

# DEALMAKER<sup>®</sup> 8

## User Guide



The logo for TAS GROUP. It features a white arc above the text "TAS GROUP". The "T" is stylized with a small dot above it. The text "TAS GROUP" is in a white sans-serif font.

# Smart Opportunity Manager



*Dealmaker Smart Opportunity Manager* delivers intelligent advice on how to win each deal based on information you provide, and increases your win rate. Automated deal coaching, applied in context, identifies risks and vulnerabilities. Buyer relationship strategies are automatically defined to show you how to sell to each buyer, and the optimal competitive strategy is identified. *Insight Maps* help you visually represent how your solution meets the buyer’s needs. Like an automated deal review, *Coach Me* pulls it all together, diagnoses problems and prescribes actions to increase your chance of winning the opportunity. Dealmaker Smart Opportunity Manager includes TAS sales methodology, but can also be configured to your own methodology.

## The Dealmaker Launch Pad

Each of the modules of Dealmaker Smart Opportunity Manager can be accessed from the **Dealmaker Launch Pad** in the opportunity record in *Salesforce*.



You can also get a quick overview of the completeness of your opportunity plan from the blue status bar at the top of each icon. For example, in the graphic above, you can see that there are *8 contacts* in the political map, and that a *Flanking* strategy has been selected as the *Competitive Strategy*.

## Using Smart Opportunity Manager with Smart Playbook

In many cases you will have *Smart Playbook* installed as well as Dealmaker Smart Opportunity Manager. Smart Playbook in Dealmaker helps you to understand the steps you need to take to progress an opportunity through each of the stages of your sales cycle. It is a combination of sales process(es) and the associated content items that are attached using the Quicklinks capability in Dealmaker. When Smart Playbook is installed the Dealmaker Launch Pad will have an extra icon to the left of the **Assessment** icon.



# Assessment

**Assessment** guides you to determine the status of your opportunity by addressing a series of questions relating to your opportunity from your company’s perspective, and, if relevant, also for your competitors. The assessment in Dealmaker is pre-configured with the *TAS 1-20* questions, summarized under four key questions / section headings. Your Dealmaker administrator can change, or extend, the assessment questions and section headings if required.

## Access Assessment

There are two ways you access the opportunity assessment. You can click on the **Assessment** icon on the **Dealmaker Launch Pad** from within the opportunity screen.

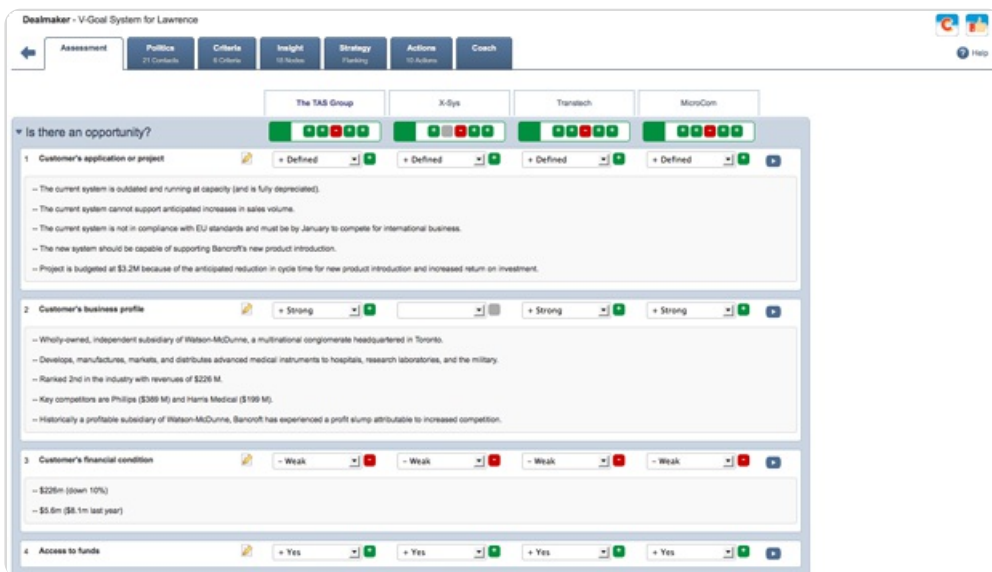


You can also access the Assessment at any stage to get guidance on what to do next to assess the health of your opportunity by clicking on the **Assessment** tab.



## Using Assessment

The assessment screen displays a matrix of the questions (grouped by section heading) for you and each of the identified competitors on the opportunity.



Note that the competitors are first added to the opportunity via the standard opportunity-competitor section in *Salesforce*. Competitors can also be added from the **Competitive Strategy** screen.

Competitors			
Action	Competitor Name	Strengths	Weaknesses
<a href="#">Edit</a>   <a href="#">Del</a>	X-Sys	Low price Well connected at Burlington	No supporters at Lawrence due
<a href="#">Edit</a>   <a href="#">Del</a>	Transtech	Ability to provide local support Reputation in Munich and Burlington	No custom offering Over-relian
<a href="#">Edit</a>   <a href="#">Del</a>	MicroCom	Highly regarded at Eian/Montreaux Solution fit	Unproven technology

Stage History

## Section Headings

The section headings (**Is there an opportunity?**, **Can we compete?**, etc. in the screenshot below) display a quick view for each of the selling organizations of the status of the underlying questions.

Dealmaker - V-Goal System for Lawrence						
Assessment	Politics 21 Controls	Criteria 8 Goals	Insight 18 Notes	Strategy Planning	Actions 8 Actions	Coach
	The TAS Group	X-Sys	TransTech	MicroCom		
Is there an opportunity?	Green	Green	Green	Green		
Can we compete?	Green	Green	Yellow	Yellow		
Can we win?	Green	Yellow	Red	Red		
Is it worth winning?	Green	Yellow	Green	Green		

A background color of green/yellow/red indicates the overall “score” of the section (based on the +/–/? status for the questions), providing you with a quick view of the overall strength or weakness of that section for the organization. Note that some questions may be deemed more important than others with a higher score weighting which will result in their status having a greater impact on the overall section score. Dealmaker comes pre-loaded with scores for the positive (“+”), negative (“–”) and unknown (“?”) responses for each question. Your Dealmaker Administrator can change these associated scores if required.

## Assessment Questions

The assessment questions are grouped under the top-level section headings.

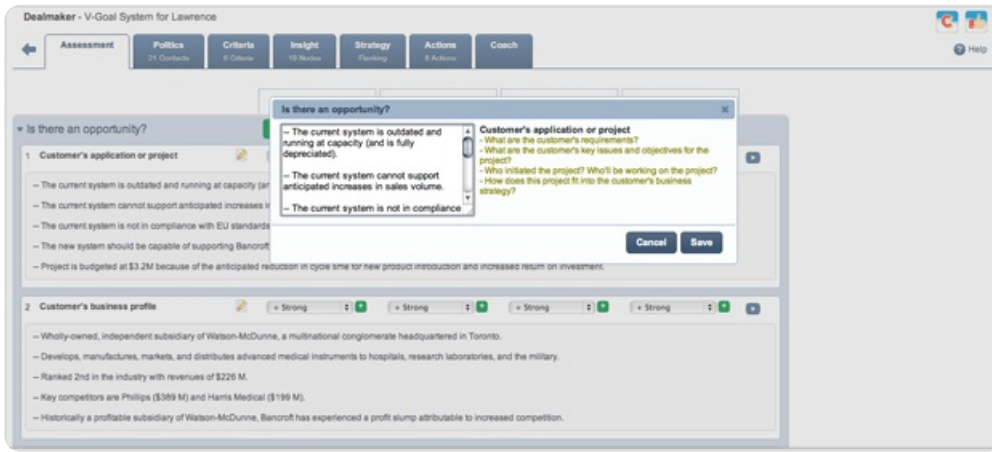
**Expand / Collapse**

▼ Is there an opportunity?

	The TAS Group	The Boardman Group	RK Strategies
1 Customer’s application or project	+ Defined	+ Defined	+ Defined

Competitive Pressure is causing an increasing trend in lost deals. They are looking to increase their revenue 15% in this fiscal year. There are resources and sales methodologies to improve forecast and pipeline visibility. They are targeting a Global deployment in 10 months.

To expand a section and view the underlying questions, click the arrow to the left of the section heading.

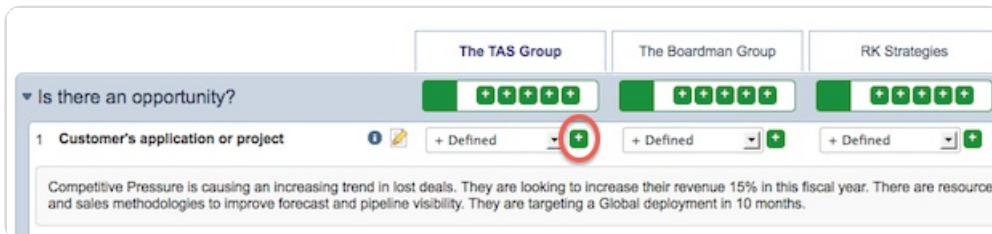


Each question includes:

- Notes:** Displayed under the question, the notes can be added/edited by clicking the **Edit** icon to the right of the question. In the provided pop-up, edit the content and then click to **Cancel** or **Save** your changes. The edit pop-up includes prompter help to remind you what information should be included in your notes.

As per the other areas of the assessment, Dealmaker comes pre-loaded with appropriate prompter help that your Dealmaker Administrator can change if required.

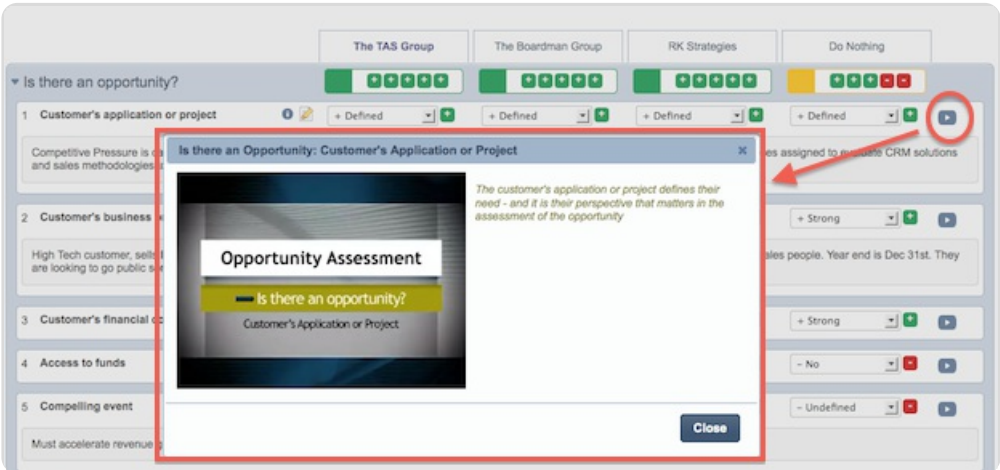
- Status:** Available for each of the selling organizations (your company and each of the opportunity-competitors), the provided picklists allow you to view/set the status of the specific question for that organization. The options available are: **blank** (indicates that the status has not been set), **"?"** (question mark – indicates that the status is unknown), **"+"** (plus – indicates that the status is positive ), and **"–"** (minus – indicates that the status is negative).



Note that the icon to the right of the picklist provides a visual of the selected option. This is provided to allow you to quickly see the current status without having to read the values in the picklist.

You can either select from the **Status** drop-down, or click on the **Status** icon (either to the right of the drop-down, or on the summary line) to set the status.

- Play:** Your Dealmaker Administrator may have configured links to additional information for any of the assessment questions using Quicklinks. Clicking on the play icon on the extreme right of the question will provide you with links to video learning or other content for additional support.





# Political Map

**Political Map** provides a visual representation of the people in the buyer’s organization who are involved in your opportunity or account, their relationship to each other and information about each one. You can identify your friends and enemies, and uncover the influencers in the organization.

## Why use Political Map?

With the information you record in Political Map, *Dealmaker* can help you to determine who can impact your success. You should update the map as you learn about the people and their roles. Dealmaker uses this information to help identify risks and vulnerabilities as you progress through the sales cycle.

## Accessing Political Map

To access Political Map, click on the **Political Map** icon on the **Dealmaker Launch Pad** from within the opportunity screen. You can also access Political Map from any Dealmaker page by clicking on the **Politics** tab.

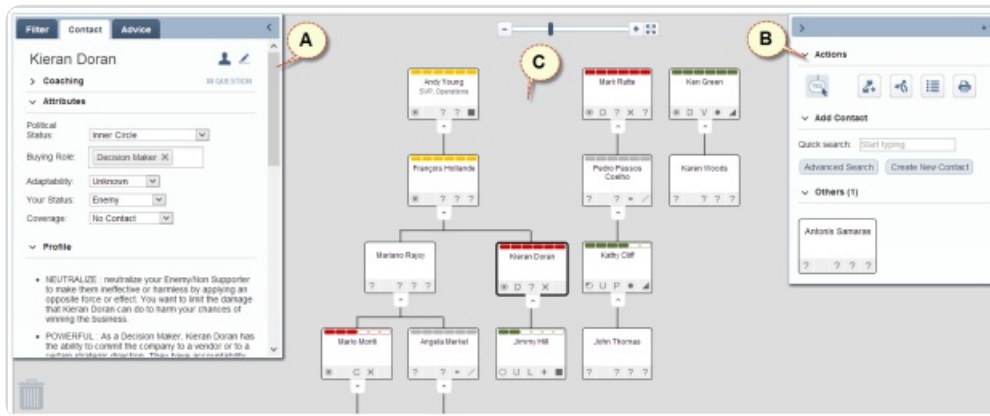


If you are using *Political Map Express*, you can access it using the **Political Map Launch Pad**. This launch pad provides information about how many contacts are contained on the map as well as a list of the five most important contacts on the map. These contacts are displayed on the basis of their impact on your opportunity. The impact is determined based on their attributes.

DEALMAKER		the TAS GROUP	
	NAME	TITLE	IMPACT
	1 Mike Bosquez	Project Mgr	++
	2 Anthony Campbell-Brown	Head of Risk Sales, Asia	++
	3 Bruce Werner	Director Strategic Programs	+
	4 Lee Wood	SVP Global Sales Ops, IP & Science	+
	5 Tom Pfeifer	SVP, Legal Sales	-

## Political Map Components





Political Map is divided into the following sections:

**A. Left Pull-out Panel:** This menu contains three tabs. The **Filter** tab is used to selectively display contacts on the map according to different criteria. The **Contact** tab is used to display and edit the details of individual contacts. The Contact tab also displays details of any actions against that contact for this opportunity as well as coaching advice for this specific contact and this contact type. The **Advice** tab displays suggestions from DealMaker advising you on how to work with each contact.

**B. Right Pull-out Panel:** This panel is used to add existing contacts to the map and create new contacts. Contacts can be added individually or by importing from another map.

**C. Main Map Area:** This is where the map is displayed. It also contains navigation controls to zoom and move the map around as well as to show a full screen version of the map.

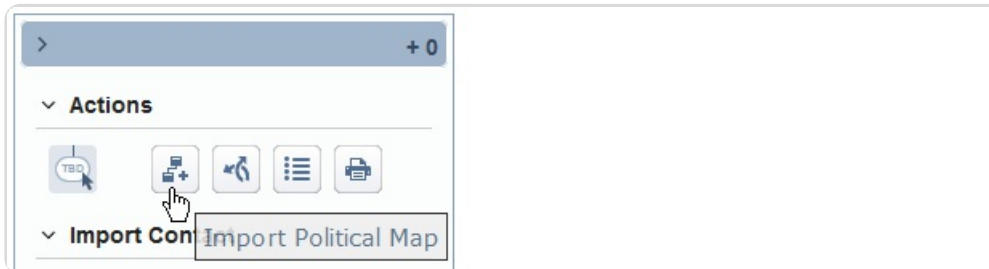


## Add and Remove Contacts

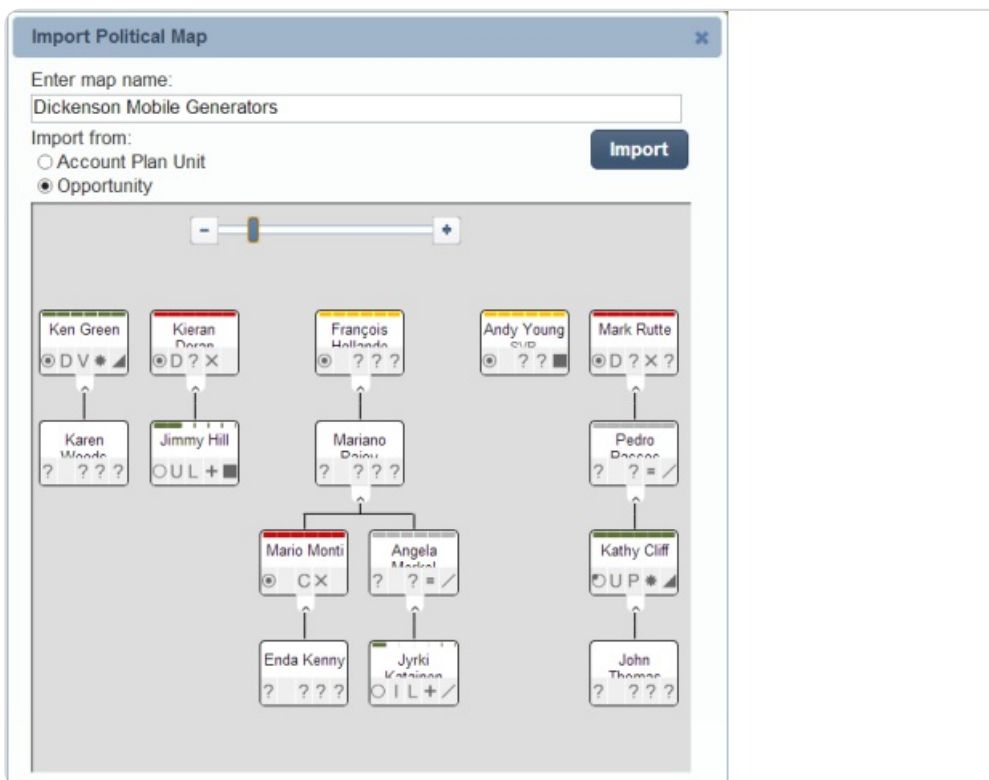
When you first open a map, it will not contain any contacts. You can add contacts by importing them from an existing map or by adding them individually.

### Import contacts from an existing map

To import contacts from an existing map, open the right pull-out panel and click **Import Political Map**.



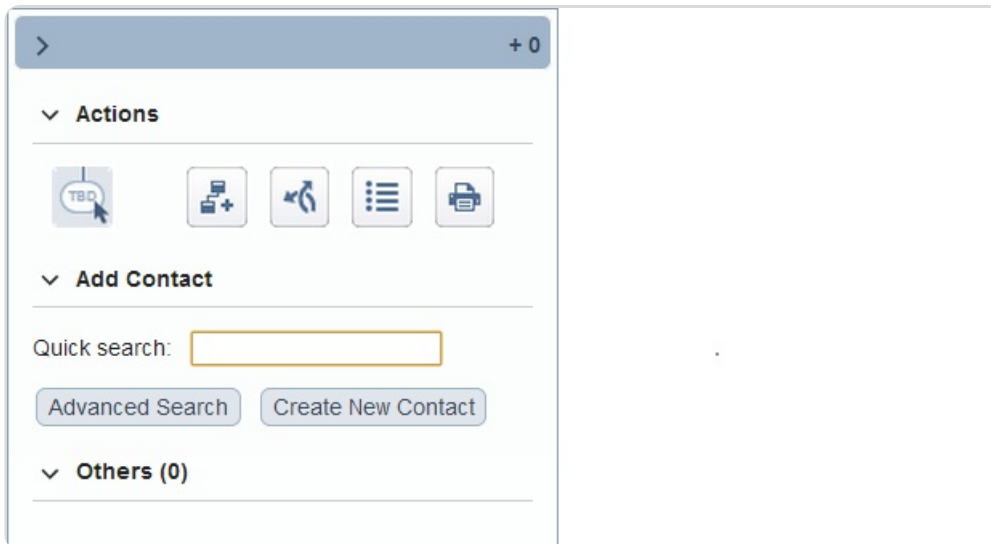
You can import a map from another opportunity by typing the name of the opportunity or, if you are using *Smart Account Manager*, from an account plan by typing an *account plan unit* name.



As you type, Dealmaker will display a list of available maps. To select a map to import, click on the map name. A visual preview of the map appears. To complete the process, click **Import**.

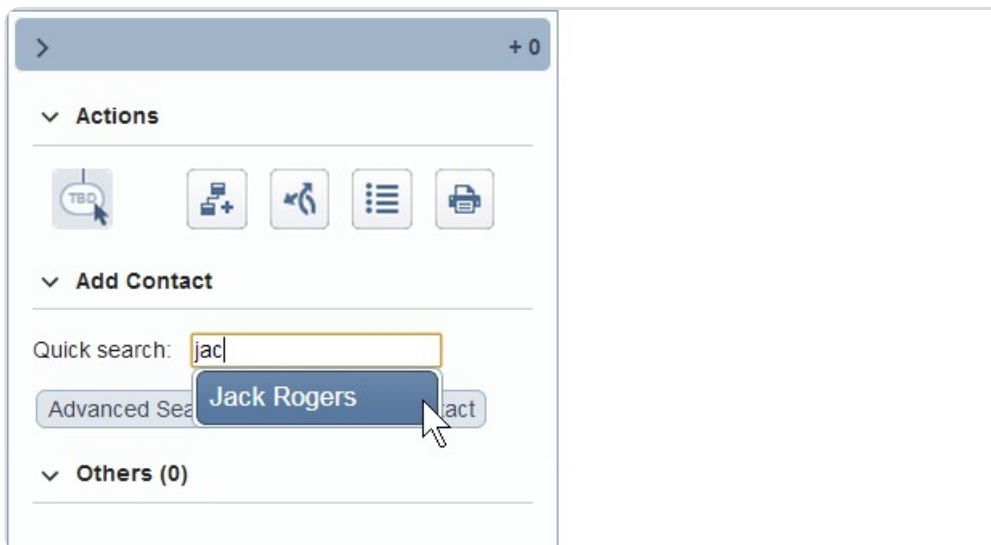
### Add contacts individually

To add contacts individually, open the right pull-out panel and go to the **Add Contact** section.



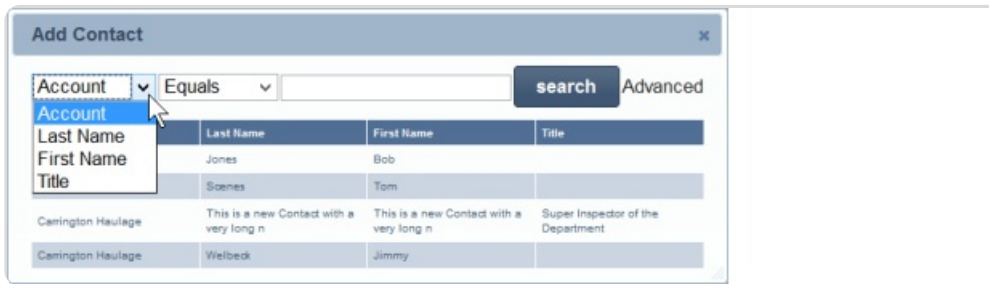
## Quick search

To include a contact on the map, start typing the contact's name in the **Quick search** field. As you type, a drop-down list appears containing matching contacts relating to the account that are not yet on the map. Click on the contact name from the list. The contact is then added to the map or — depending on its *reports-to* value — to the **Others** section on the right pull-out panel.



## Advanced search

You can also add any of the contacts in *Salesforce* using the **Advanced Search** button. This allows you to add contacts which are related to different accounts. Use a range of search criteria to filter the contacts, and then click on one or more contacts from the search results.



## Create a new contact

If you want to add a contact who is not yet in Salesforce, click on the **Create New Contact** button. Enter the details for this contact and click **Save**.

**Create New Contact**

First Name:

Last Name:

Title:

Department:

Account:

Owner:

## Remove a contact from your map

There are two ways to remove a contact from the map:

1. **Drag to Trash:** Drag and drop the contact from the map into the *trash can*, which is displayed at the bottom left of the map.



2. Click the **Remove** button in the **Advanced** section of the **Contact** tab on the left pull-out panel.

**Note:** When you remove a contact from the map, the contact record remains in Salesforce but it is no longer associated with the map.

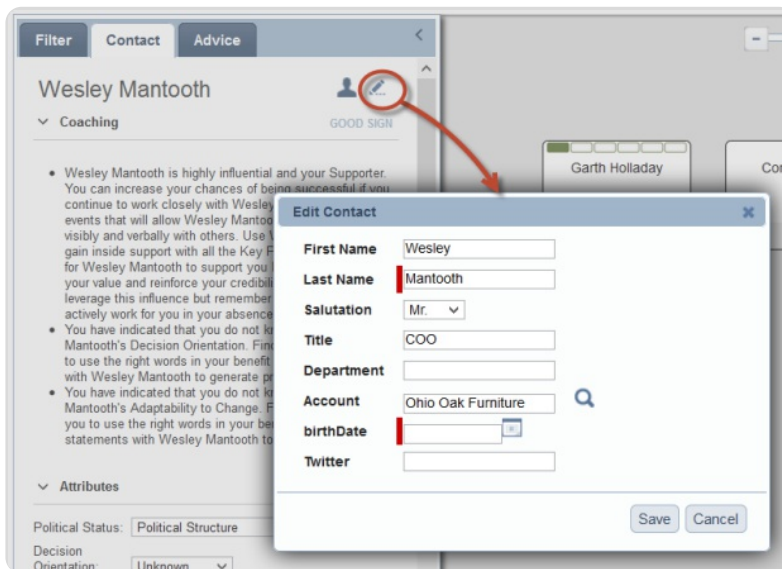
## Edit Contacts

Each contact on a map has a number of *attributes* which tell you about that person. You can edit these attributes as you add a contact or at any time after the map has been built. You should update these any time you have new insight about any of the contacts or if there has been a change in one of their attributes.

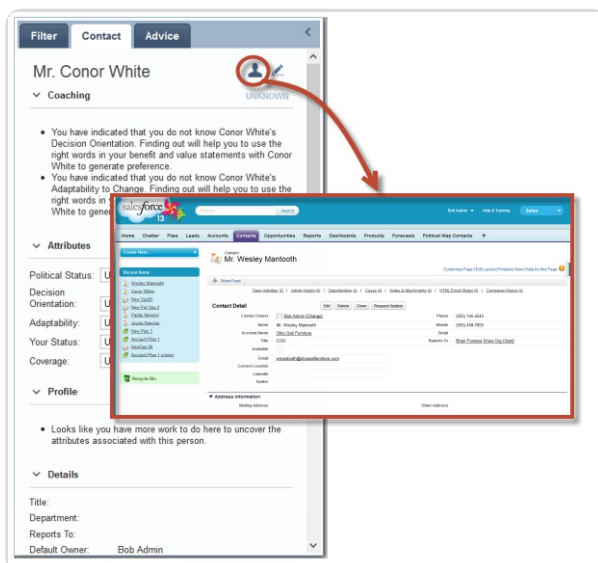
**Note:** Depending on your organization's configuration settings, these attributes may be named differently or have different option values while others may not be present at all. Please consult your *Dealmaker* administrator if you have questions about your implementation.

### Edit a contact in Dealmaker

Using the contact edit button you can edit the details for a contact within Dealmaker.



### Edit a contact in Salesforce



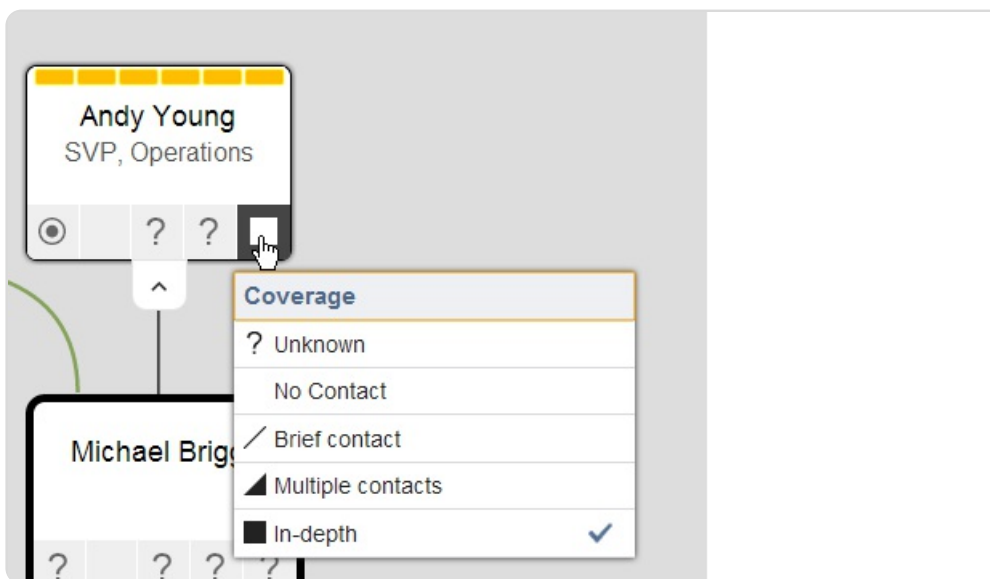
Using the contact icon to the right of the contact's name at the top of the panel you can open the *Salesforce* page for this contact. From there you can edit a wide range of information for that contact.

## Edit contacts directly on the map

You can edit the attributes for a contact directly from the map by clicking on the square **Attribute** icons at the bottom of that contact's *node*.

The details which you can change in this way are:

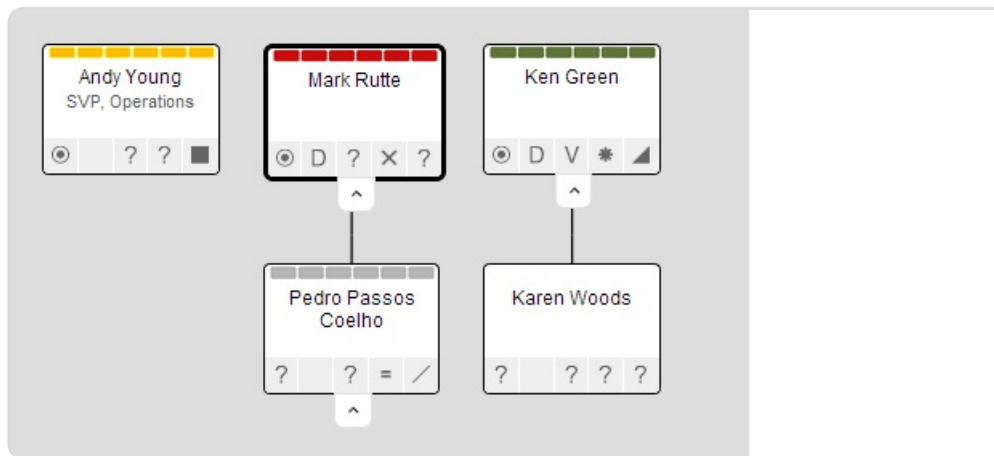
- Political Status;
- Buying Role;
- Adaptability;
- Your Status; and
- Coverage.



Each attribute is indicated by means of a unique symbol. Using the **Show/Hide Legend** button you can display the Political Map legend to get an explanation of what each symbol means. For an explanation of each attribute, see the [Political Map Glossary](#) for more details.

## Contact node colors

The colors and icons used on the contact nodes provide you with visual information about the contacts on the opportunity. This means you can differentiate, at a glance, your supporters from your enemies and those in the *inner circle* from those outside the *political structure*.



The contact which is currently selected is shown with a highlighted black border. The **Your Status** value of the contact determines the color of its banner:

- **Green** indicates *Mentors* and *Supporters*;
- **Red** indicates *Enemies* and *Non-Supporters*;
- **Yellow** indicates contacts you need to be wary of because they have a strong *political status* and you have yet to establish a good relationship with them;
- **Grey** indicates contacts who are *neutral* because they have a weak political status and you have yet to establish a good relationship with them.
- **White** indicates contacts where you need to do some more work to gather information.

The number of segments in the banner is based on a score calculated by Dealmaker on the basis of the available details for that contact.

## Edit contacts using the left pull-out panel

You can also edit the details of contact using the left pull-out panel. Any changes you make here are saved automatically.

The left pull-out panel provides access to a range of information relating to each contact. The following information can be edited in the left pull-out panel itself:

### 1. Attributes

The attributes for a contact include **Political Status**, **Buying Roles**, **Adaptability**, **Your**



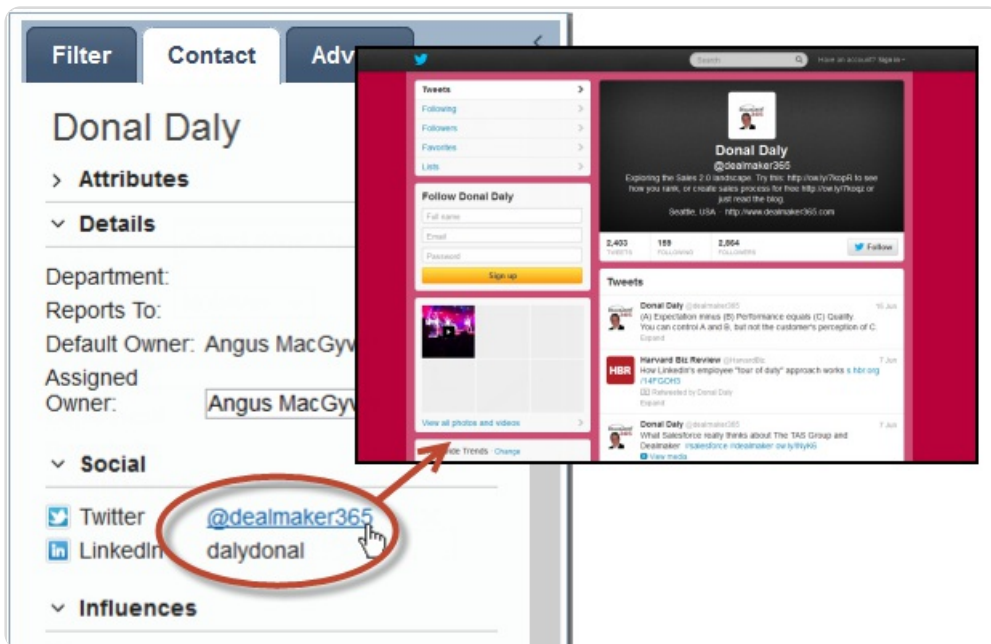
**Status and Coverage.** In certain fields, such as **Buying Role**, you can specify more than one option for a contact. Any changes you make here are saved automatically.

**2. Details**

The details section displays information about the contact such as the contact’s *department*, *default owner* and *assigned owner*. The default owner is the owner of the contact as specified in the Salesforce contact record. If you want to set an alternative owner for this contact, you can specify another user in your organization as the assigned owner. Specifying an assigned owner for a contact does not affect the contact owner in Salesforce.

**3. Social**

This section displays links to the contact’s online social media presence. Information gained from social media can help you learn more about your contacts and discover what issues are most important to them. To access the contact’s social media feed or page, click on the relevant link.

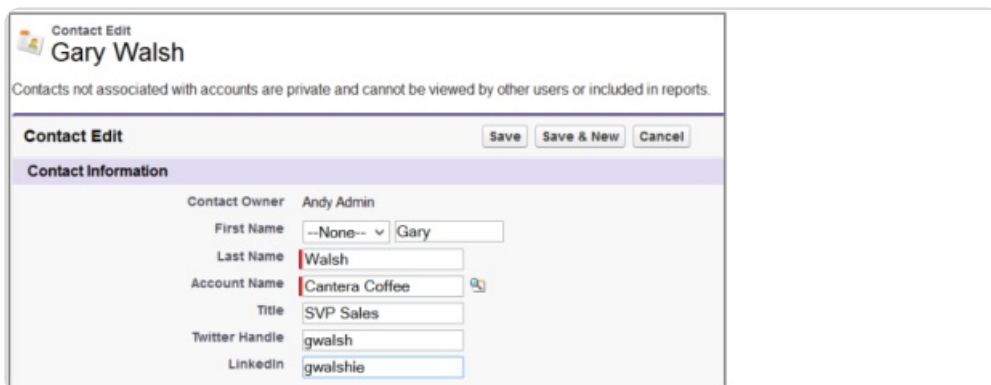



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**Note:** If it has not already been enabled on your system, your administrator can enable social media functionality by following [these steps](#).

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To add or edit this information, go to the Salesforce **Contacts** tab and edit the details for this person.



You can also click the contact icon to the right of the contact's name at the top of the left pull-out panel to open the Salesforce page for this contact.

## 4. Influences

Influence lines are a way of representing the power structures in an organization to help you understand the dynamics affecting a deal. By understanding how individual contacts in a hierarchy exert influence over others in an organization you can target your activities in a more focused way. Influence lines and how to use them are explained in *Structure your Map*.

## 5. Decision Criteria

In *Smart Opportunity Manager*, you can edit the *decision criteria* affecting a contact who has been identified as a key player in the **Decision Criteria** screen.

Criteria	Importance
<input checked="" type="checkbox"/> Industry experience	Medium
<input type="checkbox"/> Access to experienced people and ability to transfer knowledge	Critical
<input checked="" type="checkbox"/> Cultural fit	High
<input checked="" type="checkbox"/> Innovation	Medium
<input type="checkbox"/> Methodology and approach	Medium

**Notes**

**Advanced**

Remove Contact from Political Map

Clear reports-to setting for contact

Contact always on map, will not move to others bench

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**Note:** The **Decision Criteria** feature is not available in Political Map Express.

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## 6. Notes

In this section you can add additional information relating to a contact in the form of free-text notes.

## 7. Advanced

Here you can remove the contact from the map, clear the contact's **reports-to** setting and specify that the contact must always remain on the map even if it is not linked to any other contacts.

## 8. Actions

If your administrator has enabled it, the left pull-out panel will also display details of any actions or overdue actions which exist for a contact in relation to the current opportunity.

The screenshot displays the 'Contact' tab of the Smart Opportunity Manager. The interface is divided into two main sections: a left-hand navigation and settings panel, and a right-hand main content area.

**Left Panel (Navigation and Settings):**

- Filter:** A list of five items, each with a yellow equals sign icon and a dropdown menu. The items are: 'reduce downtime' (Unknown), 'reduce downtime' (Unknown), 'Rapid worldwide deployment' (Unknown), 'Rapid worldwide deployment' (Unknown), and 'Rapid worldwide deployment' (Unknown).
- Notes:** A section with a downward arrow and a yellow notepad icon.
- Actions:** A section with a downward arrow.
- Table:** A table with two columns: 'Subject' and 'Status'.

Subject	Status
Meet with Mitch to fine-tune success metrics	Not Started
- Advanced:** A section with a downward arrow containing three settings:
  - 'Remove Contact from Political Map' with a 'Remove' button.
  - 'Clear reports-to setting for contact' with a 'Clear' button.
  - 'Contact always on map, will not move' with a checkbox.

**Right Panel (Main Content):**

A yellow callout box highlights a contact card for 'Mitch Brown', Director Global Sales Operations. The card includes a yellow arrow icon in the top right corner and a toolbar with icons for refresh, edit, view, and delete.

## Structure your Map

Once you have added contacts to your map you need to describe the *relationships* between each person so that you can gain an insight into the organization. These relationships are described using the following information:

- **Reporting Structure**

Illustrating the reporting structure allows you to see who the key decision makers are in a hierarchy and it allows you to identify people who may ultimately have the final say in any deal.

- **Influences**

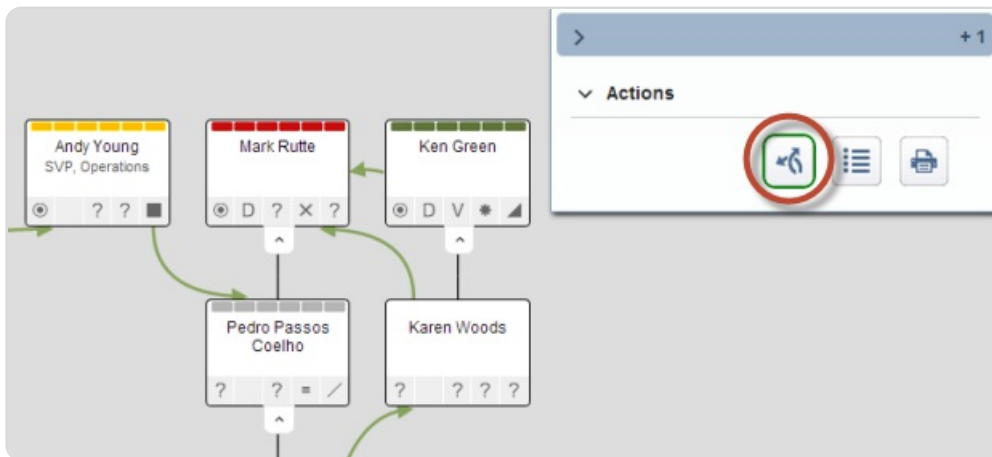
Understanding how individual contacts in a hierarchy influence others can help you understand the politics of the organization. For example, if a key player does not have a relationship with you, being able to identify a supportive contact who influences that person may be invaluable.

## Edit relationships

Political Map has two editing modes: *influence mode* and *reports-to mode*. The functionality of Political Map changes depending on which mode is selected.

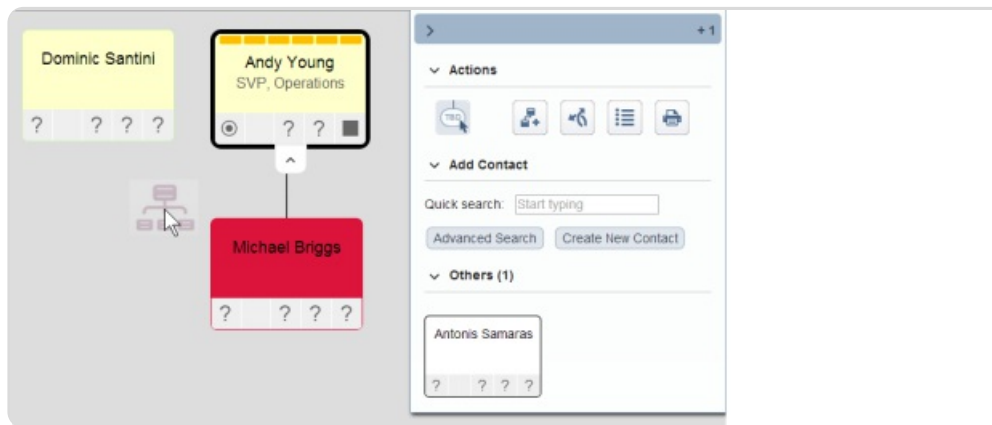
To switch between modes, use the **Show/Hide Influence Lines** button at the top of the right pull-out panel.

When the influence lines are displayed, the map is in influence mode. When the influence lines are hidden, the map is in reports-to mode.



## Specify who a contact reports to

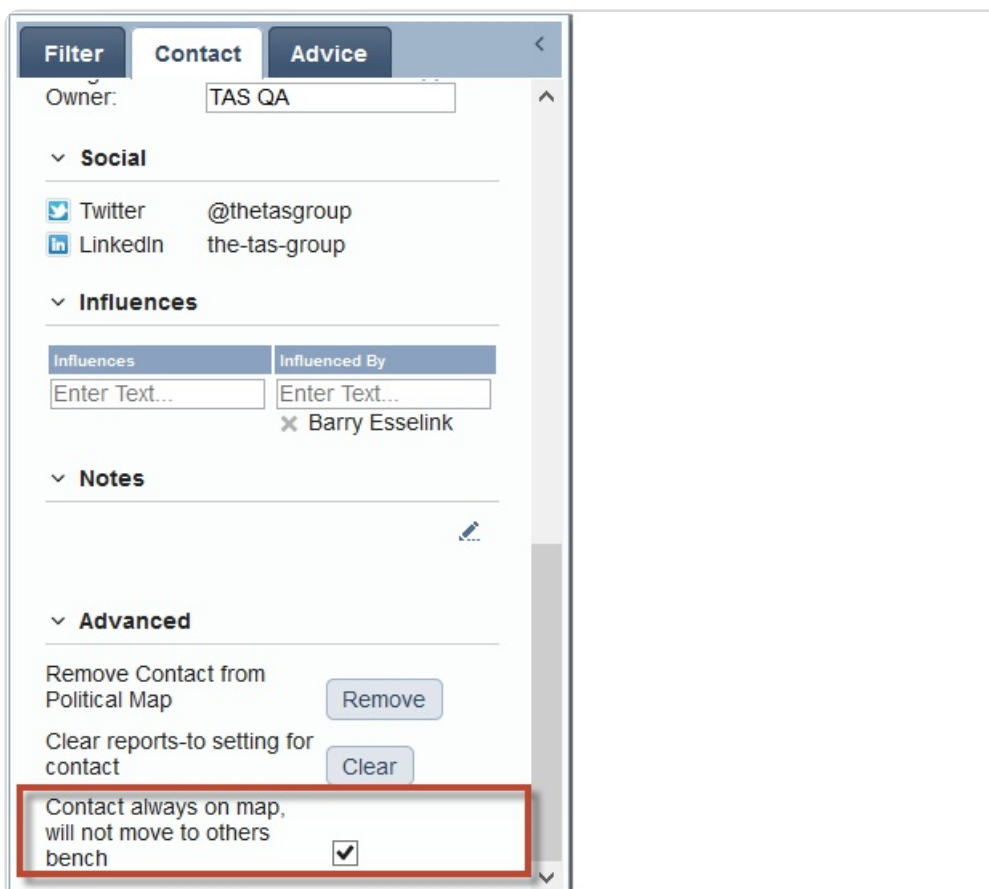
The reporting hierarchy is identified by the black reporting lines. When the map is in reports-to mode, dragging one contact to another updates the reports-to relationship. When you drag the contact, the contact is highlighted in red and a faded map icon appears under the mouse pointer to indicate that you are changing the reports-to value. This will also modify the reports-to value on the Salesforce contact record.



When the reports-to value is set for the contact (and the manager is included on the map), the contact will be placed on the map under the manager. Otherwise, it will be placed at the top of the map or in the right-hand panel under **Others**.

### Keep a contact on the map

If the contact is automatically added to the **Others** section, you may choose to drag the contact directly onto the map. This sets the **always on map** option in the **Advanced Details** section for that contact in the left panel. This is useful if you want to represent an isolated contact on the main canvas area to, for example, draw influence lines. To move the contact back to the **Others** section, uncheck this option.



To delete the reports-to value for the selected contact and clear the reporting line, go to the left pull-out panel and open the **Contact** tab. In the **Advanced** section, click **Clear**. **Note:** When you clear the reports-to for a contact this will delete the value in the reports-to

field in Salesforce.

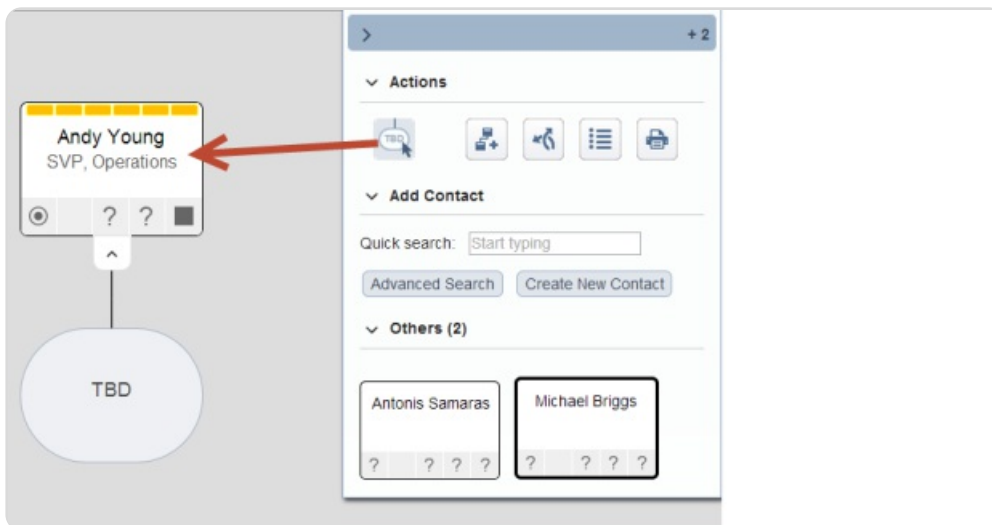


## Use TBD as a placeholder

If you do not yet know who a contact reports to or do not need to record this information, the contact is placed in the **Others** section of the right pull-out panel. Under certain circumstances, though, you may need to keep this type of contact on the map.

To do this, first add a *TBD* or *To Be Determined* contact to the map. The purpose of a TBD contact is to serve as a placeholder representing the unknown links between contacts and their direct or indirect reports. This allows you to add contacts to a map even if you do not know who they report to.

In this example, we know that Michael Briggs works in Andy Young's group. We do not know who his direct line manager is. To move these contacts from the **Others** section to the map, we first click and drag the **TBD** icon onto the contact for Andy Young.



We can then drag the contact Michael Briggs from **Others** onto the **TBD** icon.

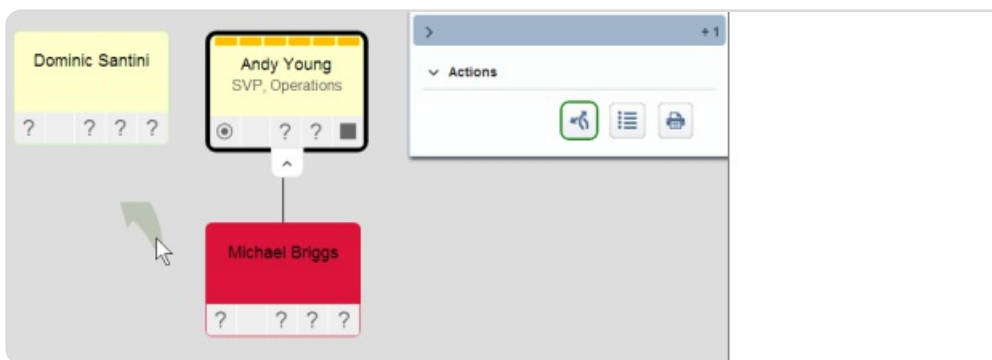




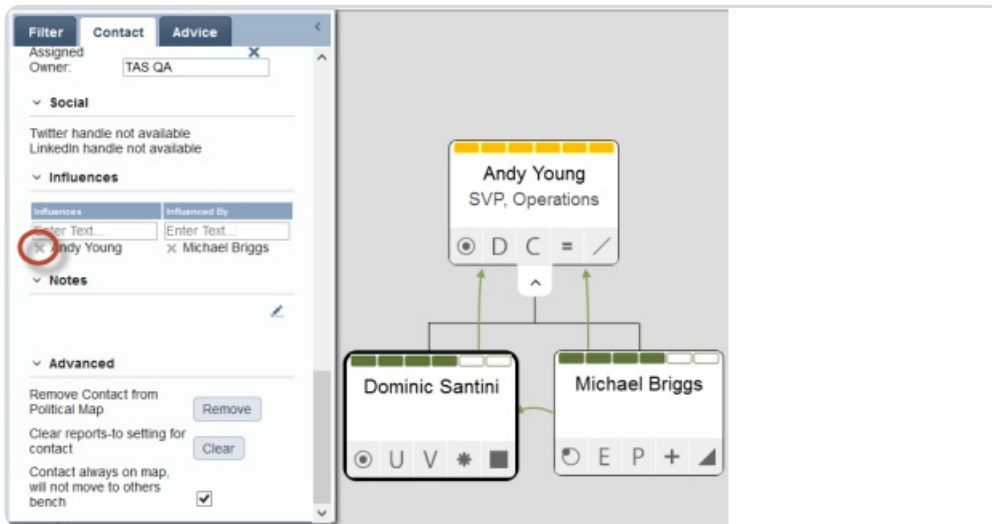
**Note:** You can only drag a contact from **Others** while you are in reports-to mode.

## Specify influences on a map

When the map is in *influences mode*, dragging one contact to another sets up an influences relationship. An arrow symbol appears on the map to remind you that you are about to modify the influences relationship.

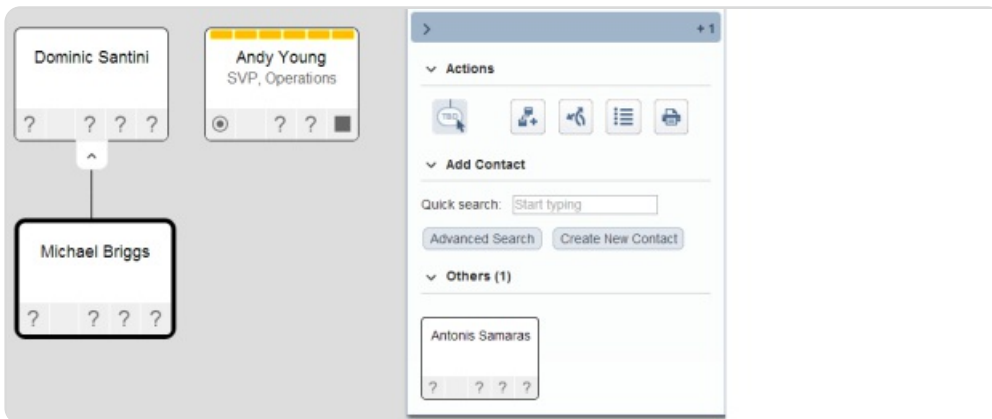


To delete influence lines, open the Contact tab in the left pull-out panel and go to the **Influences** section. Click the **X** icon beside the influences / influenced by contact to remove the connection.

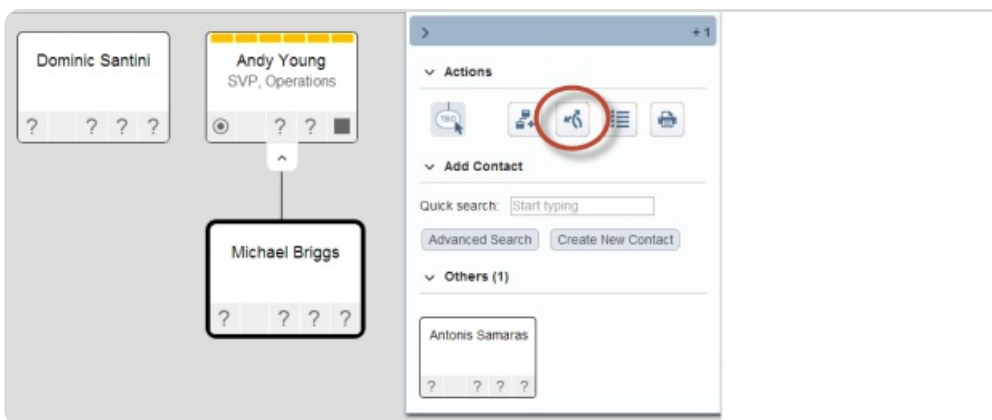


### Example of Changing Influences and Reports-to Information

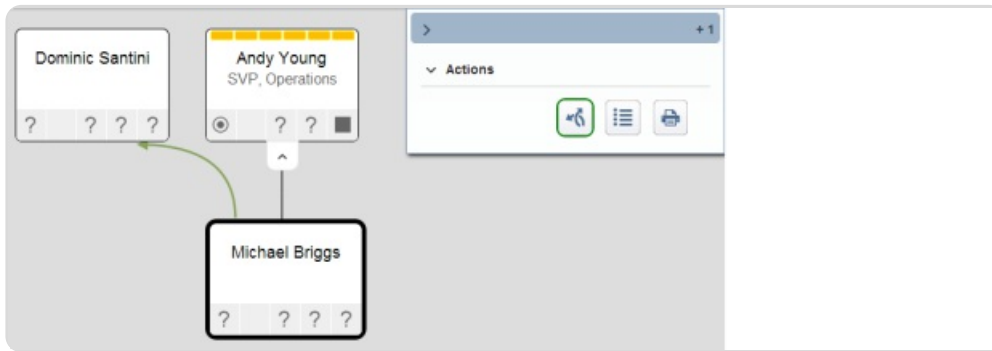
In this example, the influence lines are turned off and the map is in reports-to mode. We can see that Michael Briggs currently reports to Dominic Santini.



If we drag Michael Briggs to Andy Young, Michael Briggs will now be listed as reporting to Andy Young.



Suppose we now want to say that Dominic Santini is influenced by Michael Briggs. To activate influences mode, we display the influence lines using the **Show/Hide Influence Lines** button. Now, if we drag Michael Briggs to Dominic Santini, Michael Briggs is listed as having an influence over Dominic Santini.

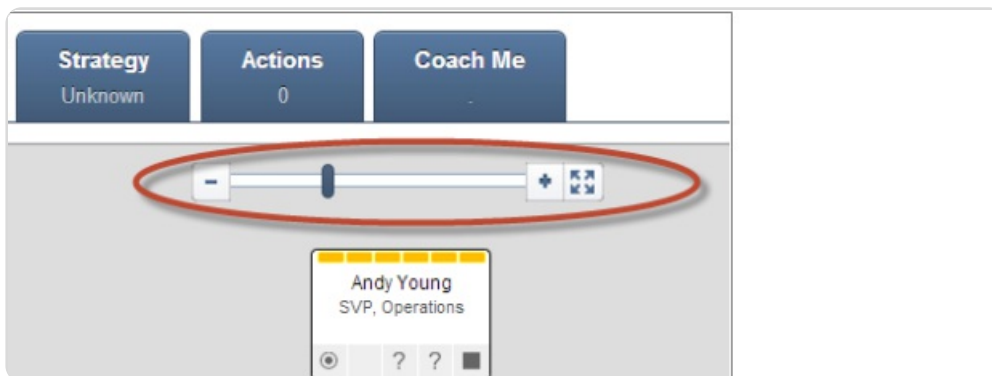


## Change the way your map appears on screen

To make working with maps easier, there are several controls to change the appearance of a map on screen.

### Zooming and panning

You can move and resize the map using a number of intuitive controls. To move a map, click anywhere on the map background and drag to a new position.



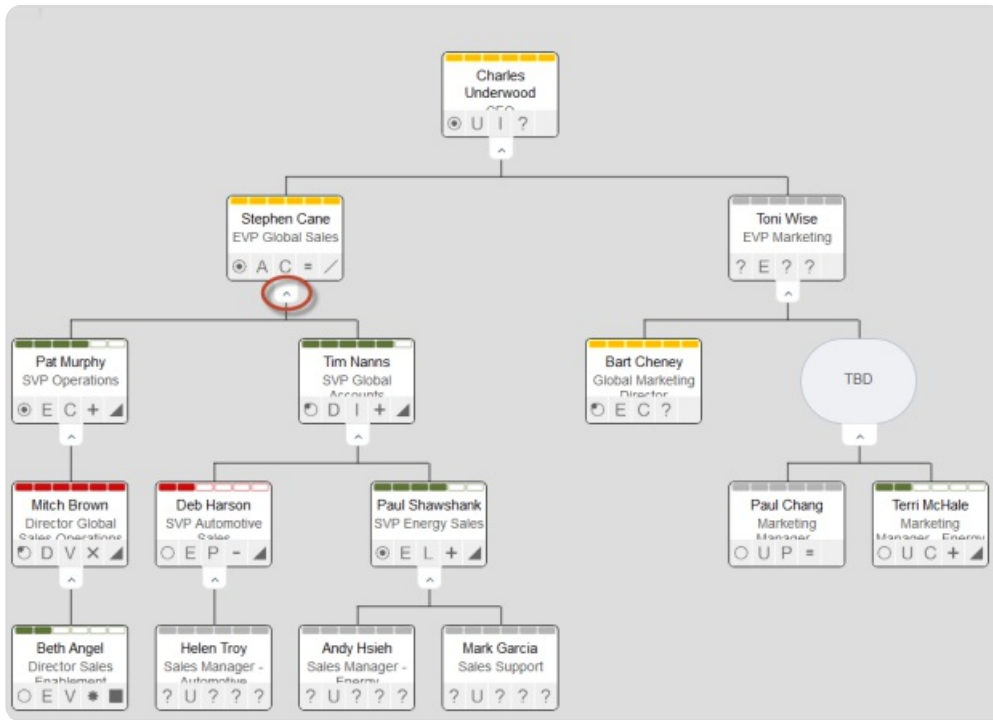
To resize the image you can:

- Use the zoom control slider on the map;
- Use the scroll wheel on your mouse;
- Click **Full Screen** to use the entire screen to view the map.

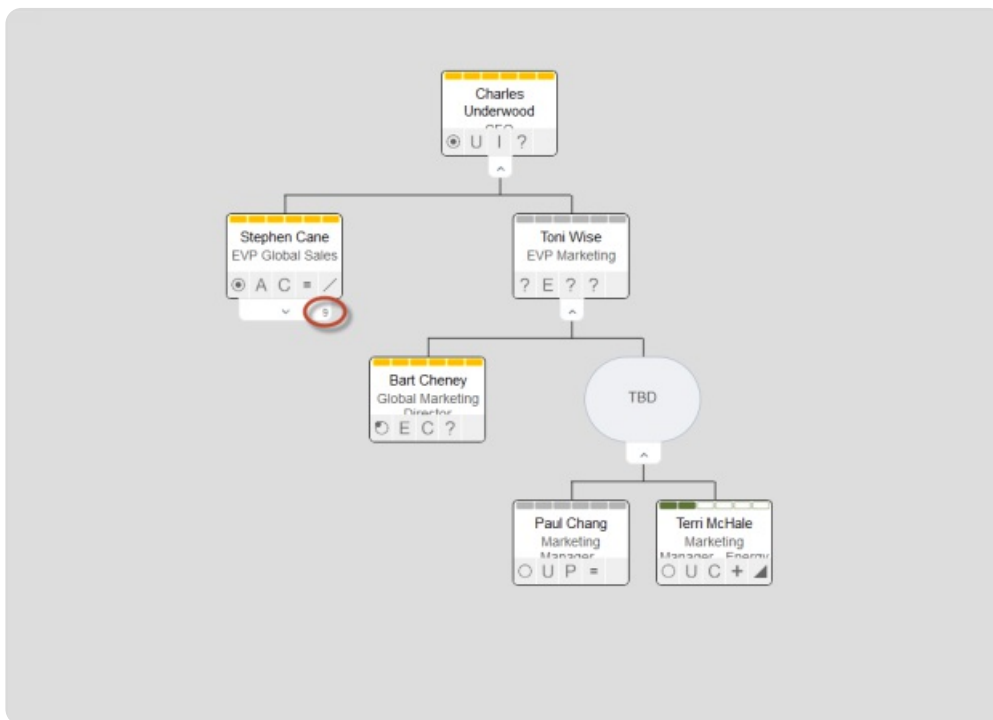
On an iPad or other touchscreen device, standard finger gestures such as swipe, pinch and double-click will provide the same functionality.

### Collapse sections of your map

If you are working with a large map which has with many contacts, you may find it useful to hide parts of the map which you are not currently using. To do this, you can collapse individual branches of the map or entire sections using the arrow at the bottom of a node.

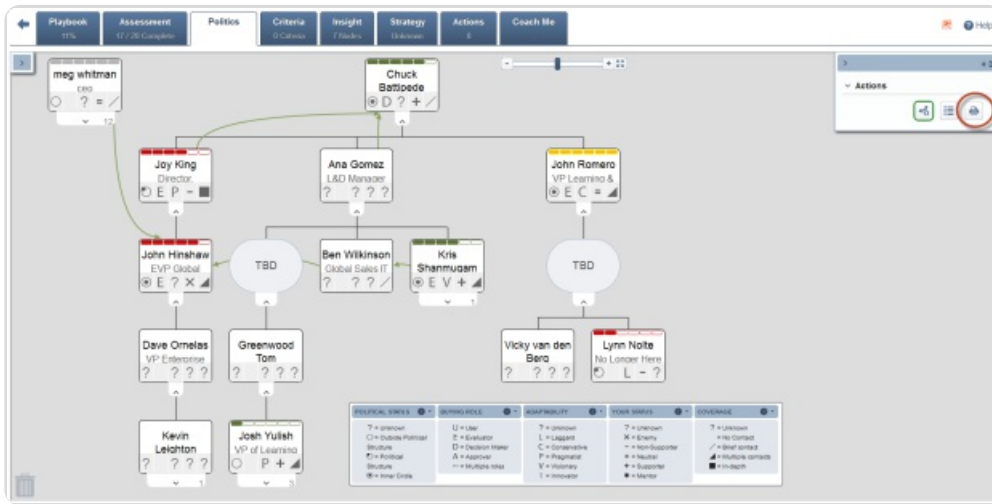


Clicking on a collapse arrow hides all of the nodes beneath it. The number of hidden nodes is displayed to the right of the arrow.



### Print your map

The pan and zoom controls are also useful when printing your map. To print your map, click on the **Print** icon in the right pull-out panel. The map opens in a new browser window. Resize and position your map on-screen as you want it to appear when printed. When you are ready, print the map using your browser's print function.




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**Note:** To ensure the map prints correctly, make sure that you enable printing of background images in your browser. This can generally be found in the *Print Preferences/Page Setup* settings.

---

## Gain Additional Insight

Once you have created your map and used it to understand basic information relating to influence lines, reporting structures and attributes of contacts, you can use the map for more advanced purposes. In *Political Map*, the *Filter* function helps you identify contacts on your map according to various criteria, for example during team debriefs. Together with the targeted coaching and advice provided in the left pull-out panel, this allows you to gain a deeper understanding of the factors affecting your deal and decide what to do next.

### How can filters help me?

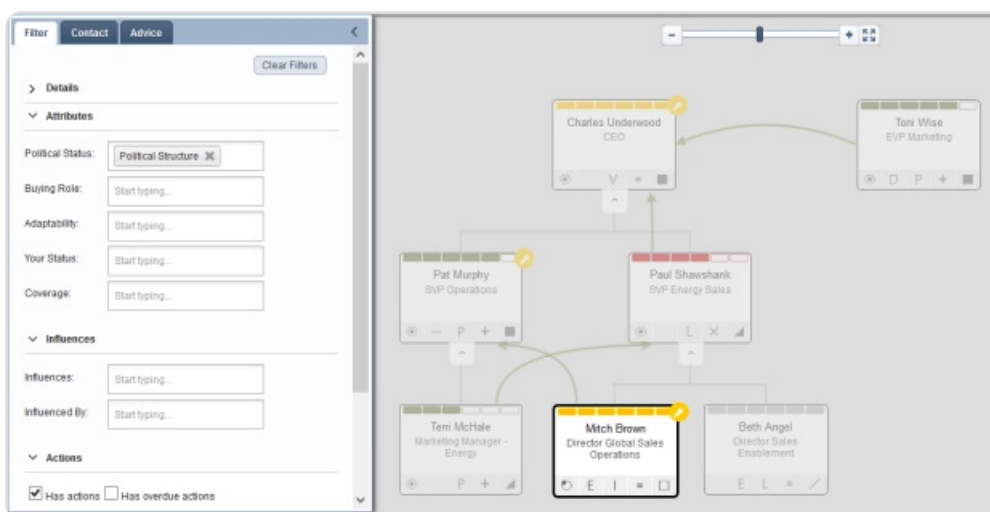
Political Map is most useful when you are evaluating “Can We Win”. In these circumstances you need to know about the people with whom you have relationships and whether they are useful for the purposes of progressing the opportunity. In particular, your level of inside support and return access are crucial in achieving a successful outcome. By identifying relevant contacts, Political Map shows you where you need to focus your efforts.

At various stages during a deal you might use filters in the following scenarios:

1. You need to identify people with low coverage who are either *decision makers* or members of the *inner circle* so that you know who you need to devote more time to. This will then drive your PRIME Actions going forward.
2. If the opportunity is at risk of stalling, you might want to filter for someone with in-depth coverage who influences a decision maker who can intercede on your behalf.
3. If you have several people within the inner circle who are responsible for evaluating potential products, it may be useful to filter for people who are at least *supporters* or ideally *mentors* on whom you can focus your efforts.
4. To keep an opportunity moving, having return access is vital. If you need to determine whether you have return access within an organization and then leverage it, you might consider using filters to find someone in the inner circle or a decision maker and with whom you have multi- or in-depth coverage. If you do not have a contact like this in your map, you can set a goal to develop this kind of relationship.

### Identify specific contacts using filters

To use the filter functionality, open the left pull-out panel and click on the **Filter** tab.



From there you can identify contacts on the basis of multiple criteria such as their *details*, *attributes*, *influences*, *actions* and *owner*.

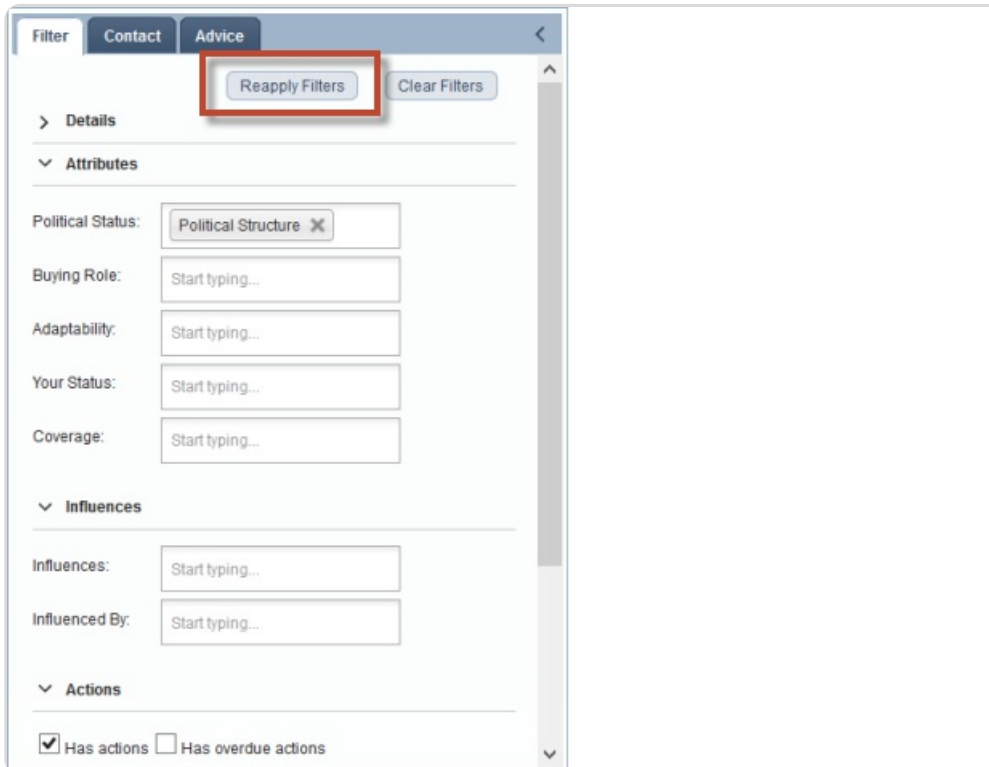


**Note:** When using filters, Political Map first searches for contacts where that name matches assigned owners. If no contact has an assigned owner with that name, the filter will select contacts with default owners by that name.

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## Reapply filters after adding a contact

When you apply a filter, it applies only to those nodes which are on the map at that time. If you add a new contact after applying a filter, the new contact will not be affected by the filter until you click on the **Reapply Filters** button in the left pull-out panel.

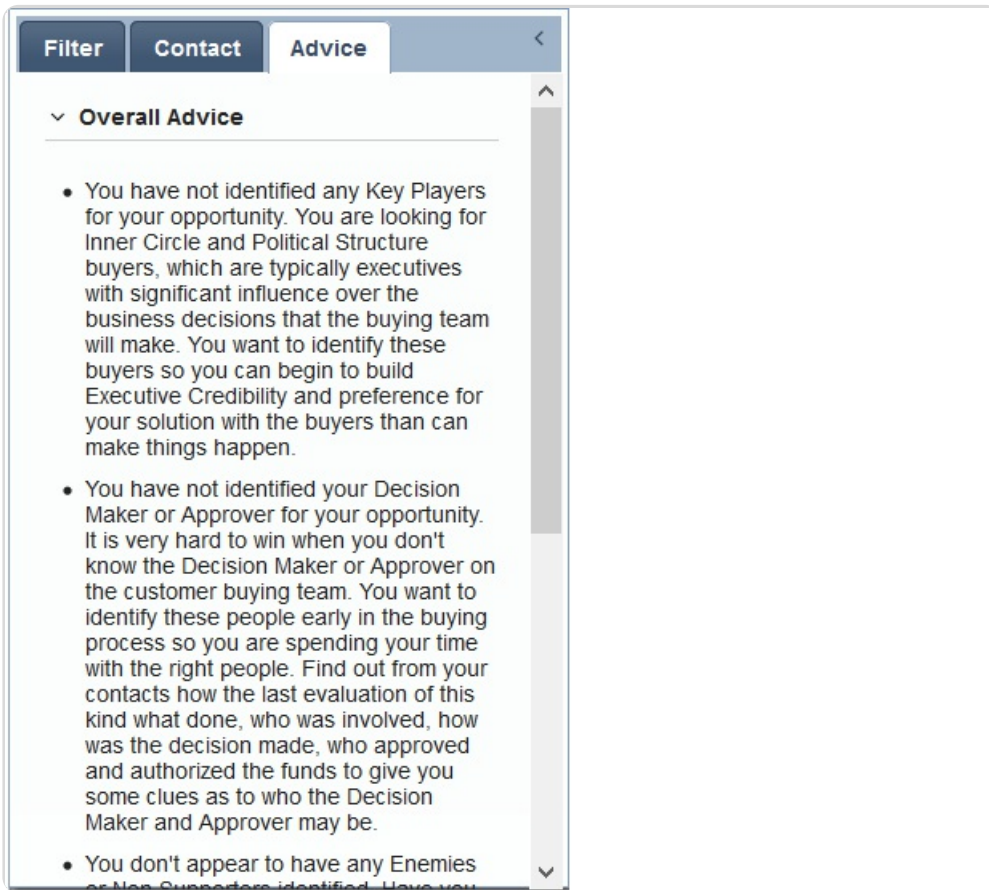


## Get advice on what to do next

Political Map's Advice function provides you with targeted information advice relating to each contact on your map. Political Map analyses the information stored for each contact and uses it to present an overall assessment of that person's role in an opportunity along with suggestions on how you should proceed. Individual advice for each contact is displayed in the **Coaching** section of the **Contact** tab while the **Advice** tab contains information for all of the contacts on your map.

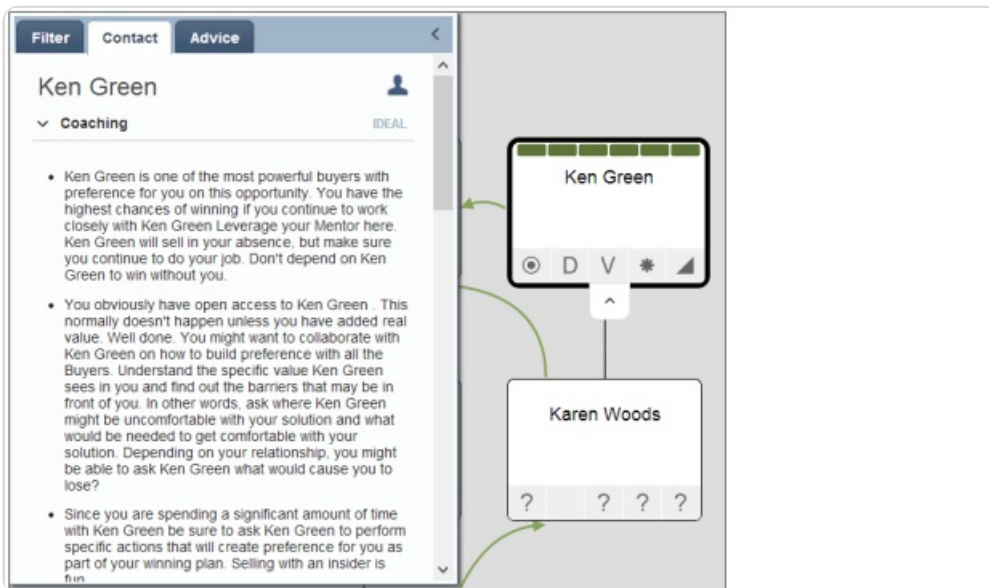
## Overall advice for your map

To see all of the advice available for your map, open the left pull-out panel and click on the **Advice** tab.

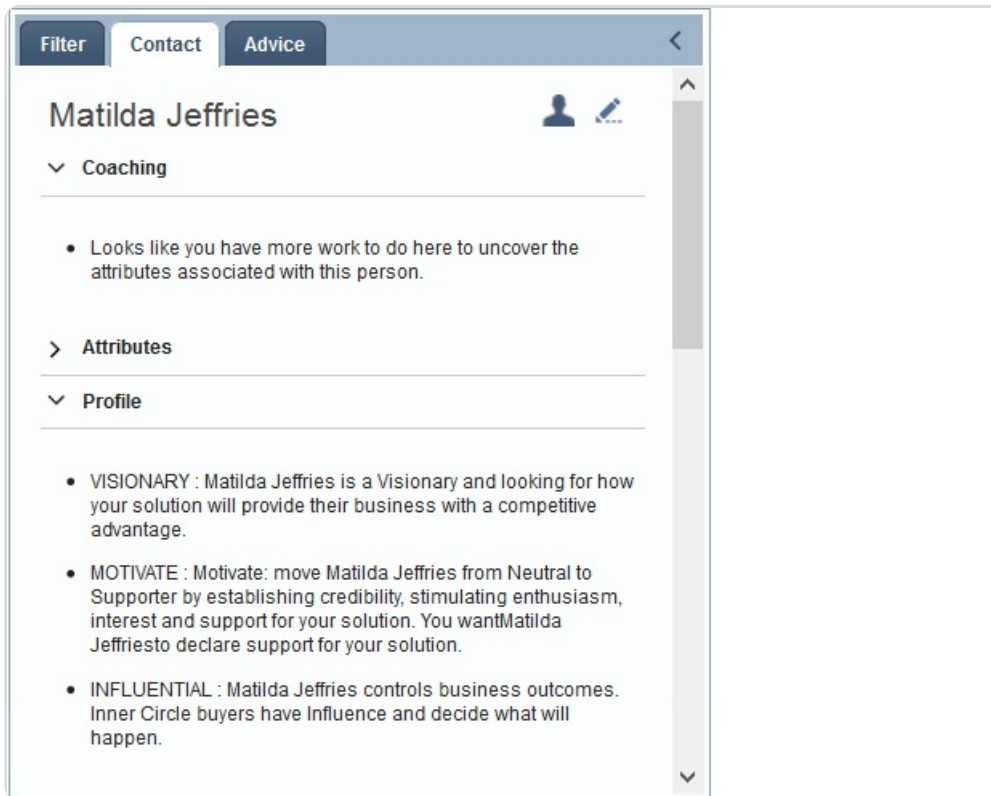


### Coaching for a specific contact

To see advice for a specific contact, click on that contact node on the map and scroll to the **Coaching** section of the left pull-out panel to view coaching tips and determine your next steps.

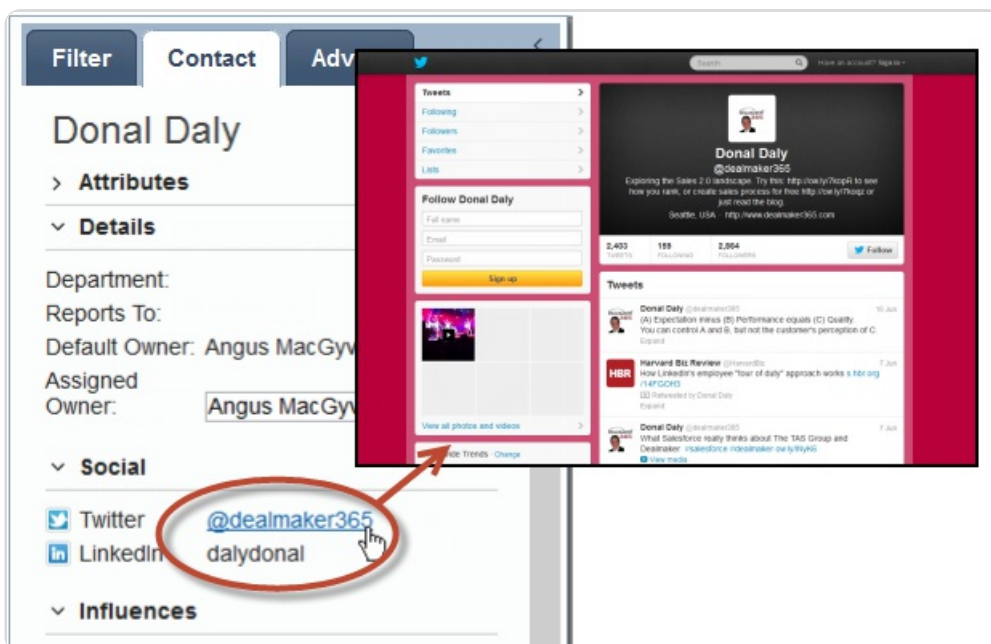


You can also find profile information in the **Profile** section of the **Contact** tab.



## Social integration

Information you can gain from a contact's social media use can help you learn more about that contact and discover what issues are most important to them. To access the contact's social media feed or page, click on the contact and scroll down to the **Social** section where you can find details of any social media links that have been entered for that contact.



# Political Map Glossary

## Political Map

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### Inner Circle:

The *Inner Circle* is a *Political Status* indicating that the person or contact "controls outcomes". Inner Circle people have Influence and decide what will happen in the organization.

The number of Inner Circle contacts is usually a correlation with the complexity and size of the account or opportunity. You will typically have 2 to 3 Inner Circle contacts for an opportunity.

At the top of the Inner Circle is many times the *Approver*, the person who approves and funds projects and initiatives. A second Inner Circle contact has the Approver's ear when deciding on which projects to approve and not approve.

Inner Circle contacts are *Key Players*.

### Political Structure:

The *Political Structure* is a *Political Status* indicating people that "make things happen" for the Inner Circle and they have influence. Political Structure people are trusted by the Inner Circle to "make things happen".

The number of Political Structure buyers is usually a correlation with the complexity and the size of the opportunity. You will typically have 2 to 5 Political Structure contacts for an opportunity.

Political Structure contacts are Key Players.

### Outside Political Structure:

*Outside the Political Structure* is a political status indicating people that watch and wonder what happened.

## Decision Orientation

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*Decision Orientation* is an attribute which is specific to *Smart Account Manager* indicating what will influence the contacts decision making process. The options include *Financial Orientation*, *Technical Orientation*, *Relationship Orientation*, and *Business Orientation*.

### Technical:

This person's primary focus is product functionality and technical capability. They are often analytical and detail-oriented. Product demonstrations, benchmarks, and careful deliberation will be key.

### Financial:

This person's primary focus is price, cost, and economics. While your product must be viable, numbers and negotiations will be key.

### Relationship:

This person believes they are forming a business partnership and their focus is the people

and company that will be serving their organization. While your product must be viable, support, trust, effort, and responsiveness will be key.

**Business:**

This person sees the big picture and overall impacts your product or solution will have on their company's present and future. This person can properly balance the technical, financial, and relationship issues. Their vision often extends beyond their company to include their clients, their competition, and their community. Industry knowledge and articulating business vs. product value will be key.

## Buying Role

---

*Decision Orientation* is an attribute which is specific to *Smart Opportunity Manager*. The options include *User*, *Evaluator*, *Decision Maker*, and *Approver*.

**User:**

A Buying Role indicating someone who will directly use your product or service or solution.

**Evaluator:**

A Buying Role that has the ability to say no, but they can't say yes. The best an Evaluator can do for you is to recommend your solution. Evaluators can block the competition or block you. Evaluators are formally assigned to the evaluation project (for an opportunity). They evaluate and accept based on defined standards, such as, "Do you meet the RFP requirements?, Have you met the defined criteria?, Do you operate within our standards/company policy/business practices? (An example of standards might be that the customer is a Six Sigma organization and you need to meet the requirement).

**Decision Maker:**

A Buying Role that has the ability to commit the company to a vendor or to a certain strategic direction. They have accountability for selecting the solution. A Decision Maker is always in the Political Structure or Inner Circle. A Decision Maker is a Key Player. A Decision Maker cannot be Outside the Political Structure.

**Approver:**

A Buying Role at a senior level who has the ultimate accountability for success of the project. They review the decision, bless it and typically release the funds. In large organizations, there may be multiple levels of approvers with dollar thresholds used to delineate their approval responsibility but they are not the ultimate approver. We are looking for the ultimate Approver for our map. (If a buyer can say 'no' and over turn a Decision Makers decision, they are an Approver). The Approver is at the top of the map and in the Inner Circle. An Approver is a Key Player.

## Adaptability to Change

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**Innovator:**

A person that loves to be the first to try new ideas and solutions. They are not afraid to be disruptive or make changes in something established.

**Visionary:**

A person who is looking for a competitive advantage; will ask supplier to make changes to standard offering to give customer a competitive advantage.

**Pragmatist:**

A person who tends to be in-charge of mission-critical-systems; generally relies on incumbent for upgrades and fix the broken system.

**Conservative:**

A person who wants 'plug and play' solutions; does not like lengthy implementations in either cost or time.

**Laggard:**

A person who will only buy when there are no other alternatives.

**Status**

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*Status* is a Person Attribute and includes *Mentor*, *Supporter*, *Neutral*, *Non-Supporter*, or *Enemy*.

**Mentor:**

Prefers your solution and sells in your absence. A Mentor is someone who believes that your success is critical to his or her success.

**Supporter:**

Prefers your solution, supports you visibly and verbally with others but doesn't sell in your absence.

**Neutral:**

Undecided or indifferent.

**Non-Supporter:**

Prefers something other than you - competitor, business as usual, another project or do-it-themselves.

**Enemy:**

Competitor's Mentor

**Coverage**

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Coverage the time or number of contacts you have had with a person relative to the total time and number of contacts you have made with the people. For each person you will have a coverage indicator of *Unknown*, *No Contact*, *Brief Contact*, *Multiple Contacts*, and *In Depth*.





No Coverage of the person, you have not had any contact with the buyer.

Brief coverage of the person relative to your total coverage of the opportunity.

Multiple points of contact have been made with the person.

In Depth coverage of the person relative to your total coverage of the opportunity.

## Decision Criteria

The **Decision Criteria** screen allows you to enter the key criteria that your customer will use when selecting a provider.

### Access Decision Criteria

There are two ways you access Decision Criteria. You can click on the **Decision Criteria** icon on the **Dealmaker Launch Pad** from within the opportunity screen.

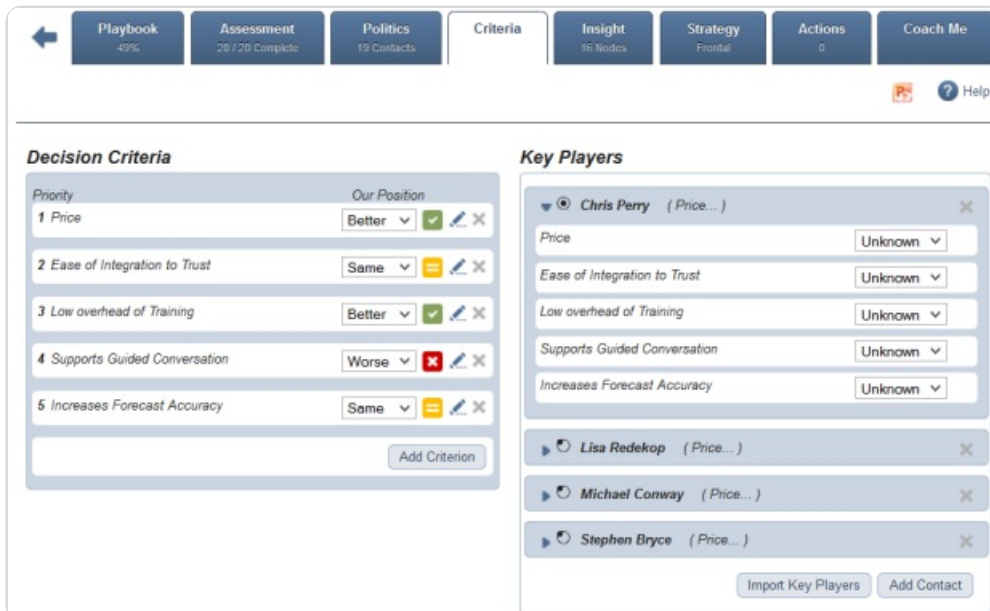


You can also access the **Decision Criteria** screen at any stage to add or update information by clicking on the **Criteria** tab.



### Use Decision Criteria

Decision Makers generally have criteria by which they make a selection. Dealmaker allows you to enter these criteria and prioritize them (*Critical / High / Medium / Low / Unknown*) for each of the key players within the customer account.



### Set the criteria

To add the Decision Criteria that affect the buying decision, click **Add Criterion** and enter a short description of the criterion. This is a free-text field, so you should be specific and clear in your description if possible.

To the right of each criterion, you can identify *Our Position* relative to the competition for this criterion. The options available are *Better* (green check), *Same* (yellow equals) or *Worse* (red cross). Consider the customer's perspective when making this assessment.

## Add the Key Players

To add the key players, either:

1. Click **Import Key Players**. This will list all of the contacts on the map whose political status is either *Inner Circle* or *Political Structure*. Click **Import** to add these contacts to the list.
2. Click **Add Contact**: A drop-down list of all contacts from the map (who aren't already added to the decision criteria screen) will be displayed. Select individual contacts and click Save to include the contact in the decision criteria / key player list.

## Set the importance of each Decision Criterion for each identified Key Player

Each Key Player is listed on the left of the screen with one of his high rank criteria displayed in brackets.

1. To display the decision criteria (listed by importance to that key player), click the blue arrow to the left of the key player's name.
2. Select the importance level for each criteria (to that key player) from the drop-down list (*Critical, High, Medium, Low, Unknown*). The criteria will be re-ordered based on their level of importance.
3. Note, changes to the importance level of a criterion to a key player may impact the overall rank of that criterion and result in it being displayed in a new position in the overall ranked list on the left of the screen.

## Notes:

- The *Overall Rank* will be determined based on the importance level across all of the key players.
- The criteria are listed on the left of the screen according to their overall rank across all key players.
- Each key player identified here will appear with a key icon in Political Map.

# Insight Map

*Insight Map* allows the sales person to accurately and quickly understand and confirm with the customer the business drivers they are confronting and the solutions which will best address those drivers.

## Accessing the Insight Map

There are two ways you access Insight Map in Dealmaker. You can click the **Insight Map** icon on the **Dealmaker Launch Pad** from within the opportunity screen.

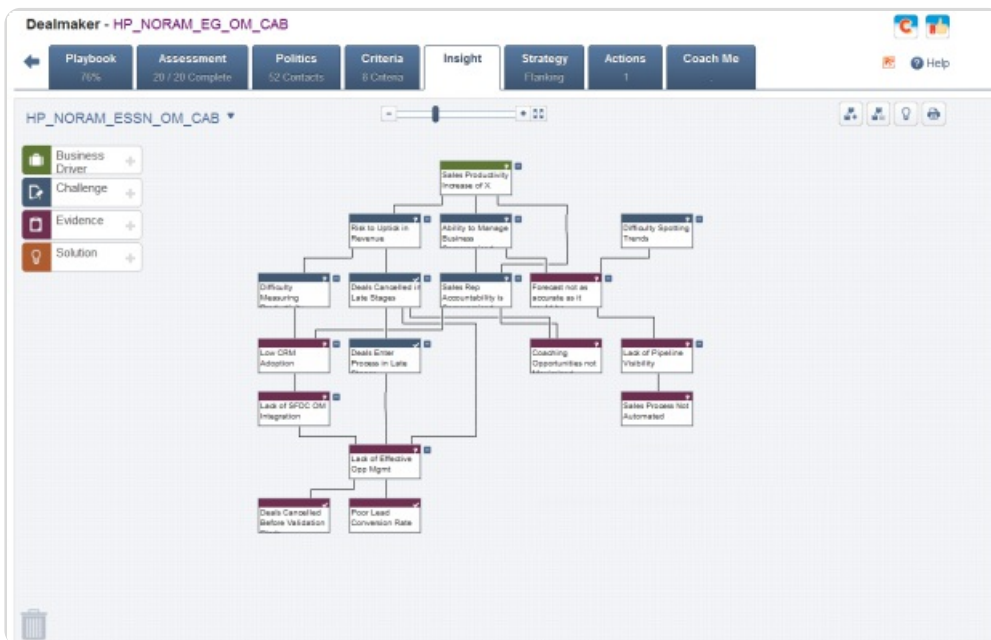


You can also access Insight Map at any stage to add or edit information by clicking on the **Insight** tab.



## Using the Insight Map

Insight Map is a graphical tool to be used by the salesperson together with their customer to visually link business issues to their associated challenges and stakeholders, allowing the salesperson, in collaboration with their customer, to prioritize the areas to address and the solutions to apply.



The main area of Insight Map is where place the nodes of the map to describe the business issue, challenges and evidence. The lines that connect these nodes illustrate the causal relationship between them.

The node types are:

- **Business Driver:** The internal and external pressures that are causing the key players on this opportunity to do something;
- **Challenge:** Strategic, Financial and Internal impacts of the business drivers;
- **Evidence:** Of a Challenge - a task, situation or process that is broken, not working well, or doesn't exist;
- **Solution:** The specific product or service you provide that can help the customer meet the Challenge.

## Insight Map: Create a map

An opportunity can include one or more insight maps.

When you first access the **Insight Map** screen on an opportunity, you will be asked to provide a name for the primary insight map for this opportunity. Once provided, the name of the map will be displayed in the top left corner of the map.



## Create additional maps for an opportunity

You can create additional insight maps for the opportunity by selecting the drop-down arrow beside the current map name, and clicking **Create New**.



The name of the new map is added to the drop-down menu below the existing map or maps. To switch between different maps, click on the map name in the drop-down menu.



## Rename a map

You can rename the map which is currently displayed on screen. To do this, switch to the

map by clicking on it in the drop-down menu. Open the drop-down menu again and select **Rename Map**.

## Delete a map

You can delete the map which is currently displayed on screen. To do this, switch to the map by clicking on it in the drop-down menu. Open the drop-down menu again and select **Delete Map**.

## Before you start

Once you have created your map, you will be presented with a blank canvas to start building the map. The following node types available for the insight map:

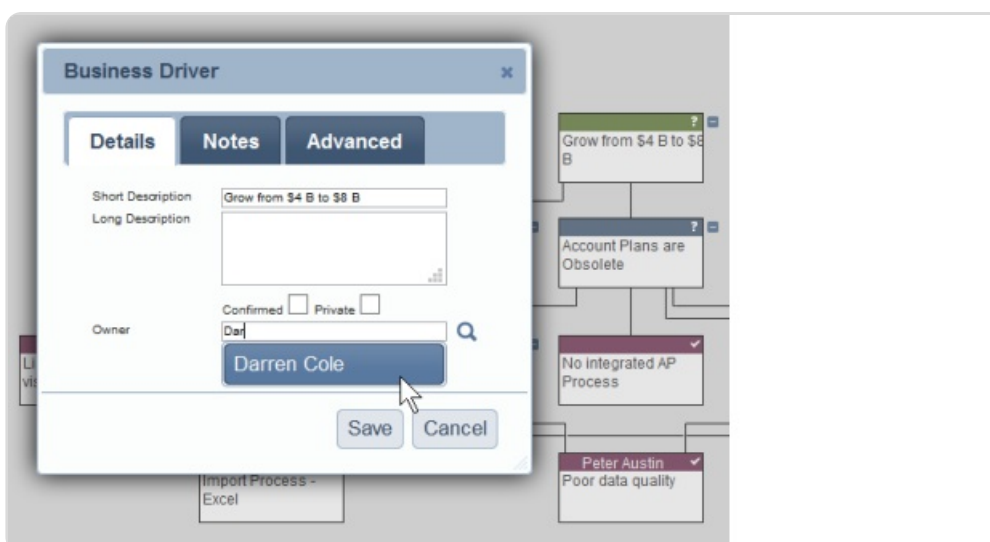
- **Business Driver:** The internal and external pressures that are causing the key players on this opportunity to do something;
- **Challenge:** Strategic, Financial and Internal impacts of the business drivers;
- **Evidence:** A task, situation or process that is broken, not working well, or doesn't exist;
- **Solution:** The specific product or service you provide that can help the customer directly relieve the evidence.

**Business Drivers** are always at the top of an insight map. Under the **Business Drivers** you can connect multiple **Challenges**. Challenges will then typically have *Evidence* nodes under them. Challenges can connect to other Challenges, and Evidence nodes can also connect directly to other Evidence nodes. Solutions will typically connect to Evidence nodes, although they can also connect directly to Challenges. The hierarchy of your Insight Map, running from top-to-bottom, will typically reflect the hierarchy of the node types displayed on the left of the map.

## Add / edit nodes on an insight map

To add a node to the map, click on one of the node types on the left and drag-and-drop it on to the map area. (On an iPad or other touchscreen device, hold your finger down on the node, and drag it on to the map area, and then lift your finger.) The **Edit** dialog appears for the new node when it's dropped onto the map. Here we have added a solution node to the map.

To add/edit any details of any node on your insight map, click the node and view the details in the pop-up box.





The edit pop-up for all node types (except Solutions) includes the following tabs:

### Details

- **Short Description:** Provide a 40 character description which will be displayed on the node.
- **Long Description:** This is a longer description which is displayed when you hover over the node.
- **Confirmed:** Use this checkbox to specify whether or not the item has been confirmed by the prospect (if confirmed, a checkmark is displayed in the node title; if not, a question mark is displayed).
- **Private:** Private nodes can be hidden from the display.
- **Owner:** Start typing the owner's first name to display a drop down list of matching contacts. Select the correct contact from the list to populate the first and last name boxes.

### Notes

This tab contains a free form text field where you can add details to the node. These notes are visible when you hover over a node.

### Advanced

- **Remove** button: Remove the node from the map. You can also drag-and-drop the node into the waste basket in the bottom left of the map.
- **Disconnect** button: Remove the links to and from this node. To connect the node to other nodes, you can drag-and-drop the child node to the parent node.
- **Change type:** Use this drop-down list to assign a different type to an unconnected node. Note this option is not available on a node which has connections to other nodes. If you wish to change the type of a node you must first disconnect it from other nodes.

## Add Additional Nodes and Building Connections Between Nodes

To add more nodes to the map drag-and-drop one of the node types on to the map area. (On an iPad or other touchscreen device, hold your finger down on the node, drag it on to the map area, and then lift your finger.) The **Edit** dialog appears for the new node when it is dropped onto the map.

**Rules for Valid Connections between Nodes:** The connection between nodes is subject to some logic rules.

1. Business Drivers will always be at the top of the tree.
2. Only Challenges can connect upwards to Business Drivers.
3. Challenges may connect to other Challenges in a parent-child relationship.
4. Evidence nodes may connect upwards to Challenges.
5. Evidence Nodes may also connect to other Evidence nodes.
6. Solutions may connect to either Challenge or Evidence nodes.

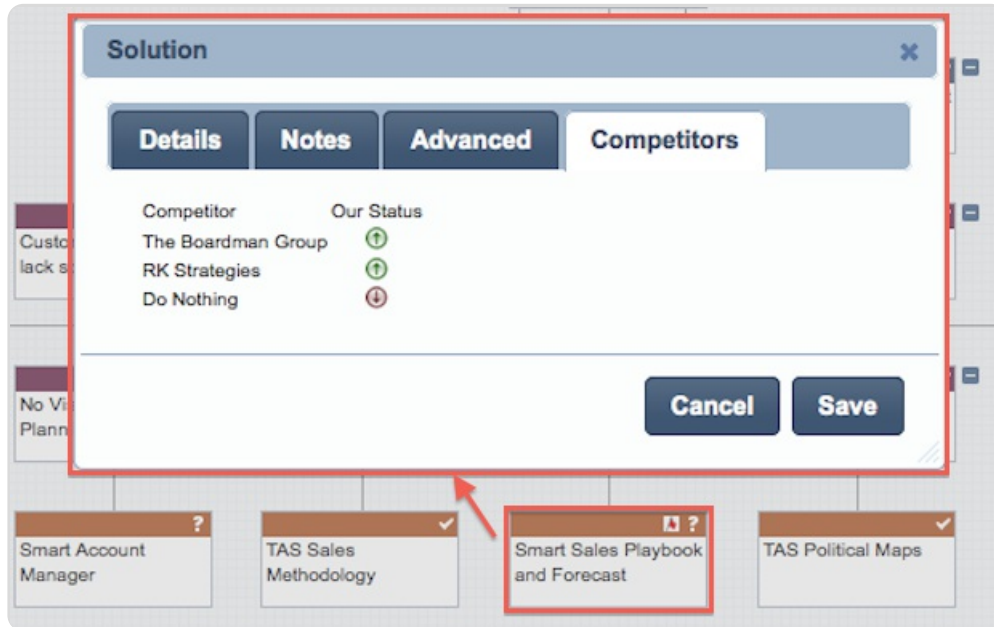
When adding a node simply drag it onto the existing node and Dealmaker will connect it automatically.

You can connect two nodes already on the map by clicking on the node representing the *effect* and dragging your cursor to the *cause* node (in other words, drag the child onto the parent). Each node is eligible for *many-to-many* linkage (subject to the rules given above).

## Add solutions

Once you have built your Insight Map, and agreed it with the customer, you should be in a position to identify which specific elements of your product or service will address the customer's specific Challenges or Evidence points. You will know that your Insight Map is heading in the right direction when you can identify a very specific feature of your offering that solve the problem described by the Challenge or Evidence.

You can add a Solution to your map in the same drag-and-drop manner as you add other nodes.



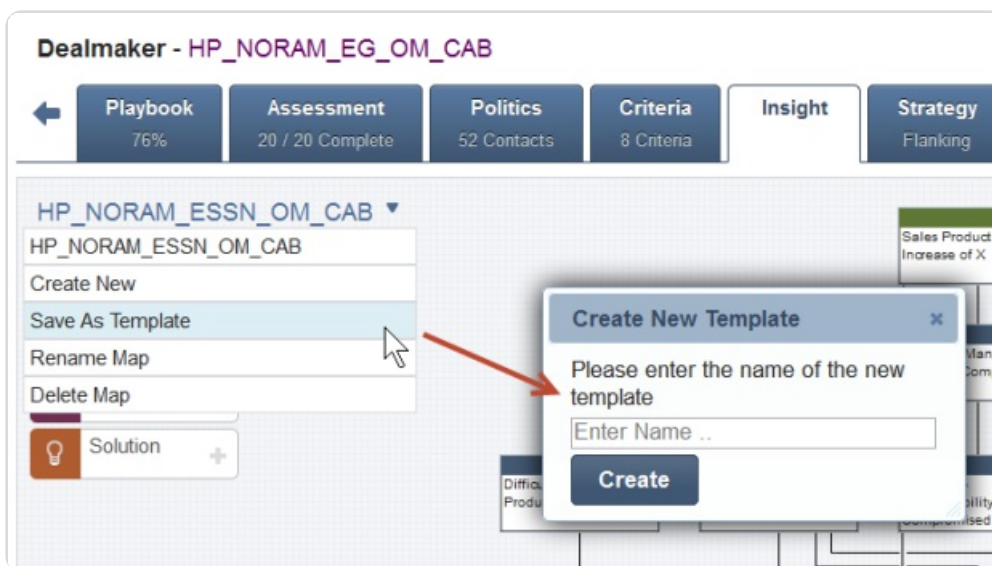
There is an additional tab - **Competitors** - for solution nodes. Here you see the competitors that you have identified for the opportunity and your relative status. Click on the **Status** icon to toggle through the *Our Status* values.

## Insight Map: Templates

If you sell to a particular profile of customer – perhaps customers in a particular industry, or customers who frequently have similar *Business Drivers* – you might find it useful to have a standard template insight map to serve as a foundation for each new opportunity. Some companies may want their marketing departments to create a standard set of templates for the sales team to use in each opportunity. Dealmaker allows you to save any Insight Map you are using as template and then import that template into a new opportunity.

### Create an insight map template

To create an insight map template, you should first [create](#) the complete insight map you want to use as a foundation for other maps. Then, click on the map name at the top-left of the insight map, and select **Save As Template** from the **Options** menu.



When you select **Save As Template**, provide a meaningful name for the template and click **Create**. Any user who has access to the opportunity where the template was saved, can import it into any opportunity.

### Import an insight map

To import an insight map for use as a template:

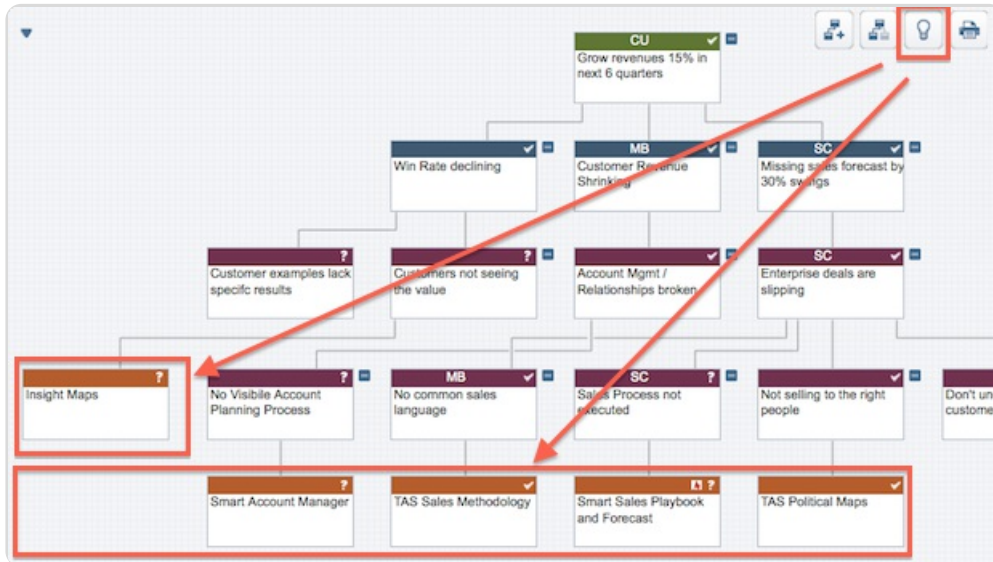
- Click on the **Import Insight Map** icon on the top right of the **Insight Map** screen.
- In the pop-up box, click on either the **Template** or **Map** radio button to indicate that you want to either search through the maps that were created specifically as templates, or search through all maps. When you have found the map you want, click on it to preview.
- Click **Import** to select.



# Insight Map: Manage and Edit

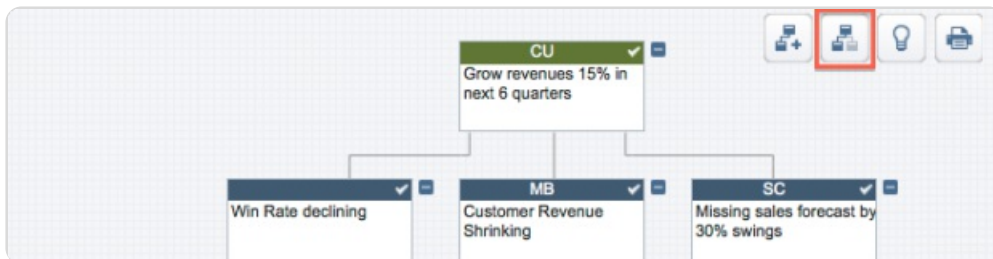
## Show / hide solutions

There may be occasions when you want to share the insight map with your customer, but do not want to show the solutions that you have attached to the map. If you want to show or hide the solutions on the map at any time, click the **Show / Hide Solutions** icon.



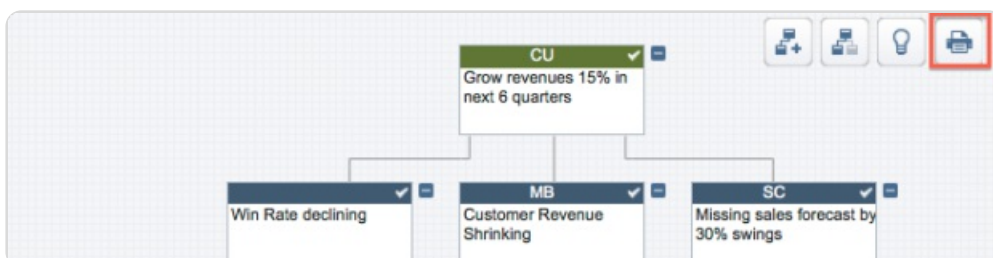
## Show/hide private nodes

If you want to show or hide *private nodes* on the map at any time, click on the **Show / Hide Private Nodes** icon.



## Print the map

To print the map, click on the **Print** icon.



A second window or tab opens in your browser.



Here you can collapse/expand nodes of the map (note that children with multiple parents will continue to display if any one parent is expanded), and zoom/pan to the desired section of the map, before using the standard File>Print facility in your browser to print your on-screen results.

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**Note:** To ensure the map prints correctly, make sure that you enable printing of background images in your browser. This can generally be found in the *Print Preferences/Page Setup* settings.

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# Competitive Strategy

Most opportunities have some competition, whether it be another supplier you must defeat or competing priorities and budgets within the customer account. The customer, of course, always has the option to *do nothing*. In any case, you need to analyze your competition and develop a winning strategy.

## Access Competitive Strategy

There are two ways you can access the *Competitive Strategy* for your opportunity. You can click on the **Competitive Strategy** icon on the **Dealmaker Launch Pad** from within the opportunity screen.



You can also determine the Competitive Strategy at any time while working your opportunity plan in Dealmaker by clicking on the **Strategy** tab.



## Use Competitive Strategy

Before you can analyze your competitors, you must identify which competitors you face within each opportunity. You can add the competitors directly in *Salesforce*, or add from the **Dealmaker Competitive Strategy** screen (click on the **Add Competitor** button).

Dealmaker - Ancaster Engineering - 200 Enterprise Licenses

Navigation: Playbook (33%), Assessment (20 / 20 Complete), Politics (8 Contacts), Criteria (6 Criteria), Insight (36 Nodes), **Strategy**, Actions (3 Actions), Coach Me

**Your Strategy**

**Flanking** Change

Use recommended strategy

A flanking strategy shifts the focus of the customer's buying criteria to new or different issues that favor your solution.

1. Flexibility for enterprise and transactional sales
2. Proven blend of skills, methodologies, and technology
3. Rapid deployment globally
4. Change Execution Process

**Competitors**

Competitor Name	Strategy	Strengths	Weaknesses
The Boardman Group	Flanking	The new kid on the block with good ideas. Well founded behaviors and skills programs.	Do not integrate to CRM. No methodology. Not well enough established for the type of customer.
RK Strategies	Defend	The incumbent. Very established and respected methodology.	Very involved methodology. Does not easily cater to multiple sales processes.
Do Nothing	Unknown	Zero capex or opex outlay.	Does not provide a jump start. Not scalable. Slow and not agile enough.

**Add Competitor**



## Determine your competitive strategy

Dealmaker can help you determine the strategy to employ in order to win against your competition.

To get Dealmaker's recommended Competitive Strategy:

1. Click on the **Change** button in the **Your Strategy** section of the Competitive Strategy screen.
2. Answer the questions that Dealmaker asks.

When all questions have been answered, Dealmaker will provide its recommendation.

**Dealmaker - Ancaster Engineering - 200 Enterprise Licenses**

Navigation: Playbook (33%), Assessment (20 / 20 Complete), Politics (8 Contacts), Criteria (6 Criteria), Insight (36 Nodes), **Strategy**, Actions (3 Actions), Coach Me

**Your Strategy**

**Flanking** **Change**

Use recommended strategy

A flanking strategy shifts the focus of the customer's buying criteria to new or different issues that favor your solution.

**Guideline Questions**

Is there a compelling event or can you create one?

**Yes** **No**

1. Flexibility for enterprise and transactional sales  
2. Proven blend of skills, methodologies, and technology  
3. Rapid deployment globally  
4. Change Execution Process

**Competitors**

Competitor Name	Strategy	Strengths	Weaknesses
The Boardman Group	Flanking	The new kid on the block with good ideas. Well founded behaviors and skills programs.	Do not integrate to CRM. No methodology. Not well enough established for the type of customer.
RK Strategies	Defend	The incumbent. Very established and respected methodology.	Very involved methodology. Does not easily cater to multiple sales processes.
Do Nothing	Unknown	Zero capex or opex outlay.	Does not provide a jump start. Not scalable. Slow and not agile enough.

**Add Competitor**

You can select to use Dealmaker's recommended strategy by checking the box beside **Use recommended strategy**. If the box is unchecked, you have the opportunity to select your own strategy and describe why you have chosen it.

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**Note:** You are able to update or edit your strategy at any time should something of high impact change in your opportunity. Click on the **Change** button in the **Your Strategy** section and answer the questions again.

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## Recording your competitors' strategies

Click on the edit icon in the *Competitors* section of the Competitive Strategy screen.

**Competitors**

Competitor Name	Strategy	Strengths	Weaknesses
The Boardman Group	Flanking	The new kid on the block with good ideas. Well founded behaviors and skills programs.	Do not integrate to CRM. No methodology. Not well enough established for the type of customer.
RK Strategies	Defend	The incumbent. Very established and respected methodology.	Very involved methodology. Does not easily cater to multiple sales processes.
Do Nothing	Unknown	Zero capex or opex outlay.	Does not provide a jump start. Not scalable. Slow and not agile enough.

**Add Competitor**

You will be presented with an editable area to record details about your competitors.

**Competitors**

Competitor Name	Strategy	Strengths	Weaknesses
<input type="text" value="The Boardman Group"/>	<input type="text" value="Flanking"/>	<input type="text" value="The new kid on the block with good ideas. Well founded behaviors and skills programs."/>	<input type="text" value="Do not integrate to CRM. No methodology. Not well enough established for the type of customer."/>
RK Strategies	Defend	The incumbent. Very established and respected methodology.	Very involved methodology. Does not easily cater to multiple sales processes.
Do Nothing	Unknown	Zero capex or opex outlay.	Does not provide a jump start. Not scalable. Slow and not agile enough.

**Cancel Save Add Competitor**

1. Start by documenting your competitors strengths and weaknesses in the free-text areas at the bottom of the Competitive Strategy screen.
2. Based on their strengths and weaknesses, identify from the drop-down list the anticipated competitive strategy that the competitor is going to use.
3. When you are finished, click **Save** changes.

## PRIME Actions

As you work an opportunity, you will continually identify the actions you need to implement in order to win the opportunity. The **PRIME Actions** screen supports the addition of these actions and maintains an ongoing “to-do” list of tasks and actions required. Dealmaker synchronizes these actions with *Tasks* in *Salesforce*.

### Access PRIME Actions

There are two ways you access PRIME Actions. You can click on the **PRIME Actions** icon on the **Dealmaker Launch Pad** from within the opportunity screen.



You can add or review your PRIME actions at any stage by clicking on the **Actions** tab.



### Use PRIME Actions

When you access PRIME Actions you are presented with a screen that displays the list of **Open Actions** - tasks relating to this opportunity plan that you have yet to complete, and **Closed Actions** - tasks that you have already completed.

The screenshot shows the Dealmaker - Ancaster Upgrades screen. At the top, it says 'Dealmaker - Ancaster Upgrades' and 'Show Feed'. Below this is a navigation bar with tabs: Playbook (33%), Assessment (20 / 20 Complete), Politics (8 Contacts), Criteria (6 Criteria), Insight (36 Nodes), Strategy (Flanking), Actions, and Coach Me. The 'Actions' tab is selected. Below the navigation bar, there are two sections: 'Open Actions' and 'Closed Actions'. Each section contains a table of actions.

Action	Due	Subject	Comments	Action Type	Contact	Due Date	Owner	Priority	Status
		Collate Data		Retrieve missing information		10/29/2013	Das, Dancz	Normal	In Progress
		Organize product demonstration	Arrange a customized demonstration at client's site	Pose your value		10/15/2013	Das, Dancz	Normal	Not Started
+									

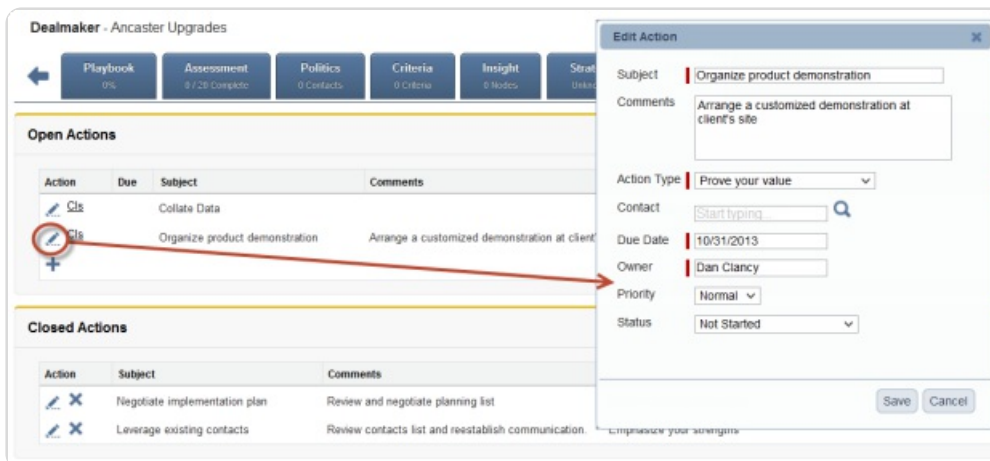
  

Action	Subject	Comments	Action Type	Contact	Due Date	Owner	Priority	Status
	Negotiate implementation plan	Review and negotiate planning list	Retrieve missing information		11/12/2013	Das, Dancz	High	Completed
	Leverage existing contacts	Review contacts list and reestablish communication.	Emphasize your strengths		11/22/2013	Das, Dancz	High	Completed

If you want to add a new PRIME Action, can click on the **Create PRIME Action** button.



To edit an existing PRIME Action you can click on the **Edit** link to the left of the specific action.



It is important to remember to select the PRIME Action type from the **PRIME Action** drop-down list. If you do not set a value here, Dealmaker will assume that you are just recording a Task that is not related to this opportunity plan, and will not display it in your **PRIME Actions** list. It will however be recorded with the Tasks list in Salesforce.

**Note:** Depending on how your administrator has configured your system, the contents of this screen may vary. You may see either:

- (1.) a list of PRIME actions only, or
- (2.) a list of *all* actions relating to this opportunity. In this case, the **PRIME Action type** column may or may not be displayed.

## Coach Me

*Coach Me* provides real-time, deal-specific coaching, helping you to identify risks and vulnerabilities in your opportunity. It offers specific coaching on your opportunities that is dependent on the information you have provided. Coach Me suggests actions you should take to progress your sales opportunity.

### How Coach Me Works

Dealmaker includes a library of Coach Me rules is available, and your Dealmaker administrator can enable these coaching rules for your company. The Coach Me rules embed extensive sales knowledge, and when you click on **Coach Me**, the methodology knowledge is applied to your opportunity. Different Coach Me rules apply at different stages in the sales cycle, and can be applied differently for varying deal sizes or opportunities in distinct types of sales opportunities. Your Dealmaker administrator can enable or disable the rules that are provided, can edit the standard rules, and can add additional rules.

### Access Coach Me

There are two ways you access Coach Me. You can click on the **Coach Me** icon on the **Dealmaker Launch Pad** from within the opportunity screen.



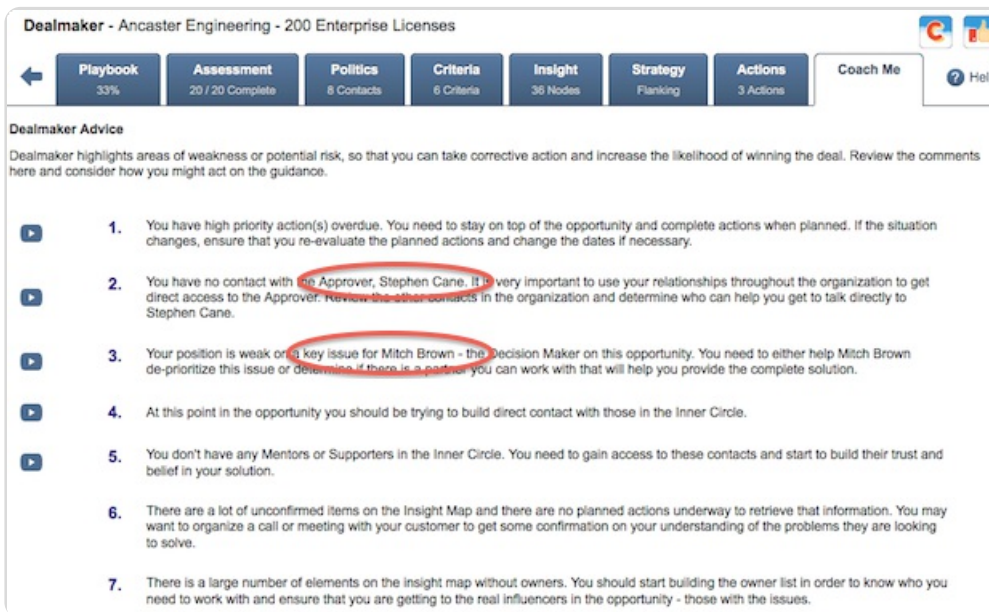
You can also invoke also access Coach Me at any stage to get guidance on what to do next or to highlight any inconsistencies or weaknesses in your opportunity by clicking on the **Coach Me** tab.



### Use Coach Me

After launching Coach Me, a window appears with opportunity-specific guidance, based on the actual circumstances in your opportunity.





In this example, you can see that Coach Me has identified some very specific vulnerabilities relating to the Approver and the Decision Maker in the opportunity. Acting on the Coach Me advice will enhance the likelihood of winning the opportunity. If your Dealmaker administrator has enabled Quicklinks in your Coach Me configuration, you may also see the Quicklinks play button to the left of specific Coach Me rules. Quicklinks provides the ability to link to additional information, learning or guidance to address the point at hand.



## Use Coach Me for sales coaching

When a sales person is reviewing an opportunity with her sales manager, the effectiveness of the review call is dramatically increased when both parties have reviewed the Coach Me advice in advance of the call. The sales person should have used Coach Me to identify areas that she can address herself, and where possible will have addressed those points in advance of the call. The manager should then be using Coach Me to highlight areas where the sales person might need help or guidance in overcoming the challenges that are unsolved by the

sales person.



# Reports

*Dealmaker Opportunity Manager* provides a number of reports which allow you to examine your opportunities and gain an insight into their status. The following reports are available:

1. Dealmaker Opp Plan Summary

The *Dealmaker Opp Plan Summary* report provides an overview of all current opportunities for a selected period of time. For more details, [click here](#).

2. Dealmaker Opportunity Plan Completeness Report

The *Dealmaker Opportunity Plan Completeness* report provides a general overview of the completeness levels of opportunities for a selected period of time. For more details, [click here](#).

3. Dealmaker Opp Plan Completeness Detail Report

The *Dealmaker Opportunity Plan Completeness Detail* report provides a detailed overview of the completeness levels of opportunities for a selected period of time. For more details, [click here](#).

4. Dealmaker Usage Report

The *Dealmaker Usage Report* provides a detailed overview of usage activity for users during a selected period of time. For more details, [click here](#).

# Opp Plan Summary

The *Dealmaker Opp Plan Summary* report provides an overview of all current opportunities for a selected period of time. This report provides details of the value and status of each opportunity as well as the associated accounts and opportunity owner.

To run the report, go to the **Reports** tab and click on **Dealmaker Opp Plan Summary**.

Owner	Opportunity Name	Account Name	Amount	Assessment #	Political Map #	Decision Criteria #	Insight #	Strategy	PRIME #
Phil Carlson	Thomson Reuters Corp_DM Ultimate x licenses_PC	Thomson Reuters Corporation	\$1,000,000.00	10	23	3	1	Unknown	1
Kevin McDonald	NetApp_WW Acct Planning RFP	NetApp Inc.	\$800,000.00	18	9	3	0	Unknown	0
Tim Foster	Thomson Reuters F&R Process Project	Thomson Reuters Corporation	\$500,000.00	-	8	-	-	Unknown	0
Andrew Walters	Technogym-	Technogym	\$450,000.00	20	1	0	0	Unknown	0
Craig Sawicki	JCI-PS_DM_OM (WW) - 500 lic_Y2_Jan2014	Johnson Controls, Inc. (JCI)	\$263,640.00	-	-	-	-	Unknown	-
Craig Sawicki	JCI-PS_DM_OM (WW) - 500 lic_Y3_Jan2015	Johnson Controls, Inc. (JCI)	\$263,640.00	-	-	-	-	Unknown	-
Craig Sawicki	JCI-PS_DM_OM (WW) - 500 lic_Y4_Jan2016 RENEWAL	Johnson Controls, Inc. (JCI)	\$263,640.00	-	-	-	-	Unknown	-
Travis Hill	Forrester Research, Inc.-	Forrester Research, Inc.	\$250,000.00	20	8	6	13	Flanking	1
Katarina Haddad	Bell Mobility - DM Playbook and Forecast	Bell Canada	\$200,000.00	-	-	-	-	Unknown	-

## Information Contained in the Report

In addition to the *Owner*, *Opportunity Name* and *Account Name* for each opportunity, the report provides the following information:

- **Amount:** The value of the opportunity.
- **Assessment %23:** Indicates the number of assessment criteria which have been answered in Dealmaker.
- **Political Map %23:** Indicates the number of contacts which have been added to the political map in the *Politics* tab.
- **Decision Criteria %23:** Indicates the number of decision criteria which exist for this opportunity.
- **Insight %23:** Indicates the number of nodes in the insight map.
- **Strategy:** Indicates the strategy which has been specified for this opportunity.
- **PRIME %23:** Indicates the number of open actions which exist for this opportunity.

The data can be sorted and summarized according to each criterion and can be exported into Excel format for printing or further processing.

# Opp Plan Completeness

The *Dealmaker Opportunity Plan Completeness* report provides a general overview of the completeness levels of opportunities for a selected period of time. This report provides details of the value, stage and level of completeness of each opportunity as well as the opportunity owner and account name.

Owner	Opportunity Name	Amount	Stage	% Complete
<input type="checkbox"/> Account Name: <u>Acme Pty Ltd</u> (1 record)				
Brian Rice	<u>Audit</u>	\$45,000.00	Target Qualified	70.10%
<input type="checkbox"/> Account Name: <u>Ancaster Engineering</u> (2 records)				
Brian Rice	<u>Ancaster Engineering - 200 Enterprise Clone</u>	\$250,000.00	Requirements	59.10%
Brian Rice	<u>Clone: Ancaster Engineering - 200 Enterprise Licenses</u>	\$250,000.00	Target Selected	0.00%
<input type="checkbox"/> Account Name: <u>Ancaster Inc</u> (2 records)				
Brian Rice	<u>Ancaster - Multiple Products</u>	-	Requirements	0.00%
Brian Rice	<u>Data cloud expansion</u>	\$500,000.00	Evidence	0.00%

To run the report, go to the **Reports** tab and select **Dealmaker Opportunity Plan Completeness** from the drop down list.

More detailed opportunity completeness information is available using the [Dealmaker Opp Plan Completeness Detail](#) report.

## Opp Plan Completeness Detail

The *Dealmaker Opportunity Plan Completeness Detail* report provides a detailed overview of the completeness levels of opportunities for a selected period of time. In addition to general information relating to the opportunity such as its owner and associated account, this report provides a detailed breakdown of an opportunity's completeness and how it has been calculated.

The *Dealmaker Completeness* field ('% **Complete**') computes an overall score based on the completeness of the data recorded in the various modules.

**Dealmaker Opp Plan Completeness Detail**

Report Generation Status: Complete

Report Options:

Summarize information by: Show  
 --None-- All dealmaker opportunities

Time Frame  
 Date Field: Created Date Range: Current FQ  
 From: 4/1/2013 To: 6/30/2013

Run Report Hide Details Customize Save Save As Delete Printable View Export Details

Owner	Account Name	Opportunity Name	Amount	Assessment %	Politics %	Decision Criteria %	Insight %	PRIME %	Strategy %	% Complete
Brian Rice	Acme Pty Ltd	Audit	\$45,000.00	65%	100%	50%	82%	0%	72%	70.10%
Brian Rice	Telcom 1	Enterprise Solution	\$465,000.00	-	-	-	-	0%	0%	0.00%

The *Dealmaker Completeness* is calculated as follows:

Assessment Completeness \* 30% +  
 Politics Completeness \* 20% +  
 Decision Criteria Completeness \* 15% +  
 Insight Completeness \* 15% +  
 PRIME Completeness \* 5% +  
 Strategy Completeness \* 15%

*Assessment Completeness* is calculated as follows:

- 20% of the score is based on answers provided for competitors
- 80% of the score is based on what you have recorded against your company
  - 60% of the score is allocated to the number of questions answered / total number of questions
  - 20% of the score is based on comments added to questions marked as *Recommended*.

The following questions are recommended by default:

- Compelling Event;
- Unique Business Value;
- Inside Support;
- Executive Credibility;
- Informal Decision Criteria.

*Politics Completeness* is calculated based on the number of contacts with more than one attribute set:

- 1-3 contacts scores 50%
- 4-5 contacts scores 75%
- 6 or more contacts scores 100%

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*Decision Criteria Completeness* is calculated as follows:

- 40% of the score is based on the number of decision criteria identified:
    - 1-3 criteria scores 20%
    - 4 criteria or more scores 40%
  - 60% of the score is based on the number of key players who also have a *Political Status of inner circle or political structure*
    - 1-3 such key players scores 30%
    - 4 or more such key players scores 60%
- 

*Insight Completeness* is calculated as follows:

- 40% of the score is based on having at least one node of each node type (10% for each node type). If your Insight Map contains at least one node of each type (*Business Driver, Challenge, Evidence, Solution*) it will score 40%
  - 60% of the score is based on the number of nodes:
    - 1-4 nodes scores 24%
    - 5-8 nodes scores 42%
    - 9 nodes or greater scores 60%
- 

*PRIME Completeness* is set to:

- 100% if the opportunity is closed
  - If the opportunity is open:
    - 0% if there are no defined open PRIME actions
    - 50% if there are 1-3 open PRIME actions
    - 100% if there are 4 or more open PRIME actions
- 

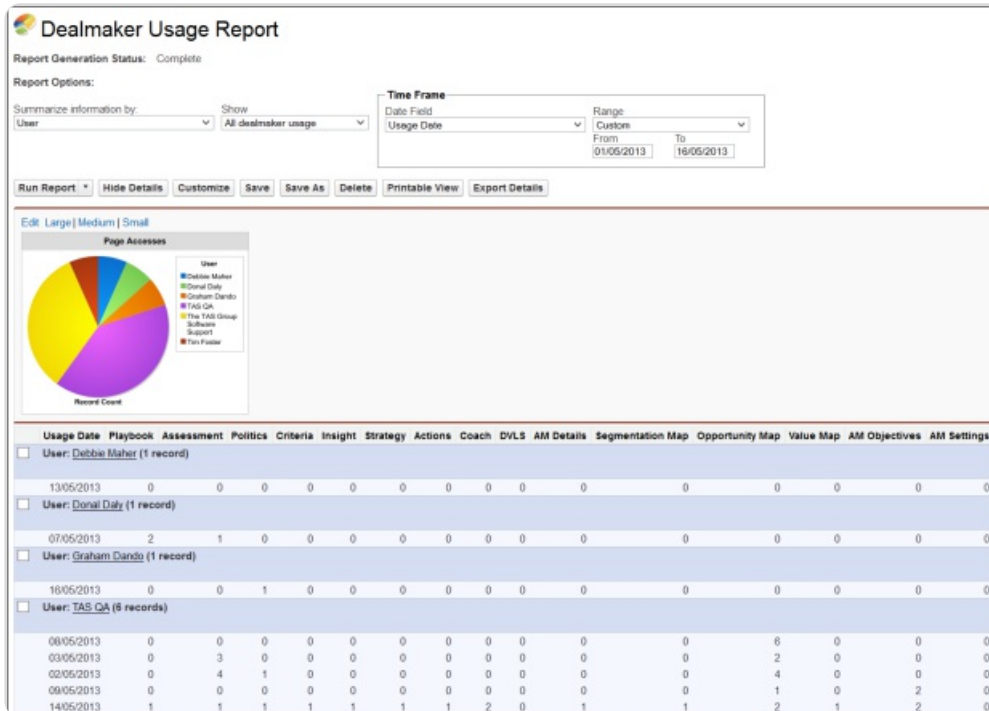
*Strategy Completeness* is calculated as follows:

- 70% of the score is based on what you have recorded for your strategy:
  - 42% for setting your strategy (either using the recommended strategy or setting your own)
  - 28% for adding detail notes to your strategy
- 30% of the score is based on adding competitor strategy information
  - 12% for having one or more opportunity competitors identified with a strategy set
  - 6% for having competitor strengths added for one of the opportunity competitors
  - 6% for having competitor weaknesses added for one of the opportunity competitors

# Dealmaker Usage Report

The *Dealmaker Usage Report* provides a detailed overview of usage activity for users during a selected period of time. In addition to general statistics indicating a user’s overall usage, the report provides a detailed daily breakdown of how many times each page was accessed by each user.

To access the report, go to the **Reports** tab and click on **Dealmaker Usage Report**. To generate the report, select the required reporting period in the time frame section. Specify how which information should be displayed and how it should be summarized. Click **Run Report** when ready.



Once generated, the report can be printed, saved in Dealmaker, printed or exported in either Excel or CSV format.

## Collaborate via Chatter

Dealmaker provides functionality which integrates with Salesforce *Chatter*. here are two variants of Chatter functionality. Depending on how your administrator has configured your system, you will see either:

- Dealmaker Chatter Inline, or
- Salesforce Chatter.

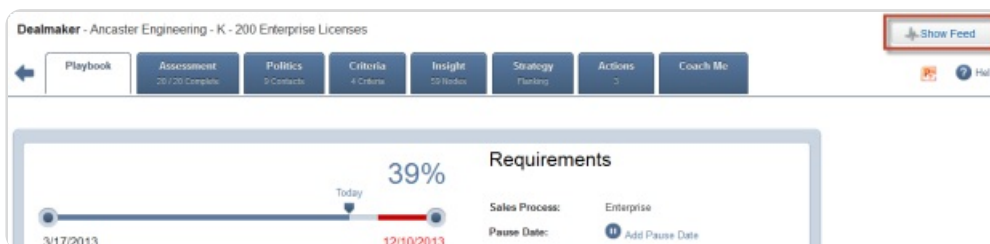
Using this functionality you can post updates on opportunities, view the message feed for that opportunity or share files and links with other users.

If you are using **Dealmaker Chatter Inline**, you can view the message feed for a Dealmaker item or share files and links with other users in a Chatter group. You can also see when other members of your Chatter group make changes to an item. The message feed is updated when someone posts a comment, shares a file, link or post, creates a poll question or modifies an item. These updates are posted to your Chatter group automatically. Using the "snooze function", your system administrator can configure how many of these automatic updates are posted within a specific period of time.

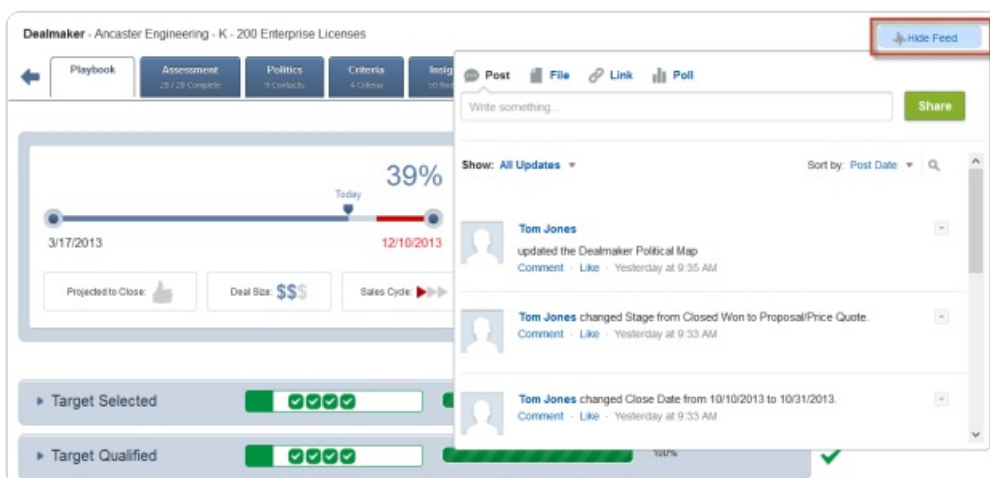
If you are using **Salesforce Chatter**, you can share links to Dealmaker pages or recommend individual pages.

### Dealmaker Chatter Inline

To access the Chatter functions, click on the **Show Feed** icon at the top right of the screen.



In the inline Chatter window, you can post updates, share files, links and polls and view all updates for a particular item. To close the Chatter panel, click on the **Hide Feed** icon.

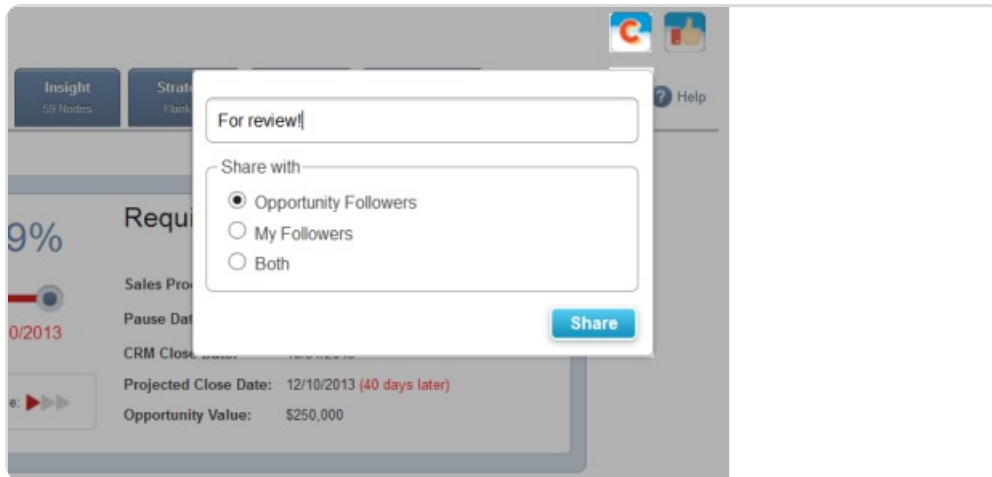




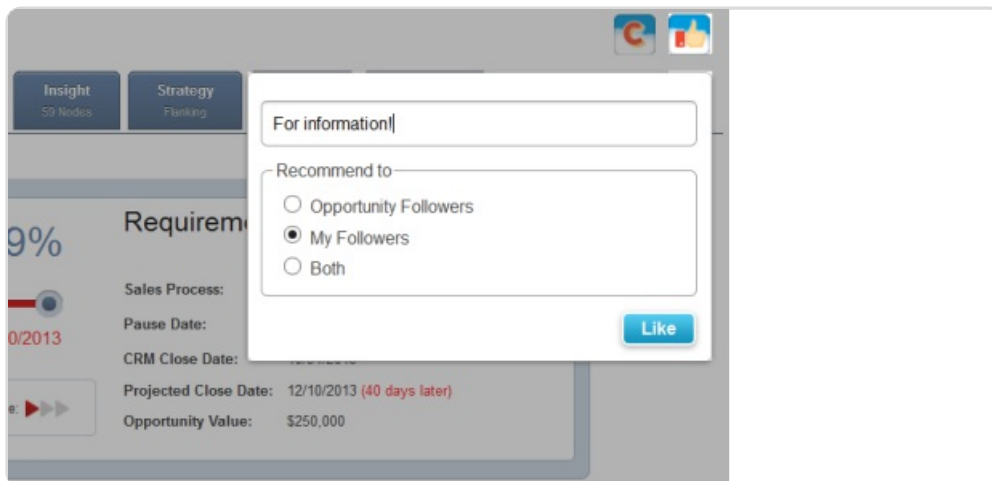
## Salesforce Chatter

Using the Salesforce Chatter functionality, you can share or recommend opportunities, account plans or other Dealmaker elements with your followers, associated Chatter groups or both.

To share an item, click on the Share icon on the left.



To recommend an item, click on the "thumbs up" icon on the right.



## Chatter Updates

When you edit and save information on a tab, an update is automatically posted to Chatter. To prevent large amounts of updates being generated if you make multiple edits, this function includes a time delay so that the next update *for that tab* is only posted after a specified length of time has passed. This time delay is configured using the Chatter Snooze setting which is set to 30 minutes by default.