Ardexus Sales Cycle Manager – Windows Edition

Version 2.1.0

Ardexus Sales Cycle Manager

Introduction

Welcome to Ardexus Sales Cycle Manager - Windows Edition, the only sales opportunity-tracking application based on patented Intelligent Response Technology designed to help you sell better. Sales Cycle Manager lets you track and update your sales opportunities using your PC.

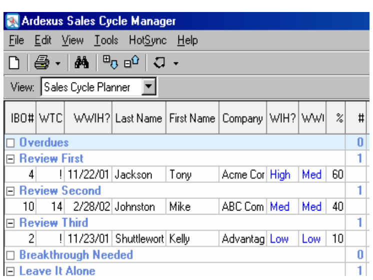
Sales Cycle Manager has four main views. The first main view is the Sales Cycle Planner, which lists all of your open sales opportunities, ranked by priority. This view allows you to list all of your Open sales opportunities by priority along with the reference number, weeks to close, contact, company, probability, value, a scalable graphical representation of the particular IBO's sales cycle, and the product . (IBO is an acronym for Identified Business Opportunity and is used to refer to sales opportunities throughout SC Manager)

Each IBO has it's own set of tabs, which displays the details of a specific sales opportunity. From this form, you can update the various items of information regarding the opportunity and review and feedback generated by the Intelligent Response. In fact, Sales Cycle Manager gives you the option to receive an even greater degree of Intelligent Response, by allowing you to upgrade new or existing IBO's to the use of Sales Advisor Expert. Sales Advisor Expert uses the Sales Advisor tab within an IBO to displays a graphical representation of the sales cycle, sales advice, and the strategic details of the sales opportunity. It can provide this high level of feedback based on information you enter on the Sales Environment tab which records and references key elements of a sale, such as competitive pressure, funding status, decision makers, relationship, etc.

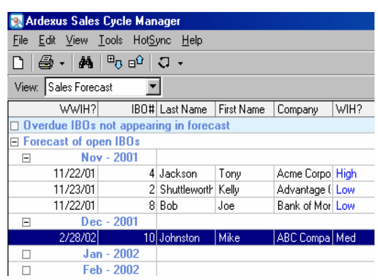
The second main view is the Sales Forecast, which categorizes all your open sales opportunities by "When will it Happen?". All open IBO's can be viewed by year and month. A special Overdue category is available for any IBO that has an expected close date prior to the current date.

The third main view available when is the IBO List. This view lists all IBO's, sorted by the selected column. IBO's that are Open, Won, Lost, or Cancelled can be filtered in this view.

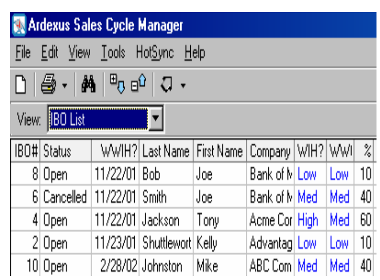
A fourth view available is the IBO Archive view. This view displays all deleted IBO's that you have decided to keep in the archive.



Sales Cycle planner view. List opportunities by priority. Sort opportunities by company, contact, product, etc



Sales Forecast view. Display IBO's by close date. Assigns a probability to each opportunity.



IBO List form displays all opportunities and can filter between showing all, open, closed, won, lost, and cancelled opportunities.

Figure 1: The main Sales Cycle Manager views in Sales Cycle Manager - Windows Edition.

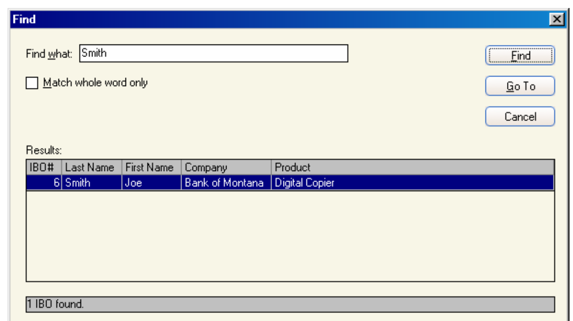
Manager Workgroups

The workgroups aspect of Sales Cycle Manager for your PC allows for the management of multiple SCM users. It uses powerful excel pivot tables to generate reports that calculate YTD Forecasts, Total Sales and current Opportunities, Opportunities by Product/Company, and Reasons for Won/Lost/Cancelled Opportunities. It can produce these reports for single or multiple fiscal years and quarters. Most importantly, all reports can be produced for single or multiple Sales representatives and it can even compare Sales Representative(s) actual and forecast data to previously determined goals

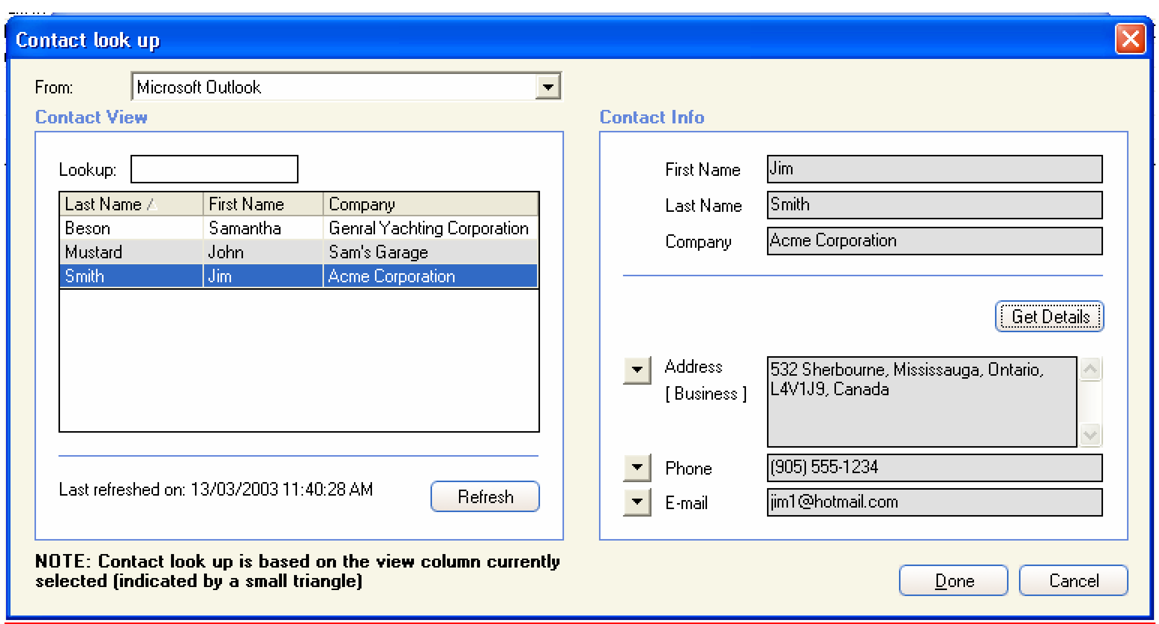
Additional Sales Cycle Manager Features

In addition to the functionality found in each of the four areas described, Ardexus Sales Cycle Manager also provides a find feature, an automatic lookup of contacts from the Palm Address Book, MS Outlook®, or Act!2000 (Version 6), a calendar display for selecting dates, ability to store notes, and much more.

Calendar date lookup



Find view displays



Select contacts from Palm, MS Outlook®, or ACT!

Figure 2: A few of the additional lookup or search forms

Integration with MS Outlook®, ACT!2000 (Version 6), and the Palm Address Book: Ardexus Sales Cycle Manager integrates with the Palm Address Book, MS Outlook®, and ACT!2000 (Version 6). Ardexus Sales Cycle Manager has been designed as a stand-alone opportunity manager based on patent-pending technology found in the T.A.S.C. sales automation package.

Installation

Please refer to the Readme.txt file included in the .ZIP file, or on the installation CD for specific instructions.

Registering Sales Cycle Manager

Unregistered copies of Ardexus Sales Cycle Manager remain active for 30 days from the time that they are installed on your PC. These unregistered copies of the software have the complete functionality of the registered version. Any data entered using the unregistered copy will continue to be available when you complete the product registration.

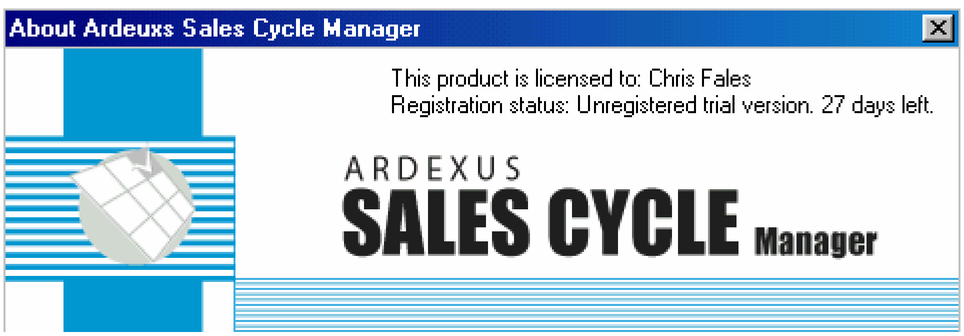


Figure 3: Registration Message

To register your copy of Sales Cycle Manager select the Help menu and choose the Register option. The Registration Information page will display next, allowing you to enter your software license key to unlock your evaluation copy. To obtain a registration key visit the Ardexus web site (www.ardexus.com) for information on how to purchase a license for your copy of Sales Cycle Manager.

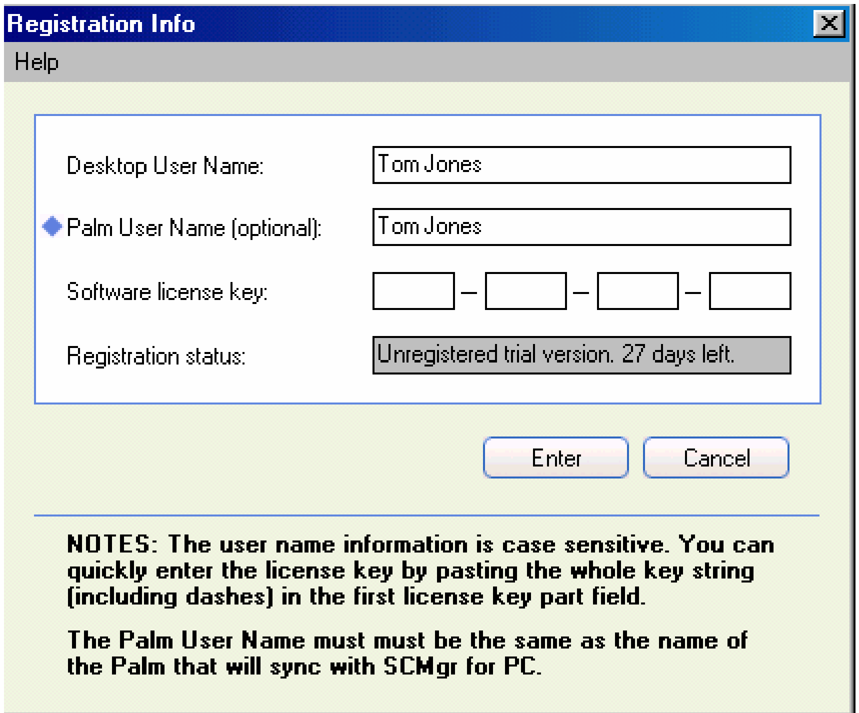


Figure 4: Registration Form

The registration information window displays the user name assigned to the Sales Cycle Manager desktop as well as your Palm User name. The Palm User Name field is optional and only necessary if you plan to synchronize Sales Cycle Manager - Windows Edition with Sales Cycle Manager – Palm Edition. It is important to note that your Desktop User Name is unique to your license key. If you change your Desktop User Name you will need to contact Ardexus for an updated license key.

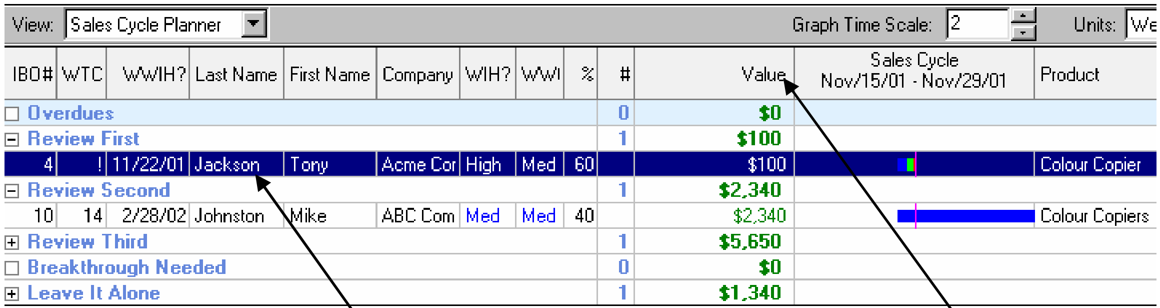
Enter the complete registration key in the fields provided, and click the Enter button to complete your registration.

Sales Cycle Planner view

The first screen displayed once SC Manager is opened is the Sales Cycle Planner view. This view displays a list of all of your open sales opportunities, and can be used to prioritize your time and determine which opportunity to focus on. Sales Cycle Planner prioritizes and displays your opportunities in six categories: Overdues, Review First, Review Second, Review Third and two special categories called Breakthrough Needed and Leave it Alone.

The Sales Cycle Planner view displays a great deal of useful information about your open opportunities. The Sales Cycle Planner view lists the priority of the opportunity, the IBO reference number of the opportunity, the number of weeks until the opportunity is due to close (WTC), contact information, “Will it Happen”, “Will We Get It”, a forecasting percentage, the IBO overall value, a graphical sales cycle representation and the products that are involved in the sale.

You can expand or collapse each of the categories by clicking on the plus or minus symbol to the left of the category.



The list categorizes opportunities by priority. Within each category, opportunities are sorted by number of weeks to close, probability, and by opportunity value.	*To edit an existing sales opportunity, double click the line displaying that opportunity. The opportunity form will open, displaying the information for that IBO (identified business opportunity).*	*View columns can be resized by clicking on the column divider and dragging it left or right*

Figure 5: Sales Cycle Planner view

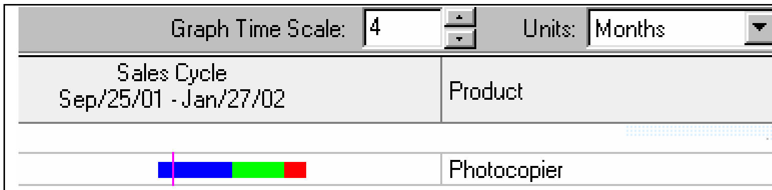
Sales Cycle View Columns

The following table describes each of the columns in the Sales Cycle Planner view.

	Heading:	Name:	Description:
1		Priority	The priority category of the IBOs found beneath.
2	IBO#	IBO Number	IBO reference number used to track specific sales opportunities.
3	WTC	Weeks to Close	The number of weeks until the sales opportunity is due to be closed (ie. won, lost, cancelled). A negative value indicates that the opportunity is overdue and the close date has passed, but that the opportunity is still listed as open. If an IBO is equal or less than three days from closing an exclamation mark (**!**) will appear in the WTC column
4	WWIH	When Will It Happen	The expected date that the IBO will close.
5	Last Name	Last Name	The last name of the primary contact you are trying to sell to.
6	First Name	First Name	The first name of the primary contact you are trying to sell to.
7	Company	Company Name	The company name of the organization you are trying to sell to.
8	WIH?	Will It happen?	The chance that this IBO will actually happen. High, Med, and Low are the available options.
9	WWI?	Will we get it?	The chance that this IBO will be won by you. High, Med, and Low are the available options.
10	%	Probability	The probability percentage that you will win the opportunity. (eg. 80% chance of winning the order).
11	#	Number of IBO’s	The number of IBO’s in a Category
12	Value	Value	The total value of an IBO
13	Sales Cycle	Sales Cycle	A graphical Representation on the Sales Cycle
14	Product	Product Name	The first product in the product list.

The Sales Cycle Column

The second last column in the Sales Cycle Planner view provides a graphical representation of each IBO's Sales Cycle. Each IBO has a Sales Cycle that is split up in three phases – the longest portion is the Probe Phase, the second longest is the Prove Phase, and the shortest is the Close Phase. You can change the scale of all the Sales Cycles by increasing or decreasing the number in the Graph Time Scale menu. It is also, possible to change the Units from days, weeks, months, or years depending on the length of the Sales Cycle.



To Change the Units or Graph Time Scale use the arrow down key or click the available buttons.

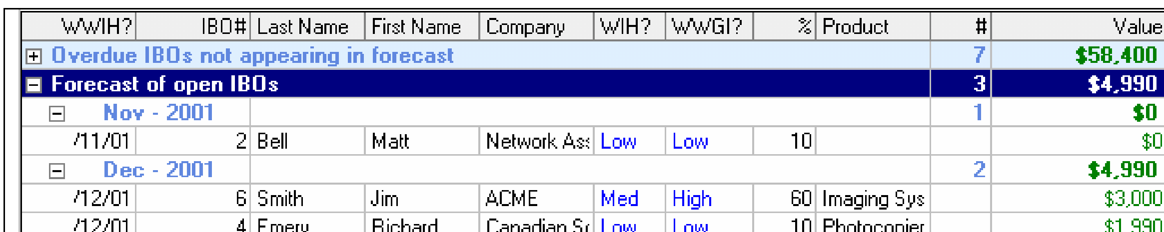
The Probe phase is shown in Blue, the Prove phase in Green, and the Close phase in Red. The Pink vertical line shows today's date in relation to the entire Sales Cycle.

Figure 6: Sales Cycle Planner View – Sales Cycle Column

Sales Forecast

The Sales Forecast form allows you to view a forecast summary of all of your IBOs by expected close data and categorized by month and year. Open the sales forecast view by selecting Sales Forecast from the View menu in the toolbar.

You can expand or collapse each category by clicking the plus or minus sign to the left of the category.



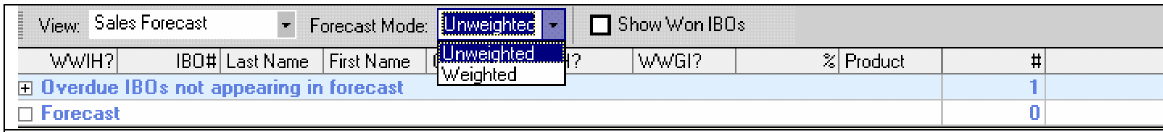
WWIH?	IBO#	Last Name	First Name	Company	WIH?	WWGI?	%	Product	#	Value
⊞ Overdue IBOs not appearing in forecast									7	$58,400
⊟ Forecast of open IBOs									3	$4,990
⊟ Nov - 2001									1	$0
/11/01	2	Bell	Matt	Network Ass	Low	Low	10			$0
⊟ Dec - 2001									2	$4,990
/12/01	6	Smith	Jim	ACME	Med	High	60	Imaging Sys		$3,000
/12/01	4	Emery	Richard	Canadian Sc	Low	Low	10	Photocopier		$1,990

The Sales Forecast view displays a monthly dollar summary based on the date expected (When will it happen) of all open IBOs.

Total value is displayed along with any amount currently overdue.

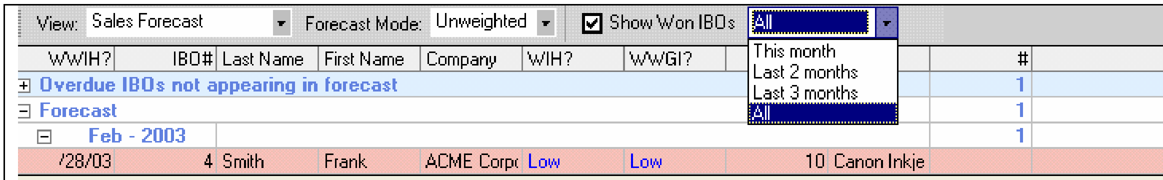
Figure 7: Sales Forecast View

In addition, you can select the Forecast Method by choosing the Unweighted or Weighted option in the upper left corner of the view. These options will allow you to choose whether to view the total value (Unweighted) or a percentage of the IBO value based on the probability of winning the sale (Weighted).



Selecting either Weighted or Unweighted as the Forecast Mode will change the total values displayed in the forecast. Unweighted displays the total value while Weighted displays a percentage of the total value.

Figure 8: Weighted vs. Unweighted Forecast

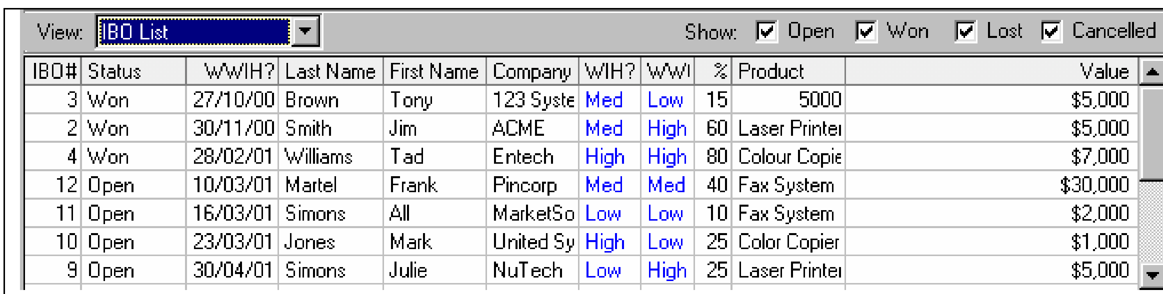


Selecting Show Won IBO's in the Forecast view will display all IBO's that are classified as" Won" in the Forecast area, beneath the month that they were "Won" in. It is also possible to filter which "Won" IBO's are displayed. Easily select IBO's that have been marked as "Won" in the current month, last 2 months, last 3 months, or that have ever been "Won" (All).

Figure 9: Show Won IBO's

IBO List View

The IBO List View allows you to view all of your IBOs in an uncategorized sort able list. You can filter the list of IBOs using the Show options on the upper right area of the toolbar. The Show options allow you to choose whether to display Open, Won, Lost or Cancelled IBOs, or any combination of options.

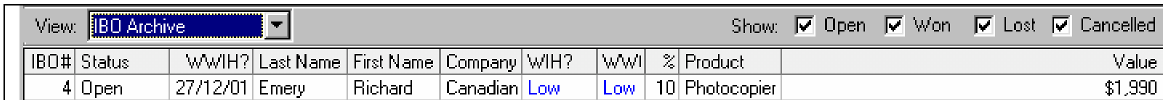


Sort the list of IBOs by clicking on any of the displayed column headings.	*Filter the list of IBOs (Open, Won, Lost, Cancelled) List by choosing the type of IBO's to display. Select any combination of Open, Won, Lost and Cancelled.*

Figure 10: IBO List View

IBO Archive View

The IBO Archive View is similar to the IBO List view with the difference that it only displays IBOs that have been marked for deletion and not yet purged from the database. When a user chooses to delete an IBO they have the option to save an archive copy. These archived IBOs can be seen in the IBO Archive view.



Sort the list of IBOs by clicking on any of the displayed column headings.	*Filter the list of IBOs. (Open, Won, Lost, Cancelled) List by choosing the type of IBO's to display. Select any combination of Open, Won, Lost and Cancelled.*

Figure 11: IBO Archive List View

Customizing View Columns

The width of view columns in all views can be adjusted by clicking on the edge of the view column heading and dragging it left or right to expand or reduce the width.

Column widths can be resized by clicking on the column edge and dragging the column left or right.

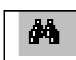
Figure 12: Customizable View Columns

Sales Cycle Manager will remember your column width settings even after you exit the application and re-open it.

Using Find in Sales Cycle Manager

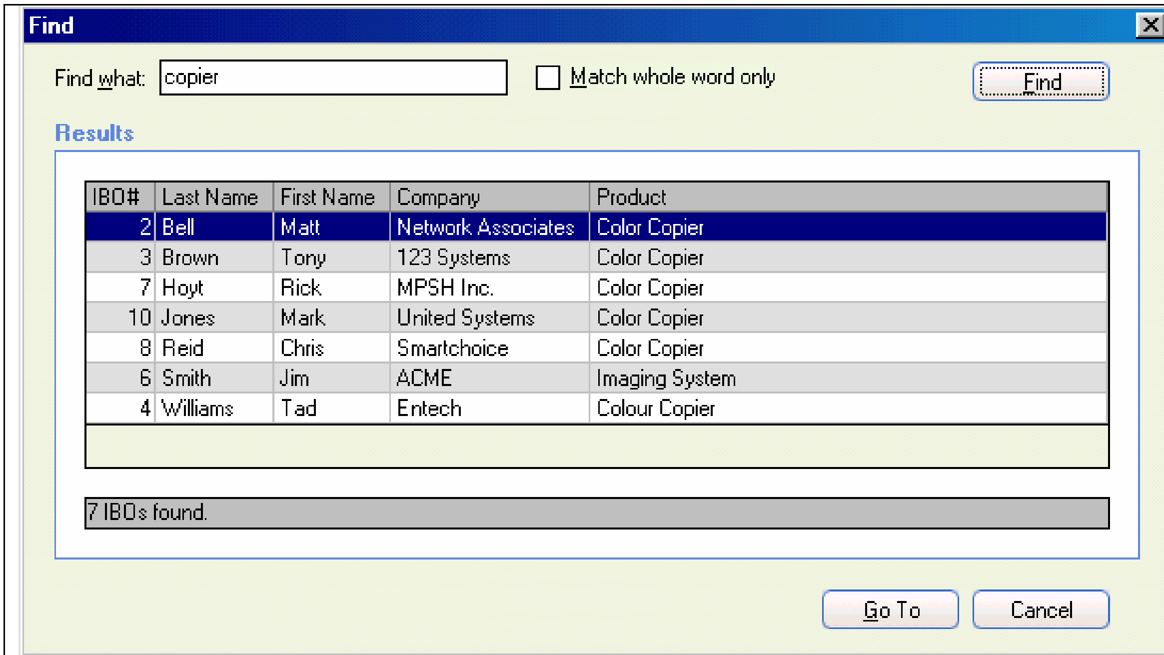
The Find feature in Sales Cycle Manager allows you to quickly locate a specific IBO in a large list without having to manually search entire views.

From the Sales Cycle Manager toolbar, a user can search a view for a particular IBO by clicking the "binoculars" icon. You can also press CTRL+F or select Edit, Find from the menu bar.



Click on the Find icon to search for IBOs containing a specific word or phrase.

Figure 13: Find Icon



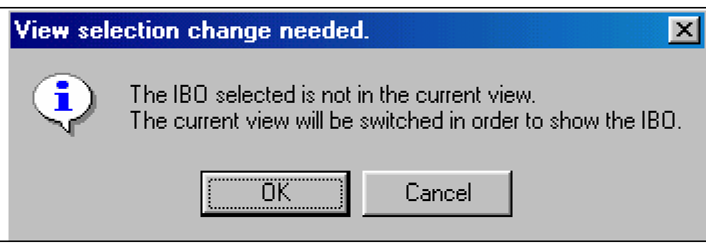
To locate a specific IBO quickly within any view enter the search value in the Find what field. *(eg. copier) All IBO's with the word copier will be listed in the Results field. SC Manager will automatically highlight the first IBO found for copier in the results.*

To open a specific IBO record, simply highlight it in the Results list and click on the Go To button (or double click the IBO that you would like to view).

To close the Find window without opening an IBO click on the Cancel button.

Figure 14: Look Up Feature

The "Match whole word only" option in the Find dialog allows you to choose whether to search for a complete match between the search text and the IBO text. If you do not enable this option the Find feature will look for the text anywhere within the IBO document. (eg. start of the word, middle of the word, end of the word)



If you select an IBO in the Results list that cannot be found in the currently open view, Sales Cycle Manager will ask whether you would like to switch to another view where the IBO can be displayed.

Figure 15: Go To Feature

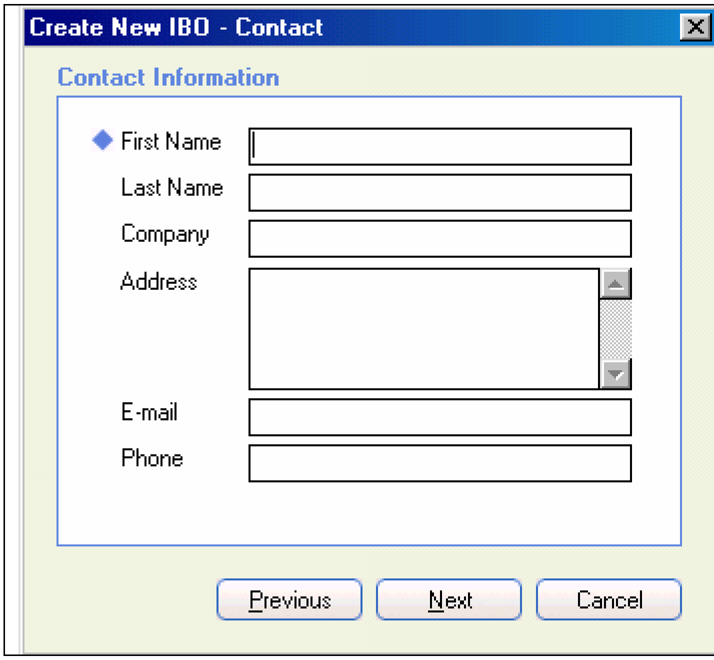
Note: The Find feature will not locate deleted IBOs unless it is used from the IBO Archive view. If you need to search for a specific deleted IBO make sure to switch to the IBO Archive view before using the Find feature.

Creating a New Opportunity (IBO)

To create a new sales opportunity click on the New IBO icon, or select Edit, New IBO from the menu, or press CTRL-N on the keyboard. The New IBO option will display the new IBO wizard, which will walk you through the creation process for a new IBO record.

Contact Form

The contact form is used to enter the name and address of the person you are selling to. You can enter the name and address manually or look up information from your Palm Desktop, MS Outlook®, or ACT!2000 (Version 6) address books. To look up an address, click the blue diamond to the left of the First Name field. This will display a list of contacts in the Palm, MS Outlook®, or ACT!2000 (Version 6) address books for you to choose from.



Click on the blue diamond symbol to the left of the First Name field in order to look up contact information from your Palm Desktop, MS Outlook®, or ACT!2000 (Version 6) address books.

Enter the contact information for the primary person you will be selling to when dealing with this opportunity

Previous and Next buttons move backwards and forwards within the create wizard.

Cancel button closes the New IBO Wizard without saving changes

Figure 16: New IBO Wizard - Contact Form

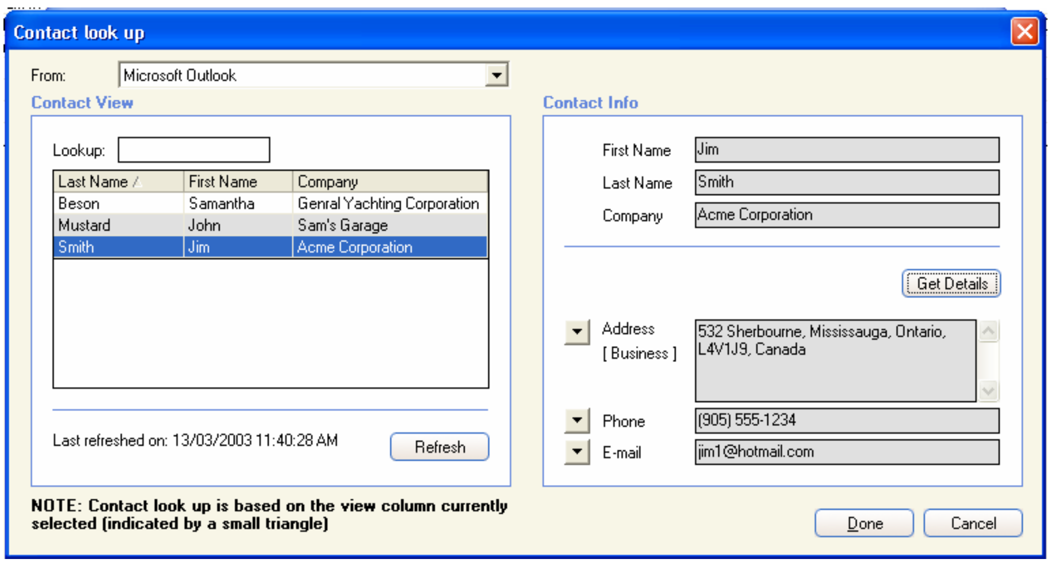
If you look up an existing contact from your Palm Desktop, Outlook , or ACT!2000 (Version 6) address list you may edit the retrieved information without fear of it modifying the information in The originating list. SC Manager stores a copy of the contact information and does not update the address book information.

After entering or looking up the contact information click on the Next button to move to the next phase of the create wizard.

Contact Look Up

The contact look up dialog allows you to retrieve existing contact name and address information from other address books and make use of it in Sales Cycle Manager. The contact lookup dialog is activated by clicking on the blue diamond next to the contact first name field on the contact page.

Choose the address list source in the upper right of the contact look up dialog box. The available lookup sources will vary depending upon what applications you have installed on your computer. The three possible lookup sources are “Palm Desktop”, “Microsoft Outlook®”, and “ACT!2000 (v6)”. When looking up to Outlook, all contacts by default in all subfolders can be viewed in a single alphabetical view by last name. When looking up to ACT!2000 (v6), all primary contacts(no other type) can be viewed in a single alphabetical view by last name



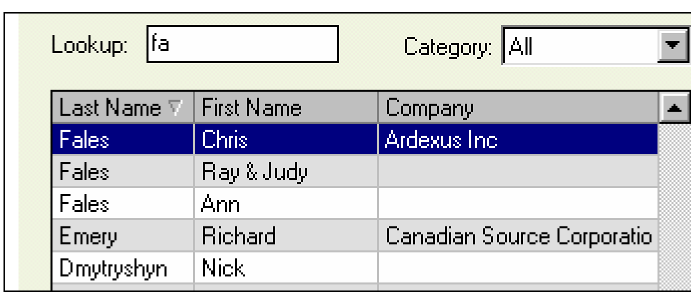
Highlight a contact name from the look up Contacts form and click the Done button to retrieve their information from the Palm Desktop Outlookaddress list.

Click the Cancel button to close without selecting a contact.

Note: The Contact Lookup for ACT200, Palm, and Microsoft Outlook varies slightly.

Figure 17: Contact Look Up

From within the contact look up dialog you can search for a specific contact by clicking a column header in the list and entering a search string in the Lookup field.



Enter a name in the Lookup field to search for a matching contact in the contact list.

Click on a column header to sort the contacts by the values in that column.

Figure 18: Locating Contacts

Once you have selected a contact from the contact lookup list, click “Get Details” to retrieve their address and telephone information. As some contacts may have more than one telephone number you can choose which telephone number you would like to use within Sales Cycle Manager by clicking on the drop down arrow next to the phone number field.

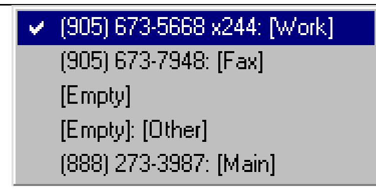
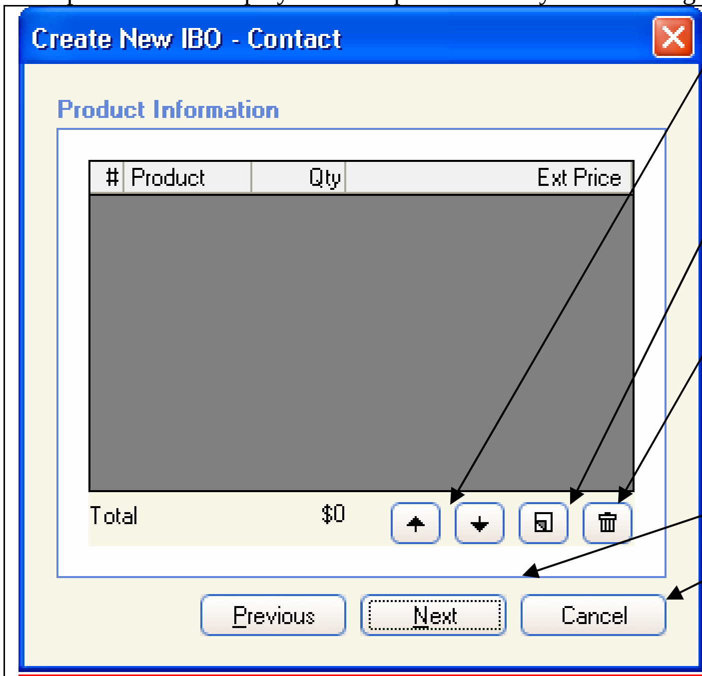
<table>
<tr>
<td>
</td>
<td>
</td>
</tr>
<tr>
<td>Click on the down arrow icon next to the telephone number field to display a drop down list of available phone numbers for the currently selected contact.</td>
<td>Select one of the available telephone numbers from the drop down list of numbers displayed.</td>
</tr>
</table>

Figure 19: Choosing Phone Number

Product Information Form

The product information form is the second form in the new IBO wizard. It allows you to enter information on the products or services you are attempting to sell as part of this sales opportunity, as well as the value of the opportunity.

The product form displays a list of products that you are selling as part of this opportunity.



Navigate between various lines in the Product Information box by using the up and down arrows

Enter the various products or services that this new sales opportunity deals with in the Products field

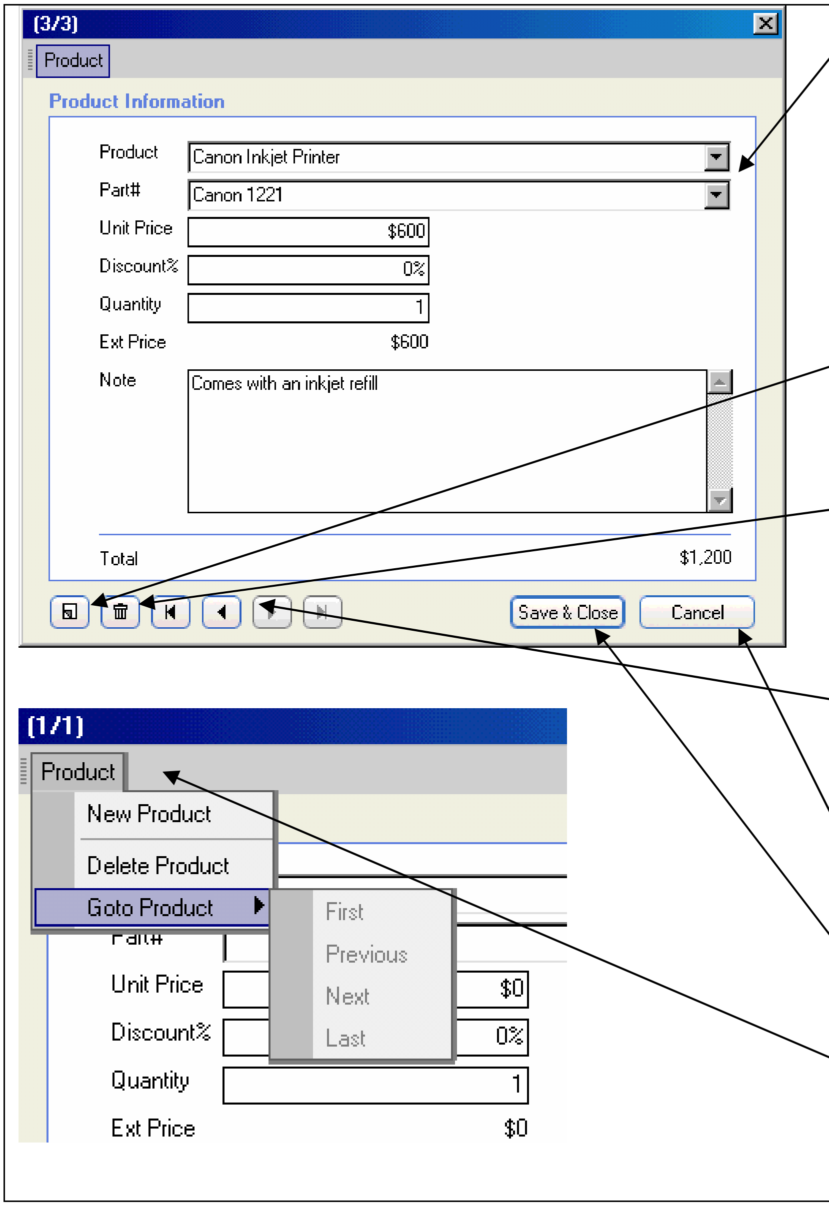
Delete the various products or services being displayed in the Product Information box by highlighting them and using the delete button.

Click on Previous and Next to navigate within the New IBO wizard

Click the Cancel button to close without selecting a contact.

Figure 20: New IBO Wizard – Products Information

Click the "New" button to add a new product. The Product Information form has multi-line product fields for entering a number of different products or services that represent this new sales opportunity. The Product Lookup features (from the Product editor) will lookup to a Product and it's subsequent Part #. Once a Product and Part# have been selected, the Unit Price, available discount, quantity will be defaulted.



Select a Product and Part# from the available dropdown menu. This drop down menu looks up all Products and Part#'s that have been setup in the Product Editor.

It is possible to change the defaulted Unit Price, Discount%, and Quantity.

Enter the various products or services that this new sales opportunity deals with in the Products field

Delete the various products or services being displayed in the Product Information box by highlighting them and using the delete button.

Click on the various arrows to navigate within the Product List wizard

Click the Cancel button to close without creating a product or service.

Click the Save & Close button to Save and Close the Product section of the new IBO wizard.

This menu option allows the use of creating, deleting, and searching for products or services without the use of smart icon's described above.

Figure 21: New IBO Wizard – Entering Products into the Product Information page

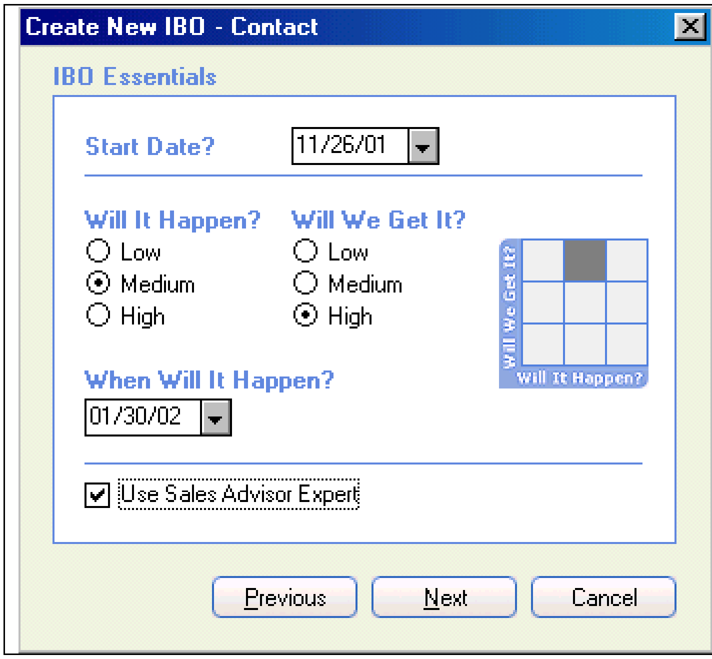
After entering the product and value information you can click on the Save and Close buttons to move to the next form of the new IBO wizard process. To quit the new IBO wizard without saving any of your changes click on the Cancel button. Once products are saved, it is still possible to change them. Simply, highlight an IBO, double click, and select the Product Information tab. Highlight and double click on any product in the Product Information view to make edits.

IBO Essentials

The IBO Essentials form allows you to enter key pieces of information about the new sales opportunity that will allow you to determine its probability, as well as its expected closing date.

SC Manager allows you to assess the probability of winning the opportunity by answering two simple questions - “Will It Happen?” and “Will We Get It?”. The answers to these two questions are then combined to provide you with a single probability of you winning the sale.

The IBO Essentials form also allows you to set the sales cycle length of the new opportunity. The sales cycle length is determined from the start date (typically the date that you enter the new opportunity) and the close date. These two dates set the time window in which you have to sell your solution to the customer.



IBO Essentials form allows you to enter the key elements of the sales opportunity.

IBO Essentials are -
Will It Happen?
Will We Get It?
When Will It Happen?

These are three of the most important pieces of information about the opportunity.

Probability Matrix displays the combined answers to Will it Happen and Will We Get It

Figure 22: New IBO Wizard – IBO Essentials Form

Setting the Start Date

The Start Date field is used to set the beginning of the sales cycle and indicates when this sales opportunity first came to be. The start date defaults to the current date and is usually best left as the current date. However, in some cases you may want to change the start date if you are entering the new IBO some time after you first become aware of it.
You can change the default start date by clicking the down arrow to the right of the Start Date field.

Answering Will It Happen

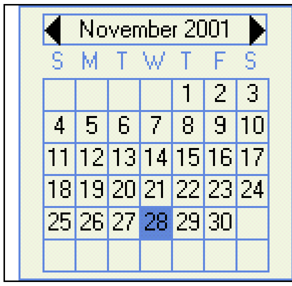
The Will It Happen field has three possible answers of High, Medium, and Low. The answer to this question establishes the chances of the customer making a purchase, from you or some other vendor. You can choose an answer to Will It Happen by clicking one of the three options.

Answering Will We Get It

The Will We Get It field has three possible answers of High, Medium, and Low. The answer to this question establishes the chances of the customer buying from you rather than the competition.

You can choose an answer to Will We Get It by clicking once on one of the three options.

Answering When Will It Happen
The When Will It Happen field sets the end date of the sales cycle for this opportunity. The value of this field is your best estimate of when this sale is going to close (ie. the customer has made their purchasing decision).
Choosing an accurate date for "When Will It Happen" is important, as it sets the time window in which you have to sell your solution to the customer.
You can enter your best estimate of the closing date by clicking once on the down arrow to the right of the When Will It Happen field.



Clicking the When Will It Happen field displays the calendar form where you can choose an expected close date for this opportunity.

Use the left and right arrows to change the month and year.

Click on any day to select a date.

Figure 23: Choosing When Will It Happen

Sales Advisor Expert
The Use Sales Advisor Expert check box displayed at the bottom of the IBO Essentials form allows you to choose what type of opportunity you wish to create. SC Manager provides you with two types of feedback for each opportunity (Sales Advisor Pro or Sales Advisor Expert).

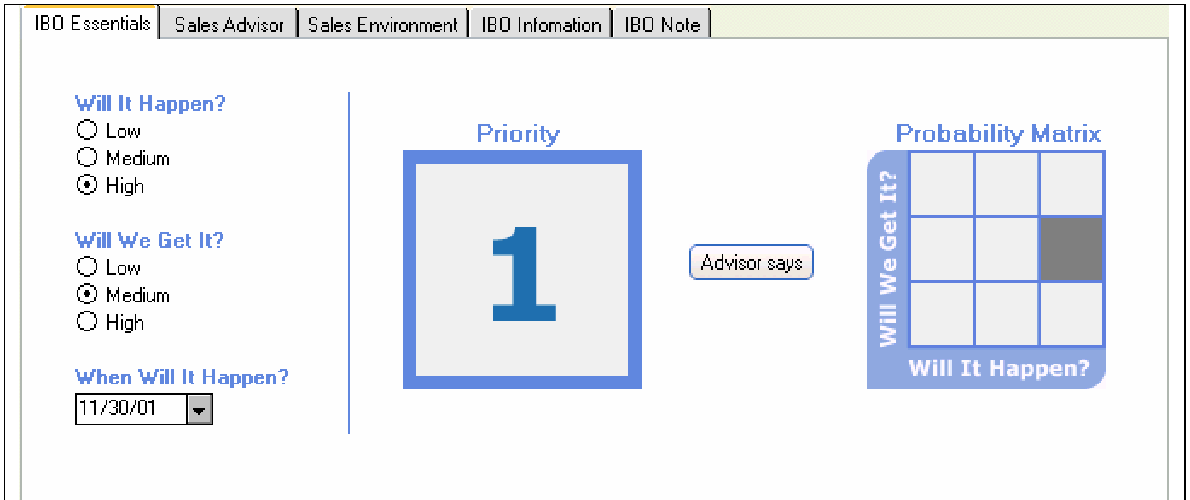
Both Sales Advisor Pro and Sales Advisor Expert provide you with feedback on areas to focus on or watch out for regarding a given sale. The difference between the two types of feedback comes in the level of detail. Sales Advisor Expert provides much more detailed feedback on potential problem areas in a given sale. Sales Advisor Expert is useful in strategic sales that may involve competition or multiple decision makers. Sales Advisor Pro is useful in simpler sales where you may not need the extra coaching provided by Sales Advisor Expert.

To choose between Sales Advisor Pro (basic feedback) and Sales Advisor Expert (advanced feedback) options simply select or deselect the check box next to the "Use Sales Advisor Expert" field. Leaving the check box empty will set the opportunity to use the basic feedback. Place a check mark in the box will set the opportunity to use the advanced feedback.

Next Button
The Next button saves information you have entered into the new IBO wizard and presents the Opportunity form where you can review and update the information on the new IBO.

Opportunity Form

The opportunity form displays all of the recorded information about an IBO and allows you to update it, as necessary. The opportunity form is divided into multiple tabbed pages. Each tab displays a different set of information about the opportunity.



Opportunity form displays the recorded information about an IBO.

Click on the tabbed page headers to switch from one set of IBO information to another.

Figure 24: Opportunity Form

IBO Essentials Tab

The IBO Essentials tab displays key information about the opportunity. The three items Will It Happen, Will We Get It, and When Will It Happen make up the IBO Essentials. These three items are the main determinants of the probability and priority of the sales opportunity.

IBO Essentials tab displays the three essential questions along with the calculated Probability and Priority.

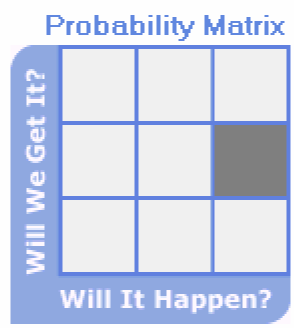
	
Priority is calculated to be *1 = first priority* *2 = second priority* *3 = third priority* *Break Through Needed* *Leave It Alone*	*Probability Matrix displays the combined probability of getting the sale based on Will It Happen and Will We Get It.*

Figure 25: IBO Essentials Tab

In addition to plotting the probability of winning the sale on the probability matrix the IBO Essentials tab also displays the priority of the IBO. Based on Will It Happen, Will We Get It, and When Will It Happen, SC Manager calculates the priority of this opportunity.

Sales Advisor Tab

The Sales Advisor tab displays a graphical representation of the sales cycle and the different phases of Probe, Prove, and Close.   A vertical bar displays your current position in this IBO's sales cycle.

The current length of the sales cycle is displayed along with your position and stage in the sales cycle.

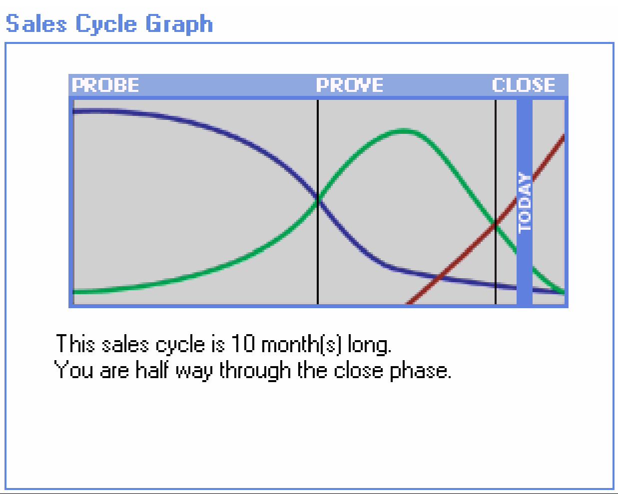
 	*Sales Advisor tab displays the current sales cycle along with your current position in the sales cycle and the length of the sales cycle.* *Graphical display of sales cycle and Probe, Prove, Close phases.* *Length and current stage of the sales cycle*

Figure 26: Sales Advisor Tab - Sales Cycle Graph

The Sales Advisor tab displays current feedback from the Sales Advisor. Based on the information entered for this opportunity the Sales Advisor displays feedback on the sale and advice on how to proceed with the sale.

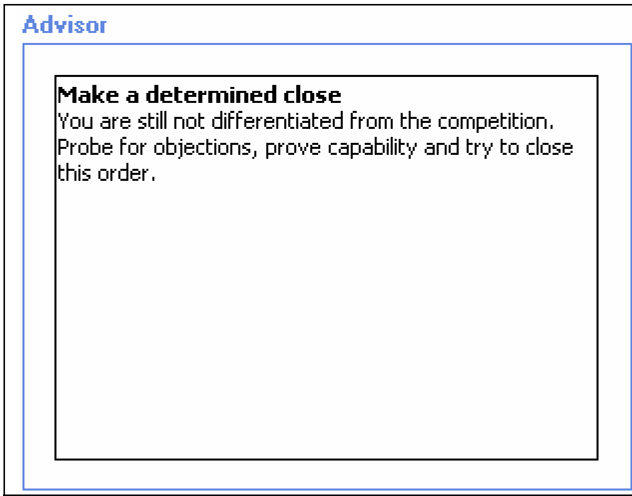
 	*Sales Advisor tab will display advice on the sale in the right hand portion of the form.* *More detailed advice will be available if "Sales Advisor Expert" is enabled.*

Figure 27: Opportunity Form - Sales Advisor Tab

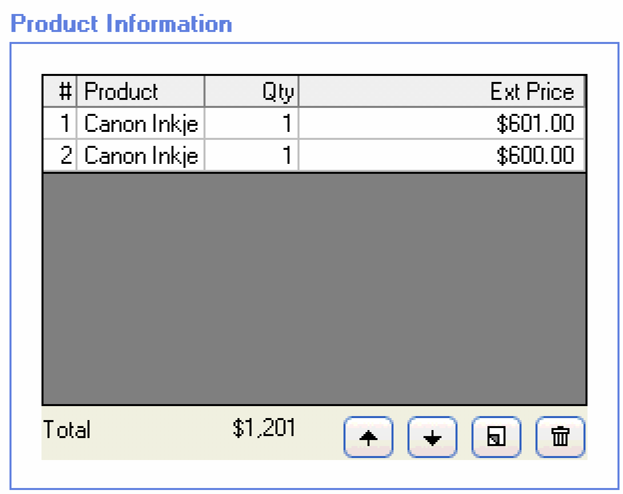
Sales Advisor will provide you with personalized advice and feedback regarding this specific sales opportunity. Depending upon where you are in the sales cycle (Probe, Prove, Close), and the probability of getting the sale (Will It Happen, Will We Get It), Sales Advisor will give you specific advice or feedback on how to proceed with the opportunity and potential problems to watch out for.

The level of feedback on the Sales Advisor tab varies, depending on whether the opportunity is set to use Sales Advisor Expert. Sales Advisor Expert will display more detailed information on the progress of the sale and will provide you with specific advice.

More information on Sales Advisor Expert can be found in the Sales Advisor Expert section later in the manual.

IBO Information Tab

The IBO Information tab displays product and pricing information on the right hand side of the page for quick and easy reference.



Update the various products or services that this sales opportunity is for.

Use the arrow up and down to move along list of products.

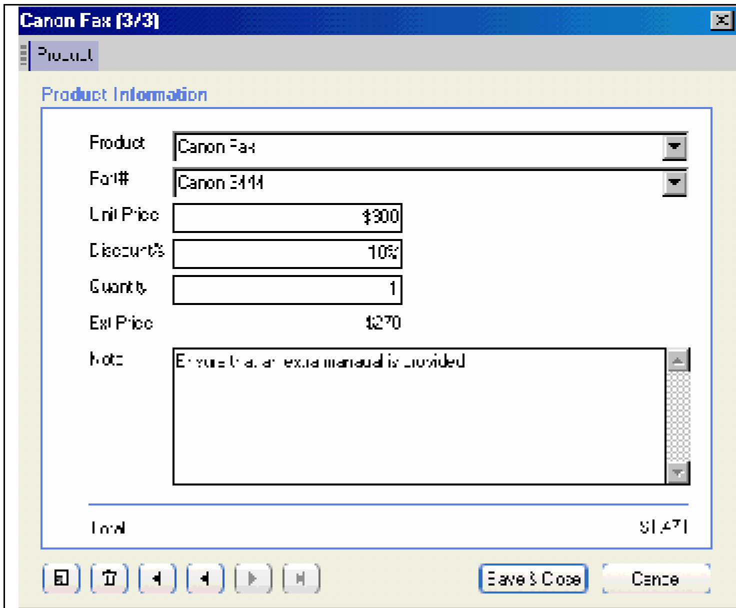
Delete products in this list by using the trash bin button

Add to this list of products by using the button with a folded Page on it.

Update the value of the sales opportunity in the Total Value field.

Figure 28: IBO Information Tab – Product Information

When adding a product, a product information lookup screen gets generated. This lookup allows you to select Product Groups and Products from a Pricelist created ahead of time. It also allows you to enter a discount, quantity and additional notes.



Update the various products or services that this sales opportunity is for.

Use the arrow up and down to move along list of products.

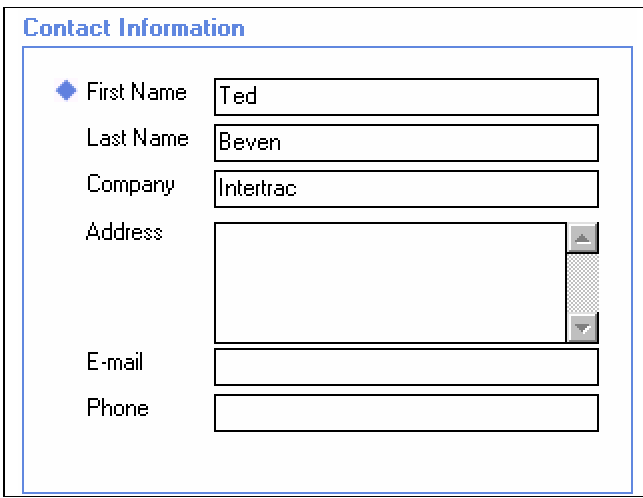
Delete products in this list by using the trash bin button

Add to this list of products by using the button with a folded Page on it.

Update the value of the sales opportunity in the Total Value field.

Figure 28: IBO Information Tab – Product Information

The IBO Information tab displays the name and address of the person you are selling to on the right hand side of the form. You can enter the name and address manually or look up information from your Palm Desktop or Outlook address book. To look up information from the Palm Desktop or Outlook address book click the blue diamond to the left of the First Name field. This will display the contact lookup dialog. (For more information on using the contact lookup feature refer to the Lookup Contact section of this manual)



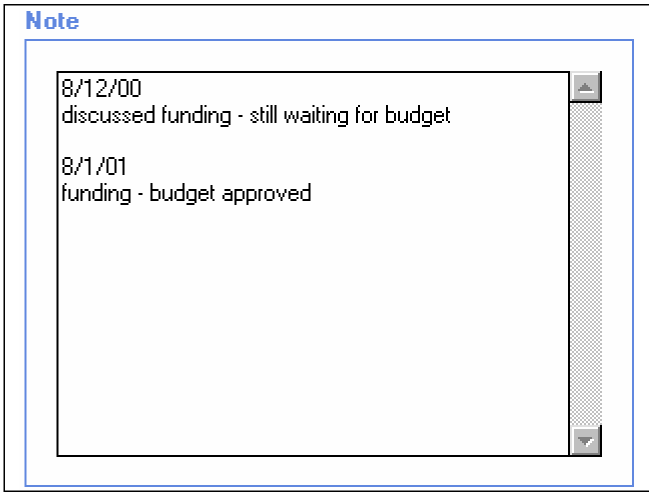
Review or modify the contact name, address, e-mail and phone information in the Contact Information section of the IBO Information tab.

Click on the blue diamond symbol to the left of the First Name field in order to look up contact information from your Palm Desktop or Outlook address book.

Figure 29: IBO Information Tab - Contact Information

IBO Note

The notepad feature in SC Manager allows you to record any important interactions or comments regarding the sales opportunity. Using the IBO Note tab you can keep records of important meetings or phone calls dealing with the current sales opportunity.



The Note section of the IBO Note tab allows you to review or record comments regarding the progress of the sale.

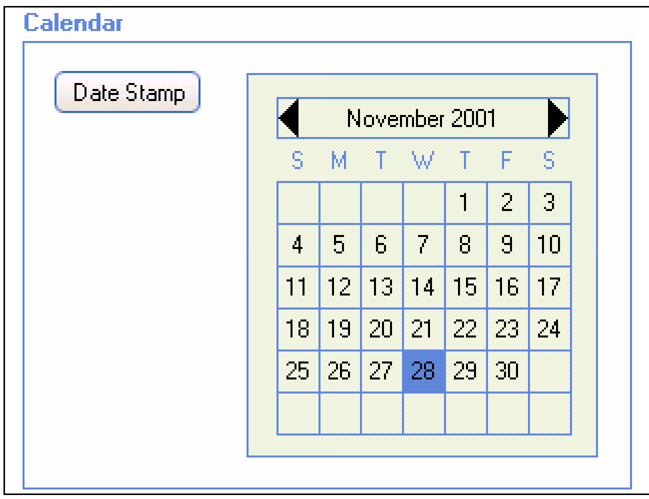
Enter multiple notes dealing with each of your important interactions regarding the sale.

Use the scroll bar to move up or down longer lists of interactions.

Figure 30: Opportunity Form - IBO Note Tab

The IBO Note tab is an ideal area to record information on your important interactions with the customer for later review and reference.

To include a date stamp with each new note you can make use of the date stamp button to the right of the form.



Calendar area of the IBO Note tab displays a monthly calendar for the current month.

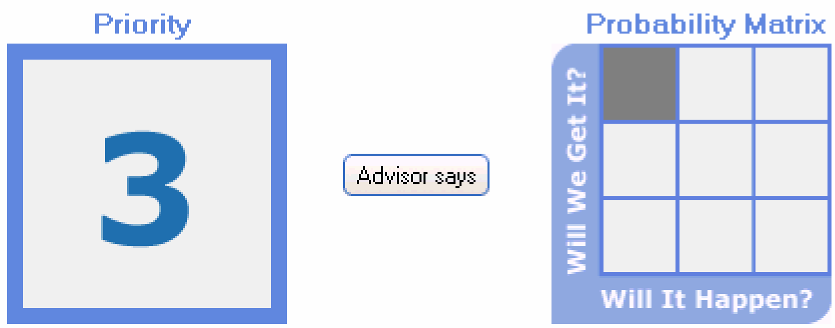
Selecting a date in the calendar and clicking the Date Stamp button inserts the date into the Note section of the IBO Note tab.

Figure 31: IBO Note Tab - Calendar

Sales Advisor Expert

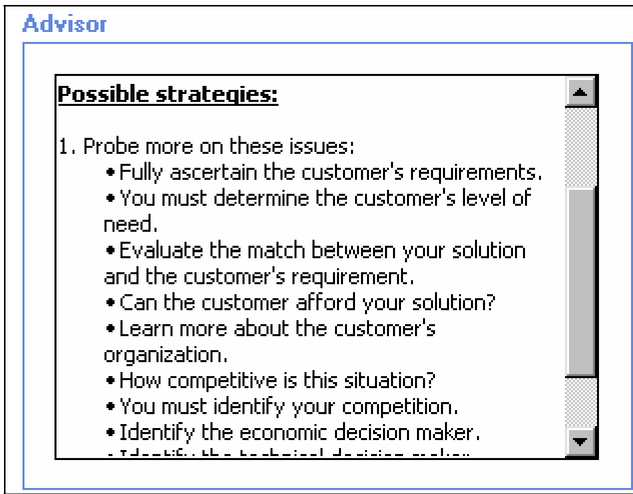
Sales Advisor Expert is a more extensive version of Sales Advisor feedback and coaching technology. Sales Advisor Expert provides detailed feedback regarding the sales opportunity and allows the tracking of strategic sales information relating to the sales opportunity.

When an opportunity is set to use Sales Advisor Expert the display of various forms is altered to display extra information or options that are available through Sales Advisor Expert.



"Advisor says" button appears when Sales Advisor Expert is enabled.
Clicking on the button displays the sales advisor's assessment of probability and priority.

Figure 32: Sales Advisor Expert – Display Differences



Sales Advisor tab displays detailed advice and feedback regarding the sale. The level of advice is much more detailed with Sales Advisor Expert than with a standard opportunity.

Figure 33: Sales Advisor Expert – Display Differences

Sales Environment tab appears when Sales Advisor Expert is enabled

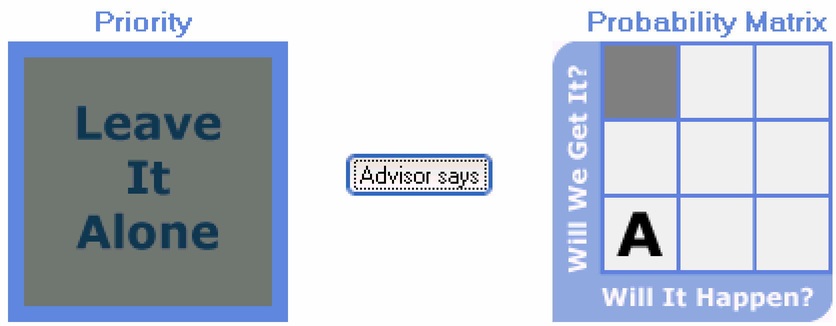
Figure 34: Sales Advisor Expert – Display Differences

If an IBO does not currently display the Sales Environment tab then Sales Advisor Expert is not enabled. To enable Sales Advisor Expert selects the Upgrade to Expert option from the IBO menu. Please see the section on Menu commands for more information on upgrading an IBO to Sales Advisor Expert.

Advisor Expert and IBO Essentials

In addition to providing extra feedback about the sales cycle on the Sales Advisor tab Sales Advisor Expert also provides you with a double check of your own assessment of the opportunity's probability and priority on the IBO Essentials tab.

The IBO Essentials tab always displays a matrix of the current probability of your winning the sale along with the priority ranking of the sale.
By pressing on the Advisor button located between the priority box and the probability matrix the SC Manager will display the Sales Advisor Expert's assessment of both the priority and probability.



Clicking and holding on the Advisor says button will display the Sales Advisor Expert's analysis of both Priority and Probability. *Advisor's Priority assessment shows in reverse image.*	*Your assessment of the probability is displayed as a filled in square in the Probability Matrix.* *Advisor's Probability assessment shows as a bold **A** symbol in the Probability Matrix*

Figure 35: Sales Advisor's Assessment of Priority and Probability

Sales Advisor Expert's assessment of the probability will be displayed in the probability matrix using a bold **A** symbol. This allows you to compare your assessment of the probability against Sales Advisor and provides a good double check of your intuitive understanding of the sale.

Sales Advisor Expert will also display its assessment of the priority of the sale in the priority box on the IBO Essentials tab. The priority determined by Sales Advisor Expert may match or differ from yours depending on the level of difference between your two probability assessments.

Sales Environment

The first question people always have when they first learn about Sales Advisor Expert and its Intelligent Response is “How does it know?”.   The answer is that we have taught it using the Sales Environment feature. The Sales Environment feature allows a user to record strategic information about the sales cycle, such as decision makers, competitive pressure, relationships, funding, etc. All of this information is then analyzed and examined by the Sales Advisor Expert in order to generate some intelligent feedback on how the sale is progressing and what strategies we might want to employ.

The Sales Environment feature is only available when Sales Advisor Expert is enabled for the current opportunity.

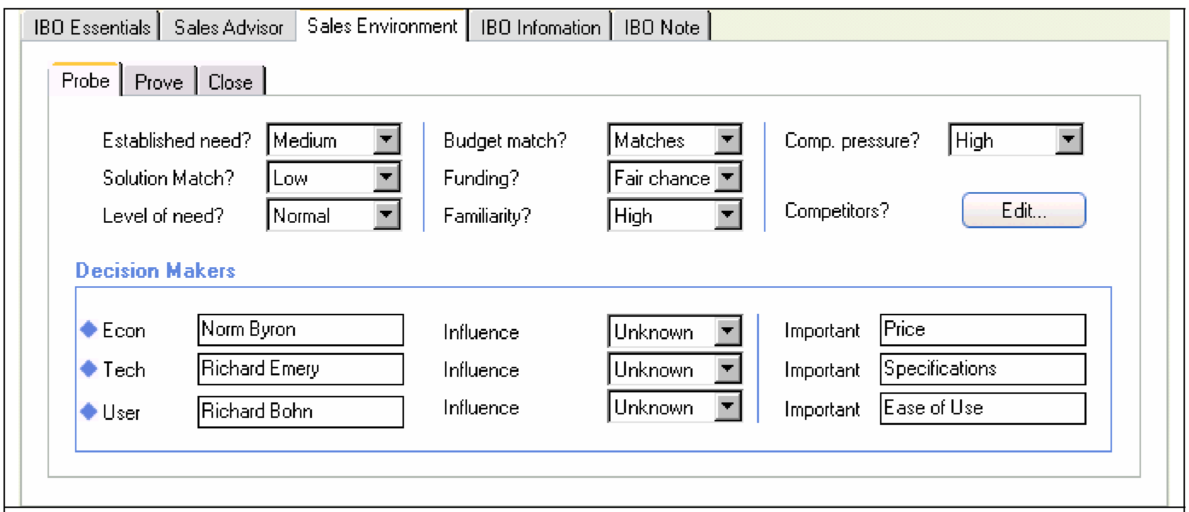
The Sales Environment tab is divided into three main sections.
The Sales Environment tab only appears when Sales Advisor Expert is enabled.

Figure 36: Sales Environment Tab

The Sales Environment form is divided into three main sections corresponding to the phases of the sales cycle (Probe, Prove, Close).

Probing Information:

The Probe tab of the Sales Environment tab prompts you for various items of information related to your probing skills. The information on the sales environment probe tab represents standard information typically gathered during any sale. Recording the information in the probe tab provides you with a central repository of your probing information and also provides information for use by Sales Advisor.



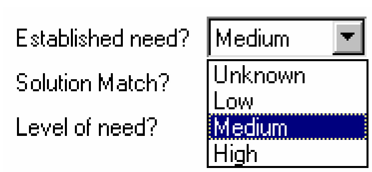
Click on the down arrow next to each question to fill in the answer.
Click on the Edit button to enter any competitors.
Click on the blue diamond icon next to each decision maker field to look up names from an address book.

Figure 37: Sales Environment Probe Form

The following list describes each of the questions on the Probe page and the possible answers to each question.

Questions:	**Description:**	**Possible Answers:**
Established need?	To what degree have you established the customer's need for your product or service?	Unknown Low Medium High
Solution match?	How well does your product or solution match the customer's requirements?	Unknown Low Medium High
Level of need?	How great is the customer's need for your product or service?	Unknown Low Normal Urgent
Budget match?	How well does the price of your solution match the customer's budget?	Unknown Matches Higher >> Higher
Funding?	What are the chances that the customer will receive funding for this purchase?	Unknown Low chance Fair chance Very high
Familiarity?	What is your familiarity with the customer and their organization?	Low Medium High
Competitive pressure?	How strong is the competitive pressure in this sale?	Unknown Low Medium High
Competitors?	Who are the competitors in this sale?	… (free form text)
Decision makers?	Who are the key decision makers in this sale?	… (free form text)

To enter or edit the answer to one of the questions click on the down arrow to the right of the question. A menu with a list of possible answers for the question will pop up. To select an answer simply click it once.



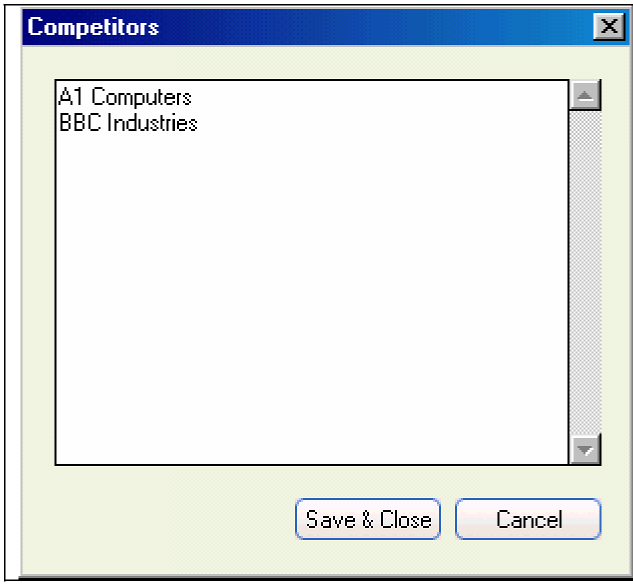
Choose an answer from one of the values in the pop up menu.

Figure 38: Answering Probing Questions

Competitors

The competitors question allows you to enter the names of the various competitors who are competing with you on this sale. You can enter multiple competitors for any given sale.

To modify the list of competitors click on the Edit button to the right of the competitor's field. This will display the Competitors form where you can enter the names of one or more competitors. Enter the name of each competitor on a separate line.



Competitor's form allows you to record the names of the various competitors who are competing with you on this sale.

Enter the name of each competitor on a separate line in the Competitors list.

Click the Save & Close button to save any changes to the Competitors list.

Figure 39: Competitors Form

Decision Makers

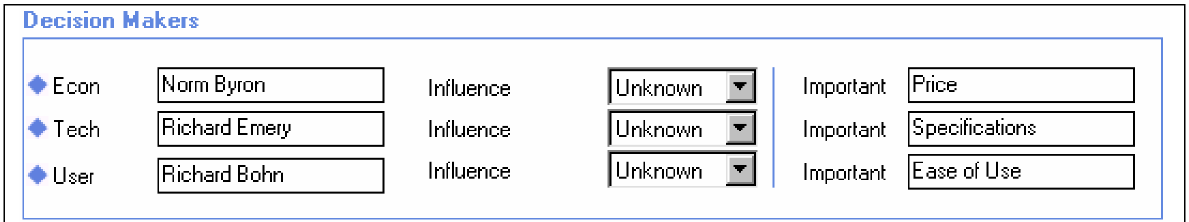
The decision makers question allows you to enter the names of the three main decision makers who are affecting the outcome of this sale.

The three decision makers are classified as one of three types (Economic, Technical, and User).

Decision Maker Type:	Description:
Economic	This is typically the individual who is most concerned about whether your product or solution matches the purchasing budget.
Technical	This contact is responsible for ensuring that your solution matches technical or performance requirements.
User	This decision maker is typically the person who will most regularly use your product or service.

It is important to remember that the same person may fill these various decision-making roles. A single customer contact may be responsible for all three roles, or alternately the roles may be filled by different contacts within the organization.

To modify the name of a decision maker either type the name into the field or click once on the blue diamond to the left of the decision maker field. This will display the contact lookup form where you can select a contact name.



Select the name of the decision maker by clicking on the blue diamond.	*What is this decision maker's level of influence on the sale?*	*What is most important to this decision maker?*

Figure 40: Probe Tab - Decision Makers

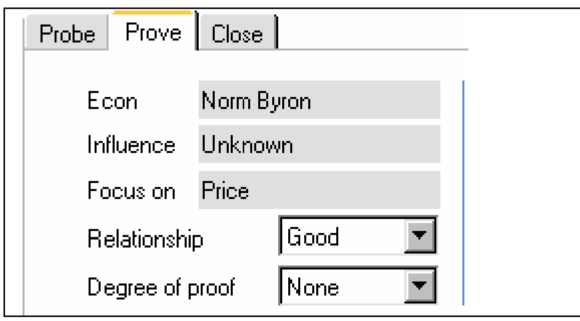
Choose a level of influence that this decision maker has on the overall sale by clicking on the down arrow next to the Influence field. This will display a pop up menu where you can select one of the following options - Unknown, Low, Medium, High.

In the Importance field enter a word or phrase that describes what feature or aspect of the product or service is most important to this decision maker. (eg. Price, Performance, Delivery, Specifications, Ease of Use, etc.)

Proving Information:

The Prove tab of the Sales Environment tab prompts you for information related to your proving skills. The information on the prove tab allows you to monitor your relationship with each decision maker and your degree of success in proving specific functionality to them.

The Prove tab displays the name, level of influence, and important areas to prove for the various decision makers identified in the Prove stage. In addition the tab also allows you to record your relationship with the decision maker and the degree to which they are convinced of your solution.



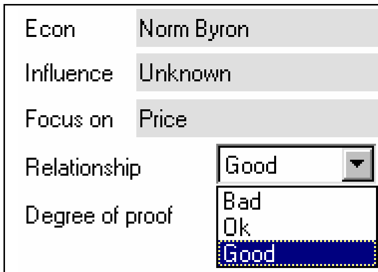
Prove tab of the sales environment form is displays information for each of the three decision makers.

How well do you get along with the decision maker?

How successfully have you proven your product or service to this decision maker?

Figure 41: Sales Environment Prove Tab

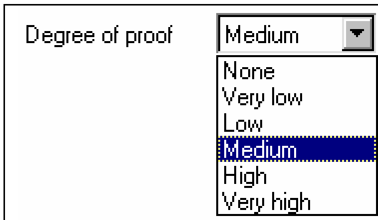
To update the information on your relationship with the decision maker or the degree of proof click once on the down arrow to the right of both the "Relationship" field and the "Degree of Proof" field. This will display a pop up menu with various options for you to select from.



Click once on the down arrow to the right of the Relationship field to enter your relationship with the decision maker

Your relationship with the decision maker can vary between Good, Ok, and Bad.

Figure 42: Prove Tab - Relationship



Click once on the black arrow to the right of the Degree of Proof field to enter how well you have proven your product to the decision maker.

Degree of Proof can range from None to Very High.

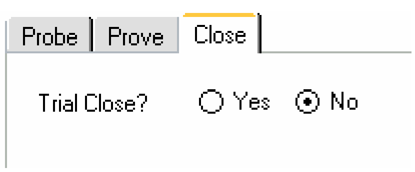
Figure 43: Prove Tab - Degree of Proof

Closing Information:

The Close tab of the Sales Environment form prompts you for information related to your closing skills. The information on the close tab allows you to monitor your closing effort and closing strategies regarding the current sale.

The Close tab also contains a running history of your closing activities that you can review.

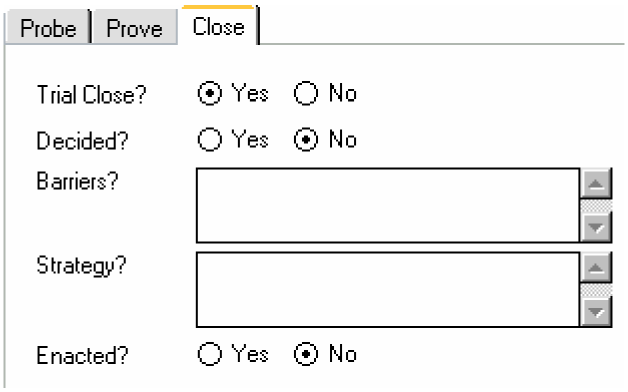
The Close tab only displays information during the late stages of the sales cycle. In earlier stages of the sales cycle the message “It is too early to close” will display.



Close tab contains information on your trial closes.

Figure 44: Sales Environment - Close Information

Trial Close?
The Trial Close question asks whether or not you have attempted to close the sale. The default answer is “No” indicating that you have not attempted a trial close. If you change the answer to “Yes” another set of questions appear to record the outcome of the trial close.

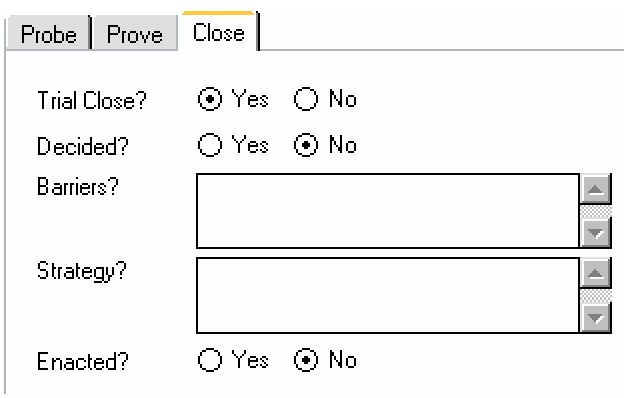


Have you attempted to close the sale?

Answering Yes to Trial Close? will display a number of additional questions regarding the trial close.

Figure 45: Trial Close

Decided?
The Decided question appears if you answer “Yes” to Trial Close. This question is asking whether or not the customer has made their purchasing decision. The default answer is “No” indicating that the customer is still making up their mind. In the case where the customer has still not made their decision you are presented with additional fields to record the barriers to closing, your potential closing strategies, and whether or not you have enacted your strategy.



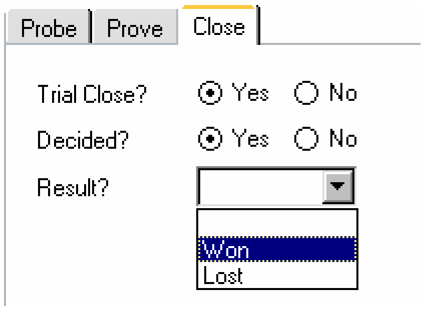
Has the customer made their purchasing decision?

Depending upon whether you choose Yes or No to Decided? other options appear on the form.

Figure 46: Customer’s Decision Made

If you change the Decided answer to “Yes” another question appears asking for the outcome of the customer’s decision.

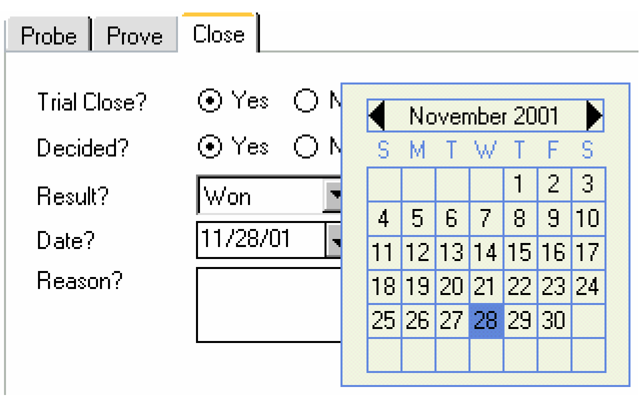
Result?
The result field allows you to record the outcome of the customer's decision and close the sales opportunity. The two possible answers for the Result field are Won and Lost.
If the customer has made their decision and opted to purchase from the competition then you select Lost as the result.
If the customer has made the decision to purchase from you then you select Won as the result.
In either case the sales opportunity will be closed and marked as either Won or Lost depending upon the option selected.



If the customer has made their decision was the sale Won or Lost?

Figure 47: Win or Lose Result

Date Won/Lost
The date field allows you to record the date that the opportunity was either Won or Lost. The date field only appears when the opportunity has been either Won or Lost.
Enter the date that the opportunity was Won or Lost by clicking once on the dotted rectangle to the right of the Date field.

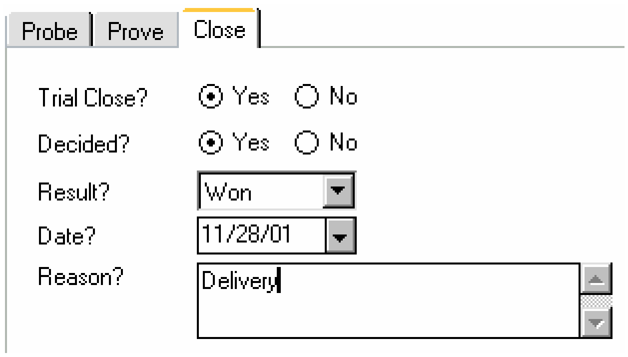


Click once on the down arrow next to the Date field to select the Date Won/Lost

A pop-up calendar will display allowing you to select the Date Won/Lost

Figure 48: Date Won/Lost

Reasons for Win/Loss
The reason field allows you to enter the reason(s) why you Won or Lost the sale. The Reason field only displays when the opportunity has been either Won or Lost.
Enter the reasons for winning or losing by clicking once on the dotted rectangle to the right of the Reason field.



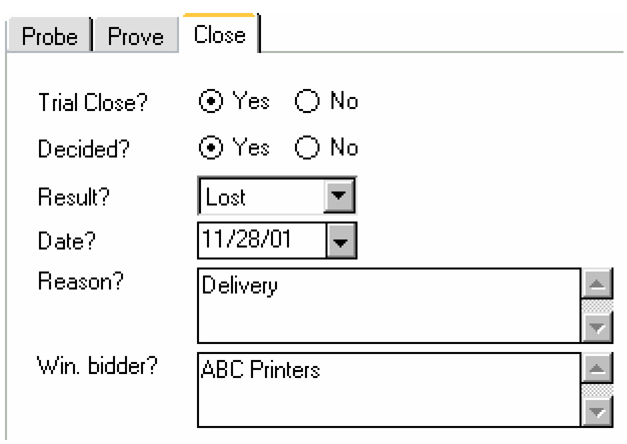
In the case where a sale has been Won or Lost the reasons for Winning or Losing can be entered in the Reason field.

Use the scroll bars to move up or down the contents of the Reason field.

Figure 49: Reason Won/Lost

Winning Bidder
The Win. Bidder field allows you to record the name(s) of the winning bidder(s) in the event that you lost the sale. The winning bidder field only displays when the opportunity has been Lost.

To edit or modify the list of winning bidders click once on the dotted rectangle next to the Win Bidder field. The Winning Bidder field will display allowing you to enter the name(s) of the winning bidders. You can also choose to enter any product or pricing information for the competition at this point if you wish.

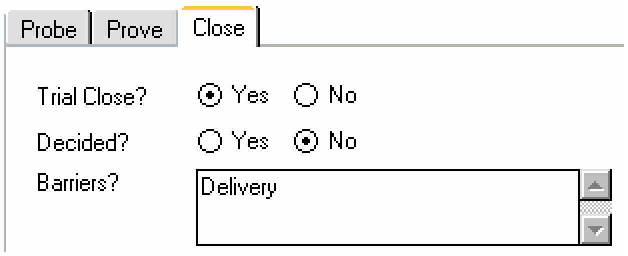


The winning bidder field allows you to record who won the sale in the instance where the sale has been lost.

Use the scroll bar to move up or down the contents of the winning bidder field.

Figure 50: Winning Bidder

Barriers to Close
The Barriers field allows you to record any barriers that are affecting your ability to close the sale in your favour. The Barriers field only displays in cases where the customer has not yet made their purchasing decision.

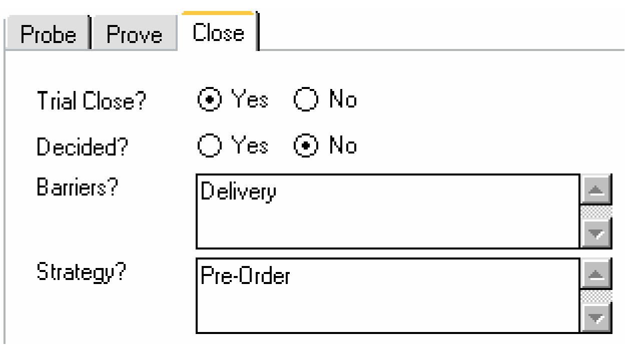


Enter any barriers to closing the sale in the Barriers field

Use the scroll bar to move up or down the contents of the winning bidder field.

Figure 51: Barriers to close

Strategy
The Strategy field allows you to record your strategy for overcoming any identified barriers and winning the sale. The Strategy field only displays in cases where the customer has not yet made their purchasing decision.



Enter your closing strategy in the Strategy form

Use the scroll bar to move up or down the contents of the winning bidder field.

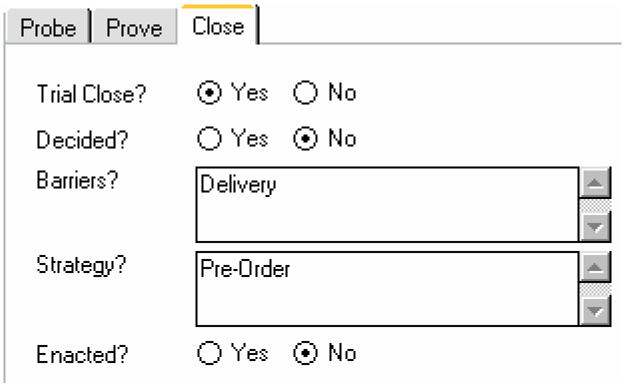
Figure 52: Strategy

Strategy Enacted
The final question on the Close page in cases where the customer has not yet made up their mind is whether or not you have enacted your strategy. The default answer to the Enacted field is "No", meaning you have not yet enacted your strategy.

In the case where you have not yet enacted your strategy leave the answer to Enacted? as No. This will keep your barriers and strategy information available from the Close form for later reference or further refinement.

In the case where you have already implemented your strategy you can choose the Yes option. Choosing Yes will save your trial close information to the Close History and reset the Close form for the next trial close.

Both a Barrier and Strategy need to be entered before you can answer Yes to the Enacted question.



Your current closing barriers and strategy will remain displayed on the Close tab until you Enact your strategy. Once the strategy has been enacted the Close tab is reset for your next trial close.

The Enacted field allows you to choose whether or not you have enacted your closing strategy.

Figure 53: Enacted strategy

Trial Close History:

The Trial Close History section contains a summary of all your previous trial closes and enacted strategies. The Trial Close History is a useful tool for reviewing your past barriers and strategies for a given sale.

The History section at the bottom of the Close tab displays your first trial close. To view a complete history of all of your trial closes, or see more information on the most recent trial close, click once on the dotted rectangle next to the History field. This will display the Trial Close History form, which contains a list of your enacted trial close strategies.

The history of trial closes is maintained in the Trial Close History section.

Trial closes are displayed along with the trial close date, barriers, and strategy.

Only the last 10 trial closes are listed in the Trial Close History section.

Figure 54: Trial Close History

Using Menu Options

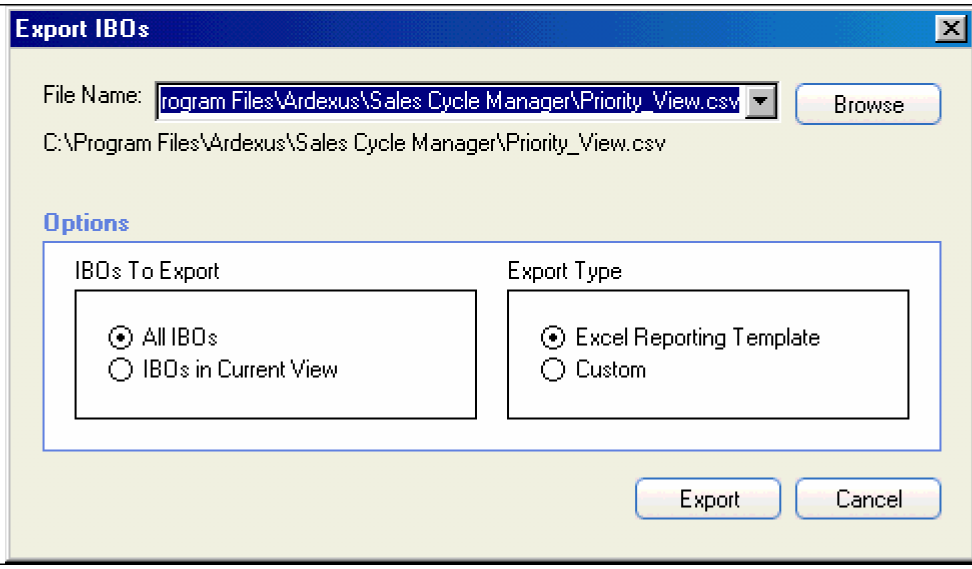
The majority of activities in Sales Cycle Manager can be performed directly from whatever record or view you find yourself. There are however a few activities that require the use of a menu option to carry out. The menu bar is displayed at the top of each record or view.

Available menu options display at the top of the active record or view.

Figure 55: Menu Bar

File Menu

Export…
The Export All menu option allows you to export all of your IBOs to a comma separated values (CSV) file for use in other software packages, send to other Sales Cycle Manager users or use in Sales Reporter. Selecting this option will display the Export As dialog box which allows you to specify the output file name, location of the export file, which IBO's to export, and the export type.



Choose the file name and path for the export file.

Figure 56: Export As Dialog

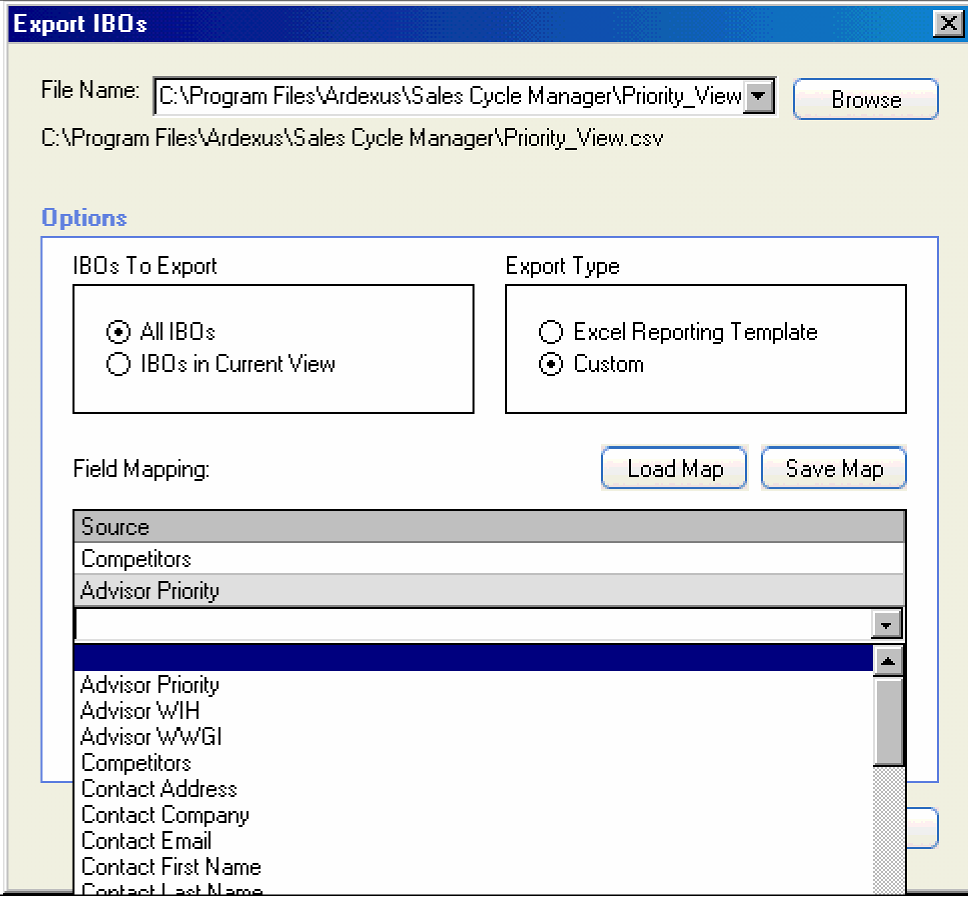
Options

IBO's To Export
The **All IBO's** menu option allows you to export all the IBO's in the software to a comma separated values (CSV) file for use in other software packages, send to other Sales Cycle Manager users, or use in Sales Reporter.

The Export **IBO's in Current View** menu option allows you to export all of the IBOs displayed in the currently open view to a comma separated values (CSV) file for use in other software packages, send to other Sales Cycle Manager users, or use in Sales Reporter.

Export Type
The **Excel Reporting Template** option creates an excel file in the path specified above. This excel file contains all IBO data displayed in columns with headers.

If you select the **Custom** option, an additional **Field Mapping** area appears in the **Export IBO's** dialog box.



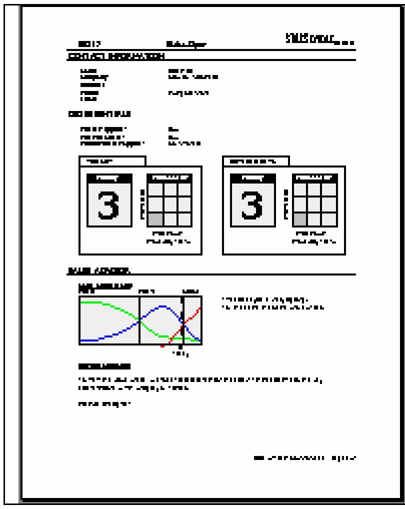
Select a Line in the field box below the "Field Mapping:" section, by clicking on any blank line. A drop down box appears, allowing you to select the IBO field that you wish to export.

Figure 57: Export As Dialog

What ever is **mapped** in this section can be exported into a Comma Separated File (CSV), which can be used in other programs.

It is also possible to save what is mapped in this dialog box, by using the **Save Map** button. This feature allows you to save what you map as a template in a specified path and format to be reused in latter exports.

Print IBO
The Print IBO menu option allows you to print the currently selected or highlighted IBO. The print dialog will display allowing you to select the output printer and print settings. When you print an IBO the print preview form is displayed allowing you to review the layout of the document.

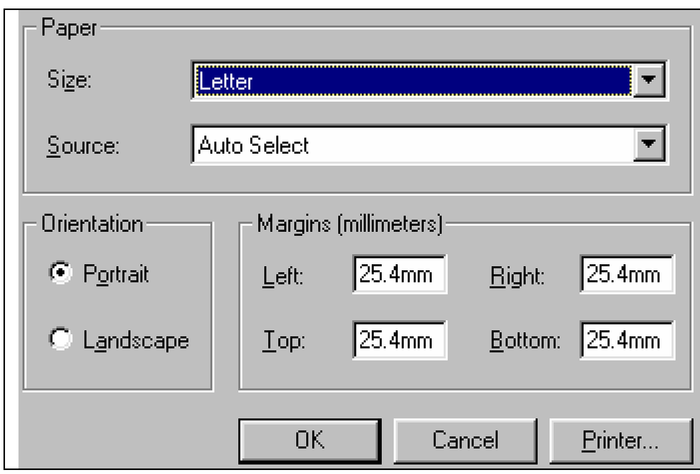


Print preview form displays when printing IBOs or views to allow you to review the document layout.

Figure 58: Print Preview

Print View
The Print View menu option allows you to print the currently open view. The print dialog will display allowing you to select the output printer and print settings. When you print a view the print preview form is displayed allowing you to review the layout of the document.

Page Setup
The Page Setup menu option allows you to configure the print layout and printing options.



Change the default print settings to be used when printing documents or views.

Set landscape or portrait mode along with margins and default printer.

Figure 60: Page Setup

Exit
The Exit menu option exits the Sales Cycle Manager application.

IBO Menu

Upgrade to Expert

The Upgrade to Expert menu option allows you to change a Sales Advisor Pro situation to a Sales Advisor Expert situation in order to take advantage of the extra strategic feedback provided by Sales Advisor Expert.
To convert a regular IBO to a Sales Advisor Expert IBO select the Upgrade to Expert option beneath the IBO menu option.

Change Start Date

The Change Start Date menu option allows you to modify the starting date of the sales cycle. The start of the sales cycle is entered when the IBO is first created, however in some cases you may want to modify the start date at a later time.
To modify the start date of the sales cycle for an existing IBO select the Change Start Date option from the IBO menu.

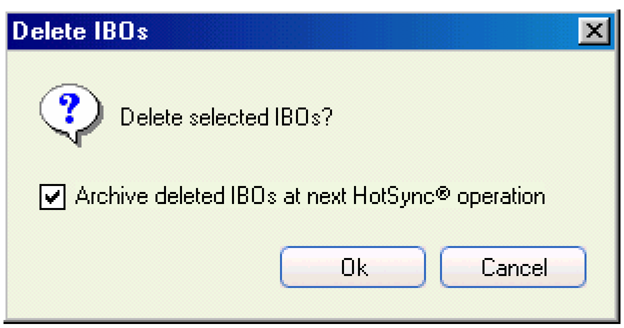
Change Status

The Change Status menu option allows you to modify the status of the IBO. The current status of the IBO is displayed in top of the Opportunity form.
To modify the status of an existing IBO select the Change Status option from the IBO menu and choose a new status from the pop up menu.

Edit Menu

Delete

The Delete menu option allows you to erase any currently highlighted sales opportunities.
To delete all currently highlighted IBOs select the Delete option from the Edit menu.



Choosing the Delete option asks you to confirm whether or not to delete the selected IBOs.

When you delete an IBO you are given the option of saving a backup copy of the IBO in an archive.

Figure 61: Delete IBO

The “Archive deleted IBOs at next HotSync operation” option is used in conjunction with the Palm version of Sales Cycle manager. Selecting this option will remove the IBO from the PC and Palm devices but leave a backup copy in the archive view of Sales Cycle Manager. This option has no effect if you are not synchronizing with the Sales Cycle Manager | Palm Edition.

Un-archive

The Un-archive function is used when a User wishes to remove an IBO from the archive view, and return it back to an “open” status. A User needs only to highlight an IBO in the archive view, go to the edit menu option, and select “Un-archive”.

New IBO…
The New IBO menu option allows you to create a new IBO entry, the same as clicking the New button. See the Creating New IBO section at the beginning of the manual for more information on creating an IBO.

Edit IBO…
The Edit IBO menu option allows you to modify the currently selected IBO. Selecting this option from the Edit menu opens the IBO form.

Create Duplicate IBO(s)…
The Create Duplicate IBO(s) allows you to make copies of a selected IBO(s). The purpose of this is to speed up data entry. If when creating a new opportunity, you find that you have a similar IBO in your list, it might be wise to duplicate that IBO. You can then change the duplicate IBO to match your current situation. However, if changing the duplicate IBO requires more data manipulation then creating a new IBO from scratch, then creating a new IBO is the better alternative. You must highlight the IBO(s) before you can create a duplicate. To highlight more then one IBO at a time, use the CTRL SHIFT button on your keyboard, and select multiple IBO's with your mouse.

Find…
The Find menu option displays a search dialog box that allows you to search for IBOs that contain a word or phrase that you type in. For more information on the Find feature review the Find feature earlier in this manual.
View Menu

Sales Cycle Planner
The Sales Cycle Planner menu option opens the Sales Cycle Planner view, which displays your open sales opportunities, sorted by priority.

Sales Forecast
The Sales Forecast menu option opens the Sales Forecast form where you can view your sales forecast. The sales forecast form displays a weighted or unweighted total of your monthly sales based on the expected dates of all the IBOs entered.

IBO List
The IBO List menu option opens the IBO List view that displays all of your IBOs.

IBO Archive
The IBO Archive menu option opens the IBO Archive view that displays all of your deleted IBOs.

Refresh
The Refresh menu option updates the currently open view to reflect any recent changes to the information. This option is useful in cases where synchronization has just occurred.

Tools Menu

Options…
The Options menu option allows you to set export preferences as well as integration with Palm Desktop and Outlook address books.

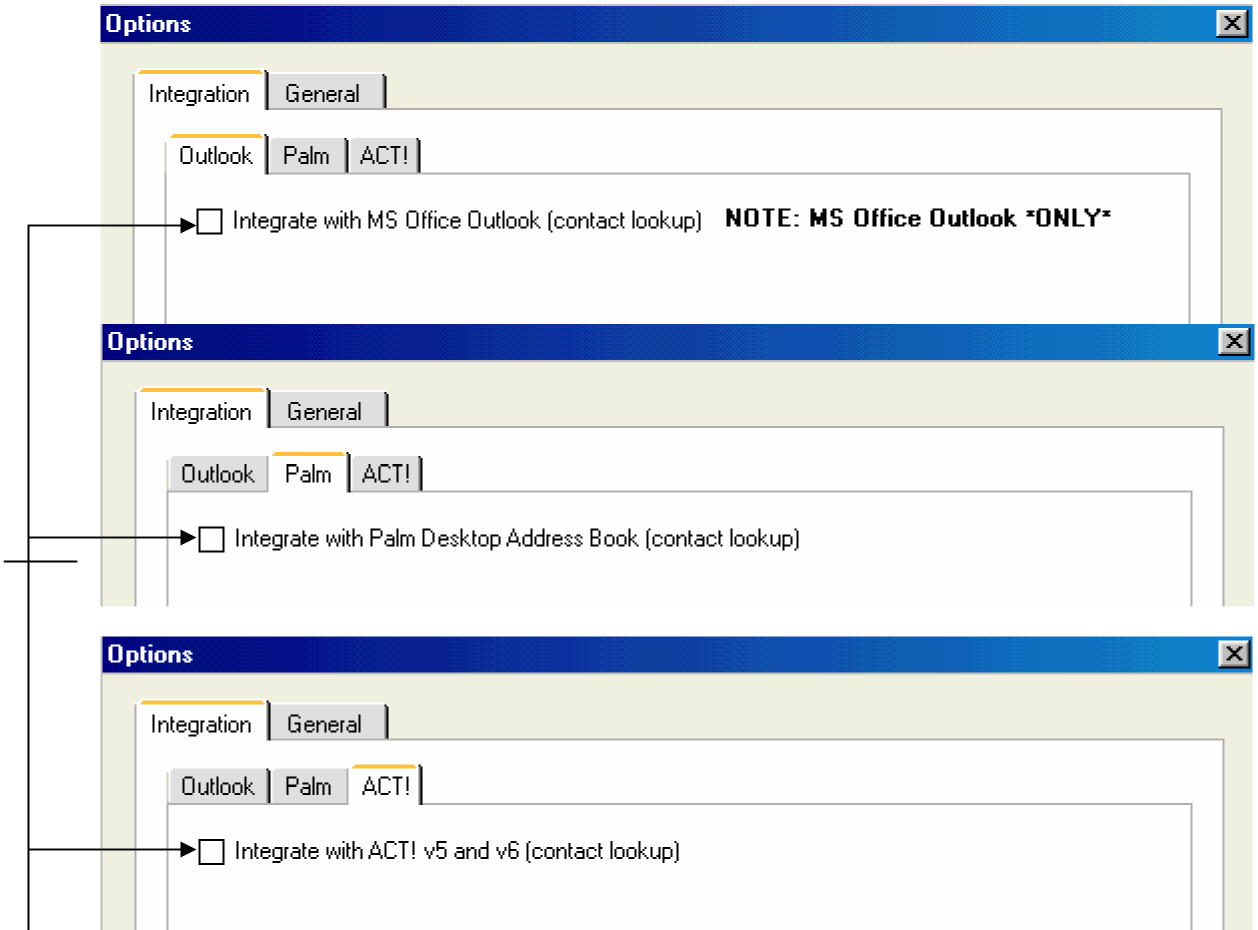


Figure 62: Options Screen – Integration Tab

By placing a checkmark in the box beside this field, you allow the SCMgr to look up to your contact list created in MS Office Outlook. This application does not lookup to Outlook Express

By placing a checkmark in the box beside this field, you allow the SCMgr to look up to your contact list created in your Palm.

By placing a checkmark in the box beside this field, you allow the SCMgr to look up to your contact list created in ACT! Version 5 and 6.

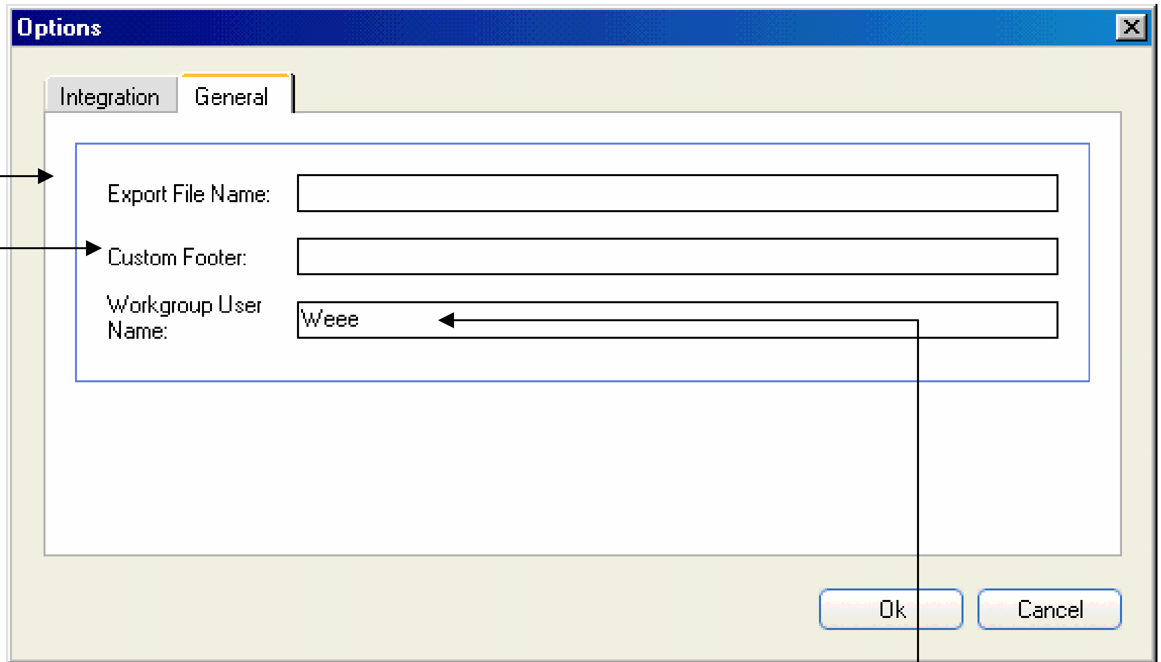


Figure 63: Options Screen – General Tab

The file names that you specify here will be used as a default file name when you export

The export tag is an extra column in the CSV export file that can be used t describe the data set

This field is used during printing. It creates footer each time you print an IBO.

Product Editor

This option allows the entering of a Product Price List for the purpose of convenient future lookup.

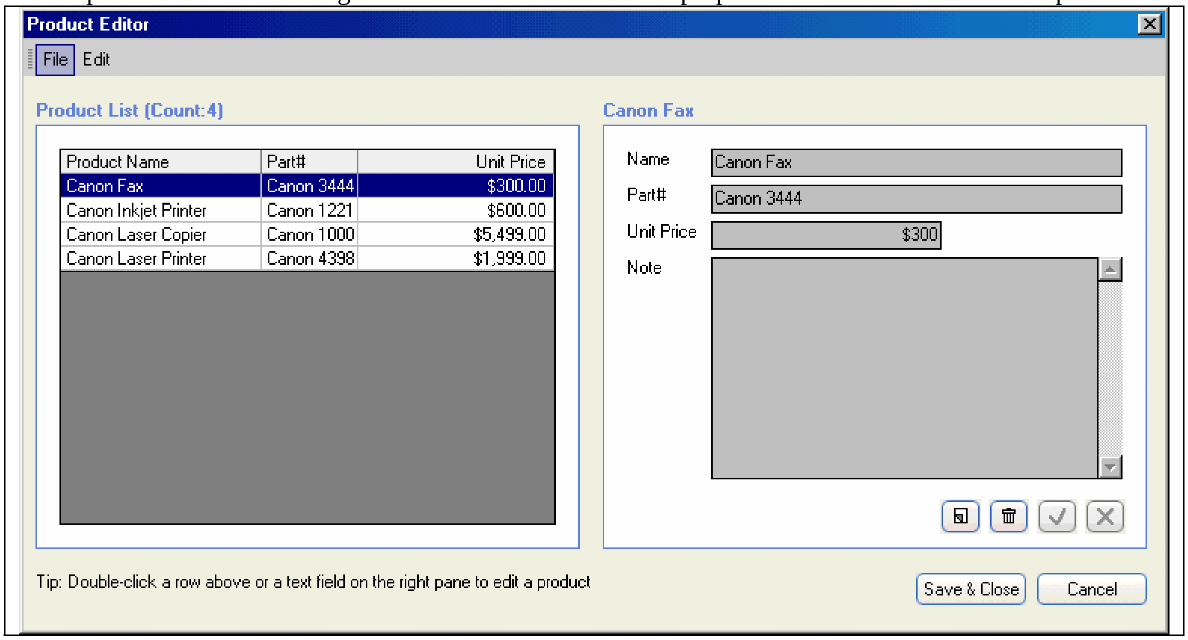


Figure 64: Product Editor Screen

Add New – Allows you to add a new product by adding a line at the bottom of the Product List and making the corresponding fields on the right hand side editable. Once the fields on the right hand are empty and editable, start typing in the product information (Name, Part#, Unit price, and Notes). The icon that resembles a “check mark” will save that product future lookup. The icon that resembles an “x” cancels an operation (such as edit). The icon that resembles a “trash can” deletes a highlighted product.

Delete – Allows you to delete a product. Highlight the line and press delete.

Lookup – This function allows you to quickly lookup a product from the Product list

Edit – To edit a row, double-click it or press Enter while it is highlighted. If you start typing while the row is highlighted, its contents will be replaced.

File – Import or Export – You can Import or Export to a Text File. In order to import a Product List, each product must be on its own separate line.

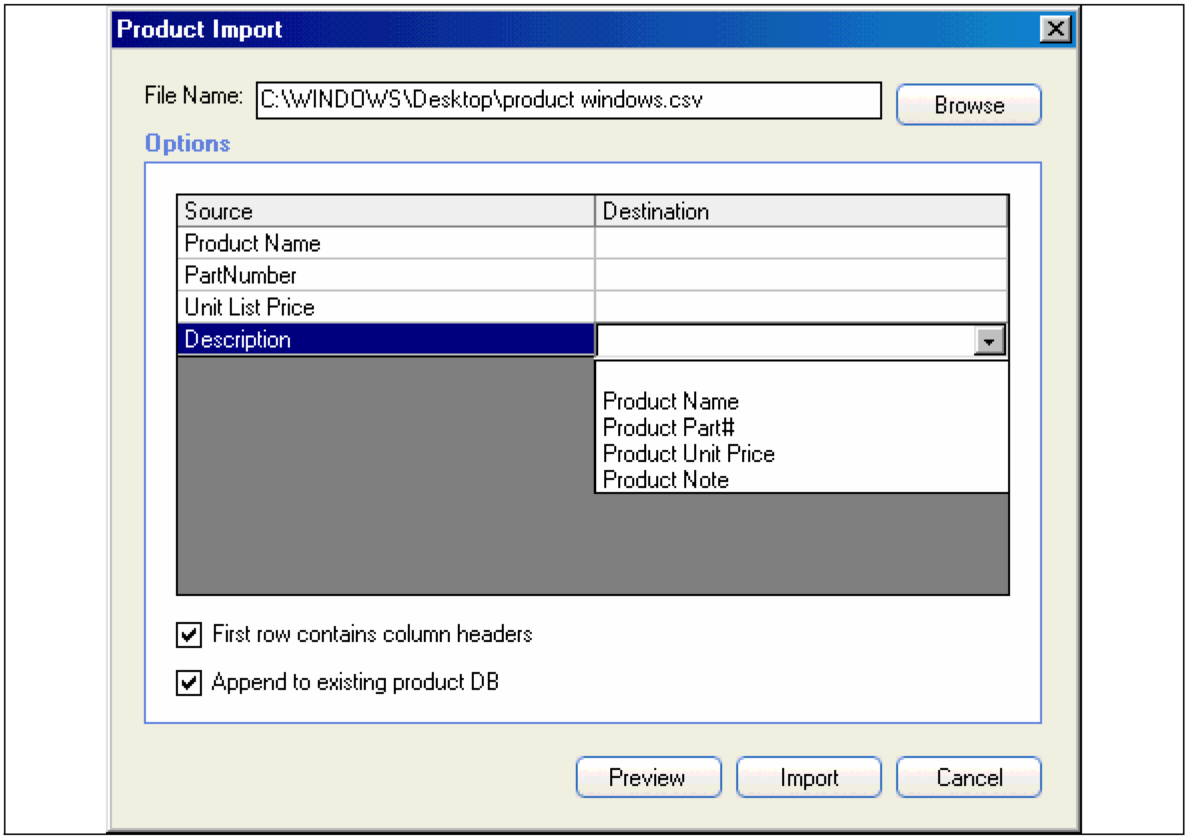


Figure 65: Product Editor Screen

In the File Name field, you must enter the path and file name of the CSV file you wish to import into the product list. The moment you enter a correct path and file name, the Source column in the Option box with display all the available fields to map from the CSV file. You can begin mapping each available field by clicking its corresponding field in the Destination column. The available field (in Sales Cycle Manager) to mapped to are: Product Name, Product Part#, Product Unit Price, and Product Note.

Install SCMgr Conduit…

This option will allow the User to synchronize information between SCMgr for Palm and SCMgr for the PC by installing SCMgr for Conduit software

Remove SCMgr Conduit….

Removes SCMgr Conduit software, which is required for the syncing between SCMgr for Palm and SCMgr for the PC.

Install SCMgr PRC…

This option will allow the User to install SCMgr for Palm. SCMgr for the Palm will be installed during the next Hotsync Operation.

HotSync Menu

Custom…
The Custom menu option opens the Palm HotSync customize menu to configure the synchronization conduits used to link Sales Cycle Manager to Sales Cycle Manager | Palm Edition.

View Log…
The View Log menu option opens the HotSync log that you can use to review status messages and error messages dealing with the synchronization of Sales Cycle Manager and Sales Cycle Manager | Palm Edition.

Setup…
The Setup menu option opens the Palm HotSync setup menu to configure the setup of your Palm device.

Help Menu

Sales Cycle Manager Help
Selecting this menu option display the on-line help guide with instructions on using Sales Cycle Manager.

Register
The Register menu option displays the product registration screen that displays your product registration information and allows you to enter your product serial number.

Support
The Support menu option allows you to create a new e-mail document to request product support from the Ardexus support team.

About Sales Cycle Manager
The About Sales Cycle Manager option presents the program splash form and copyright information for Sales Cycle Manager.

Getting Help

Help Menu

Help on using SC Manager is available at any time by selecting the Sales Cycle Manager Help option from the Help menu.

F1 Key

Help on using SC Manager is available at any time by pressing the F1 key on your keyboard.

Help Enabled Fields

In addition to using the menu and F1 key to get help information certain fields in SC Manager are help enabled to provide you with more information on the item in question. To get more information on a specific field place the mouse cursor over the field label. If the field is help enabled the mouse cursor will change to a question mark. Clicking once will display context sensitive on-line help about the field in question.

Technical Support

If you have any questions or concerns regarding Ardexus' Sales Cycle Manager please contact us by e-mail at scmgrsupport@ardexus.com

For more information on Ardexus' support offerings please see our web site at http://www.ardexus.com

Appendix A – Sales Reporter for a Sales Representative

Introduction

Sales Cycle Manager uses powerful pivot tables to report graphical sales forecasts. These tables are entirely configurable and can be further customized to achieve the exact reporting desired from Sales Cycle Manager for Windows. Reporting on a Sales Representatives goals, number of IBO's, multiple forecasting methods of those IBO's, number of won IBO's or sales, and the combined dollar value of those won sales, can be graphically achieved in an easy to read Bar Chart. This Bar chart can be configured for different fiscal year beginnings, multiple fiscal years, quarters, and forecasting methods. It is even possible to view a graph that indicates Goals, Forecasts, and Sales on a dollar by month graph.

Data

In order for Sales Reporter to fully function, it requires data. This data can be found in two separate files: a goals file, and a sales file. A sales file is required, whereas a goals file is optional.

Sales Data

Sales data is generated from using the export feature explained in the prior **File Menu** section in this manual - under the **Export Current** and **Export All Views**.

Goals Data

Goals data maybe either manually created in a CSV format or created using the Goals Utility program.

Manually Creating Data:

Each row must have a value for date, dollars, and sales representative. Each row can only have these three values in order to ensure a correct Goals record is created. It should appear as follows:

	A	B	C	D	E
1	1	2001	4000	John Weber	
2	2	2001	4000	John Weber	
3	3	2001	4000	John Weber	
4	4	2001	4000	John Weber	
5	5	2001	4000	John Weber	

1. "1" would be considered the month in the date value
2. "2001" would be considered as the year in the date value
3. "4000" would be considered a dollar value for the goal
4. "John Webber" would be the name of the Sales Representative for this goal record

Figure A1: Example of Goals Record in a CSV format

Using the Goals Utility to Create Data:

Locate the Goals.exe file in the Excel subdirectory of the Sales Cycle Manager File Folder and execute the file.

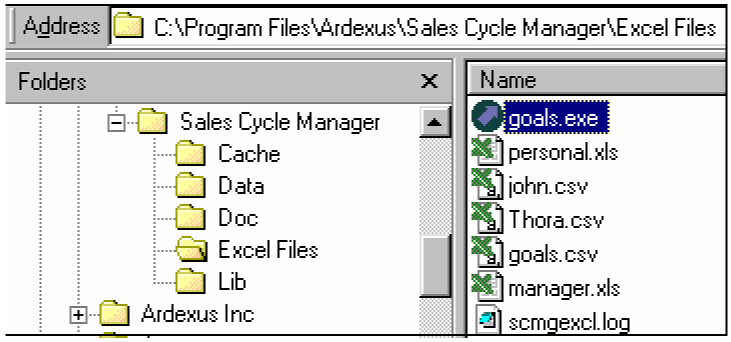
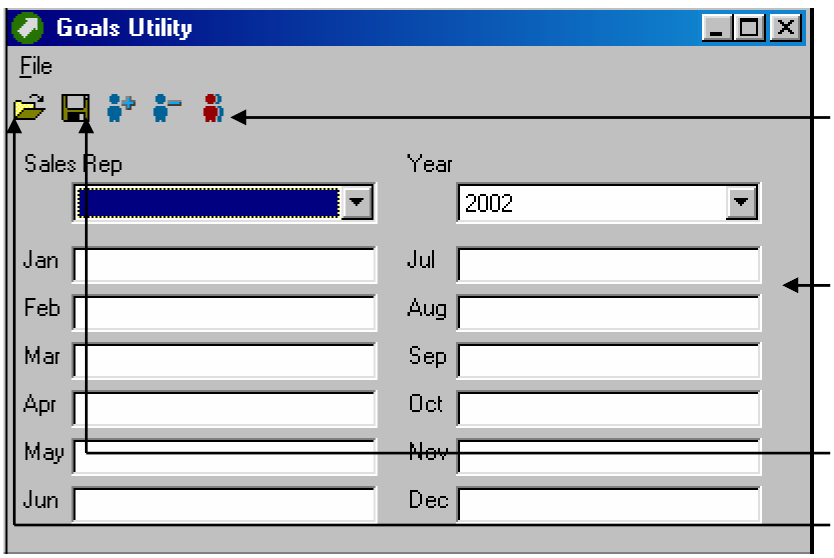


Figure A2: Example of Typical File Location

Below is the Goals Utility program that will assist in the creation of Goals Data.



You can use these three icons of people to Add, Subtract, or Edit the Sales Representatives that you wish to have Goals records.

These fields are used to record Goals Data for each month and per fiscal year.

This Icon is used to Load Goals Data

Figure A3: Goals Utility

Importing Data in Sales Reporter

Data can be imported into Sales Reporter for individual Sales Representative reporting (Personal.xls).

Personal.xls Importing

1. Launch the excel file named Personal.xls
2. Press the Load Data Button (see Figure)
3. Select the SCM Export File that was exported from Sales Cycle Manager and press Open
4. Select the Goals File that was created and press Open

Graphing of Sales Data

In order to create a Bar or YTD graph, fields must be selected on the Main Sheet to adjust the data being presented.

YTD Chart

The field that adjust the YTD graph are explained below:

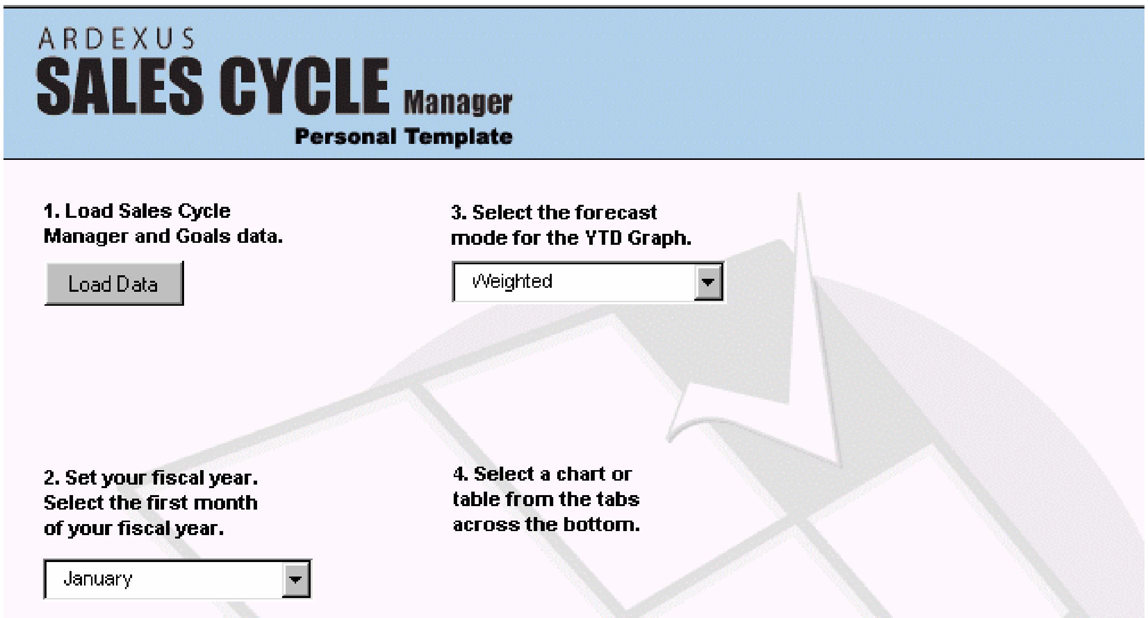


Figure A4: Main Data Collecting/Manipulation Sheet

2. Set your fiscal year. Select the first month of your fiscal year.	Will adjust the beginning and ending months for the Fiscal Year on the Bar (Pivot) and YTD graph
3. Select the forecast mode for the YTD Graph.	It is possible to change the type of Forecasting that can be displayed on the YTD chart by choosing either Weighted or Unweighted from the drop down menu option. These options will allow you to choose whether to view the total value (Unweighted) or a percentage of the IBO value based on the probability of winning the sale (Weighted).

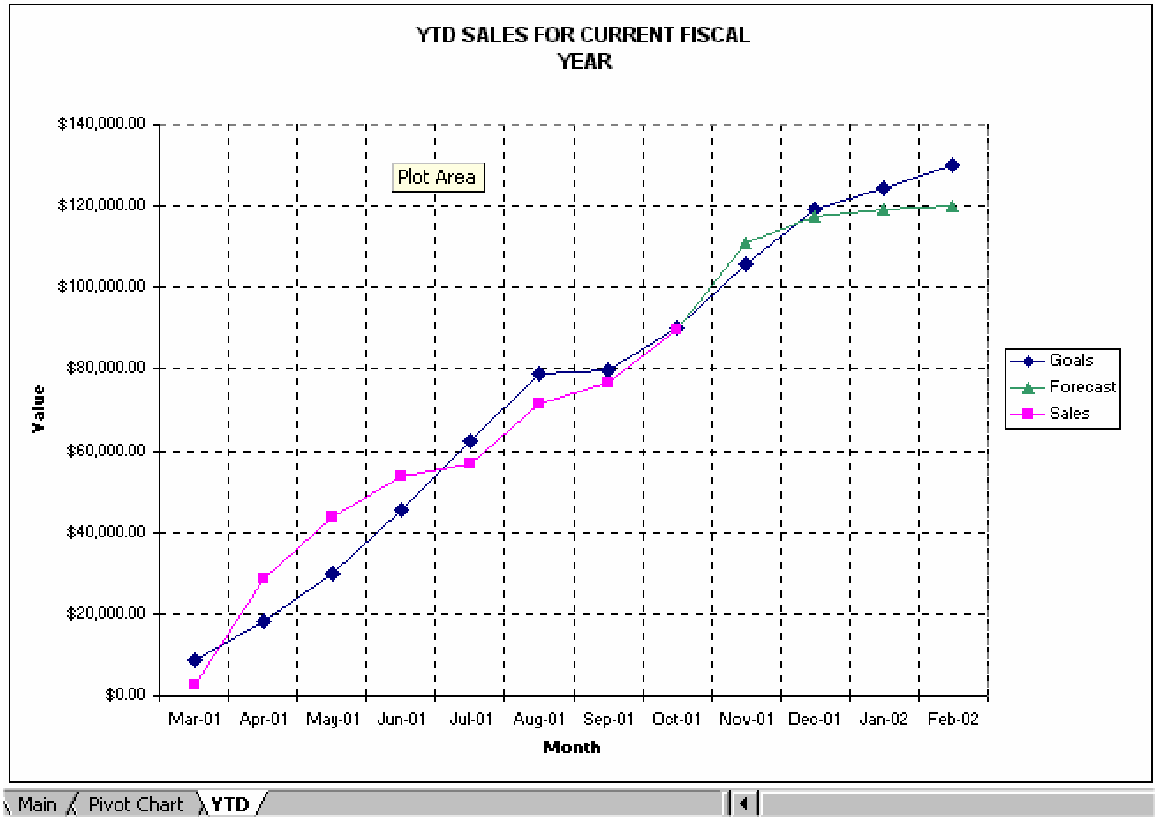


Figure A5: YTD Chart

Pivot Chart

The field that adjust the Bar (Pivot) graph are explained below:

Pivot Table

Fiscal Year	2000		
Quarter	(All)		
Value	**Type**		
Month	**IBO Unweighted Value**	**IBO Weighted Value**	**Sales Value**
1/1/00	$4,021.58	$530.74	$181,197.68
2/1/00	$10,405.70	$5,085.17	
3/1/00	$32,339.87	$15,532.06	
4/1/00	$10,379.87	$6,149.82	
6/1/00	$10,162.33	$1,660.12	
7/1/00	$4,473.56	$2,660.79	
8/1/00	$23,547.80	$4,330.40	
9/1/00	$6,885.67	$1,971.27	
10/1/00	$20,338.46	$5,126.26	
11/1/00	$1,857.31	$743.18	
12/1/00	$19,723.24	$3,599.40	
Grand Total	**$144,135.39**	**$47,389.19**	**$181,197.68**

Figure A4: Main Data Collecting/Manipulation Sheet and Pivot Table

Fiscal Year – You can select the fiscal year(s) that you wish to Chart on the Bar Graph by pressing the drop down bar option beside the field. You can either select a single fiscal year (highlight fiscal year) or all fiscal years (select All).

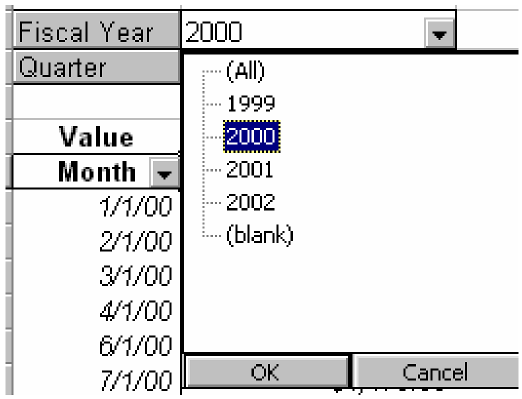


Figure A6: Fiscal Year Dropdown menu Options

Quarter - You can select the quarter(s) that you wish to Chart on the Bar Graph by pressing the drop down bar option beside the field. You can either select a single quarter(highlight quarter) or all quarters(select All).

Type: You can select the Type of data that you wish to display on the Bar Graph by pressing the drop down bar option beside the field. You can select the type of data that you wish to display by placing a checkmark in the box beside the type of data.

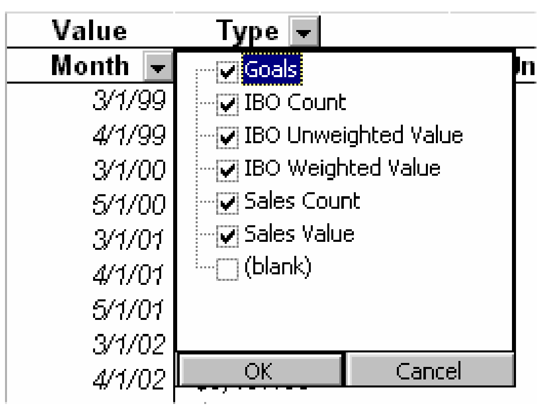


Figure A7: Type Menu Dropdown menu Options

Month: You can deselect or select the months that you wish to be included in the Bar Graph. . You can select the month that you wish to display by placing a checkmark in the box beside the month you wish to select. Notice only the months that appear on based on the criteria select in the Quarters Menu Box Option.

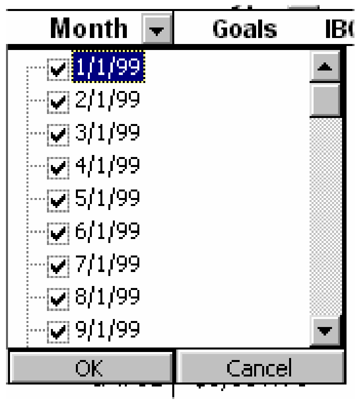


Figure A8: Month Menu Dropdown menu Options

Pivot Table

Below is an example of a Pivot Table. The Pivot table displays all the data that will be used in the Bar (pivot) graph. It also provides totals for each column.

Value	Type					
Month	**Goals**	**IBO Count**	**IBO Unweighted Value**	**IBO Weighted Value**	**Sales Count**	**Sales Value**
3/1/99					*1*	*$5,235.74*
4/1/99					*3*	*$20,191.99*
3/1/00		*1*	*$2,772.49*	*$693.12*	*1*	*$8,408.64*
5/1/00		*1*	*$3,001.58*	*$450.24*		
3/1/01	*$1,345.41*					
4/1/01	*$2,983.74*				*1*	*$6,635.66*
5/1/01	*$6,206.25*	*1*	*$3,998.59*	*$1,599.44*	*2*	*$14,865.36*
3/1/02	*$7,127.62*					
4/1/02	*$3,487.83*					
5/1/02	*$6,691.78*					
3/1/03	*$8,915.25*					
4/1/03	*$9,585.42*					
5/1/03	*$2,976.85*					
Grand Total	**$49,320.15**	**3**	**$9,772.66**	**$2,742.80**	**8**	**$55,337.39**

Figure A9: Pivot Table

Month – Lists all the months that are being used in the Bar Graph

Goals – Lists the dollar amounts of each of the Sales Representatives Goals that will be plotted on the Bar Graph

IBO Count – Provides the number of IBO forecasted for that month.

IBO Unweighted Value – The unweighted value of all the IBO's separated by month
IBO Weighted Value – The weighted value of all the IBO's separated by month

Sales Count – The count of how many IBO's were turned into Sales on a month-by-month basis.

Sales Value – The value of those IBO's that were converted into Sales on a month-by-month basis.

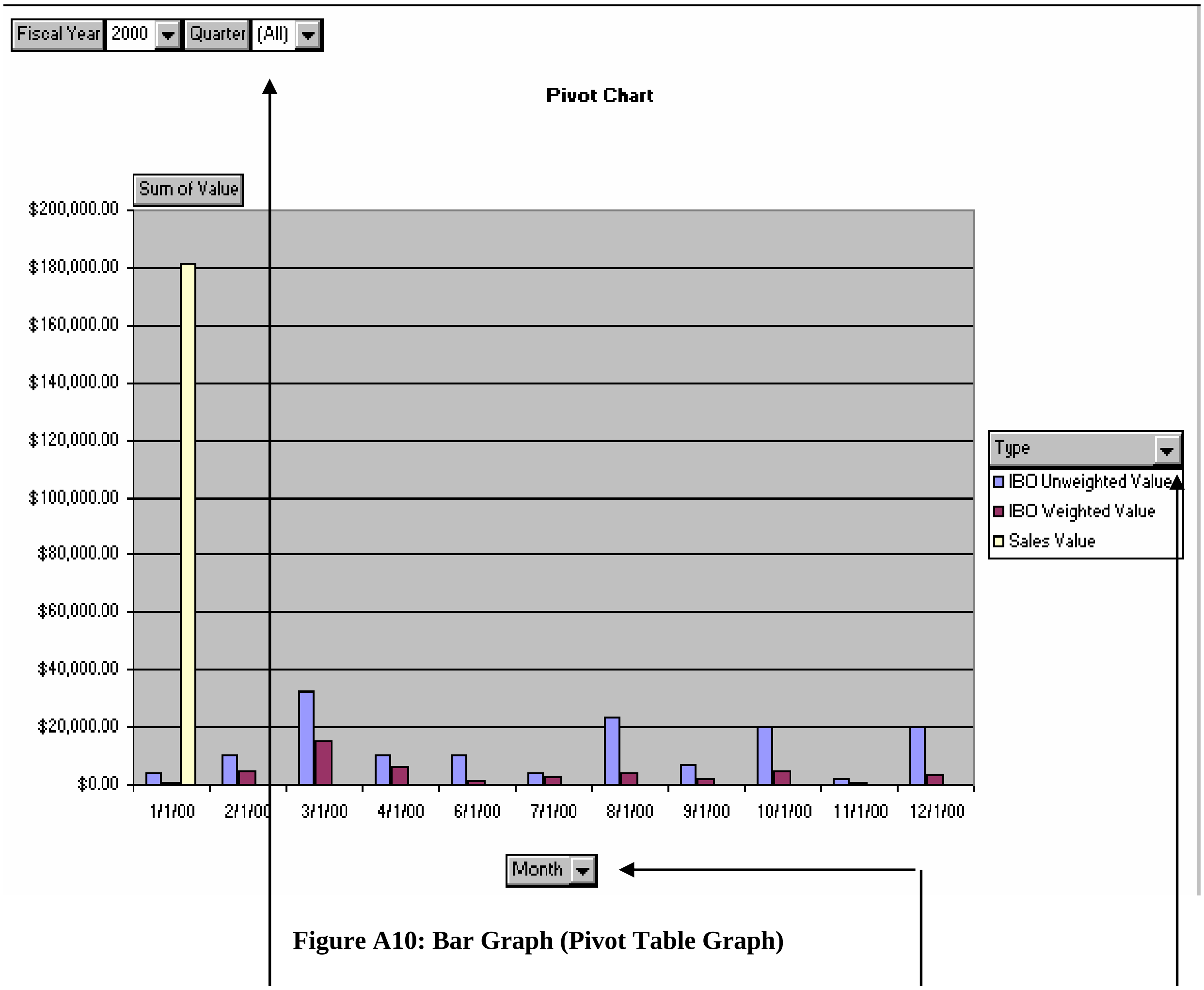


Figure A10: Bar Graph (Pivot Table Graph)

These dropdown menu options allow a Sales Representative to change their selections from the Main Tab.

Appendix B – Sales Reporter for a Sales Manager

Introduction

Sales Cycle Manager reporting for a Sales Manager uses more extensive and powerful pivot tables to report graphical sales forecasts for a group of sales representative. These tables are entirely configurable and can be further customized to achieve the exact reporting desired from Sales Cycle Manager for the PC. It is possible to graphically report on either an individual or groups of Sales Representatives for the following information:

- YTD Sales/Forecast Graph can display goals data against actual sales and a weighted or unweighted forecast.
- Displays Sales values, weighted and unweighted IBO values in a table and in a bar chart
- Displays Sales values, weighted and unweighted IBO values by Product in a table and in a bar chart
- Displays Sales values, weighted and unweighted IBO values by Company in a table and in a bar chart
- Displays reasons for won/lost/cancelled IBO's as well as the associated values in a table and in a bar chart
- Displays competitors statistics for IBO's as well as the associated values in a table and in a bar chart
- Ability configured for different fiscal year beginnings, multiple fiscal years, quarters, months and forecasting methods

Data

In order for Sales Reporter to fully function, it requires data. This data can be found in two separate files: a goals file, and a sales file. A sales file is required, whereas a goals file is optional.

Sales Data

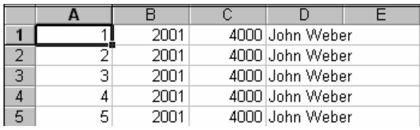
Sales data is generated from using the export feature explained in the prior **File Menu** section in this manual - under the **Export Current** and **Export All Views**.

Goals Data

Goals data maybe either manually created in a CSV format or created using the Goals Utility program.

Manually Creating Data:

Each row must have a value for date, dollars, and sales representative. Each row can only have these three values in order to ensure a correct Goals record is created. It should appear as follows:



	A	B	C	D	E
1	1	2001	4000	John Weber	
2	2	2001	4000	John Weber	
3	3	2001	4000	John Weber	
4	4	2001	4000	John Weber	
5	5	2001	4000	John Weber	

5. “1” would be considered the month in the date value
6. “2001” would be considered as the year in the date value
7. “4000” would be considered a dollar value for the goal
8. “John Webber” would be the name of the Sales Representative for this goal record

Figure B1: Example of Goals Record in a CSV format

Using the Goals Utility to Create Data:

Locate the Goals.exe file in the Excel subdirectory of the Sales Cycle Manager File Folder and execute the file.

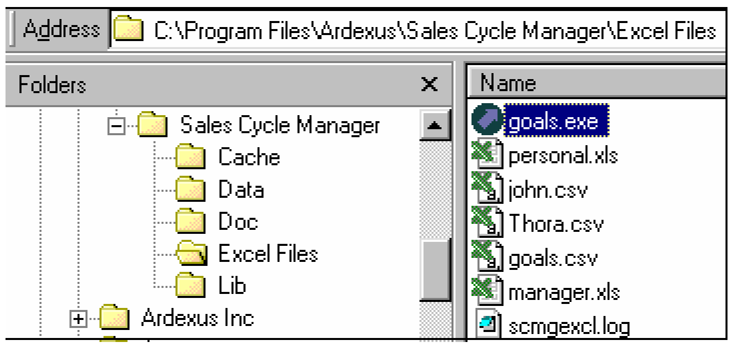
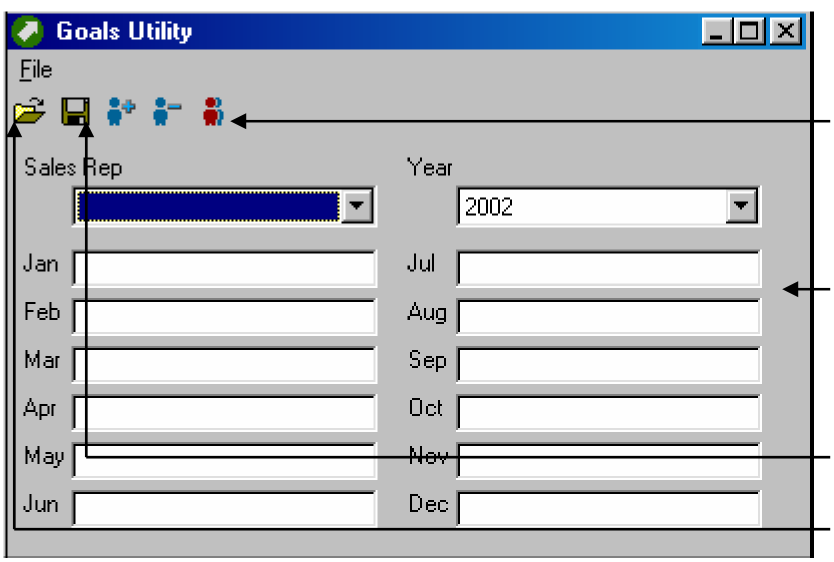


Figure B2: Example of Typical File Location

Below is the Goals Utility program that will assist in the creation of Goals Data.



You can use these three icons of people to Add, Subtract, or Edit the Sales Representatives that you wish to have Goals records.

These fields are used to record Goals Data for each month and per fiscal year.

This Icon is used to Load Goals Data

Figure B3: Goals Utility

Importing Data in Sales Reporter for a manager

Data can be imported into a Managers template for multiple sales representative reporting.

Manger.xls Importing

Launch the excel file named Manager.xls

1. Press the Load Data Button on the Main Tab (see Figure). Select the SCM Export File(s) that was exported from Sales Cycle Manager and press Open. Use the CTRL button on your keyboard to select more then one SCM Export File. Select the Goals File that was created and press Open. Use the CTRL button on your keyboard to select more then one SCM Export File

Graphing of Sales Data on a YTD Graph

In order to create YTD graph, fields must be selected on the Main Sheet to adjust the data being presented.

2. Set the month of the Fiscal Year by using the drop down menu option. Will adjust the beginning and ending months for the Fiscal Year on the Bar (Pivot) and YTD graph
3. Select the Forecast type that you wish to have displayed on the YTD graph. It is possible to change the type of Forecasting that can be displayed on the YTD chart by choosing either Weighted or Unweighted from the drop down menu option. These options will allow you to choose whether to view the total value (Unweighted) or a percentage of the IBO value based on the probability of winning the sale (Weighted).
4. Select the Users to be displayed on the YTD graph by selecting multiple Sales Representatives for the YTD Graph, by highlighting names in the scroll down menu box.
5. Select a chart or table from the tabs across the bottom
6. To reset the options that you chose, press the **Reset Pivot Table** button

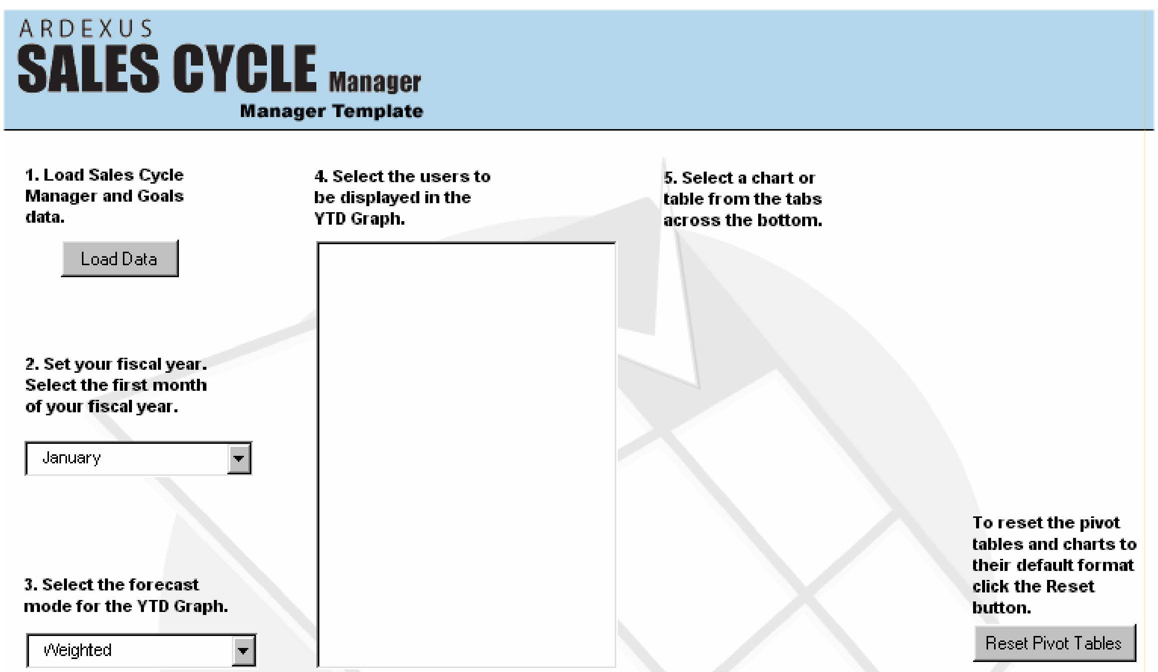


Figure B4: Main Data Collecting/Manipulation Sheet

YTD Chart

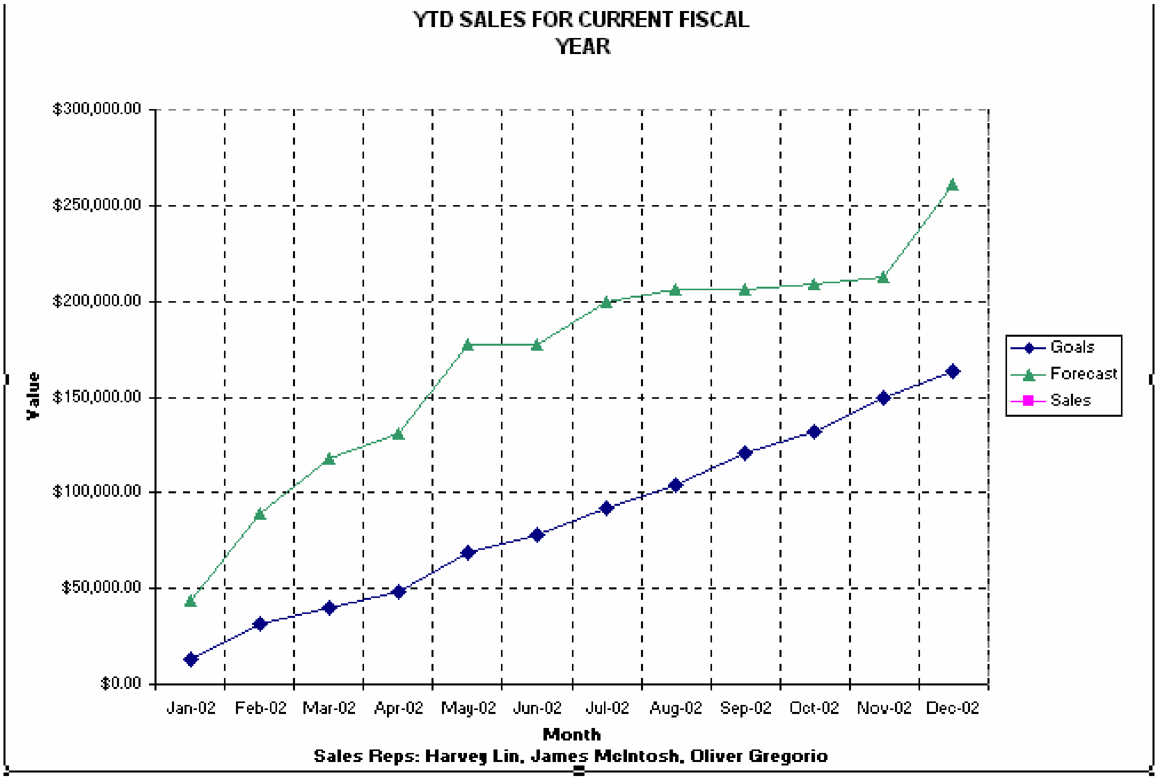


Figure B5: YTD Chart

Pivot Chart – Main Table

The field that adjust the Bar (Pivot) graph are explained below:

Fiscal Year	2000
Quarter	(All)
User	(All)

Figure B6: Main Data Collecting/Manipulation Sheet and Pivot Table

Fiscal Year – You can select the fiscal year(s) that you wish to Chart on the Bar Graph by pressing the drop down bar option beside the field. You can either select a single fiscal year (highlight fiscal year) or all fiscal years (select All).

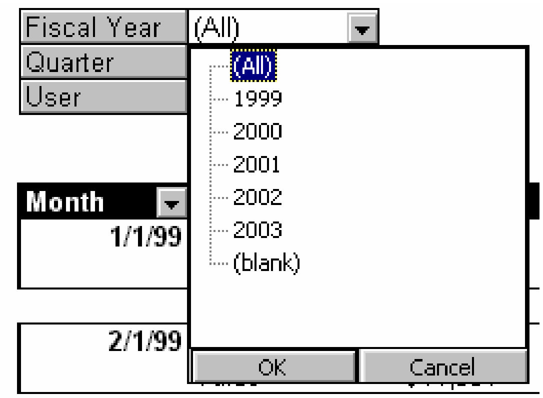


Figure B7: Fiscal Year Dropdown menu Options

Quarter - You can select the quarter(s) that you wish to Chart on the Bar Graph by pressing the drop down bar option beside the field. You can either select a single quarter(highlight quarter) or all quarters(select All).

User - This field is only available on the Manager Excel Template. You can select the User(s) that you wish to Chart on the Bar Graph by pressing the drop down bar option beside the field. You can either select a single User (highlight User) or all Users(select All).

Type: You can select the Type of data that you wish to display on the Bar Graph by pressing the drop down bar option beside the field. You can select the type of data that you wish to display by placing a checkmark in the box beside the type of data.

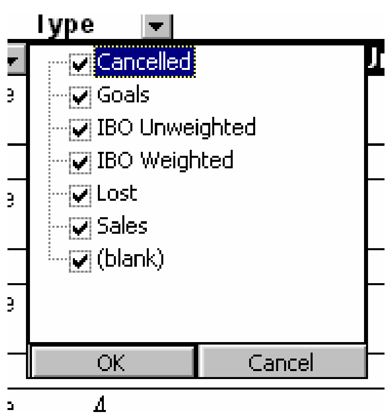


Figure B8: Type Menu Dropdown menu Options

Month: You can deselect or select the months that you wish to be included in the Bar Graph. . You can select the month that you wish to display by placing a checkmark in the box beside the month you wish to select. Notice only the months that appear on based on the criteria select in the Quarters Menu Box Option.

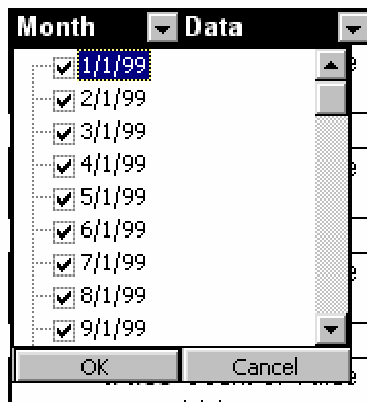


Figure B9: Month Menu Dropdown menu Options

Pivot Table – Main Chart

Below is an example of a Pivot Table. The Pivot table displays all the data that will be used in the Main Bar (pivot) graph. It also provides totals for each column.

Month	Data	Cancelled	Goals	IBO Unweighted	IBO Weighted	Lost	Sales	(blank)
1/1/99	Count of Value	34				34	30	
	Value	$148,199				$163,278	$136,592	

Figure B10: Pivot Table

Month – Lists all the months that are being used in the Bar Graph

Data – You have the option of selecting both or either Count of Value or Value. All data will appear in these categories of Data Types. “Count of Value” would be in terms of quantity of IBO’s, whereas “Value” would be in terms of dollar value of the IBO’s being listed. This option, once selected, will disappear from the current table. It can only be made available again if all pivot tables are reset from the Main Tab. There is a different Data selection option on each Pivot table.

Cancelled – How many IBO’s were Cancelled that month.

Goals – The value of the Sales representative(s) goals for that month

IBO Unweighted Value – The unweighted value of all the IBO’s separated by month

IBO Weighted Value – The weighted value of all the IBO’s separated by month

Sales Value – The value of those IBO’s that were converted into Sales on a month-by-month basis.

Lost – How many IBO’s were Lost that month.

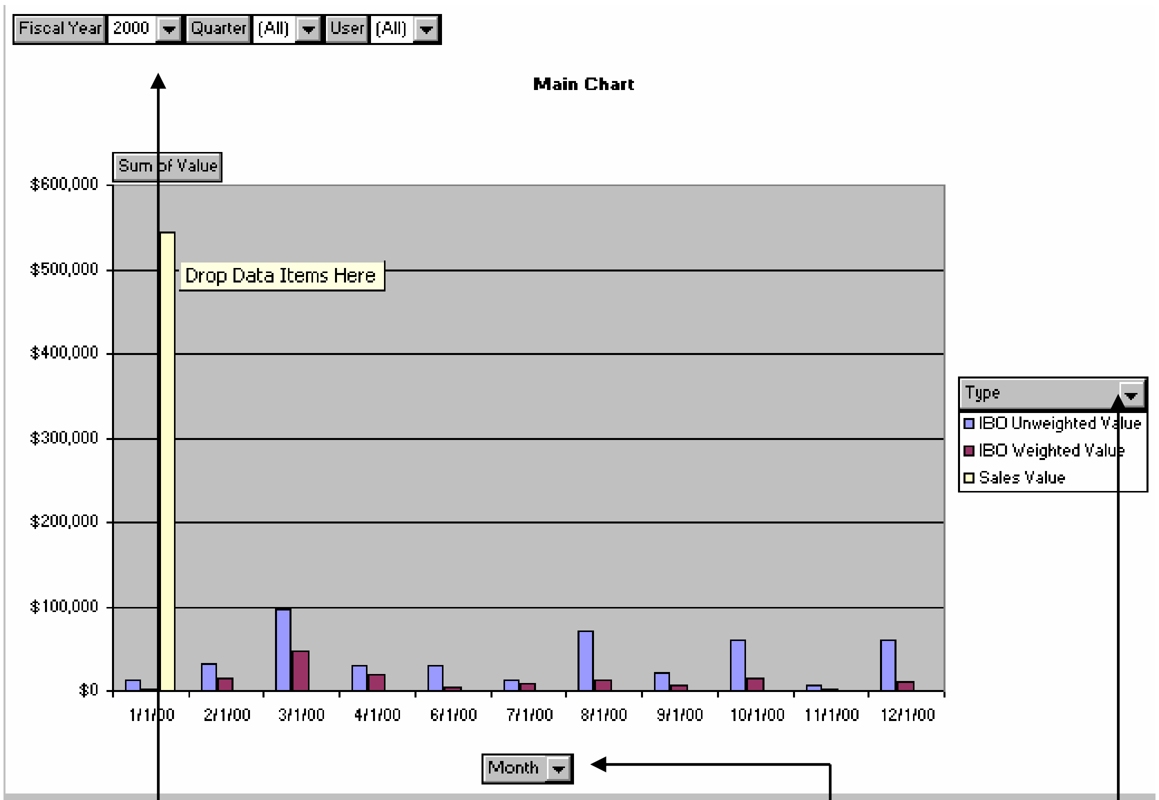


Figure B11: Bar Graph (Pivot Table Graph)

These dropdown menu options allow a Sales Representative to change their selections from the Main Tab.

Pivot Chart – By Company Table

The fields that adjust the Bar (Pivot) graph are identical to the Pivot – Main Chart, except for Company Name

Fiscal Year - identical
Quarter - identical
User - identical

Month	Product	Data	IBO Unweighted Value	IBO Weighted Value	Sales Value
02/01/2003	Canon Inkj	Value	$1,200	$120	$1,200
		Qty	2	2	2
		Count of IBO Number	2	2	2
	Canon Las	Value	$10,998	$1,100	$10,998
		Qty	2	2	2
		Count of IBO Number	2	2	2

Figure B10: Product Chart (Pivot Table)

Month – Select the Month's that you wish to display on the Bar Graph by using the drop down menu option.

Product - You can select the Product data that you wish to display on the Bar Graph by pressing the drop down bar option beside the field. You can select the product that you wish to display by placing a checkmark in the box beside the type of data.

Data – You have the option of selecting both or either Count of Value or Value. All data will appear in these categories of Data Types. "Count of Value" would be in terms of quantity of IBO's, whereas "Value" would be in terms of dollar value of the IBO's being listed. Qty refers to amount of Product being listed. These options, once selected, will disappear from the current table. It can only be made available again if all pivot tables are reset from the Main Tab. There is a different Data selection option on each Pivot table.

Pivot Table – By Company Chart

Below is an example of a Pivot Table. The Pivot table displays all the data that will be used in the By Company (pivot) graph.

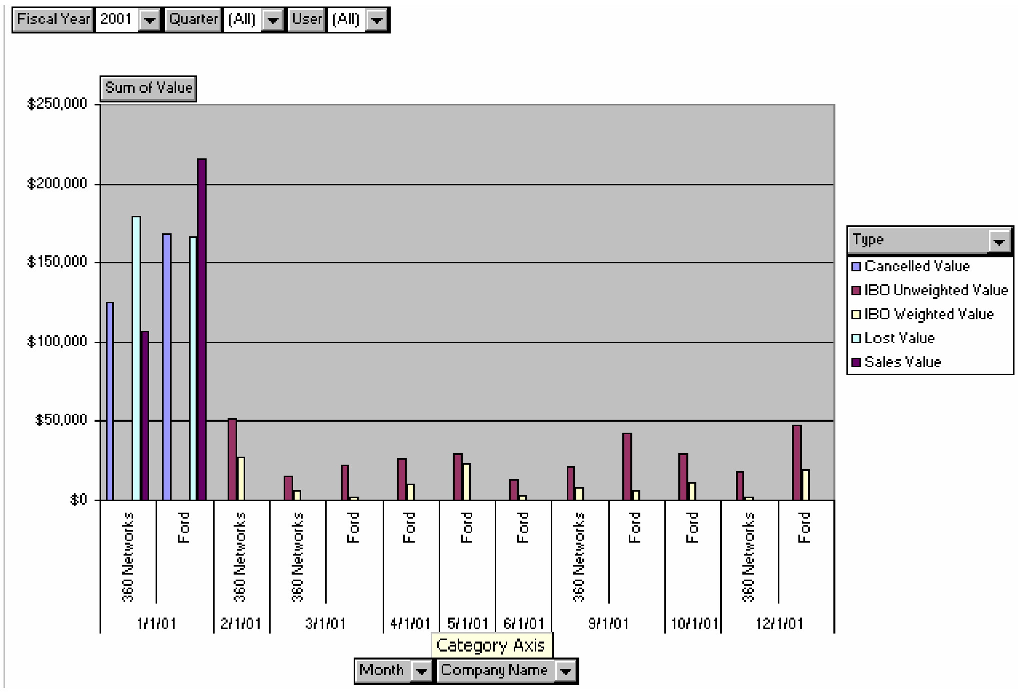


Figure B11: Company Bar Graph (Pivot Table Graph)

Pivot Chart – By Reason Table

The fields that adjust the Bar (Pivot) graph are identical to the Pivot – Main Chart except for the Reason Column

Fiscal Year - identical
Quarter - identical
User - identical

Value			Type					
Month	Status	Reason	Cancelled Count	Cancelled Value	Lost Count	Lost Value	Sales Count	Sales Value
1/1/01	Cancelle	In too late	27	$148,300				
		Outsold	15	$74,298				
		Price	27	$112,126				
		Product fit	27	$136,260				
		Product worthiness	36	$251,246				
	Cancelled Total		**132**	**$722,230**				
	Lost	In too late			30	$155,469		
		Outsold			39	$196,230		
		Price			45	$251,062		
		Product fit			24	$144,246		
		Product worthiness			24	$120,983		
	Lost Total				**162**	**$867,990**		
	Von	In too late					39	$238,189
		Outsold					30	$152,382
		Price					9	$63,092
		Product fit					18	$113,013
		Product worthiness					24	$104,083
	Von Total						**120**	**$670,760**
1/1/01 Total			**132**	**$722,230**	**162**	**$867,990**	**120**	**$670,760**

Figure B12: Reason Chart (Pivot Table)

Month – Select the Month's that you wish to display on the Bar Graph by using the drop down menu option.

Data – You have the option of selecting both or either Count of Value or Value. All data will appear in these categories of Data Types. "Count of Value" would be in terms of quantity of IBO's, whereas "Value" would be in terms of dollar value of the IBO's being listed. This option, once selected, will disappear from the current table. It can only be made available again if all pivot tables are reset from the Main Tab. There is a different Data selection option on each Pivot table.

Reasons - Select the Reason's that you wish to display on the Bar Graph by using the drop down menu option

Type - You can select the Type of data that you wish to display on the Bar Graph by pressing the drop down bar option beside the field. You can select the type of data that you wish to display by placing a checkmark in the box beside the type of data.

Pivot Table – By Reason Chart

Below is an example of a Pivot Table. The Pivot table displays all the data that will be used in the Main Bar (pivot) graph. It also provides totals for each column

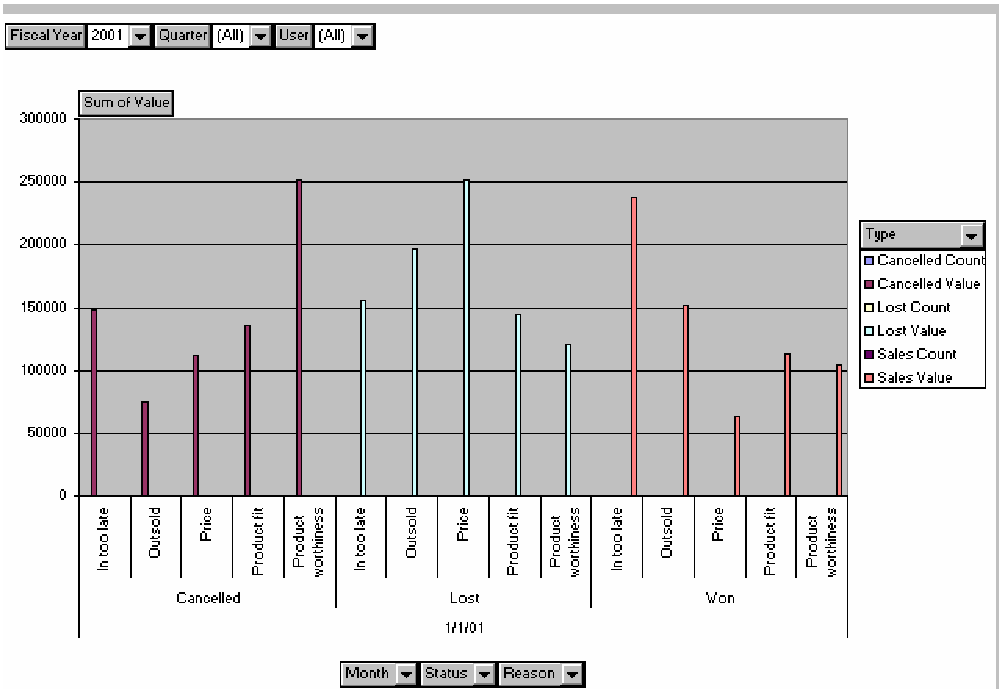


Figure B13: Reasons Bar Graph (Pivot Table Graph)

Pivot Chart – By Competitor Table

The field that adjust the Bar (Pivot) graph are identical to the Pivot – Main Chart Except for Winning Bidder selection.

Month	Winning Bidder	Data	Cancelled	Goals	IBO Unweighted	IBO Weighted	Lost	Sale
1/1/99	**360 Networks**	Count of Value					9	
		Value					$45,697	
	Ford	Count of Value					4	
		Value					$22,201	

Figure B12: Competitor Chart (Pivot Table)

Month – Select the Month's that you wish to display on the Bar Graph by using the drop down menu option.

Data – You have the option of selecting both or either Count of Value or Value. All data will appear in these categories of Data Types. "Count of Value" would be in terms of quantity of IBO's, whereas "Value" would be in terms of dollar value of the IBO's being listed. This option, once selected, will disappear from the current table. It can only be made available again if all pivot tables are reset from the Main Tab. There is a different Data selection option on each Pivot table.

Winning Bidder - Select the competitors that you wish to display on the Bar Graph by using the drop down menu option

Type - You can select the Type of data that you wish to display on the Bar Graph by pressing the drop down bar option beside the field. You can select the type of data that you wish to display by placing a checkmark in the box beside the type of data.

Pivot Table – By Competitor Chart

Below is an example of a Pivot Table. The Pivot table displays all the data that will be used in the Product Graph from the Product Chart (pivot). It also provides totals for each column.

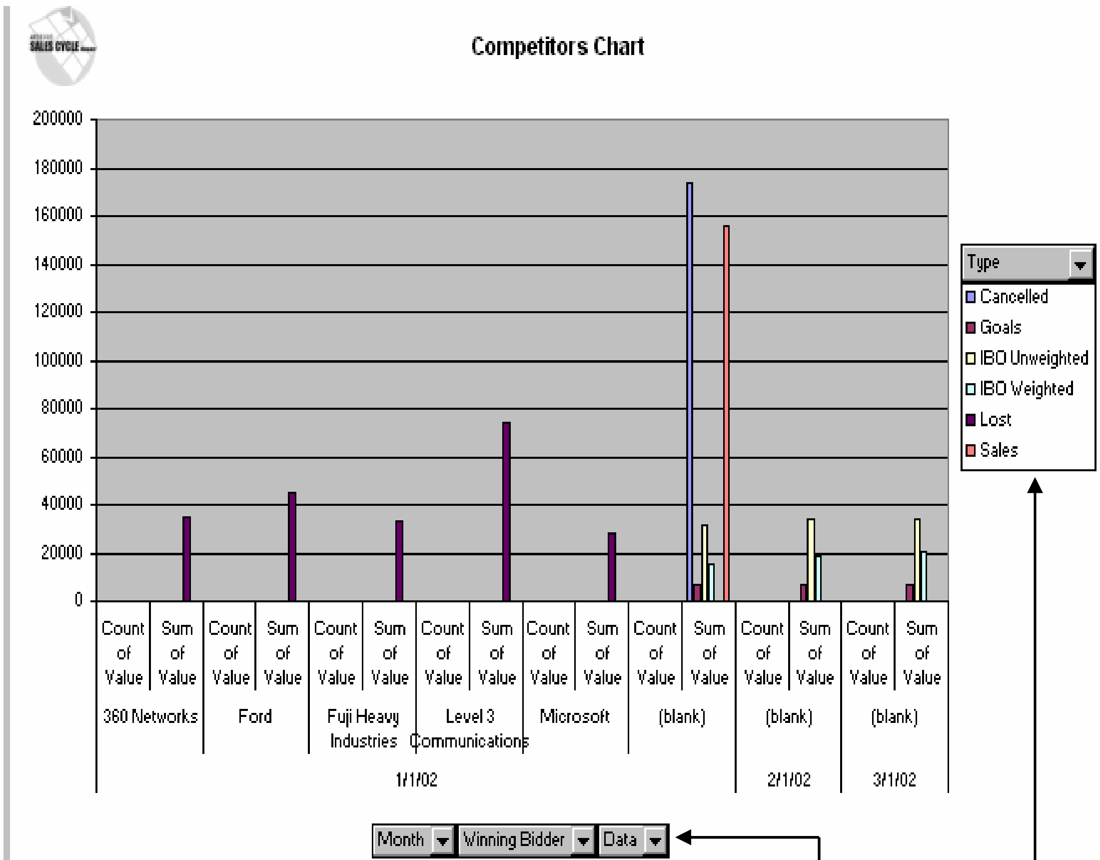


Figure B13: Competitor's Bar Graph (Pivot Table Graph)

These dropdown menu options allow a Sales Representative to change their selections from the Main Tab.

Pivot Chart – By Product Table

The field that adjust the Bar (Pivot) graph are identical to the Pivot – Main Chart, except for the Products column

Value		Type			
Product	**IBO Number**	**Ext. Price**	**IBO Unweighted Value**	**IBO Weighted Value**	**Sales Value**
Canon Fax	7	300	$600	$360	
	9	2000	$4,000	$400	

Figure B14: Product Chart (Pivot Table)

Products - Select the Product's that you wish to display on the Bar Graph by using the drop down menu option

IBO Number - You can select the IBO number that you wish to display on the Bar Graph by pressing the drop down bar option beside the field. You can select the IBO number that you wish to display by placing a checkmark in the box beside the type of data.

Ext. Price - You can select whether the extended price should display on the Bar Graph by pressing the drop down bar option beside the field. You can select the Extended prices that you wish to display by placing a checkmark in the box beside the type of data.

Pivot Table – By Product Chart

Below is an example of a Pivot Table. The Pivot table displays all the data that will be used in the Product Graph from the Product Chart (pivot). It also provides totals for each column.

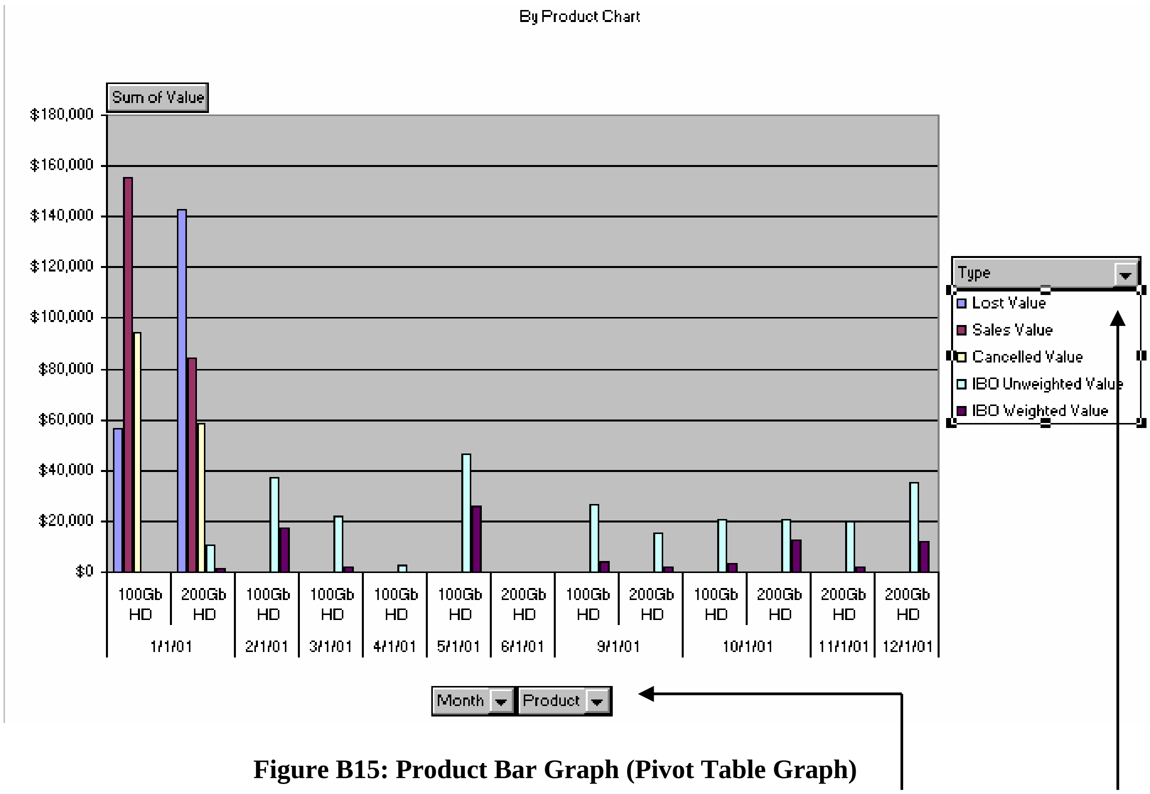


Figure B15: Product Bar Graph (Pivot Table Graph)

These dropdown menu options allow a Sales Representative to change their selections from the Main Tab.

Glossary

Close
Close is a term used to denote the last phase in the Sales Cycle, as well as the action of completing a sale.

Contact
A contact is a person or individual. Contact typically refers to one of the people you are trying to sell to.

Decision Maker
A decision maker is a person who holds influence over the buying decision of a given sale.

IBO
IBO is an acronym for Identified Business Opportunity. An IBO is a sales opportunity.

Phase
Phase refers to one of the three parts of a Sales Cycle. Every Sales Cycle is divided into three segments corresponding to the dominant selling skill active during that period.

Priority
Priority is a method of ranking opportunities in the order that they should be reviewed or worked.

Probability
Probability is an assessment of how likely a salesperson is to win a given sale.

Probe
Probe is a term used to denote the first phase in the Sales Cycle as well as the process of inquiry in order to learn more about a given sale.

Prove
Prove is a term used to denote the middle phase of the Sales Cycle as well as the demonstration of a solution to the customer.

Sales Cycle
Sales Cycle is the duration from when the salesperson first learns of a potential sale until the sale is completed, as well as the various activities that occur throughout that time period.

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