Strategy Mapper Product Overview – Sept 2019

StrategyMapper

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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.

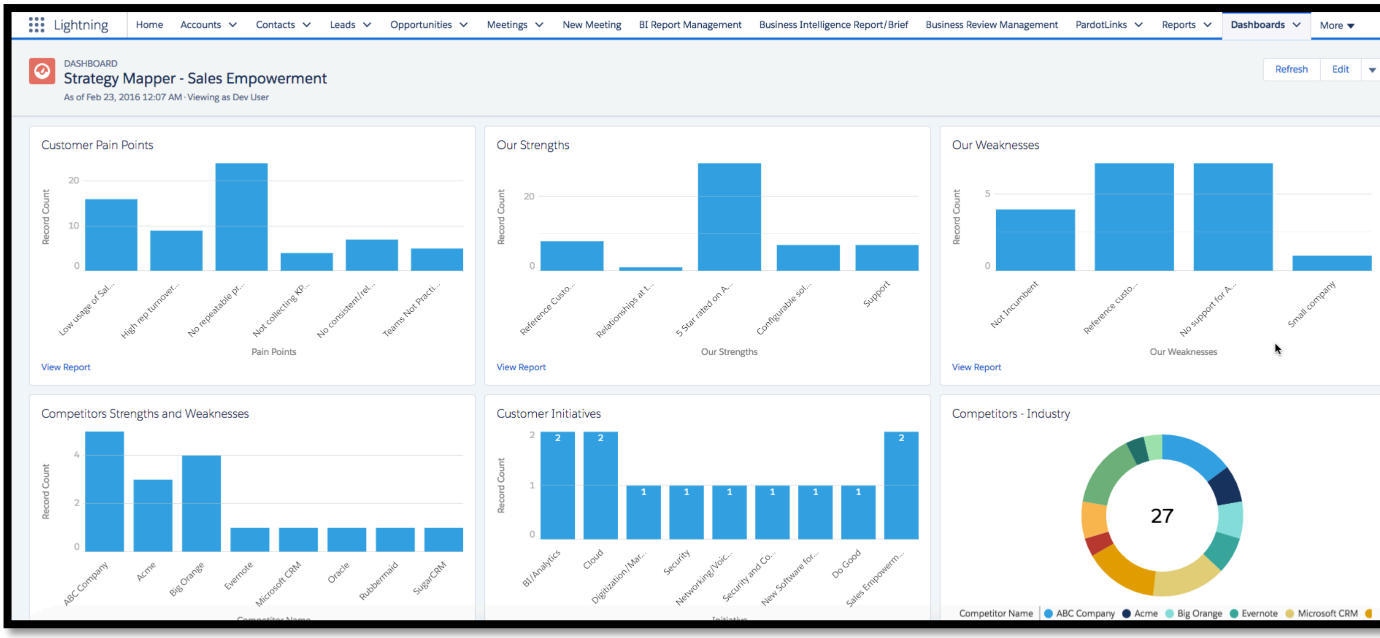
They are (figure 1):

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

Figure 1

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.



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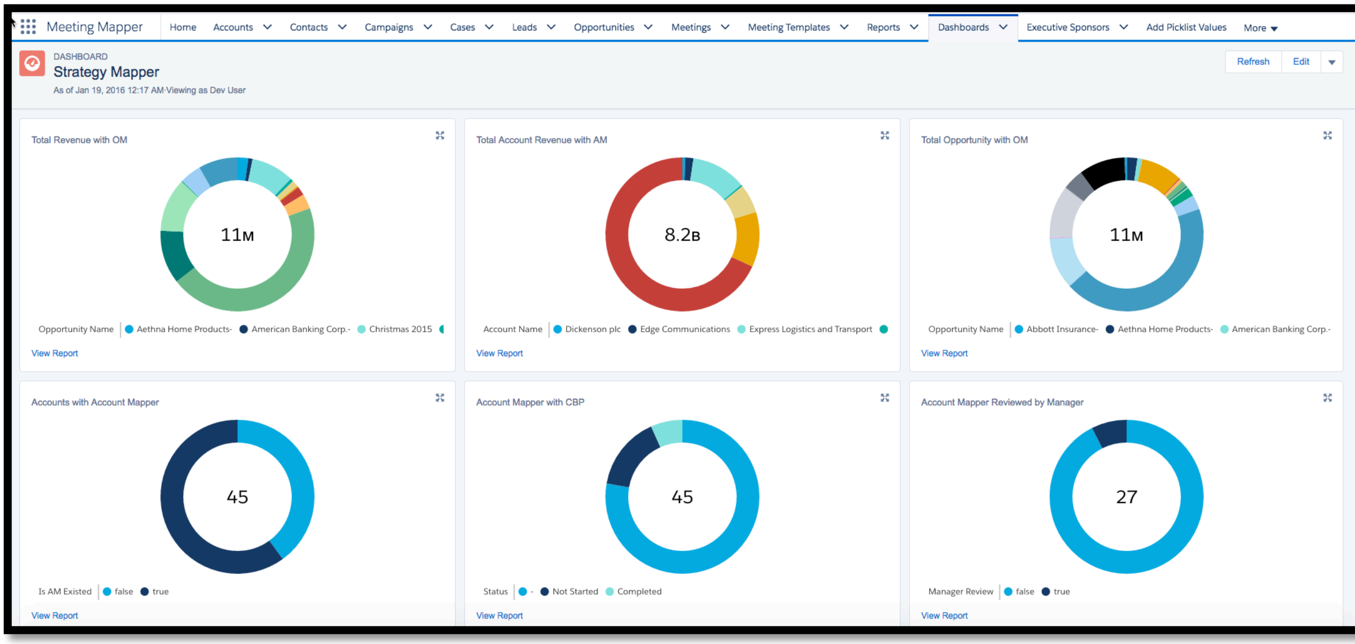

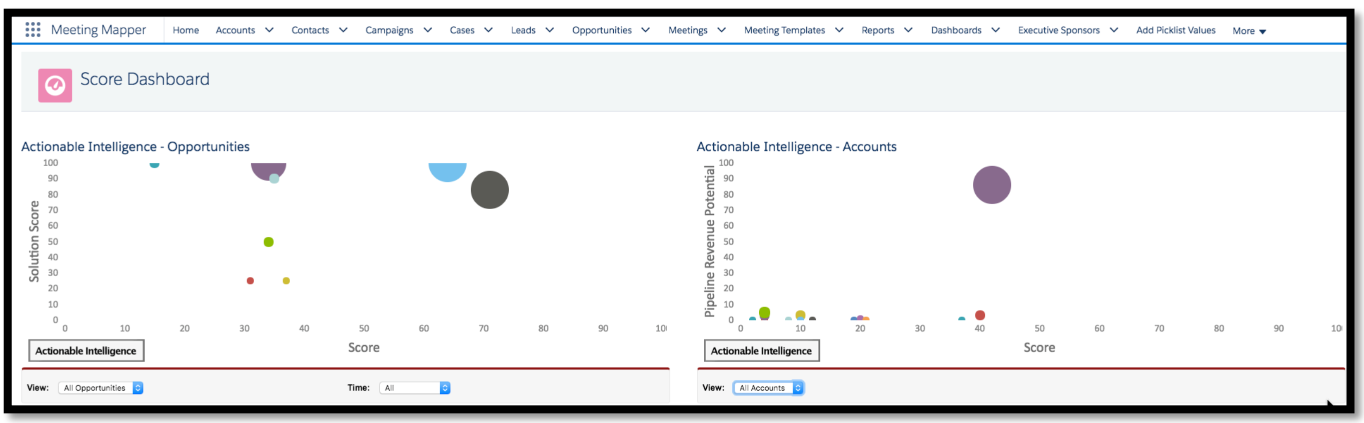

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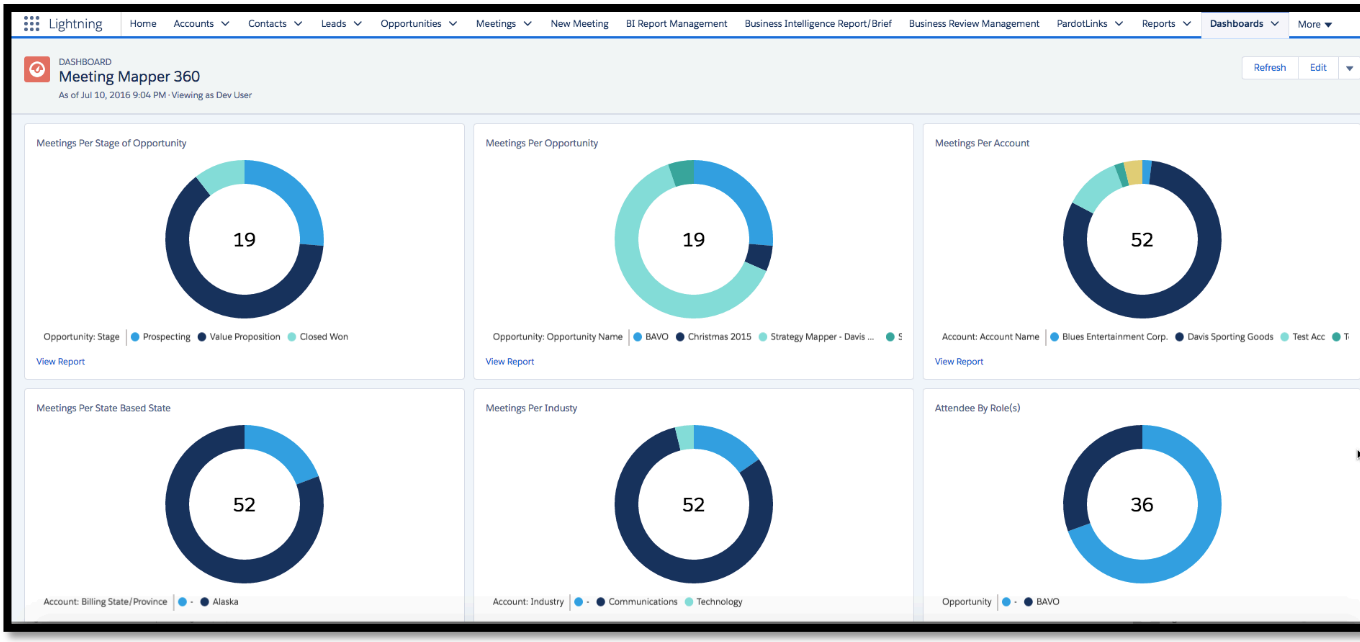
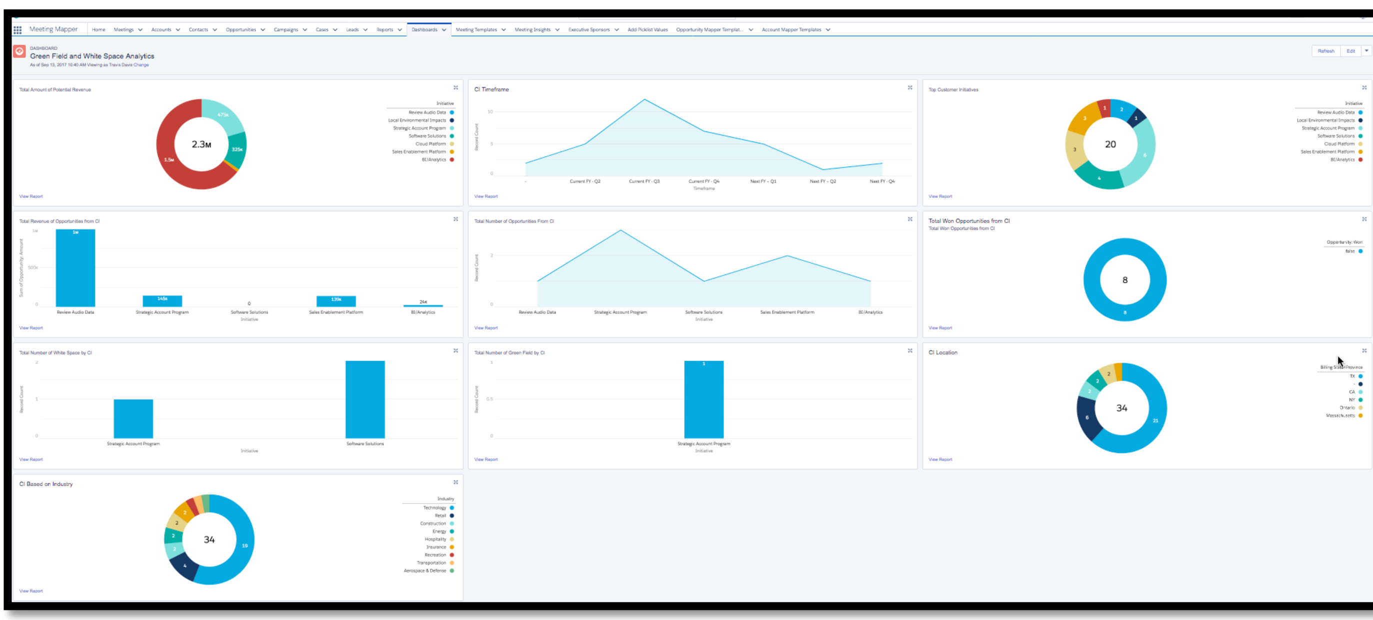


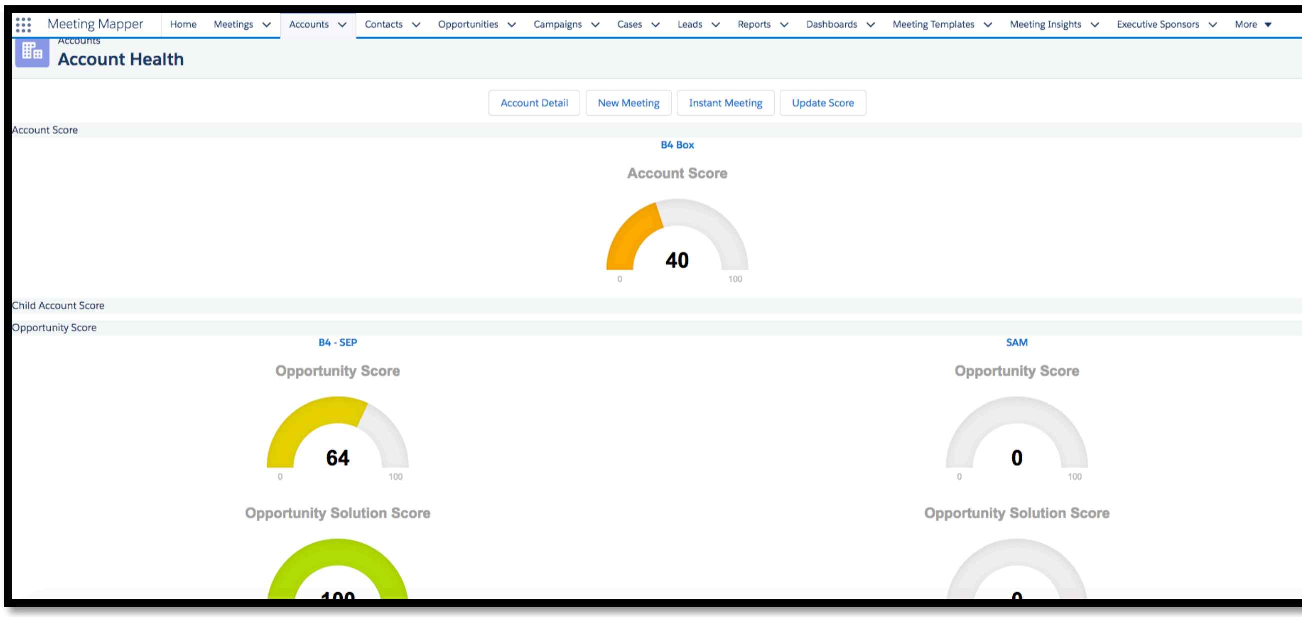


Account Mapper

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:



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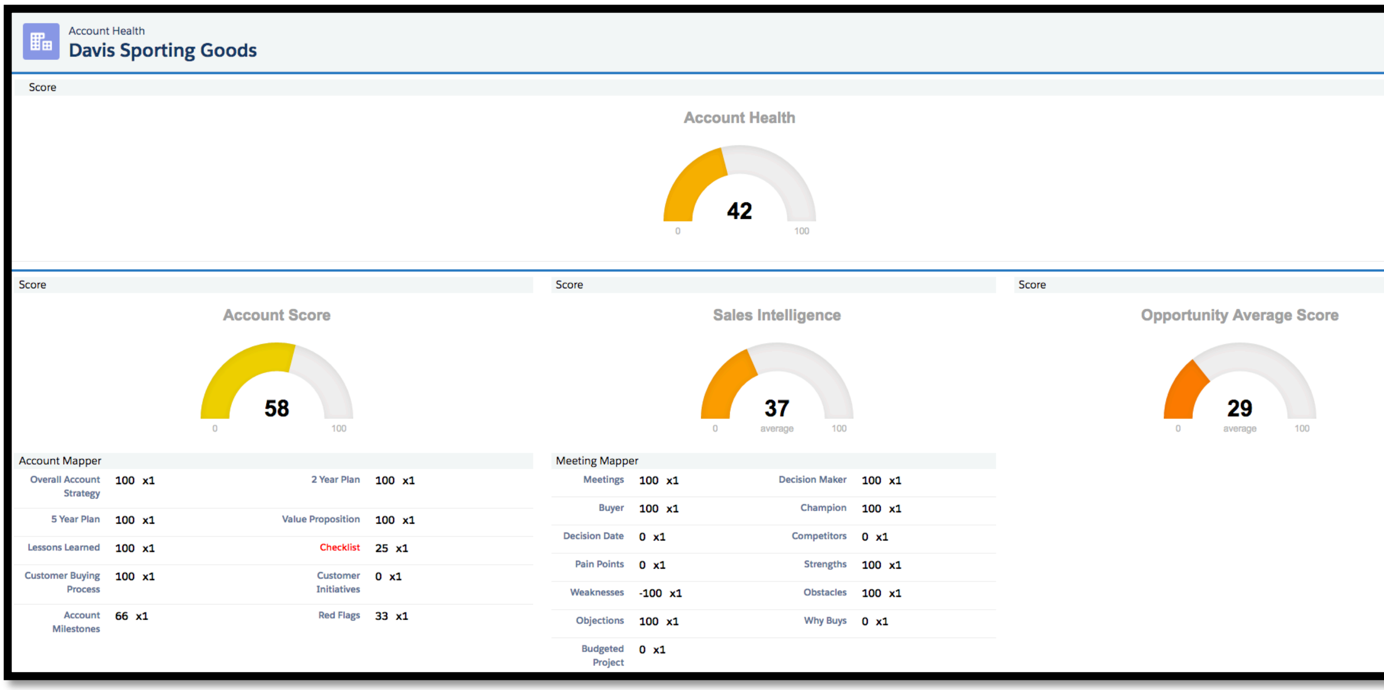
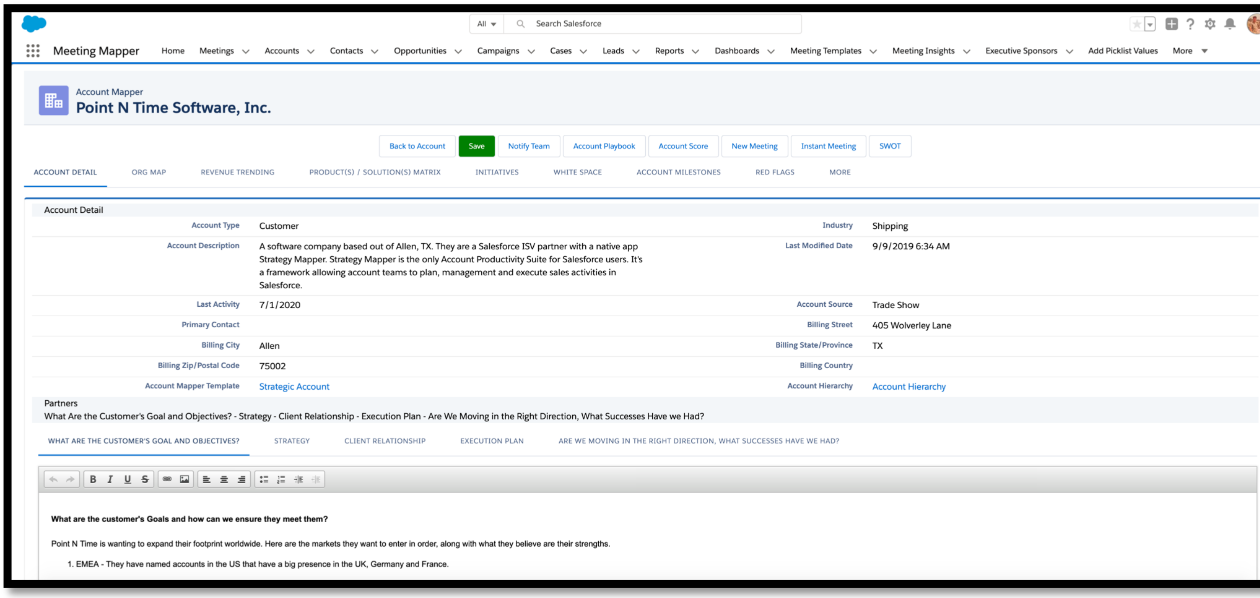
Account Health real-time overall health of the account. This score is based the score of the account, sales intelligence and average opportunity score. The Account Score is based on only the plan for this account, Sales Intelligence is based on information gather in interactions with customers using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



Account Details

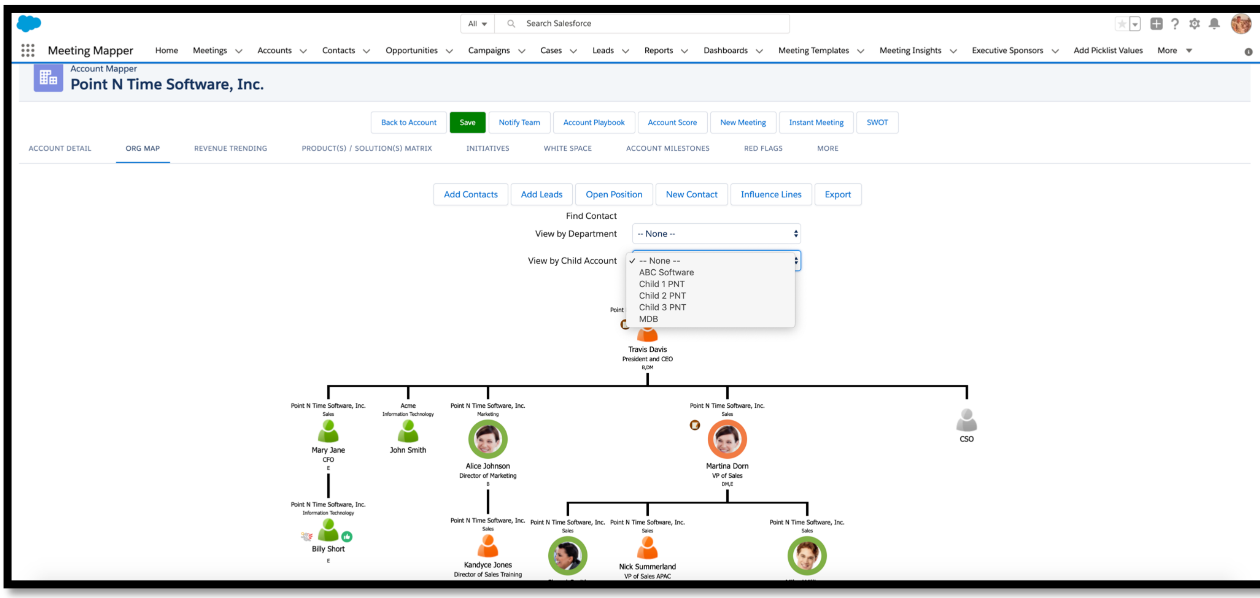
The account strategy, 6, 12 month plan, value proposition, lessons learned and much more. The labels can be changed to better depict your taxonomy or sales terminology.

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

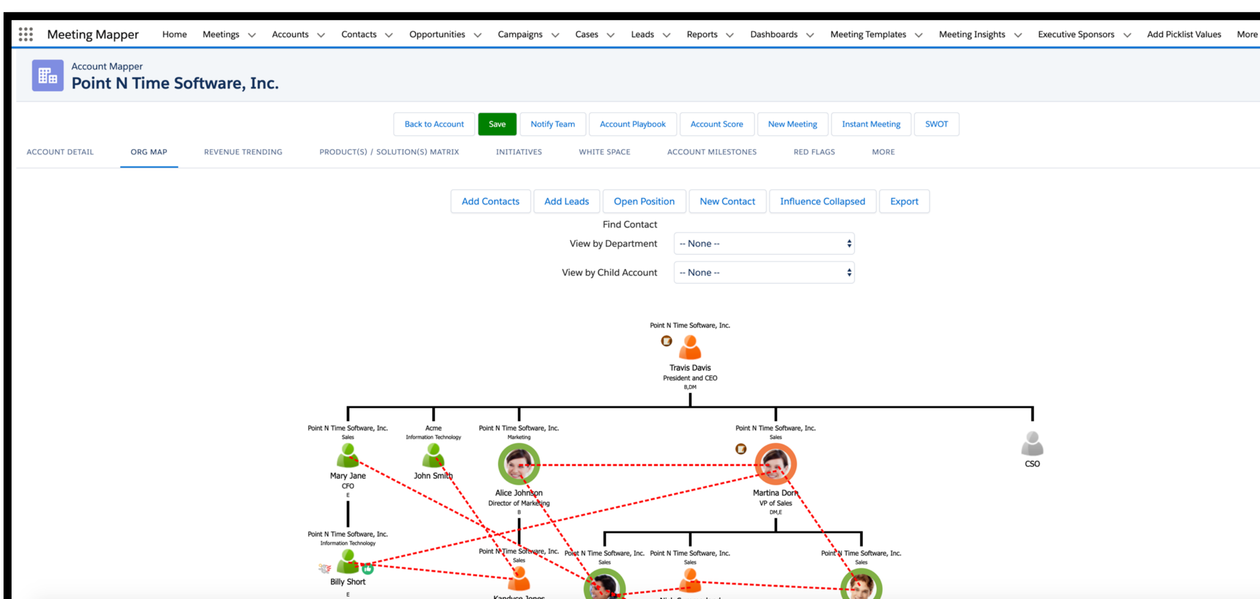


Org Map

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.

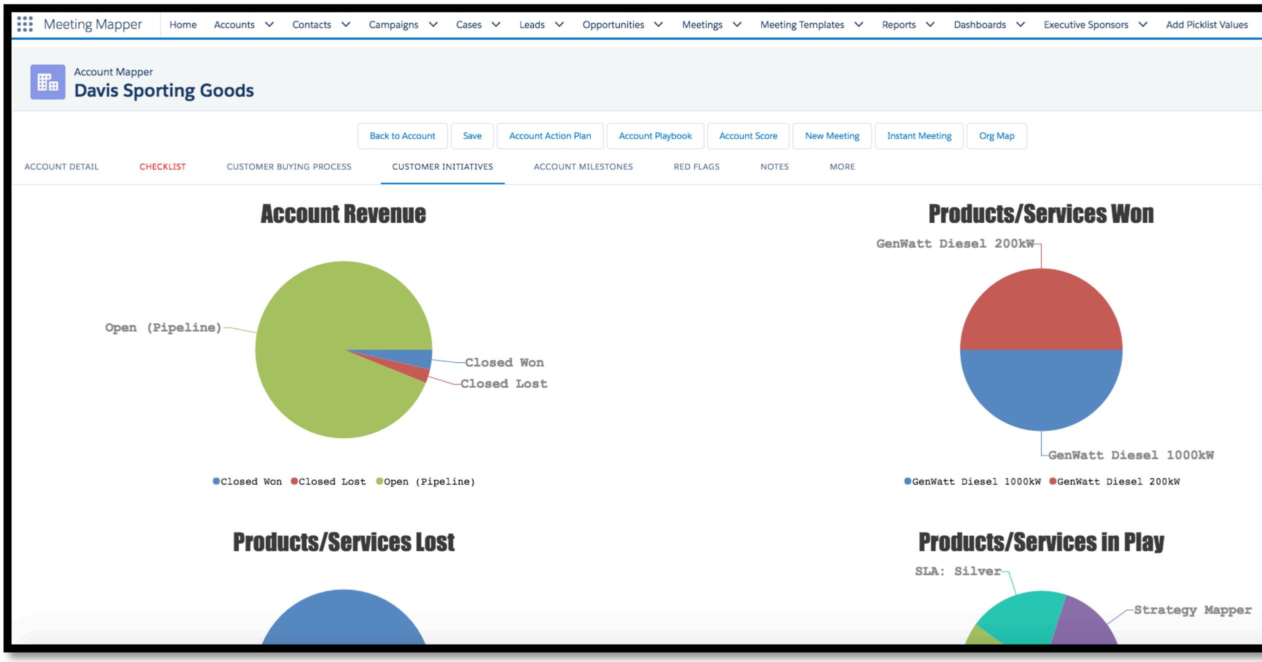


The Org Map can also display influence lines between contacts. Hovering over the line will give details regarding the link.



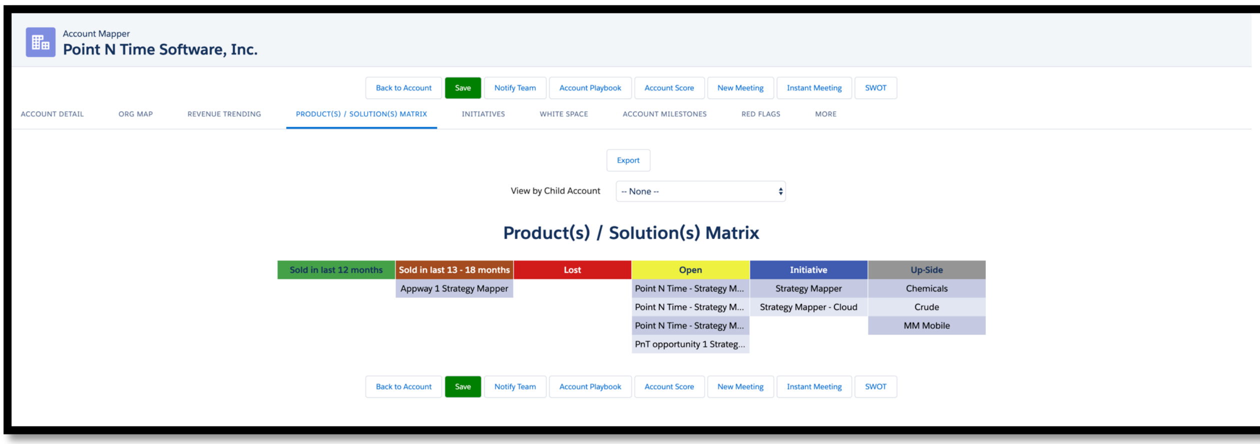
Revenue Trending

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.



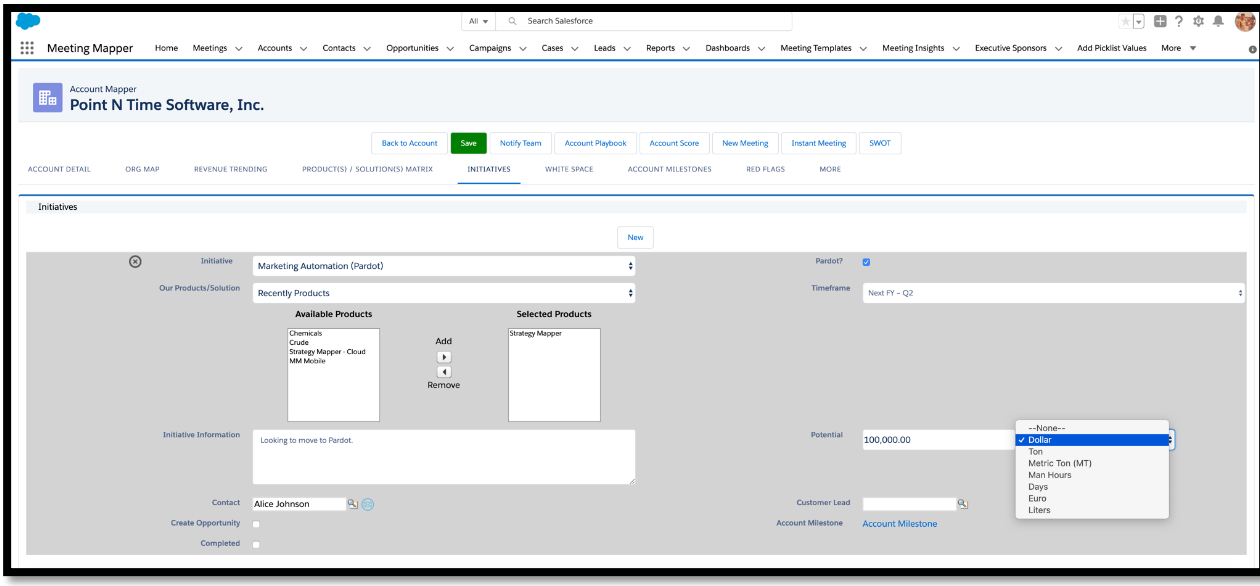
Product(s) / Solution(s) Matrix

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.



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.



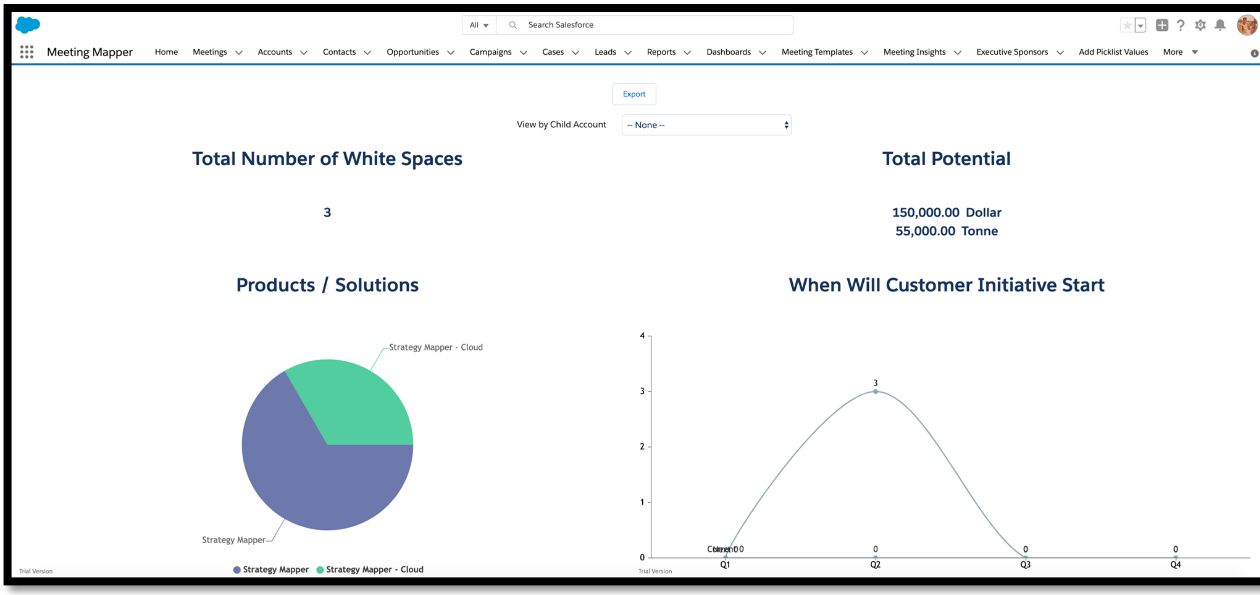
White Space / Green Field

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.

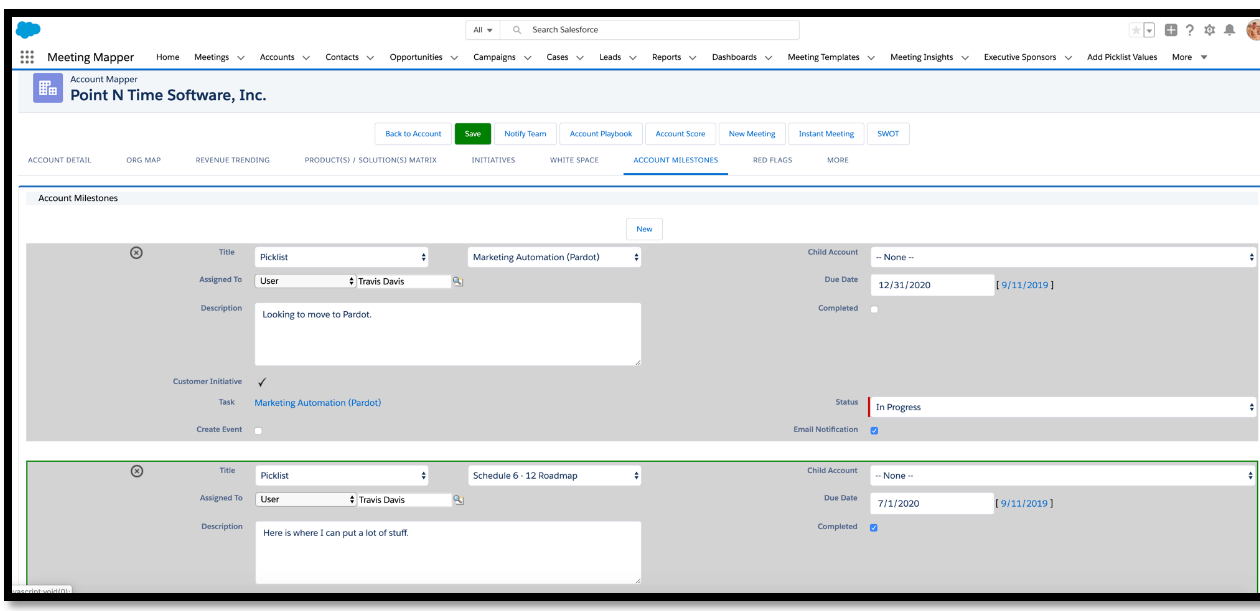
Green Field – Account Type is Prospect

White Space – Account Type is Customer



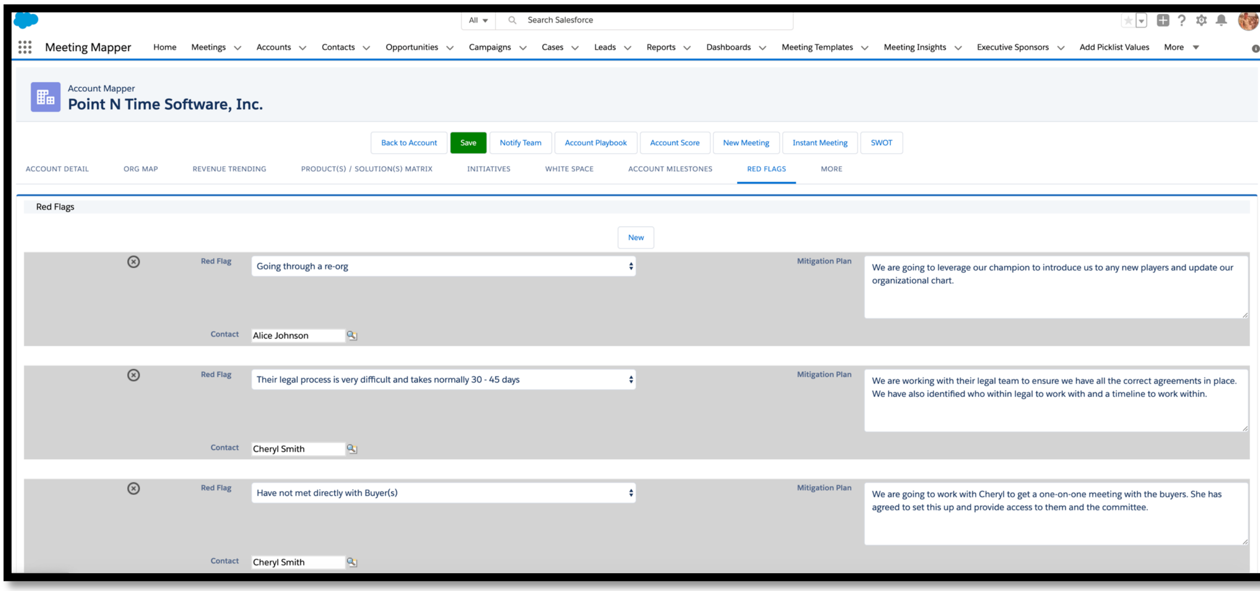
Account Milestones

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



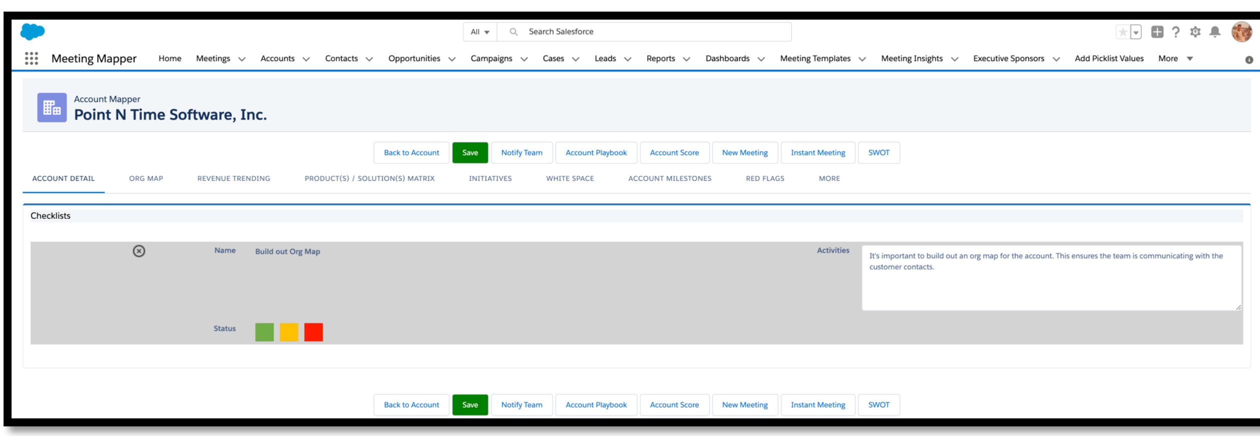
Account Red Flags

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.



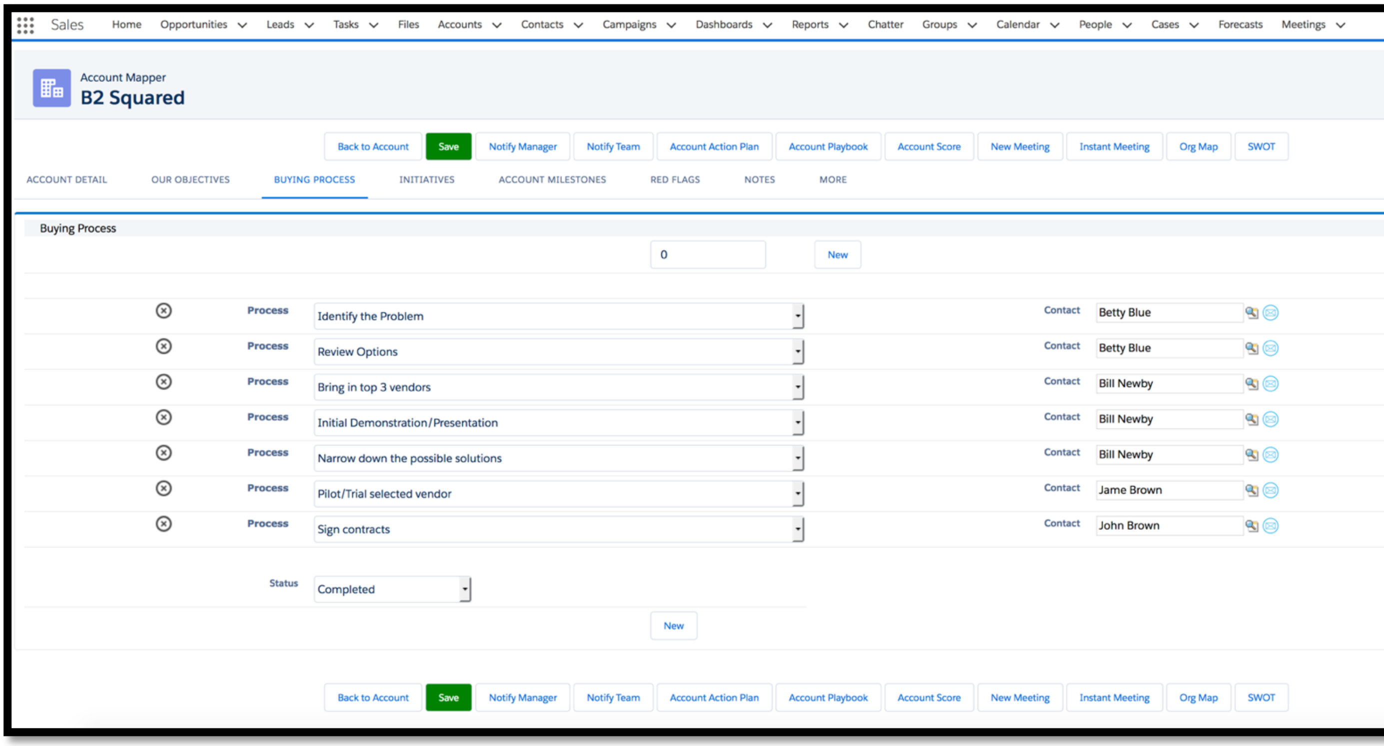
Checklist

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.



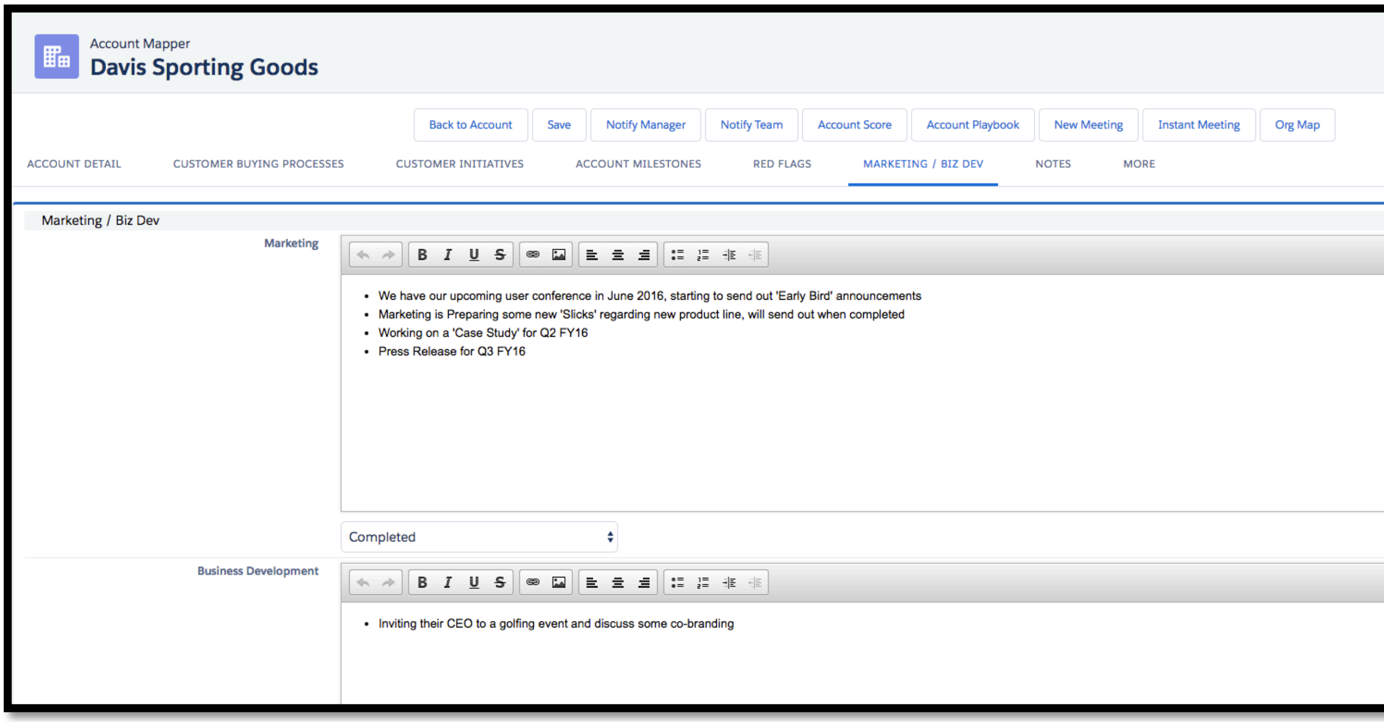
Buying Process

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.



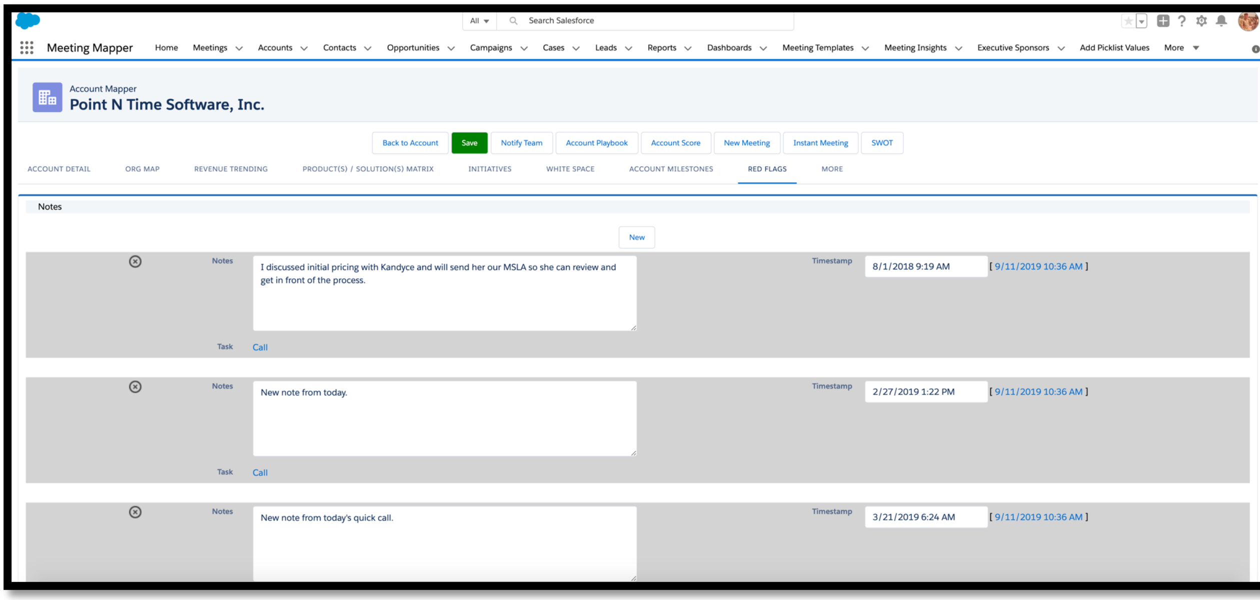
Marketing and Business Development

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



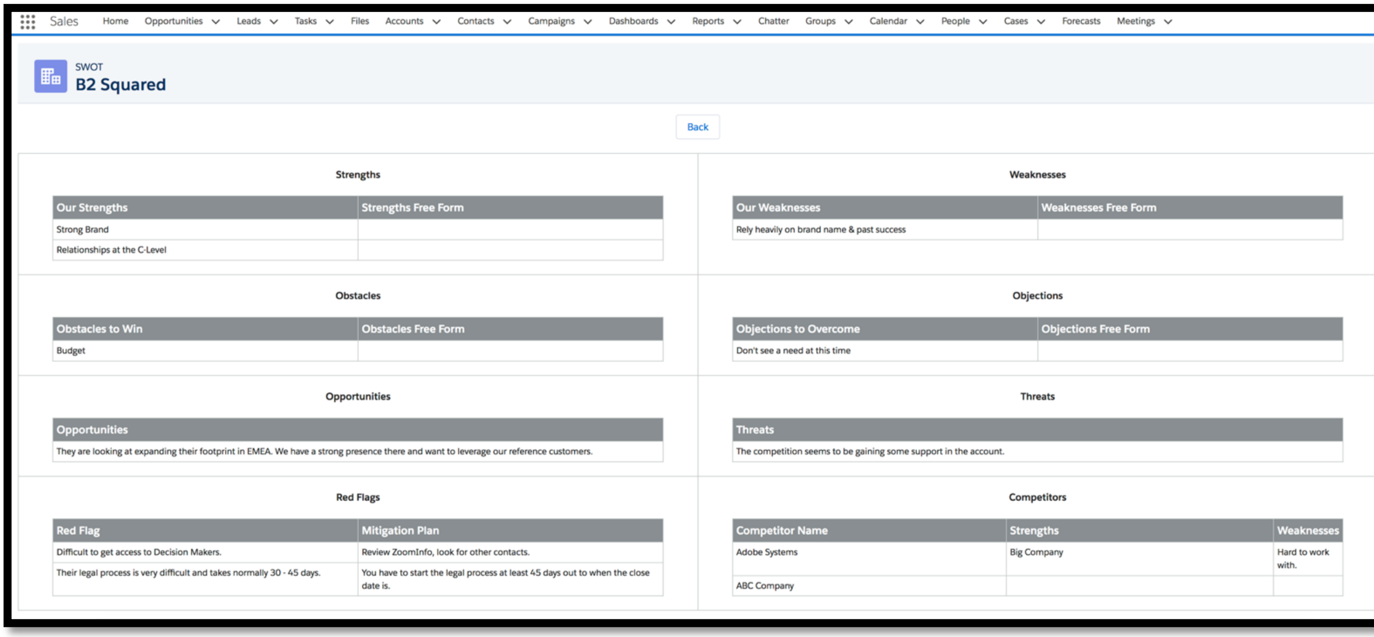
Notes

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.



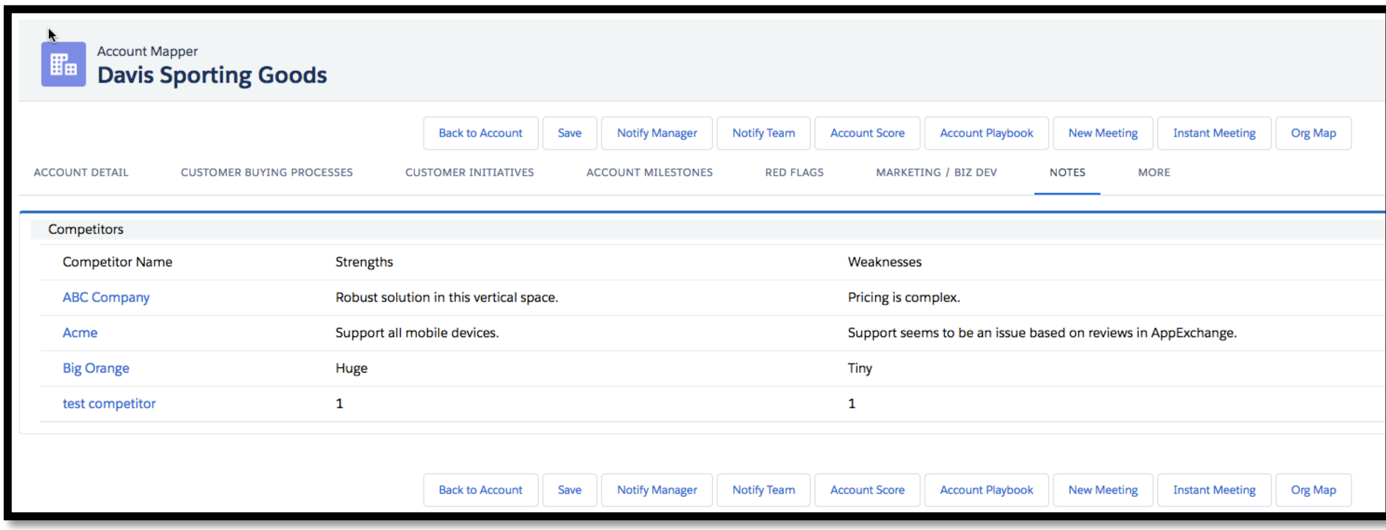
SWOT Analysis+

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.



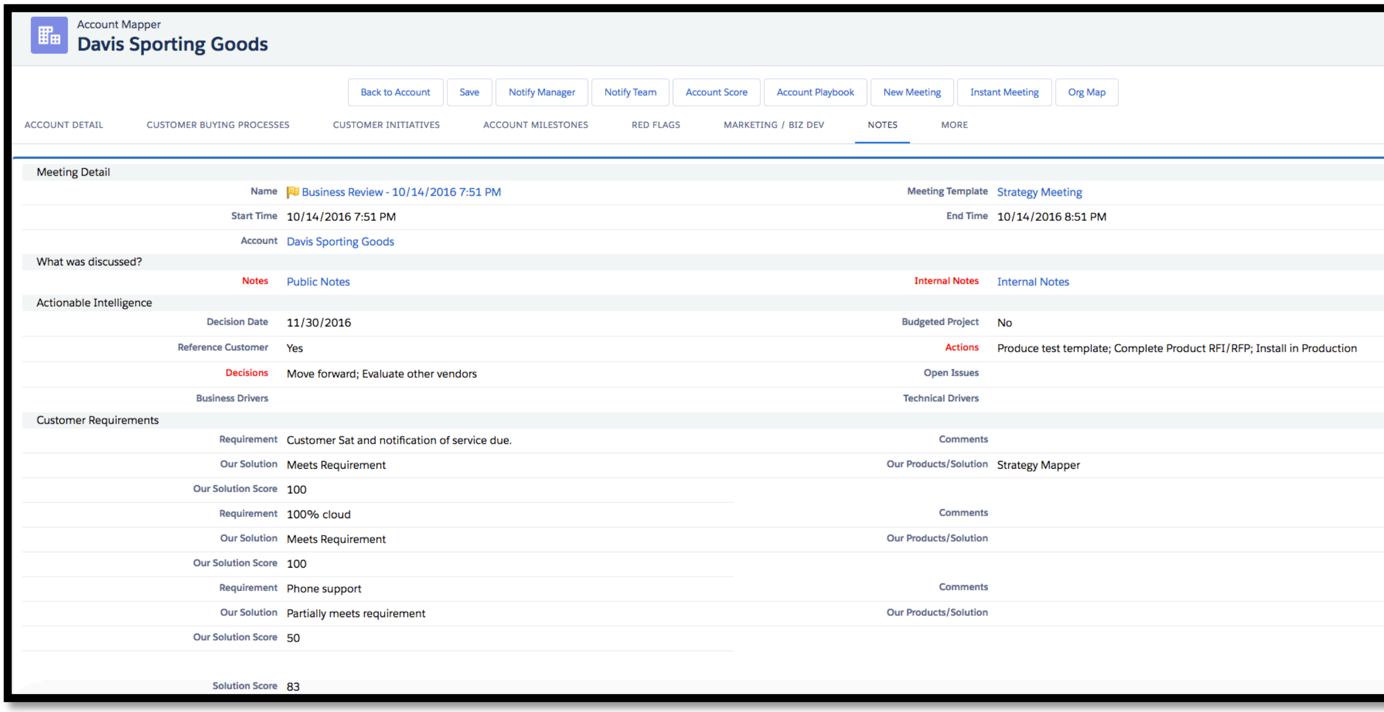
Competitors

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



Track Meetings

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

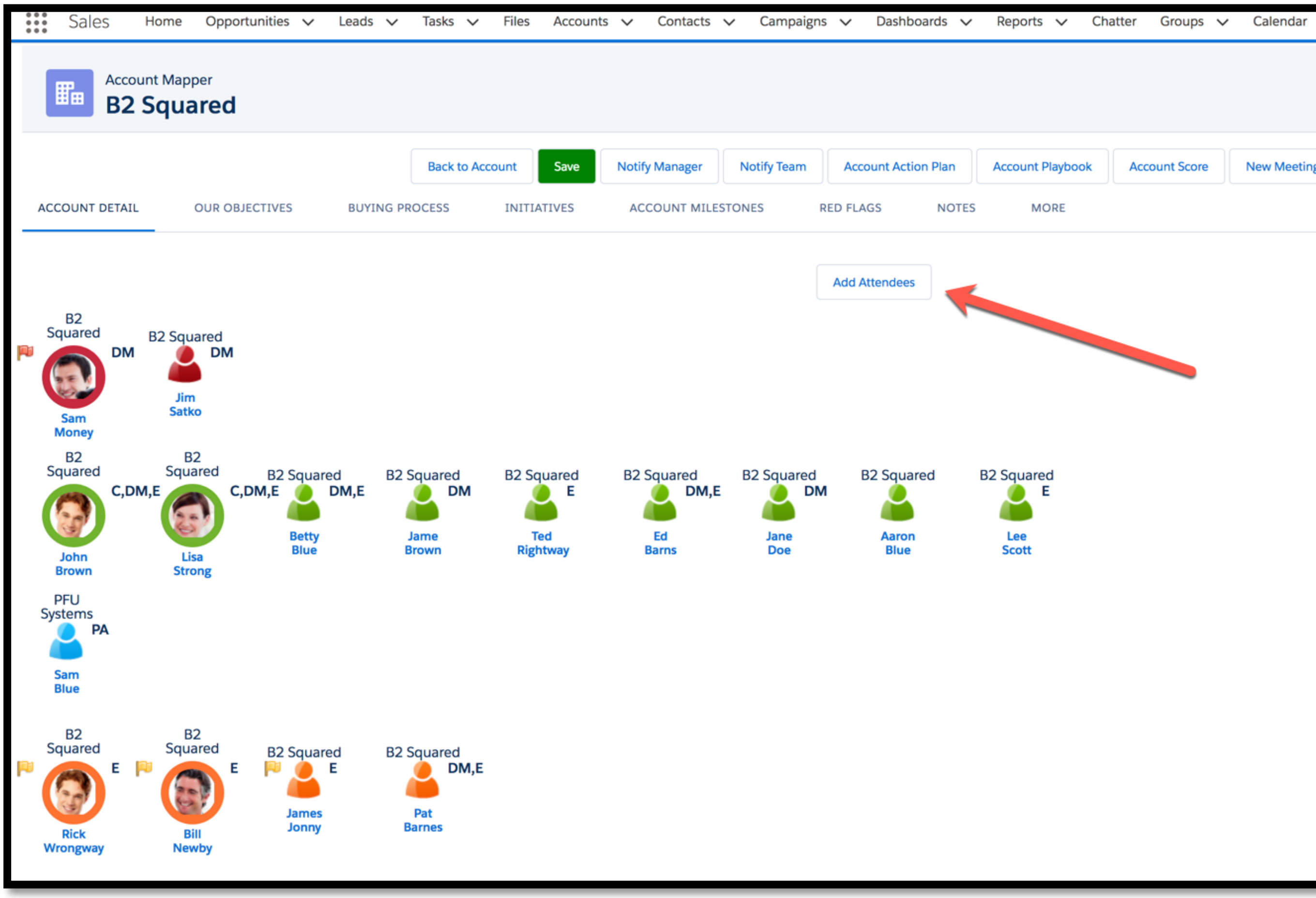


Account Timeline

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

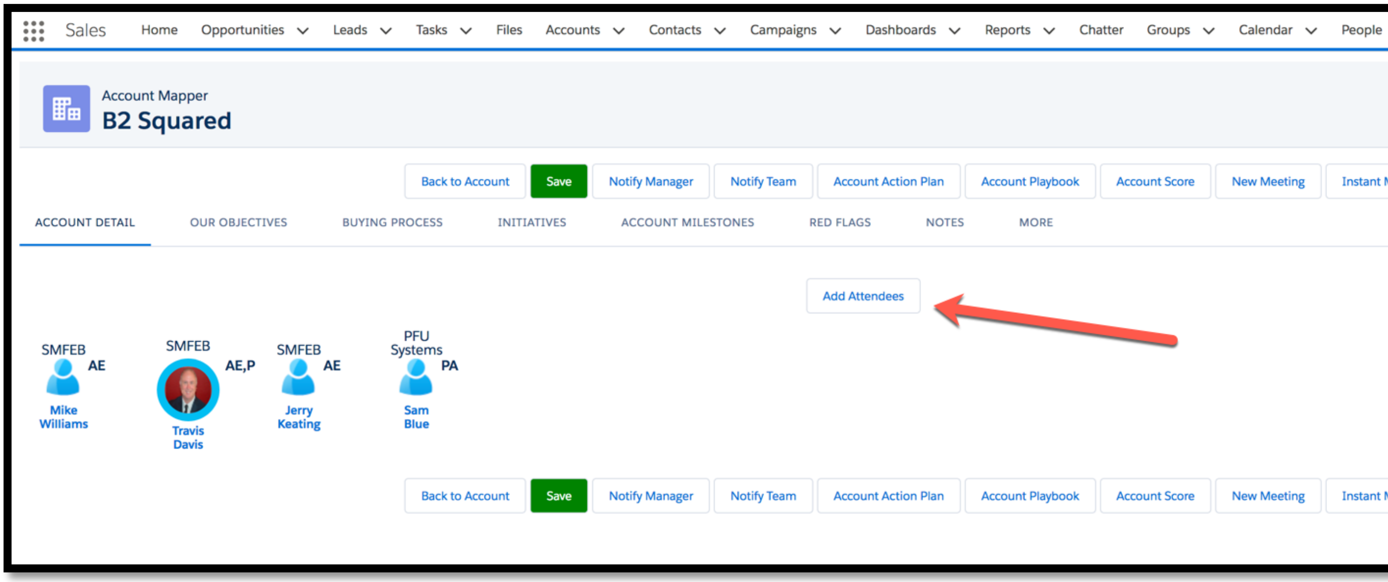
Customer Team

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.



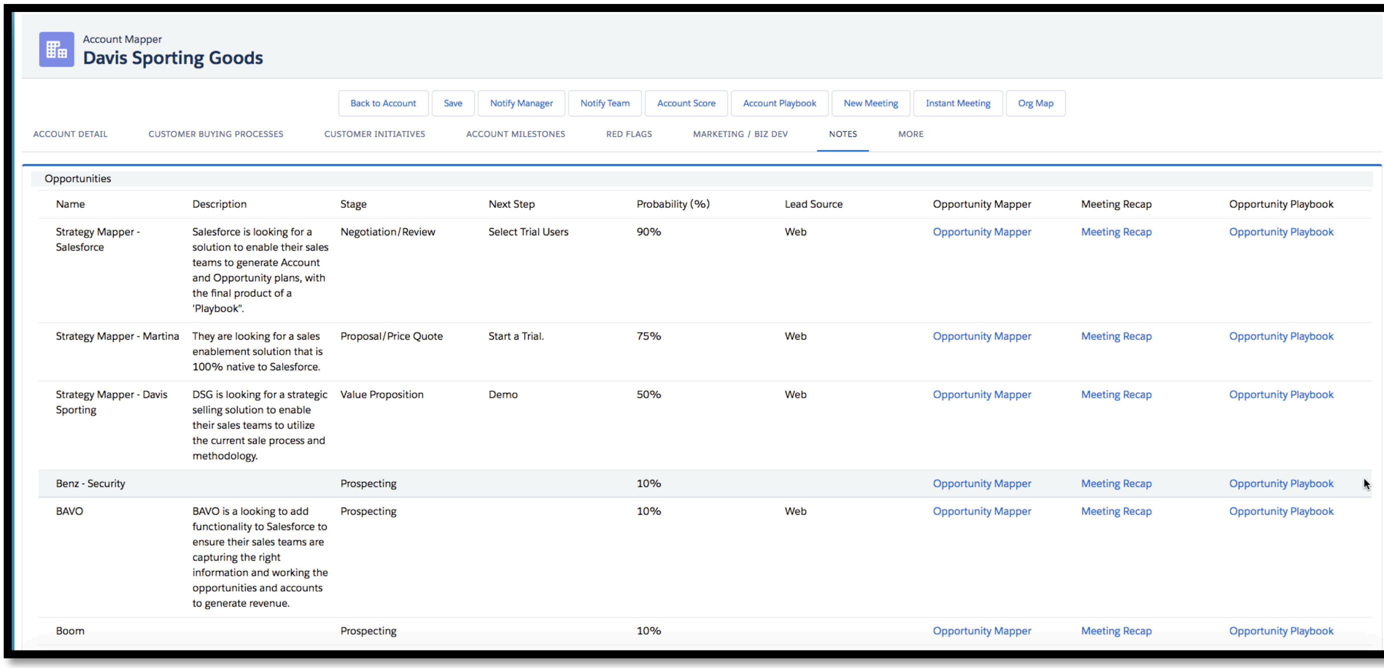
Account Team

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



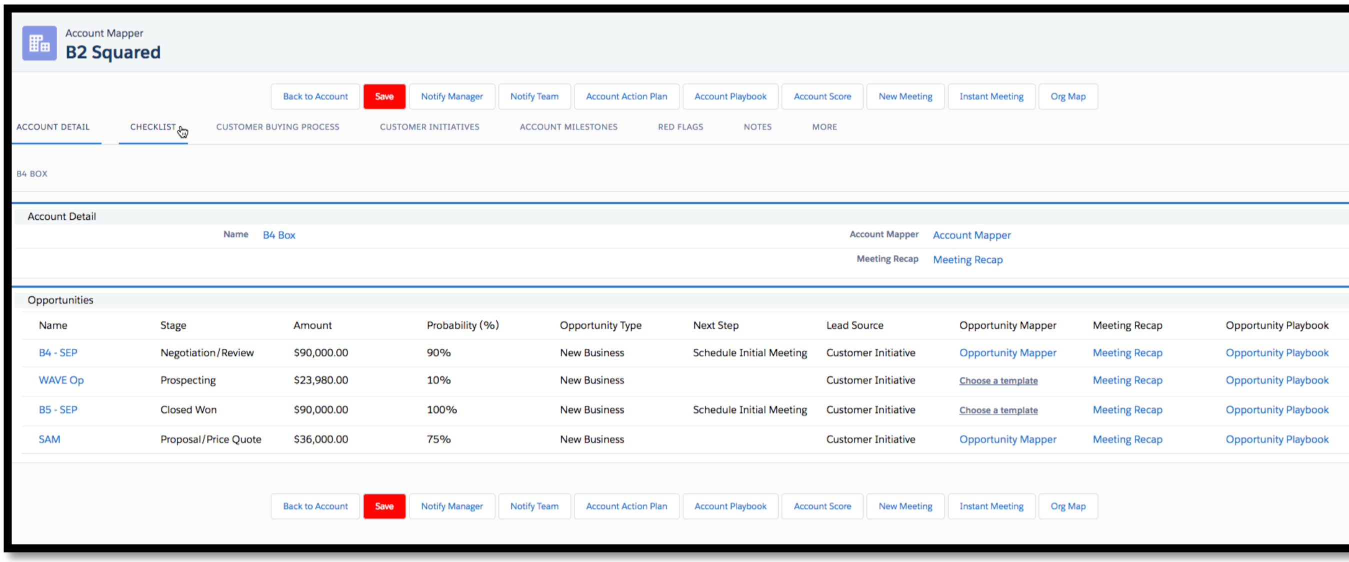
Opportunity Overview

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



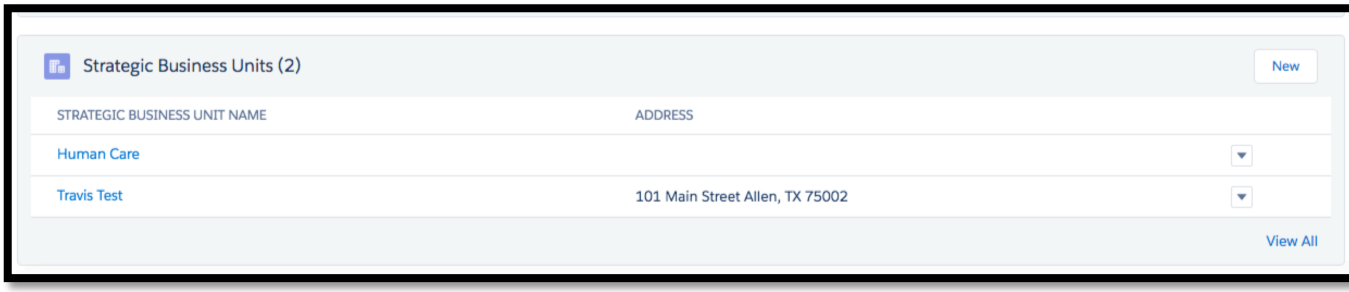
Child Accounts

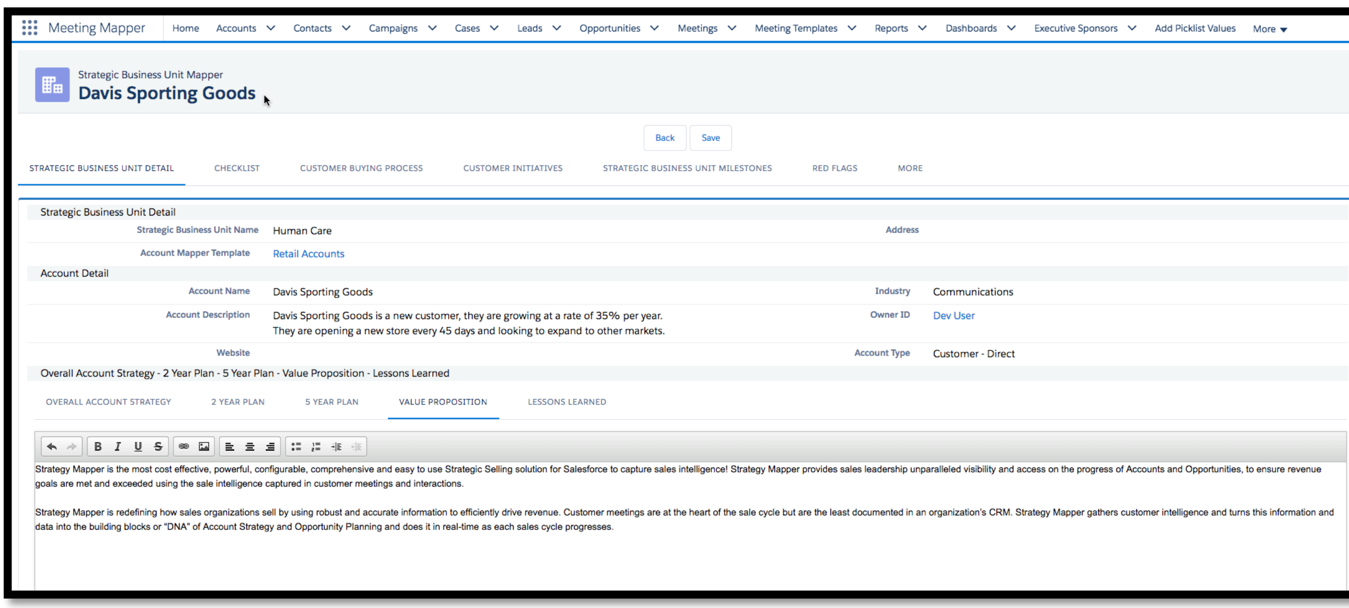
This provides easy navigation to Child Accounts, account plan, any opportunity, their playbook and Meeting Recap.



Strategic Business Units

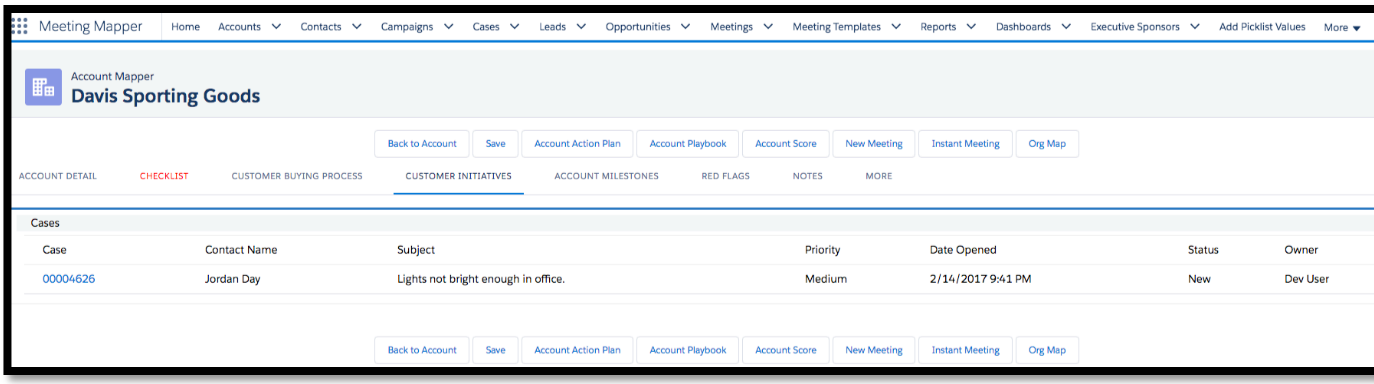
Strategy Mapper provides the ability to create Strategic Business Units as children of an account. There is only basic functionality, however you can create Strategic Business Unit plans using the same type of information in Account Mapper.





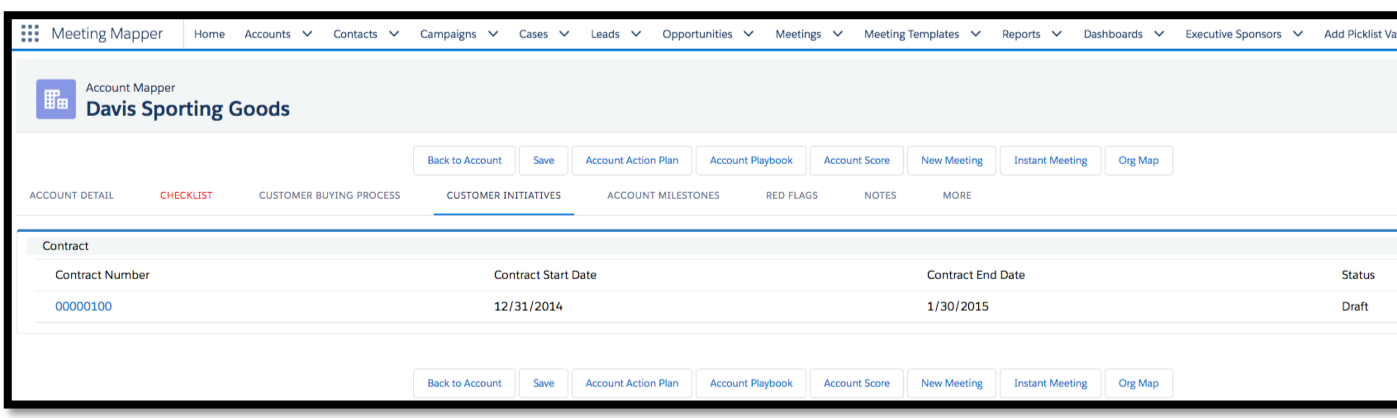
Cases

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



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 3rd party objects (Applications).



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.

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	

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.

StrategyMapper

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.	
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

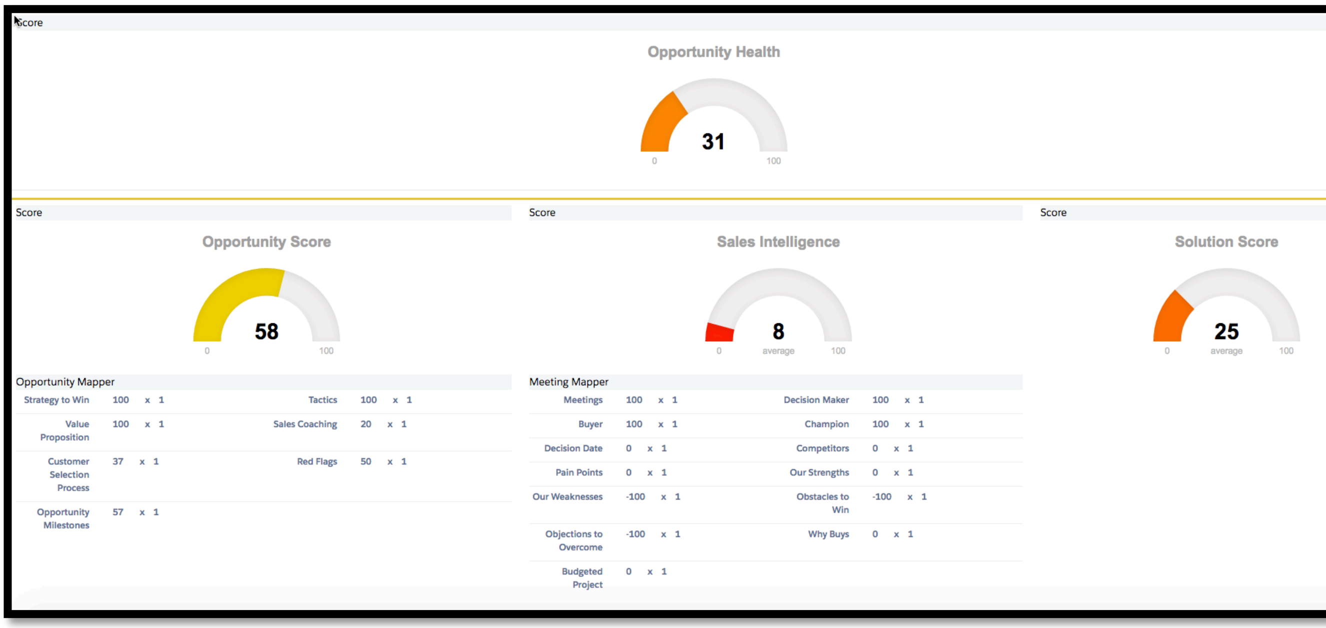
Title	Due Date	Assigned To	Description
CRM			
Schedule a Health Check	10/31/2016	Admin User	Here is some additional information.

Red Flags

Opportunity Mapper

Opportunity Scoring

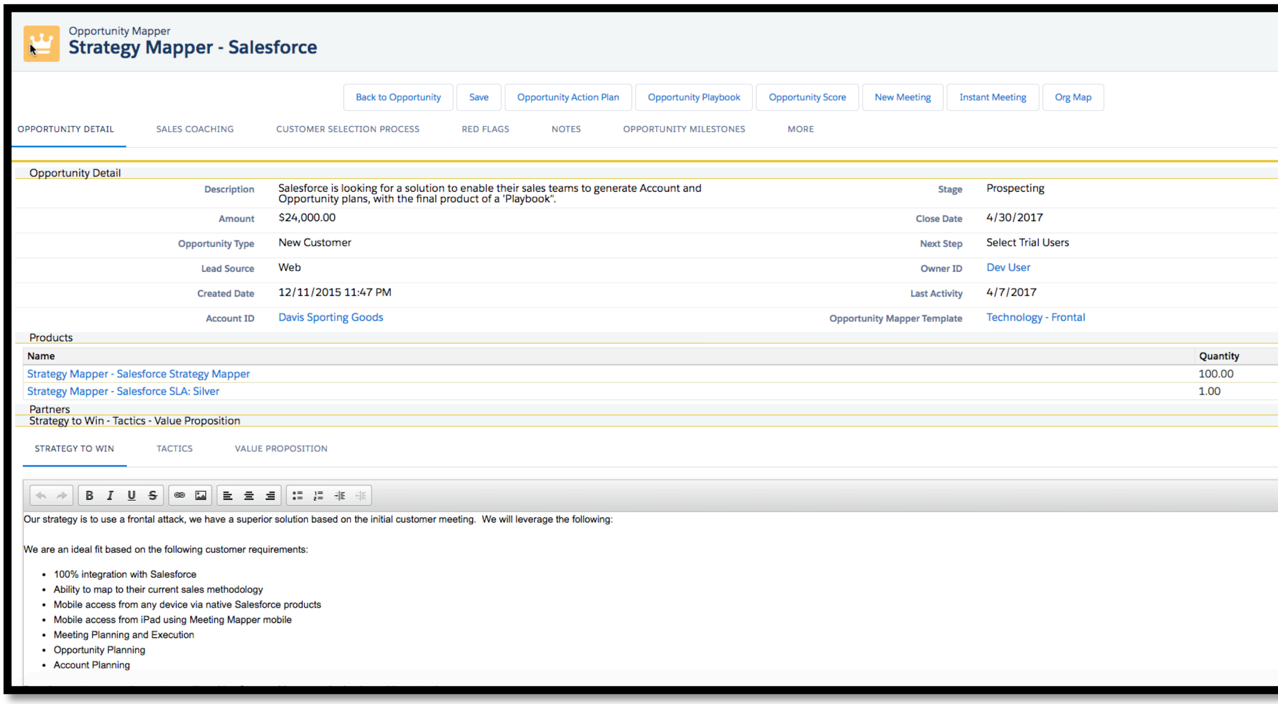
The opportunity score is comprised of the Opportunity Health, overall view of the health of the opportunity. It includes Opportunity Score, this takes into what has been completed in the opportunity plan. Sales Intelligence Score is driven but what has been gathered in customer meetings using Meeting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



Opportunity Details

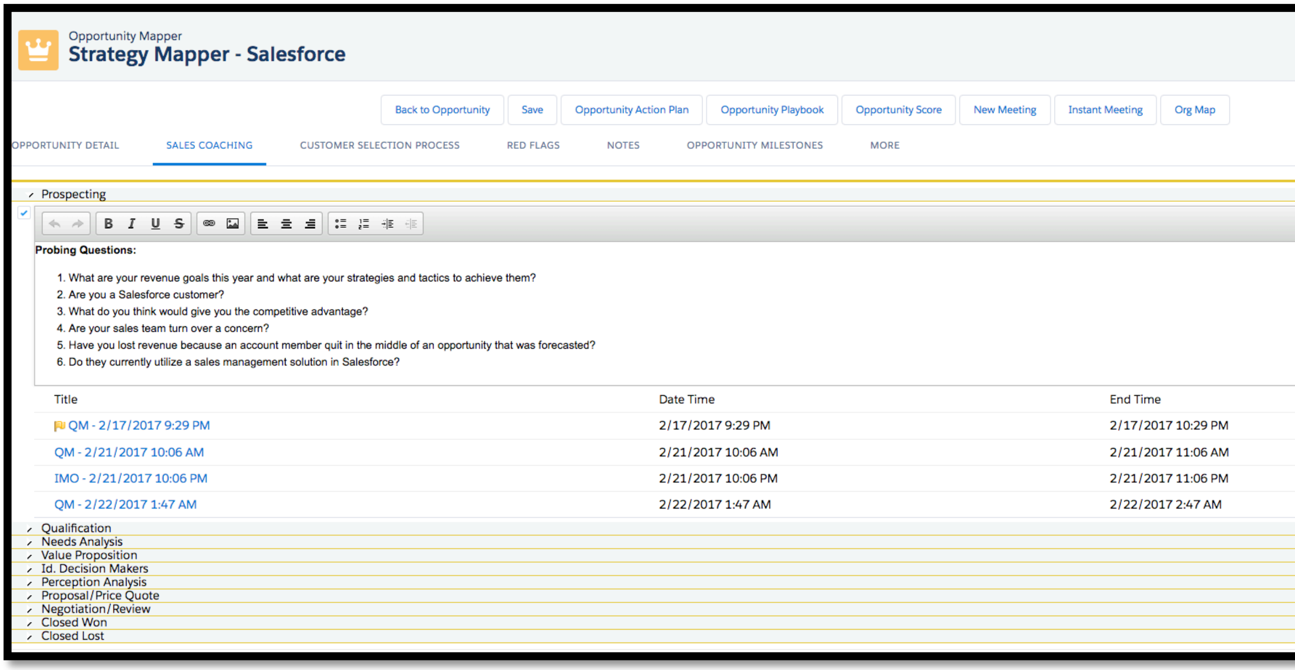
Strategy, Tactics and Value Prop and much more for the opportunity and much more. These labels are configurable.

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



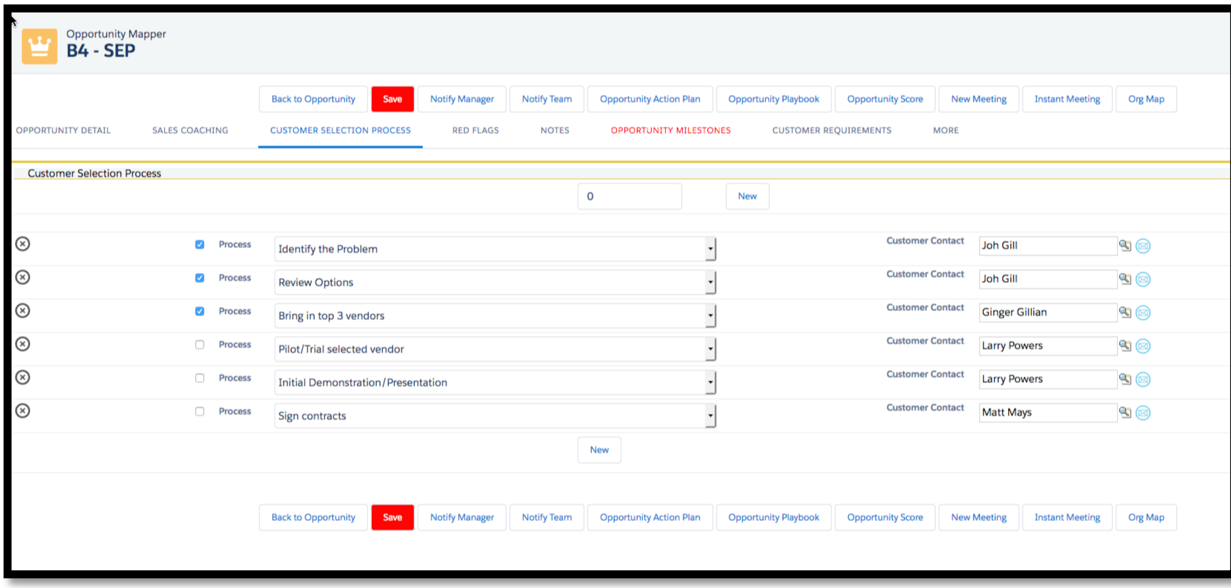
Sales Coaching

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.



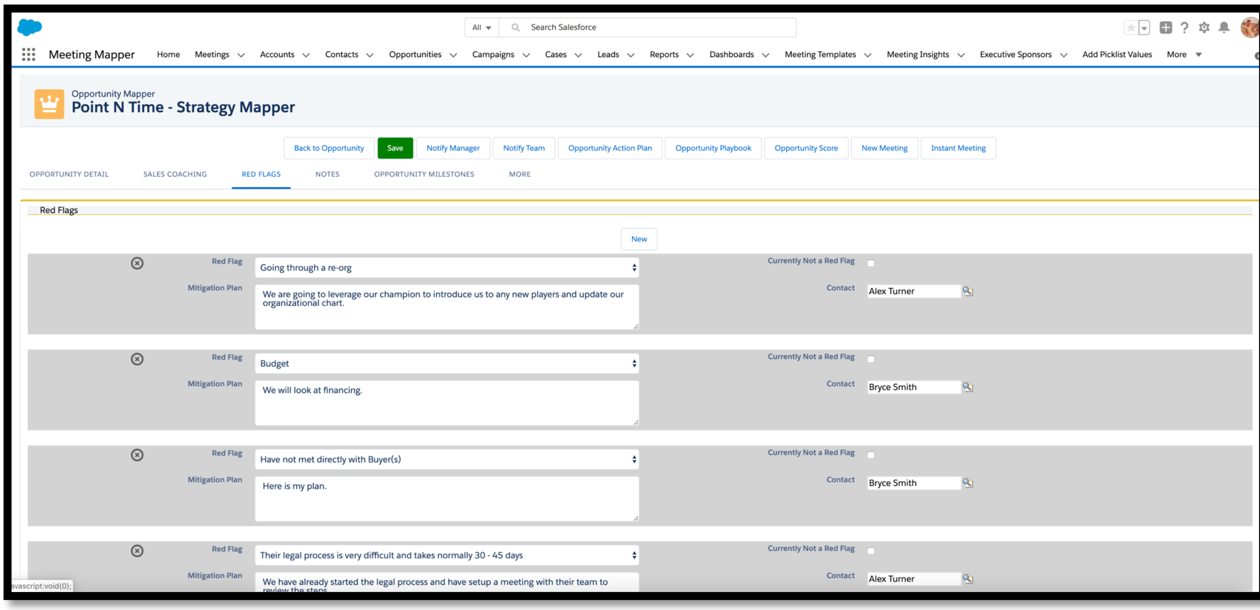
Selection Process

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.



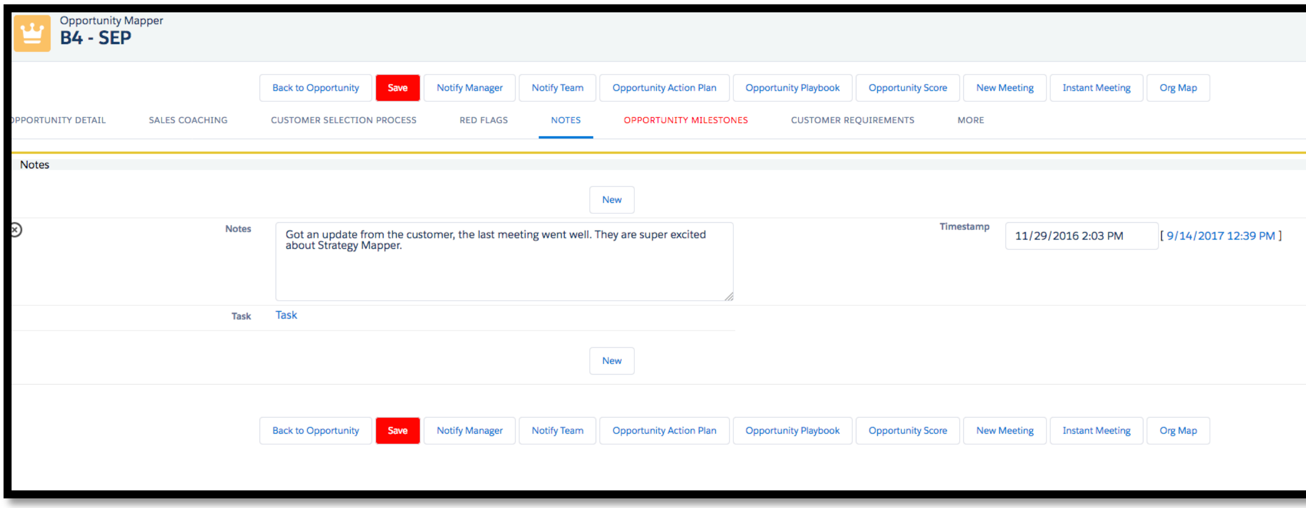
Opportunity Red Flags

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.



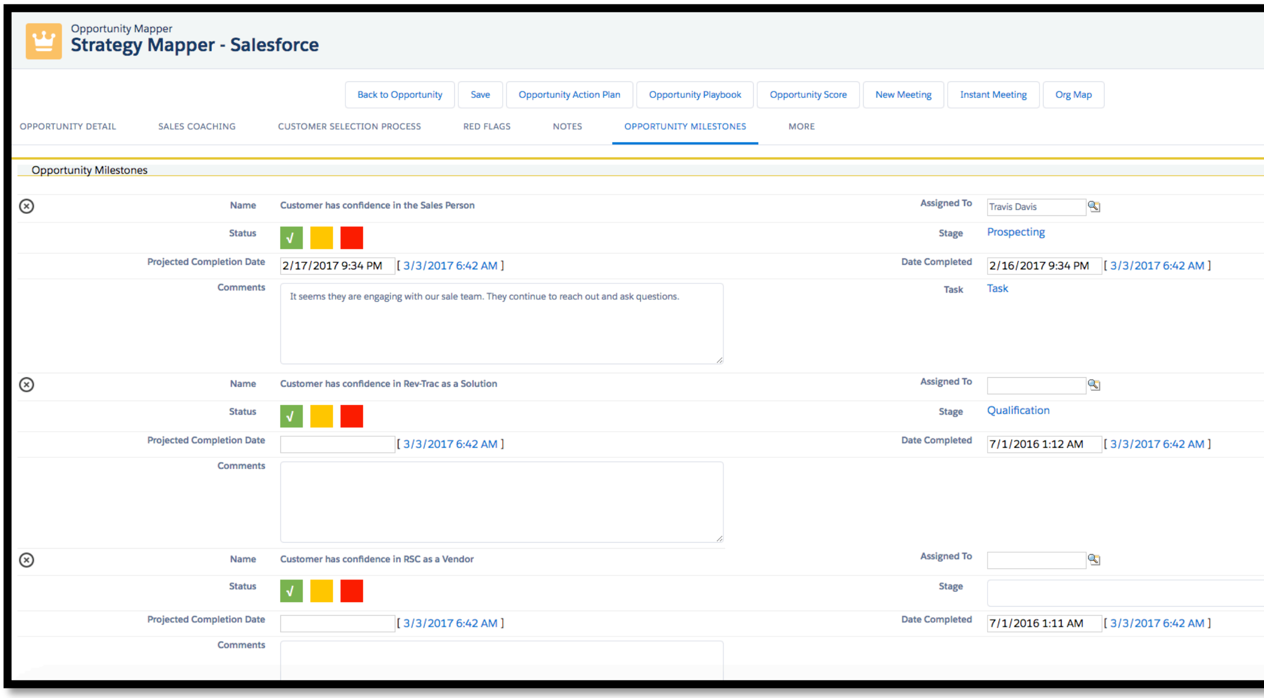
Notes

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



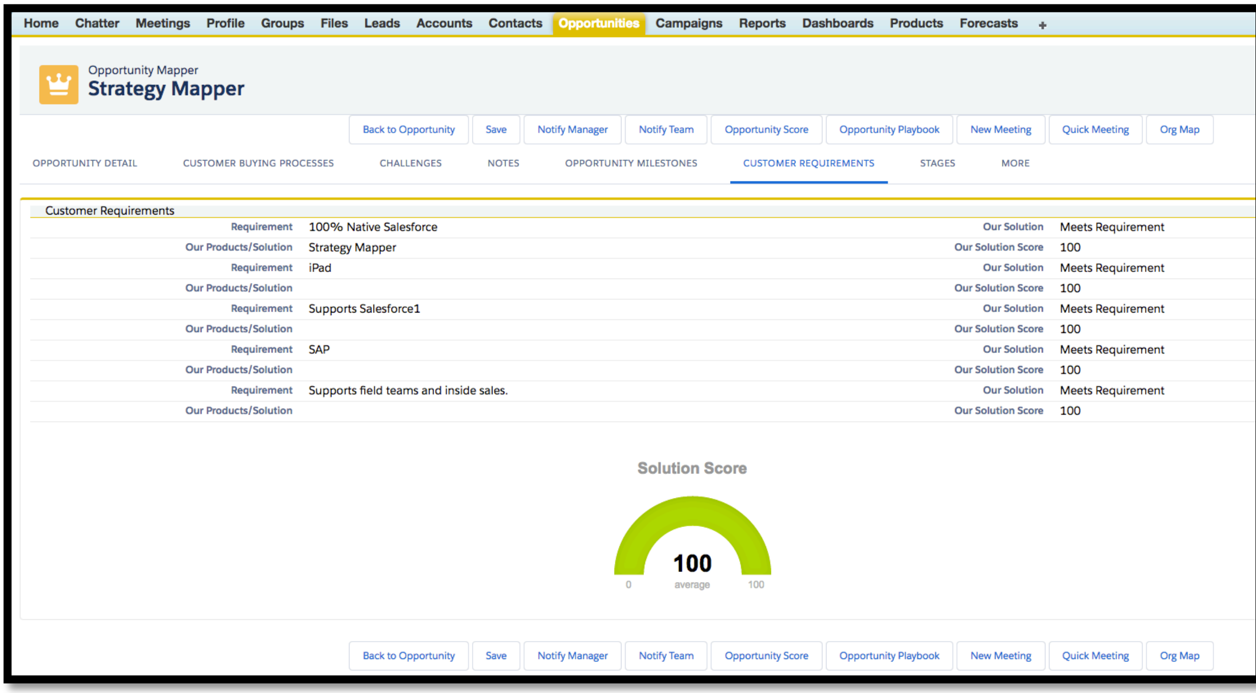
Opportunity Milestones

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.



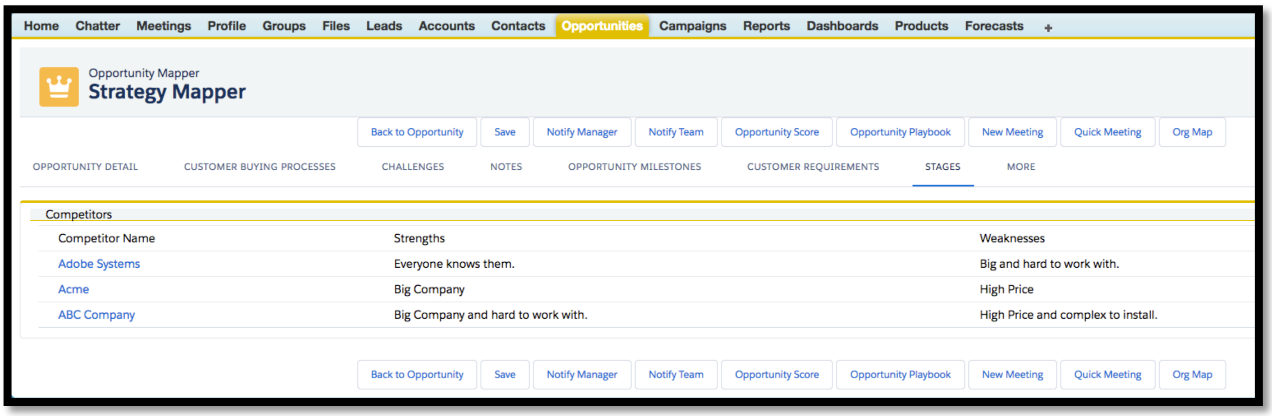
Customer Requirements

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.



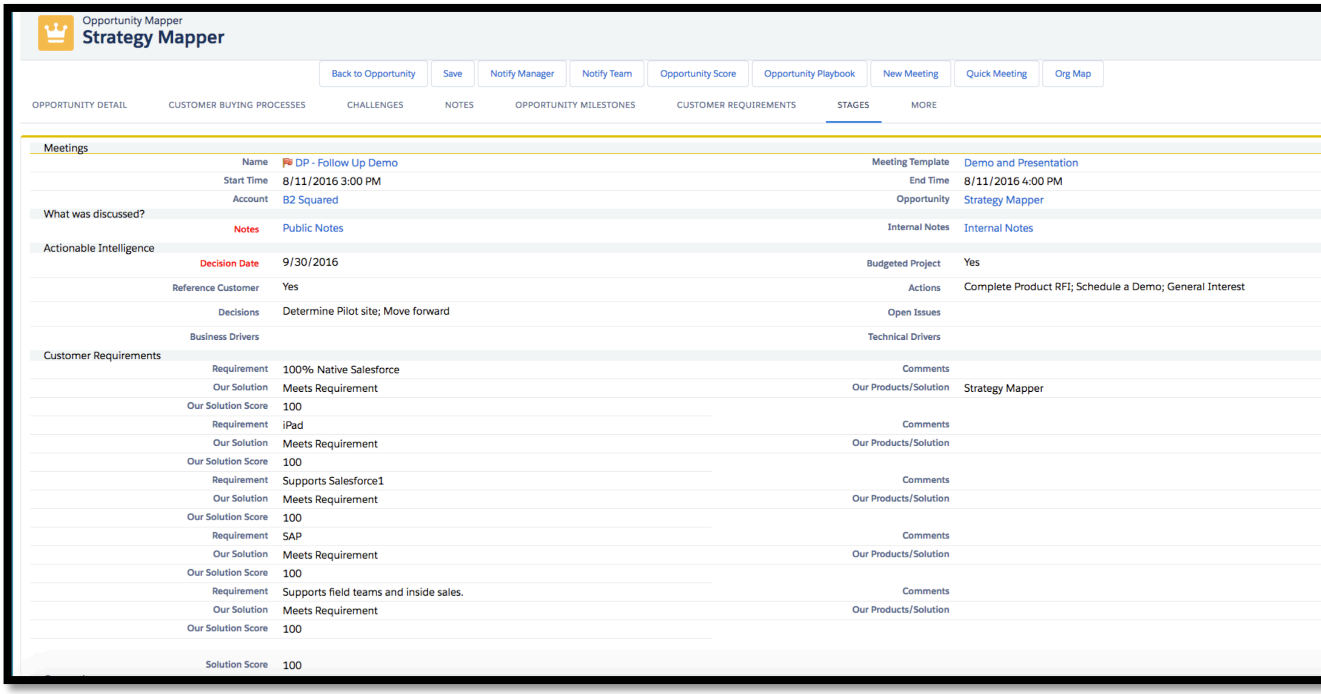
Competitors

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.



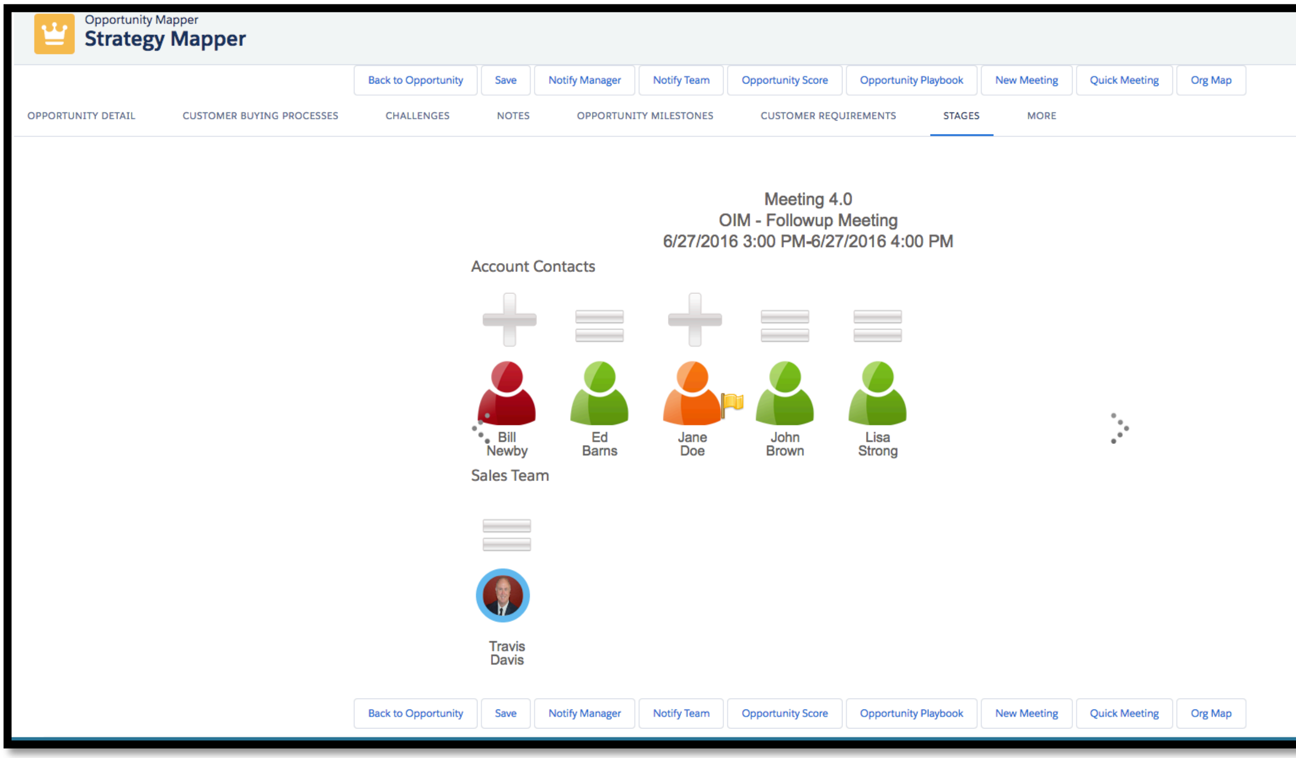
Meetings

Meeting Mapper meetings are automatically included in Opportunity Mapper.



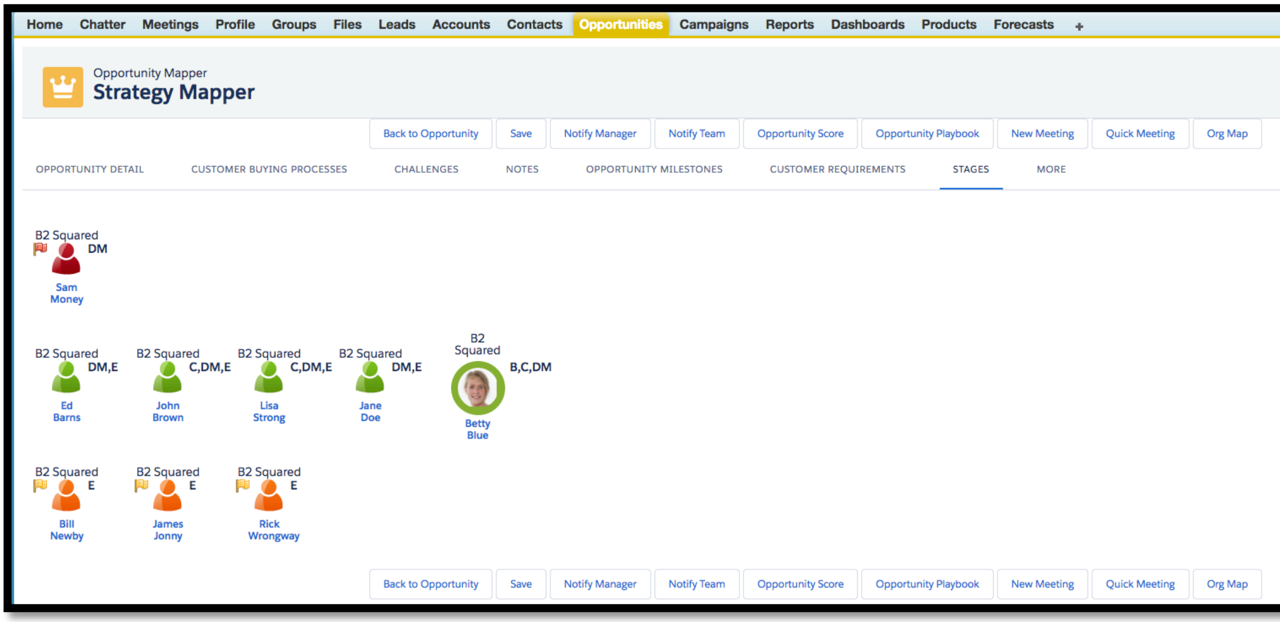
Opportunity Timeline

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



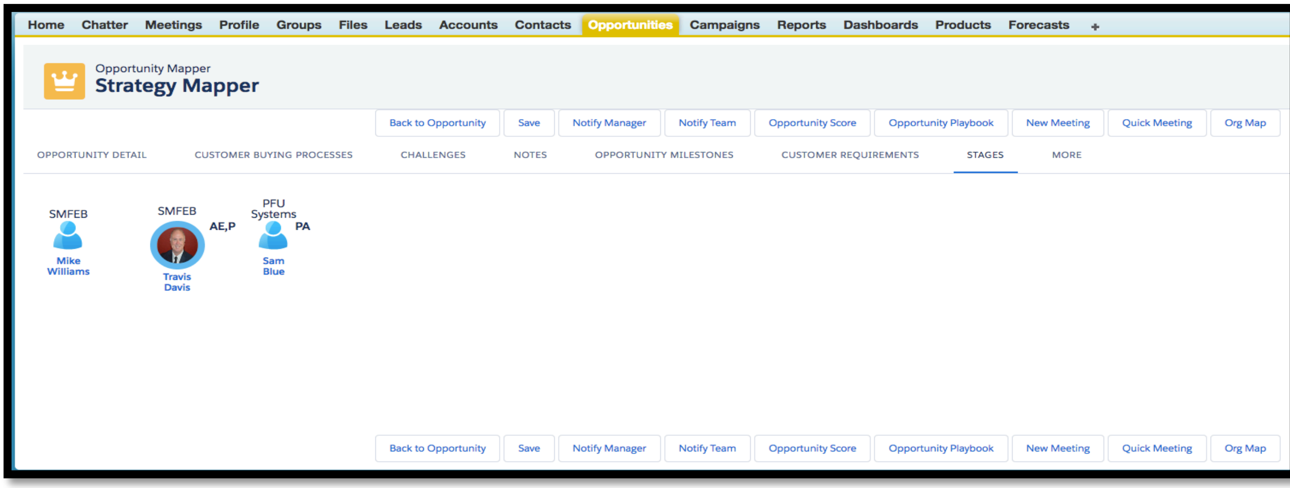
Customer Contacts

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



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.

StrategyMapper

Opportunity Playbook for Strategy Mapper - Martina

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

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

Situational Awareness

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

The most likely Pain Points of the customer are:

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

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

Opportunity Action Plan

This provides current action plan for the opportunity.

StrategyMapper

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	**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? **Helpful links for the prospect:** Short Strategy Mapper video: https://youtu.be/AM-sN2Hblj8 Disaster Recover for Sales video: https://youtu.be/8_lxLOGyt_Q AppExchange listing: https://appexchange.salesforce.com/listingDetail?listingId=a0N30000009vnGjEAI
Qualification	**Qualification Questions:** 1. Does Strategy Mapper meet the customer requirements. Is the solutions score above 75%? If not this may not be a winnable opportunity. 2. Do you currently have a project or initiative around account and/or opportunity planning? 3. Do you have budget?

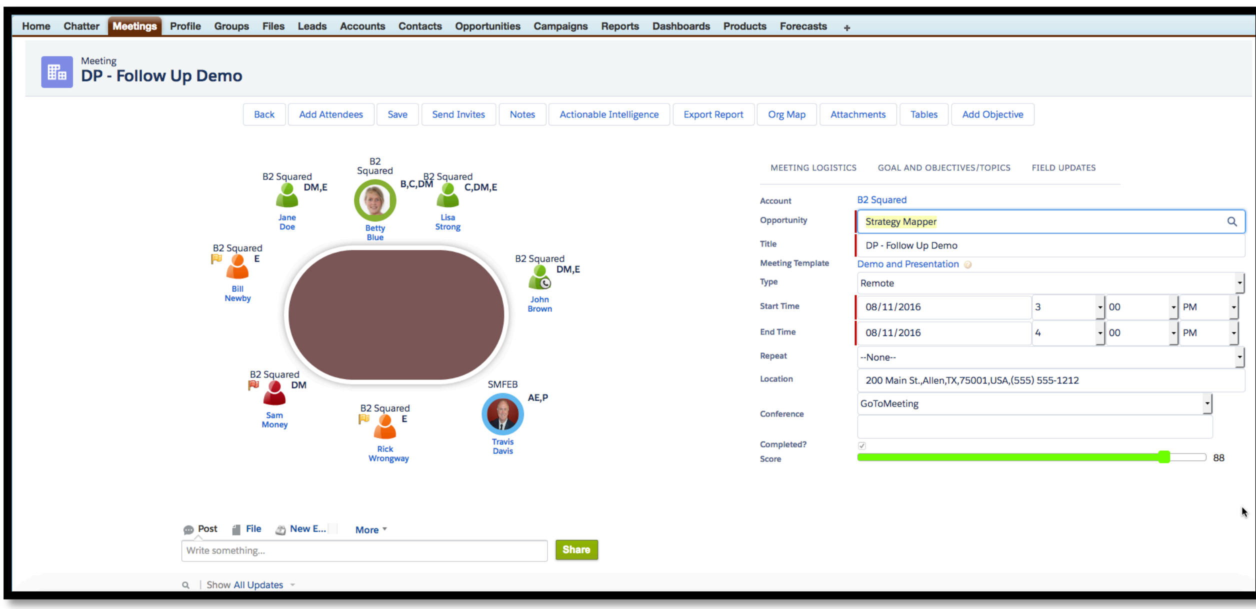
Not Completed Customer Selection Process

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.

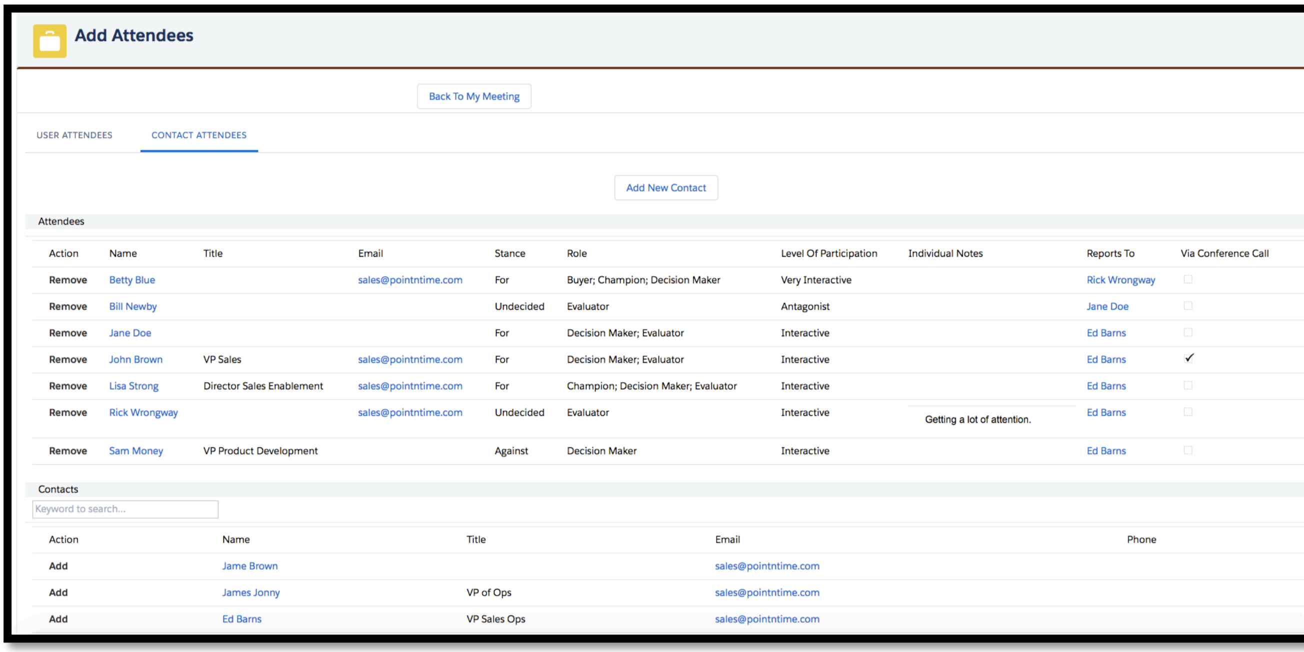
An intuitive meeting interface

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.



Add meeting attendees

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


Add Attendees

Back To My Meeting

USER ATTENDEES | CONTACT ATTENDEES

Add New Contact

Attendees

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

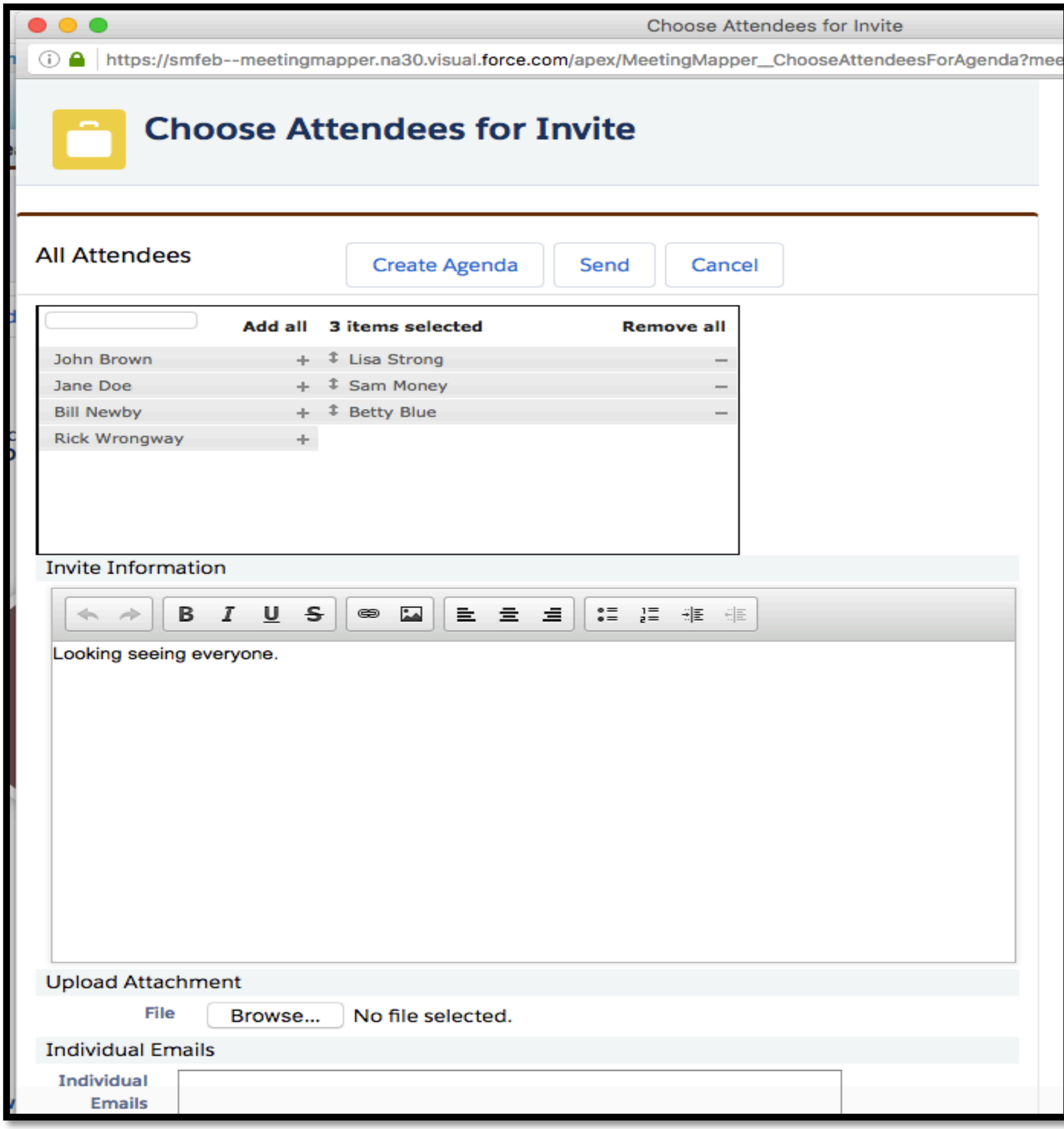
Contacts

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	

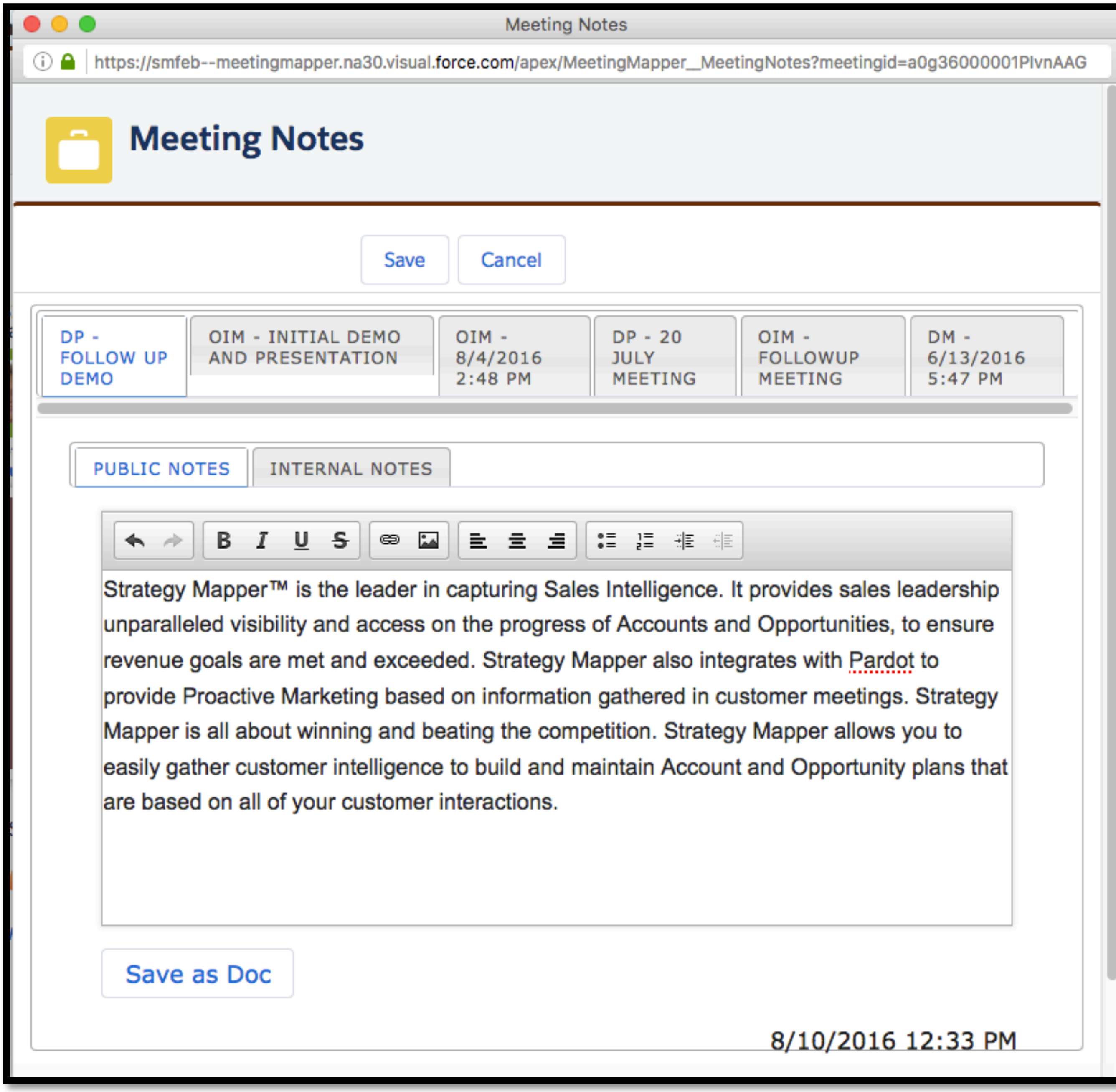
Meeting Invitations

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



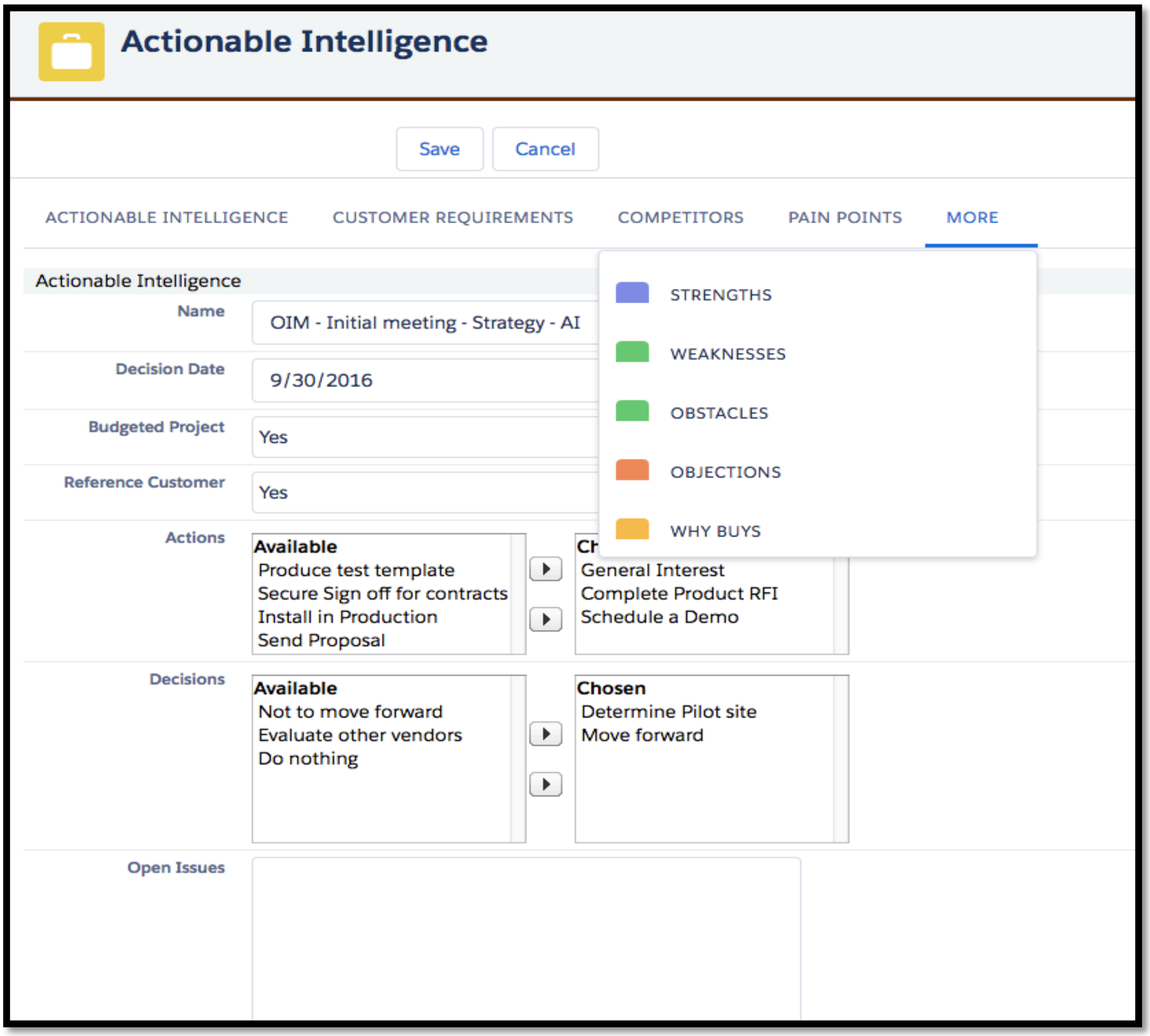
Meeting Notes

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



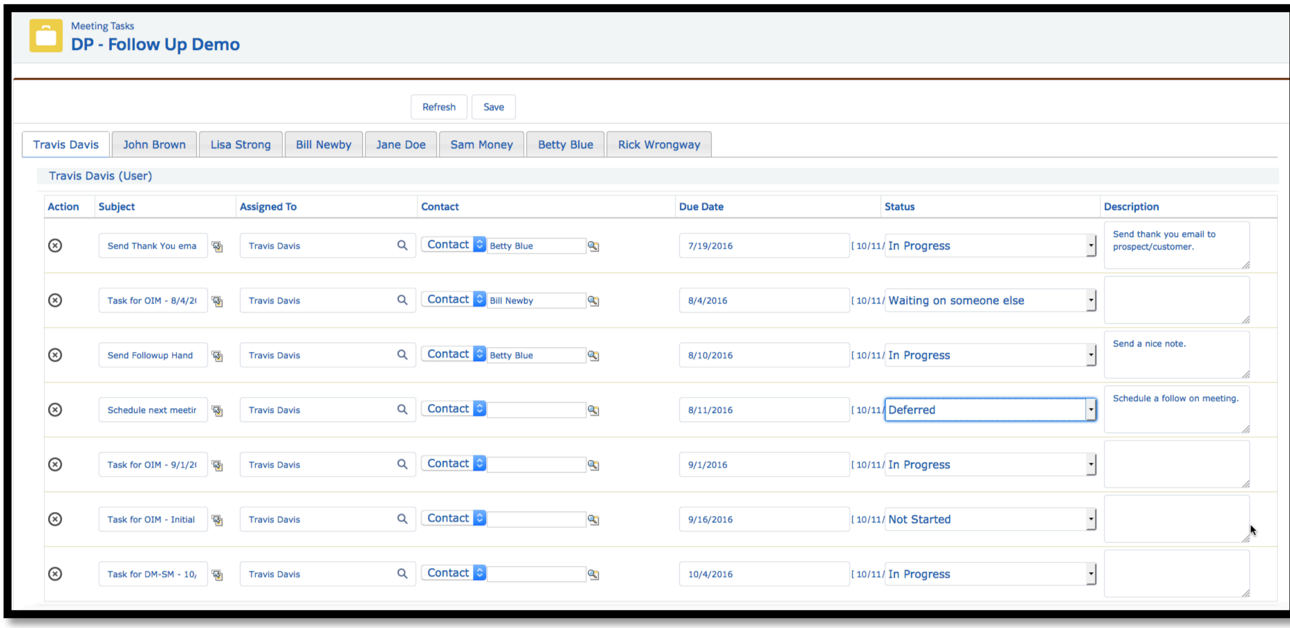
Gather Actionable Intelligence in every meeting.

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



Tasks and Events

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

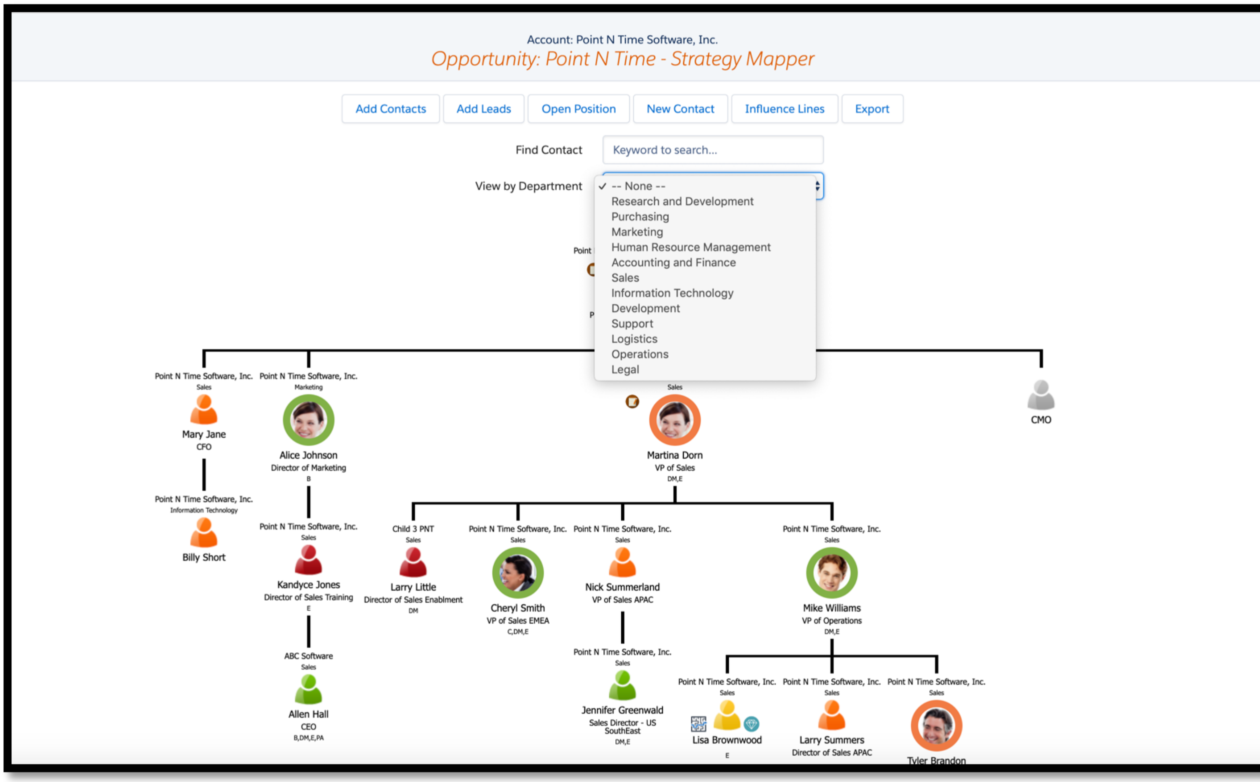


Meeting Exports

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

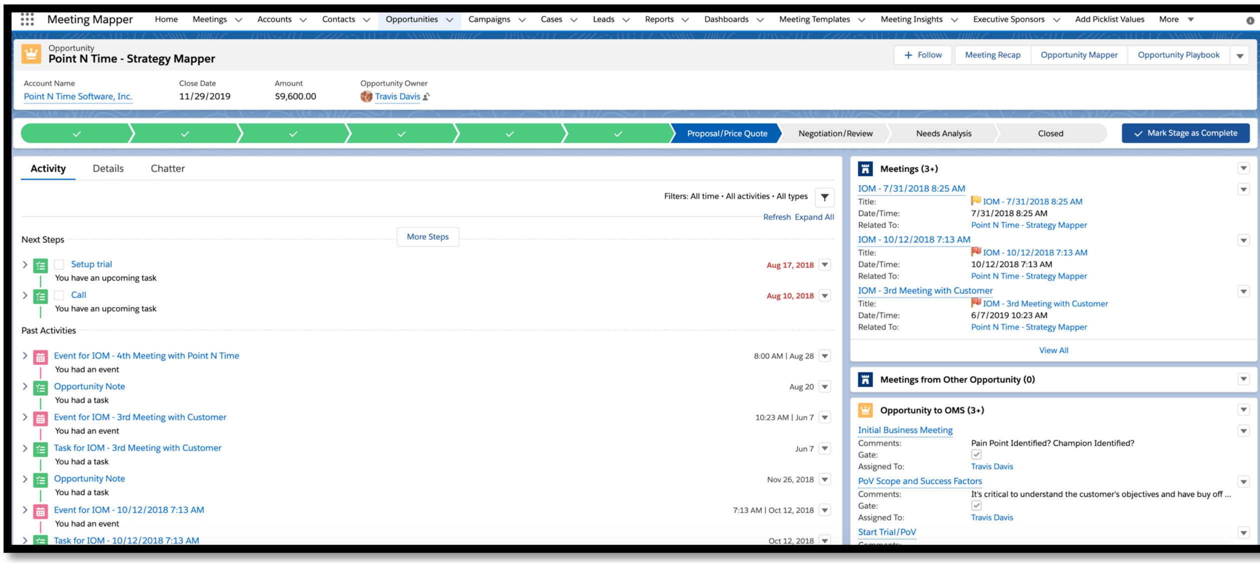
Create dynamic organizational maps.

Update org maps right in the meeting.



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.



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.