, image, list, and more options. The text in the editor is 'Looking seeing everyone.'.

Below the editor is a section titled 'Upload Attachment' with a 'File' label, a 'Browse...' button, and the text 'No file selected.'.


At the bottom is a section titled 'Individual Emails' with a table that has two columns: 'Individual Emails' and an empty cell.

## Meeting Notes

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

Meeting Notes

https://smfeb--meetingmapper.na30.visual.force.com/apex/MeetingMapper\_MeetingNotes?meetingid=a0g36000001PlvnAAG

 Meeting Notes

Save

Cancel

DP - FOLLOW UP DEMO

OIM - INITIAL DEMO AND PRESENTATION

OIM - 8/4/2016 2:48 PM

DP - 20 JULY MEETING

OIM - FOLLOWUP MEETING

DM - 6/13/2016 5:47 PM

PUBLIC NOTES

INTERNAL NOTES

↩


→


**B**


*I*


U


~~S~~























Strategy Mapper™ is the leader in capturing Sales Intelligence. It provides sales leadership unparalleled visibility and access on the progress of Accounts and Opportunities, to ensure revenue goals are met and exceeded. Strategy Mapper also integrates with Pardot to provide Proactive Marketing based on information gathered in customer meetings. Strategy Mapper is all about winning and beating the competition. Strategy Mapper allows you to easily gather customer intelligence to build and maintain Account and Opportunity plans that are based on all of your customer interactions.

Save as Doc

8/10/2016 12:33 PM

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### Gather Actionable Intelligence in every meeting.

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

**Actionable Intelligence**

Save Cancel

ACTIONABLE INTELLIGENCE CUSTOMER REQUIREMENTS COMPETITORS PAIN POINTS MORE

**Actionable Intelligence**

Name OIM - Initial meeting - Strategy - AI

Decision Date 9/30/2016

Budgeted Project Yes

Reference Customer Yes

**Actions**

**Available**

- Produce test template
- Secure Sign off for contracts
- Install in Production
- Send Proposal

**Chosen**

- General Interest
- Complete Product RFI
- Schedule a Demo

**Decisions**

**Available**

- Not to move forward
- Evaluate other vendors
- Do nothing

**Chosen**

- Determine Pilot site
- Move forward

**Open Issues**

STRENGTHS  
WEAKNESSES  
OBSTACLES  
OBJECTIONS  
WHY BUYS



## Strategy Mapper Product Overview – Sept 2019

### Tasks and Events

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

Meeting Tasks

DP - Follow Up Demo

Refresh

Save

Travis Davis

John Brown

Lisa Strong

Bill Newby

Jane Doe

Sam Money

Betty Blue

Rick Wrongway

Travis Davis (User)

Action	Subject	Assigned To	Contact	Due Date	Status	Description
	Send Thank You ema	Travis Davis	Contact Betty Blue	7/19/2016	[ 10/11 / In Progress	Send thank you email to prospect/customer.
	Task for OIM - 8/4/21	Travis Davis	Contact Bill Newby	8/4/2016	[ 10/11 / Waiting on someone else	
	Send Followup Hand	Travis Davis	Contact Betty Blue	8/10/2016	[ 10/11 / In Progress	Send a nice note.
	Schedule next meetir	Travis Davis	Contact	8/11/2016	[ 10/11 / Deferred	Schedule a follow on meeting.
	Task for OIM - 9/1/21	Travis Davis	Contact	9/1/2016	[ 10/11 / In Progress	
	Task for OIM - Initial	Travis Davis	Contact	9/16/2016	[ 10/11 / Not Started	
	Task for DM-SM - 10/	Travis Davis	Contact	10/4/2016	[ 10/11 / In Progress	

## Strategy Mapper Product Overview – Sept 2019

### Meeting Exports

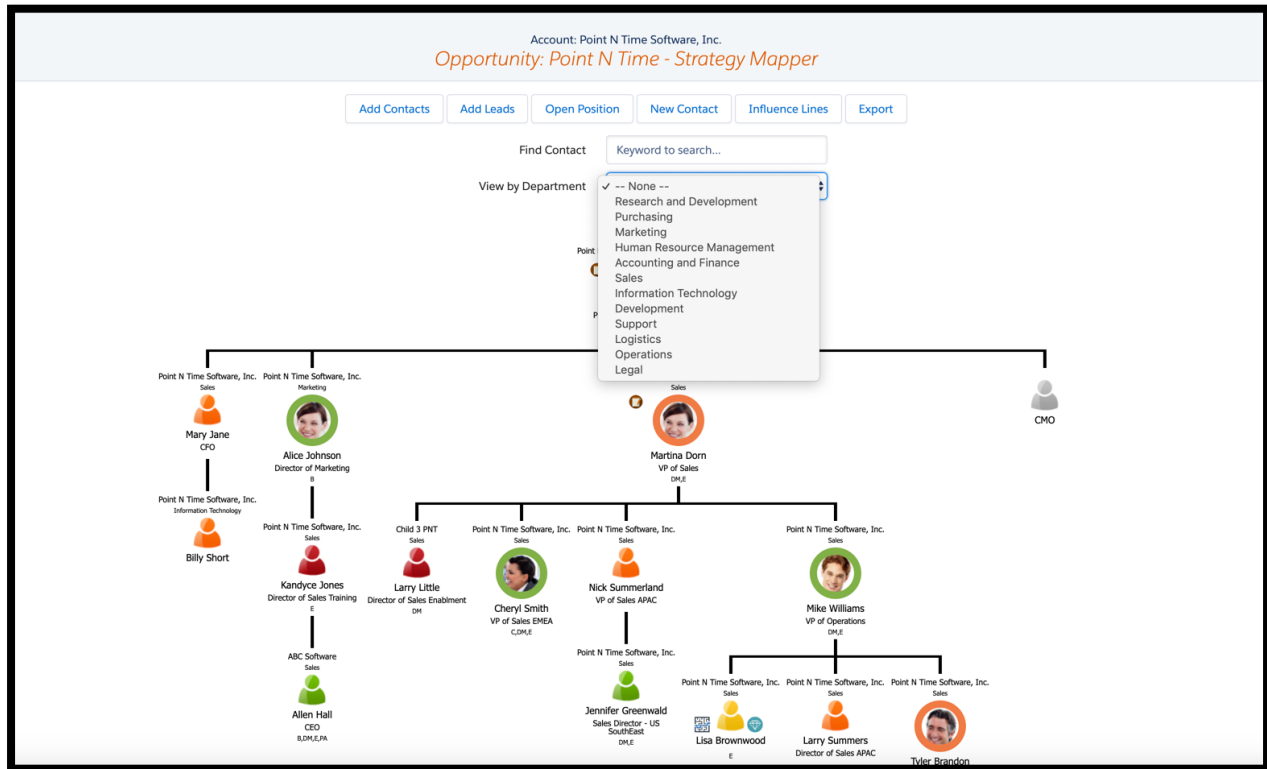
Export meeting reports (Public and/or Private) right after the meeting so you can keep all meeting attendees informed.

The screenshot displays the 'Meeting Exports' interface within the Strategy Mapper application. The top navigation bar includes links for Home, Chatter, Meetings, Profile, Groups, Files, Leads, Accounts, Contacts, Opportunities, Campaigns, Reports, Dashboards, Products, and Forecasts. The main header shows the meeting title 'DP - Follow Up Demo' and a series of action buttons: Back, Add Attendees, Save, Send Invites, Notes, Actionable Intelligence, Tasks, Export Report, Org Map, Attachments, Tables, and Add Objective. The 'Export Report' button is highlighted, showing a dropdown menu with options: Export Public Report, Export Private Report, Export Private Chatter Report, Export Setting, Send Public Export, and Send Private Export. The central area features a circular meeting map with attendees represented by icons and names: Jane Doe, Betty Blue, Lisa Strong, John Brown, Sam Money, Rick Wrongway, and Travis Davis. The right sidebar contains a search bar and a list of meeting details, including the title 'DP - Follow Up Demo', the template 'Demo and Presentation', the remote location '200 Main St, Allen, TX, 75001, USA (555) 555-1212', and the conference provider 'GoToMeeting'. A progress bar at the bottom indicates the meeting is 88% completed.

## Strategy Mapper Product Overview – Sept 2019

Create dynamic organizational maps.

Update org maps right in the meeting.



## Strategy Mapper Product Overview – Sept 2019

Everything captured in Meeting Mapper automatically updates Salesforce.com.

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

The screenshot displays the Meeting Mapper application interface, which is integrated with Salesforce.com. The top navigation bar includes various tabs such as Home, Meetings, Accounts, Contacts, Opportunities, Campaigns, Cases, Leads, Reports, Dashboards, Meeting Templates, Meeting Insights, Executive Sponsors, Add Picklist Values, and More. The main content area shows an opportunity record for 'Point N Time - Strategy Mapper'. The record details include the Account Name 'Point N Time Software, Inc.', Close Date '11/29/2019', Amount '\$9,600.00', and Opportunity Owner 'Travis Davis'. The record is currently in the 'Proposal/Price Quote' stage, with other stages like 'Negotiation/Review', 'Needs Analysis', and 'Closed' visible. The 'Activity' tab is selected, showing a timeline of activities. The 'Next Steps' section lists tasks like 'Setup trial' and 'Call'. The 'Past Activities' section shows a list of events, including 'Event for IOM - 4th Meeting with Point N Time' and 'Event for IOM - 3rd Meeting with Customer'. The right sidebar contains sections for 'Meetings (3+)', 'Meetings from Other Opportunity (0)', and 'Opportunity to OMS (3+)'. The 'Opportunity to OMS' section shows a list of opportunities with columns for Comments, Gate, Assigned To, and Start Trial/PoV.

## Strategy Mapper Product Overview – Sept 2019

### PardotLinks (Integration with Salesforce Pardot)

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

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

Save Save & New Cancel

**INFORMATION**

Actionable Intelligence Type: Customer Initiatives

Actionable Intelligence Value: Sales Enablement Platform

Industry Filter (Optional): Construction

Account Type (Optional): Prospect

Product (Optional): Strategy Mapper

Country (Optional): United States

State (Optional): Kentucky Louisiana Maryland Maine Michigan

Chosen: Arkansas Arizona California Illinois

Only My Opportunities: ☐

Save Save & New Cancel

View: Current Campaigns Filter: Tags Add Campaign Tools

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

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