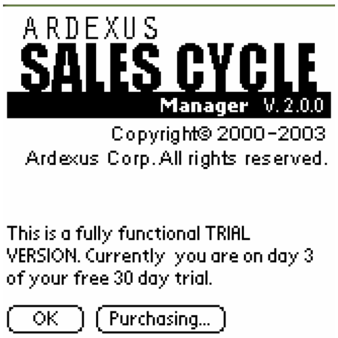
Ardexus Sales Cycle Manager
Version 2.0.0



Ardexus Sales Cycle Manager – Palm Edition

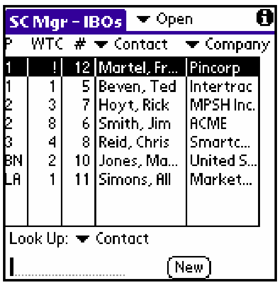
Introduction

Welcome to Ardexus Sales Cycle Manager for the Palm Computing Platform, 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 Palm handheld organizer.

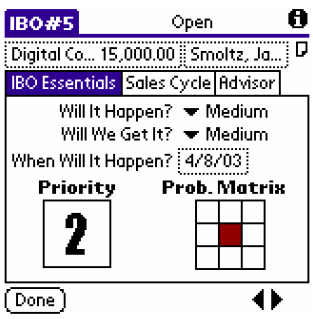
Sales Cycle Manager has three main screens. The first main screen is the IBO list, which lists all of your sales opportunities ranked by priority. This view allows you to list all of your Open, Won, Lost, or Cancelled sales opportunities by priority along with the reference number, weeks to close, company, contact, product, probability, or value (IBO is an acronym for Identified Business Opportunity and is used to refer to sales opportunities throughout SC Manager).

The second major screen is the opportunity screen, which displays the details of a specific sales opportunity. From this screen you can update the various items of information regarding the sale and review and feedback generated by the Intelligent Response.

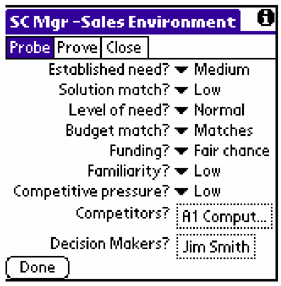
The third major screen is the Sales Environment screen, which displays the strategic details of the sales opportunity and various decision makers involved in the sale. From this screen you can record and reference the key elements of a sale, such as competitive pressure, funding status, decision makers, relationship, etc.



SC Manager IBO list. List opportunities by priority or stage. Locate opportunities by company, contact, or product.



SC Manager opportunity screen. Display the summary information about the opportunity such as probability, close date, etc.



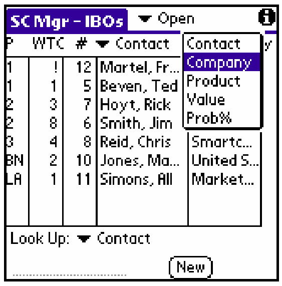
SC Manager sales environment screen. Displays strategic information about the opportunity such as competitors, decision makers, funding, etc.

Figure 1: Main Sales Cycle Manager areas on the Palm handheld device.

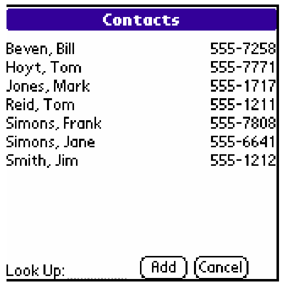
Additional Sales Cycle Manager Features

In addition to the functionality found in each of the three areas described Ardexus Sales Cycle Manager also provides customizable view displays, automatic lookup of contacts from the Palm address list, calendar display for selecting dates, ability to store notes on interactions, background information, etc.

Calendar date lookup



Customizable view displays



Select contacts from Palm address list

Figure 2: A few of the additional lookup or customization screens

Integration with desktop PIMs/Contact Managers:

Ardexus Sales Cycle Manager integrates with the Palm Computing organizer address book.

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, and can be synched with Ardexus Sales Cycle Manager – Windows Edition. For more information on Windows Edition please visit the Ardexus web site (http://www.ardexus.com).

Installation

The Sales Cycle Manager application (scmgr.prc) requires 289 KB of space on the handheld device. This application will run on a PalmPilot Professional, PalmPilot Personal, Palm III, Palm IIIe, Palm IIIx, Palm V, Palm Vx, Palm VII, IBM Workpad, and Handspring Visor. The software requires any devices that run palm OS 3.1 or higher (including OS5).

Windows Installation:

1. Verify that you have the necessary (PalmPilot, Palm III, etc.) Desktop application installed on your PC, which contains the PalmPilot, Palm III, or greater Install Tool.

2. Launch the Install Tool by selecting Start, Programs, Palm Desktop, Install Tool.

3. From the Install Tool dialog box choose your Palm user name from the drop down list.

4. Click the Add button, and browse your directory folders for the scmgr.prc file and click the Open button. Once back in the Install Tool screen click the Done button.

5. Perform a HotSync, first making sure that the Install conduit is enabled.

6. From your Palm handheld tap on the Applications Launcher and select the All category. You should now see the Sales Cycle Manager icon in the list of applications installed on your handheld.

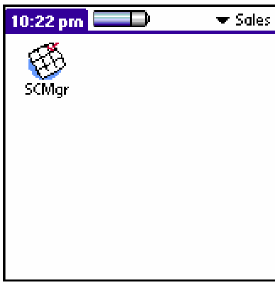


Figure 3: The Sales Cycle Manager icon on the handheld

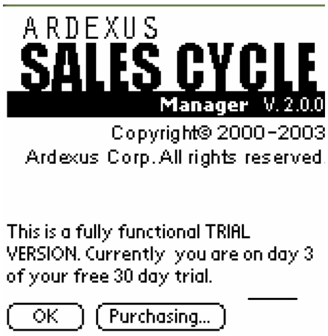
7. Tap on the SC Manager icon to open the application.

If you are installing a trial version of Sales Cycle Manager, the application will operate without a license key for 30 days. At the end of the 30 day trial a permanent license will be necessary to continue to operate the software. To obtain a license key please go to the Ardexus web site (http://www.ardexus.com), select the Products section, and follow the links to the Sales Cycle Manager page, where you will find information on ordering a license key.

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 Palm device. 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.

The unregistered copy of Ardexus Sales Cycle Manager will remain active for 30 days following its installation.



To register your copy of Sales Cycle Manager tap on the Purchasing button.

Figure 4: Registration Message

To register your copy of Sales Cycle Manager tap on the Purchasing button at the bottom right of the splash screen displayed when you first open the application. The Purchasing information page will display next, pointing you to the Ardexus web site for information on how to purchase a license for your copy of Sales Cycle Manager.

Visit www.ardexus.com for information on how to purchase a license for Sales Cycle Manager.

Tap the Done button to close the Purchasing screen.

Tap the Register button to display the registration screen where you can register your copy of Sales Cycle Manager.

Your Palm user name is displayed in the License Key window. This name is unique to your license key. If you change your Palm user name contact Ardexus for an updated license key.

Enter the complete registration key in the fields provided, and tap the Enter key.

Figure 5: Registration Screen

IBO List

The first screen displayed once SC Manager is opened is the IBO list view. This screen displays a list of all of your sales opportunities, and can be used to prioritize your time and determine which opportunity to focus on.

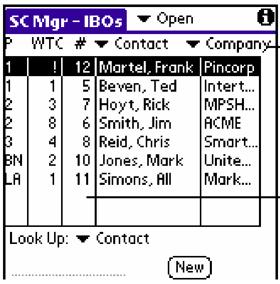
The IBO list view displays the priority of the opportunity, the IBO reference number of the opportunity, the number of weeks until the opportunity is due to close, and two user definable columns that can be set to display any of the following values (Contact, Company, Product, Value, Probability).

The IBO list view displays the various opportunities sorted by priority, weeks to close, and value of the opportunity. The IBO list view also allows you to choose what category (Open, Won, Lost, Cancelled) of opportunities you wish to display.

The IBO List screen in SC Manager displays all of your sales opportunities.

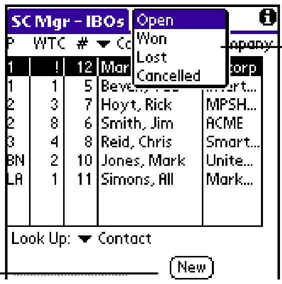
The list displays the opportunities sorted by priority, number of weeks to close and by opportunity value.

The list shows priority, IBO reference number, number of weeks to close, and two additional columns.



The two right most columns are customizable and allow you two display your choice of Contact, Company, Product, Value or Probability. (Learn how to adjust these headers in a later section of the manual)

View columns can be resized by tapping on the view column and dragging it left or right.



Select an IBO status from the list in order to view sales opportunities of a specific status (Open, Won, Lost, Cancelled)

Use the New button to create a new Open sales opportunity.

Figure 6: Open IBO List screen

You can create a new sales opportunity (IBO) by tapping the New button. This will open the New IBO wizard screen that will walk you through the steps to enter a new sales opportunity.

To open an existing sales opportunity, tap on the line displaying that opportunity. The opportunity screen will open, displaying the information for that IBO.

Open IBO List View Columns

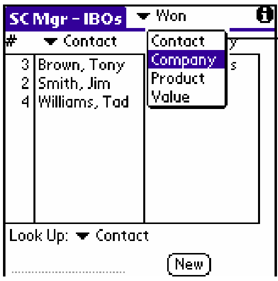
The following table describes each of the columns in the Open IBO List view. The first three columns in the view are fixed, while the last two columns are user definable.

	Heading:	Name:	Description:
1	P	Priority	Displays the priority of each IBO in the list 1 = first priority 2 = second priority 3 = third priority BN = Break Through Needed LA = Leave Alone
2	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.
3 4-5	# Contact	IBO Number Contact Name	IBO reference number used to track specific sales opportunities. The first and last name of the main contact you are trying to sell to.
4-5	Company	Company Name	The company name of the organization you are trying to sell to.
4-5	Product	Product Name	The name or category of product that the opportunity is for.
4-5	Value	Opportunity Value	The total value of the sales opportunity.
4-5	Prob%	Probability	The probability percentage that you will win the sale. (eg. 80% chance of winning the order)

Closed IBO List View

The Won, Lost, and Cancelled IBO List views have a slightly different display than the Open IBO List. Closed IBOs are not sorted by Priority and Weeks to Close. Instead the two custom columns chosen by the user sort them.

Closed IBO List Views display IBOs sorted by the two custom columns chosen by the user.



Customize the look of the closed IBO (Won, Lost, Cancelled) List by choosing the columns to display.

Figure 7: Closed IBO List

Customizing IBO List Columns

The two right most columns of the IBO List view are user definable and allow the user to choose what information about the opportunity they wish to display in the list. These two customizable columns can be used to present your IBO information in a number of different ways.

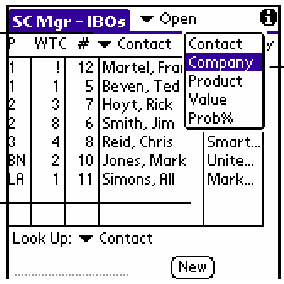
The default display for the IBO List view is to display the Contact name in the fourth column and the Company in the fifth column, but you can change these columns to display any one of Contact, Company, Product, Value, or Probability.

To change the display preferences for the two custom columns tap once on the black arrow to the left of the column that you wish to change and select a new column display option from the list that pops up.

The width of view columns can also be adjusted by tapping on the view column edge and dragging it left or right to expand or reduce the width.

Tap once on the black triangle to the left of the two right most view columns to change the display options for the column

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



A pop-up window will display letting you choose the information that you want to display in the column.

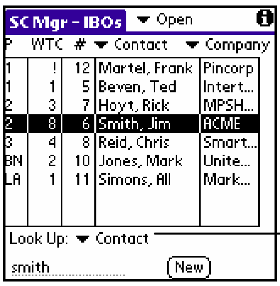
You can choose to display Contact, Company, Product, Value or Probability in the custom columns.

Figure 8: Customizable IBO ListColumns

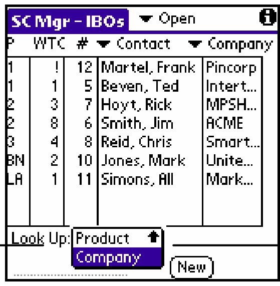
Using Look Up in IBO List

From the IBO List view you can search for specific opportunities using the Look Up feature at the bottom left of the screen. Using the Look Up feature you can quickly find a specific IBO in a large list without having to scroll up and down using the side scroll bar.

To locate a specific IBO quickly within the IBO List enter the search value in the Look Up field line. (eg. Smith) SC Manager will automatically highlight the first IBO found for Smith in the list.



The default search is on Contact. To change the search option tap on the black triangle to the right of the Look Up field.



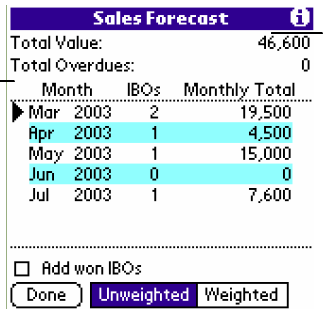
Tapping the triangle next to the Look Up field displays a pop-up list allowing you to select a different search option.

You can search on Contact, Company, or Product.

Figure 9: Look Up Feature

Sales Forecast

The Sales Forecast screen allows you to view up to a five year summary of all of your IBOs by expected close data. Open the sales forecast screen by selecting Sales Forecast from the View menu.

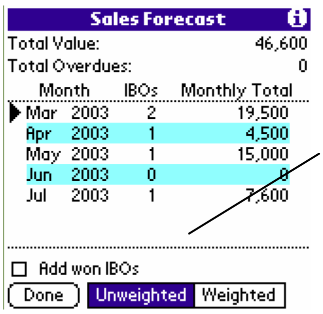


Sales Forecast screen displays a monthly dollar summary based on the date expected of all open IBOs.

Total value is displayed along with any amount currently overdue.

Figure 10: Sales Forecast

The Sales Forecast screen will display up to five years of summary forecast data.
You can choose to view the total value or the weighted value (percentage of value based on probability) by tapping on the appropriate button.



The Sales Forecast window will display up to 5 years worth of sales forecast information.

Tap on the Unweighted or Weighted option to choose whether to view the total value or a percentage of the value based on the probability of winning the sale.

Figure 11: Weighted vs. Unweighted Forecast

The Sales Forecast screen will display up to five years of summary Sales data.
You can choose to view the total value of won IBO's, the last months, the last two months, the last three months, or the total value of won IBO's by tapping on the appropriate button.

The Sales Forecast window will display up to 5 years worth of actual Sales information.

Tap on the arrow beside the Add won IBOs box to choose whether to view only this months, the last 2 months, or the last three months, the total value of sales history to date (IBO's marked with the status "won").

Deleted:

Figure 12: Add won IBO's to Forecast

Creating a New Opportunity (IBO)

To create a new sales opportunity tap on the New button from the IBO List view. This will display the new IBO wizard, which will walk you through the creation process.

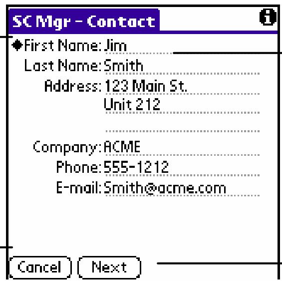
Contact Screen

The contact screen 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 handheld address book. To look up information from the Palm address book tap the black diamond to the left of the First Name field. This will display a list of contacts in your Palm address book for you to choose from. Tap a name in the list in order to retrieve their name, address, telephone, and e-mail information and have it entered automatically into SC Manager.

Tap on the black diamond symbol to the left of the First Name field in order to look up contact information from your native Palm address list.

A contact will not appear if the information in the Palm Address book is incomplete.

Cancel button closes the Contact screen without saving changes.



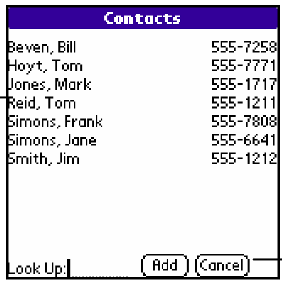
Enter the contact information for the person you will be selling to when dealing with this opportunity.

Next button navigates to the next screen in the new IBO wizard.

Figure 13: New IBO Wizard - Contact Screen

If you look up an existing contact from your Palm address list you may edit the retrieved information without fear of it modifying the information in your Palm address list. SC Manager stores a copy of the contact information retrieved from the Palm address book and does not update the address book information.

Highlight a contact name from the look up Contacts screen and tap the Add button to retrieve their information from the Palm Address list and enter it into SC Manager.



Tap the Cancel button to close the Contacts screen without selecting a contact.

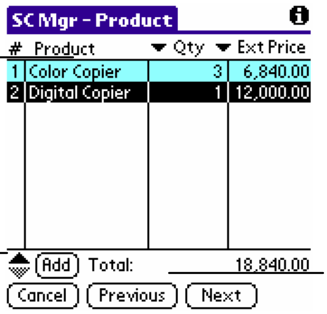
Figure 14: Lookup Palm Address List Contacts

Products Screen

Product Screen The product screen is the second screen 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.

This view displays a list of all products that belong to this particular IBO.

Enter the product or service that this new sales opportunity deals with by tapping on the Add button.



Tap the Previous button to move back to the Contacts screen.

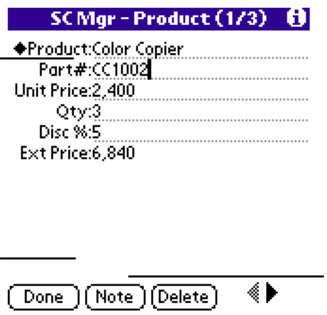
Figure 15: Lookup Palm Address List Contacts

There are two available methods for entering Products into an IBO. The default method that appears depends on whether you are syncing with Sales Cycle Manager window edition or if you are using the Sales Cycle Manager for Palm as a stand-alone application. Both methods will be explained below:

Using theSales Cycle Manager
The product screen has a multi-line product screen for entering multiple products or services. Once you select a product from product or service list that is being synced in Sales Cycle Manabegin adding a product, the following fields will be made available: product, part #, unit price, quantity, and discount. In addition, you may also record any extra detailed description of the product or service in the Note's Area. This field is multi-line and will scroll to allow additional text.

Enter the product or service that this new sales opportunity deals with in the Products field. Fill out the part, unit price, qty, and discount fields if applicable.

Tap the Done button to move back to the Products screen.



Add any additional comments or product description in the Description field available once you tap on the Notes button.

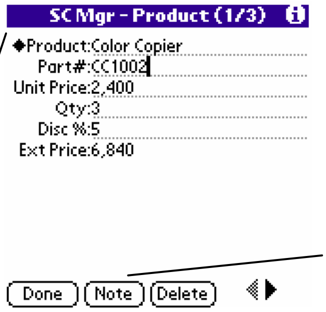
Figure 16: New IBO Wizard – Products Screen

After entering the product and value information you can tap on the Next button to move to the next screen of the new IBO wizard process. If you need to go back to the Contact screen to modify any information you can tap on the Previous button. To quit the new IBO wizard without saving any of your changes tap on the Cancel button.

Integration with Sales Cycle Manager for Workgroups or Windows Edition
The product lookup feature is available for those who are syncing with Ardexus Sales Cycle Manager. The product screen has a multi-line product screen for entering multiple products or services. Once you select a product from the list created in Sales Cycle Manager for Workgroups or Windows Edition, the following fields will be populated and made available: product, part #, unit price, quantity, and discount. In addition, you may also record any extra detailed description of the product or service in the Note's Area. This field is multi-line and will scroll to allow additional text.

Tap on the Black Diamond beside the products field to select from a list of predefined products.

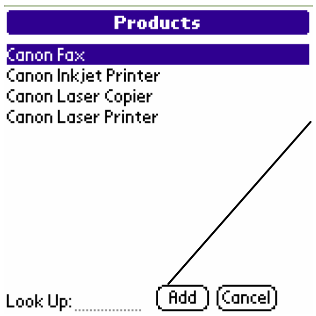
Tap the Done button to move back to the Products screen.



Add any additional comments or product description in the Description field available once you tap on the Notes button.

Figure 16: New IBO Wizard – Products Screen

This list was defined in the product editor feature in Sale Cycle Manager for Workgroups or Windows edition (depending which version you are syncing the Palm).



Highlight the product you wish to add, tap the Add button to move back to the Products screen.

Figure 16: New IBO Wizard – Products Screen

For information on the Workgroup edition or Windows edition of Sales Cycle Manager please visit the Ardexus web site (http://www.ardexus.com).

IBO Essentials

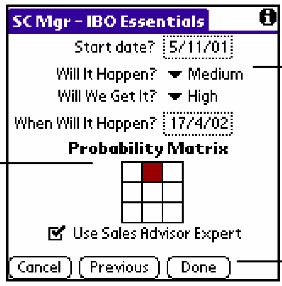
The IBO Essentials screen allows you to enter key pieces of information about the new sales opportunity that will allow you to determine its probability, as well as its expected closing date.

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 screen 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 screen allows you to enter the key elements of the sales opportunity.

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



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.

Done button saves the new opportunity.

Figure 17: New IBO Wizard – IBO Essentials Screen

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 tapping once in the box 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 tapping once on the black triangle to the right of the label and choosing one of the options in the pop-up list.

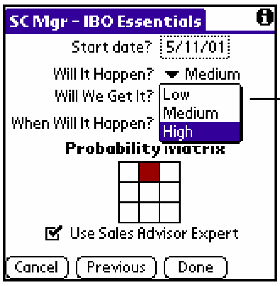
Answering Will We Get It

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 tapping once on the black triangle to the right of the label and choosing one of the options in the pop-up list.

What are the chances that the customer will make a purchase from anyone?

What are the chances that you will win the sale if it happens?



Tap on the black triangle to the right of either the Will It Happen or Will We Get It labels to select an answer of Low, Medium or High.

Figure 18: Answering "Will It Happen" and "Will We Get It"

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. However this date can (and most likely will!) change over the lifetime of this opportunity.
You can enter your best estimate of the closing date by tapping once in the box to the right of the When Will It Happen field.

Tapping next to the When Will It Happen field displays the calendar screen where you can choose an expected close date for this opportunity.

Tap on the Cancel button to close the screen without choosing a date.

Use the left and right arrows to change the year

Tap on a month to change the month displayed.

Tap on any day to select a date.

Figure 19: Choosing When Will It Happen

Sales Advisor Expert
The Use Sales Advisor Expert check box displayed at the bottom of the IBO Essentials screen 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 feedback 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.

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

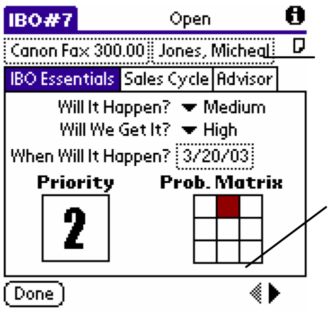
Opportunity Screen

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

Opportunity screen displays the recorded information about an IBO.

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

Done button closes the IBO and returns to the IBO List.



Tap on the tabs along the top to move from one tabbed page header to another.

Tap on the left or right pointing arrows to move to the previous or next IBO record.

Figure 20: Opportunity Screen

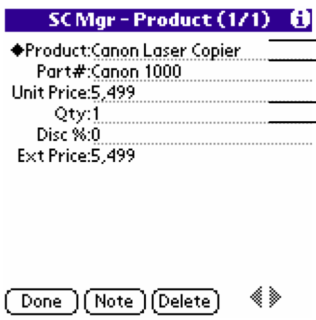
Product and Value field

The product and pricing information is displayed at the top of the opportunity screen for quick and easy reference. To modify either the product or value tap once on the product and value field.

Update the product or service that this sales opportunity is for

The Star icon when tapped, takes you to a separate list of Product and default information These products are set up in Widows edition of SCM Manager and are synced to the Palm version

Tap the Done button to save your changes.



Type in the Product
Type in the Part #

Enter in the Qty
Enter in a Discount if Any

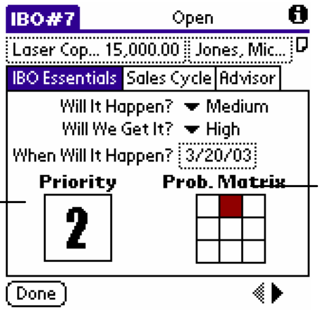
Figure 21: Opportunity Screen – Edit Products

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
BN = break through needed
LA = leave alone



Probability Matrix displays the combined probability of getting the sale based on Will It Happen and Will We Get It.

Figure 22: IBO Essentials Tab

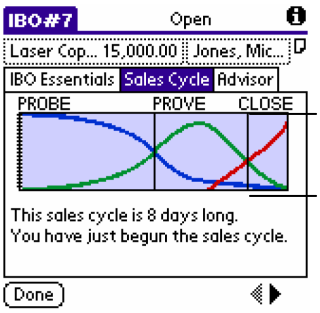
In addition to plotting the probability of winning the sale on the probability matrix the IBO Essentials tab also displays the priority of the IBO. Based on Will It Happen, Will We Get It, and When Will It Happen, the SC Manager can also calculate the priority of this opportunity.

Sales Cycle Tab

The Sales Cycle 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 Cycle 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.

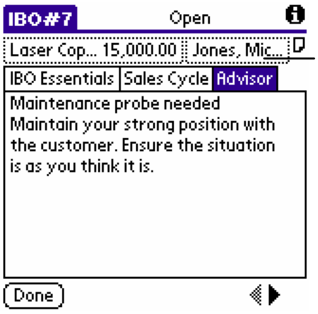
Length and current stage of the sales cycle.

Figure 23: Sales Cycle Tab

Sales Advisor Tab

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.



Navigate to the Sales Advisor tab by selecting the right scroll arrow.

More detailed advice will be available if "Sales Advisor Expert" is enabled.

Figure 24 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.

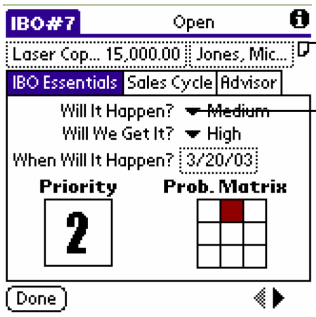
The level of feedback on the Sales Advisor tab varies, depending on whether the opportunity is set to use Sales Advisor Expert. Sales Advisor Expert will display more detailed information on the progress of the sale and will provide you with specific advice.

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

Contact Section

The Contact Section (once entered) displays the name, address, company, phone and email address of the person you are selling to. You can enter the name and address manually or look up information from your Palm handheld address book. To look up information from the Palm address book tap the black diamond to the left of the First Name field. This will display a list of contacts in your Palm address book for you to choose from. Tap a name in the list in order to retrieve their name, address, telephone, and e-mail information and automatically enter it into SC Manager.

Tap on the field that displays the Last Name of your contact in order to display contact information from the contact section.

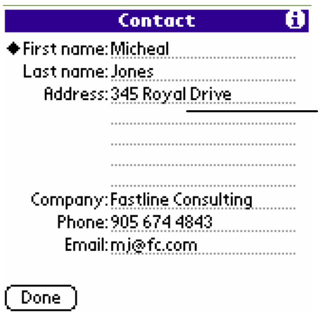


Tap on the folded page symbol to open the IBO Note screen.

Review or modify any information on the contact.

Figure 25: IBO main page

Tap on the black diamond symbol to the left of the First Name field in order to look up contact information from your native Palm address list.



Review or modify any information on the contact.

Figure 26: Contact Section

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 screen you can keep records of important meetings or phone calls dealing with the current sales opportunity.

To access the IBO Note screen tap on the folded page symbol at the upper right of the opportunity screen. Once the IBO Note screen opens you can append any notes to the list.

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

Use the date stamp button at the bottom of the screen to quickly insert the current date for your newly entered note.

Figure 27: IBO Note Screen

The IBO Note screen 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 at the bottom of the screen.

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 screens is altered to display extra information or options that are available through Sales Advisor Expert.

Enabling the Sales Advisor Expert feature for a sales opportunity changes the display of various screens to provide additional information and options.

Sales Environment button appears when Sales Advisor Expert is enabled.

Advisor button appears when Sales Advisor Expert is enabled.

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.

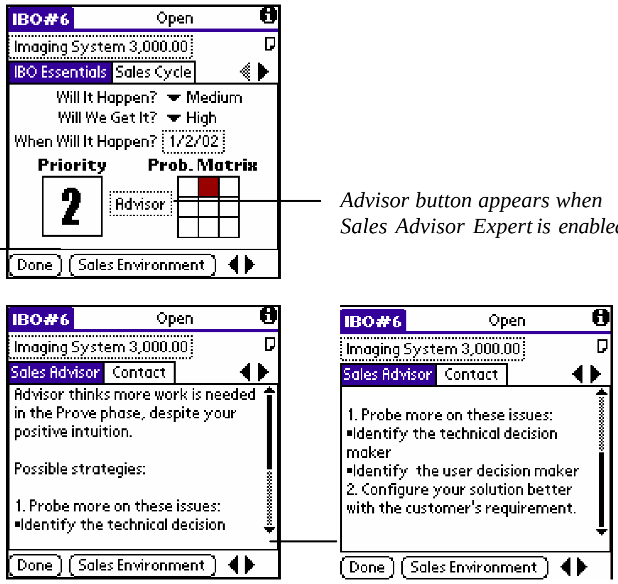


Figure 28: Sales Advisor Expert – Display Differences

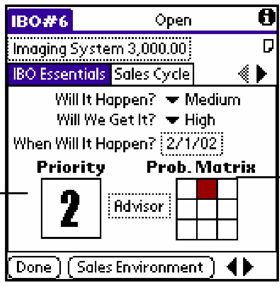
If an IBO does not currently display the Sales Environment button then Sales Advisor Expert is not enabled. To enable Sales Advisor Expert select the Upgrade to Advisor Expert option from the menu. Please see the section on Menu commands for more information on upgrading an IBO to Sales Advisor Expert.

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 Essentialstab.

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.

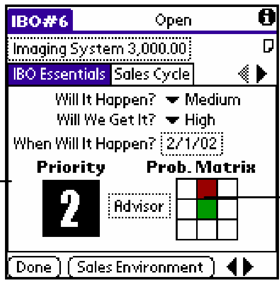
The Priority of this sale is displayed based on your assessment of the probability and the sales cycle phase you are in.



Your assessment of the probability is displayed in the Probability Matrix.

Tapping and holding on the Advisor button will display the Sales Advisor Expert's analysis of both Priority and Probability.

Advisor's Priority assessment shows in reverse image.



Advisor's Probability assessment shows in green within the matrix along with your own assessment.

Figure 29: 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 green block. 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.

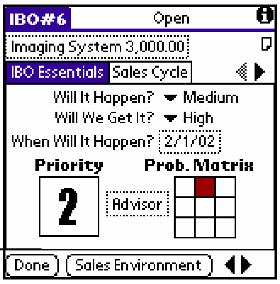
Sales Environment

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.

To access the Sales Environment tap once on the Sales Environment button at the bottom of the Opportunity Screen.

Sales Environment can be opened by tapping on the Sales Environment button at the bottom of the Opportunity screen.



The Sales Environment feature is only available for those opportunities that have Sales Advisor Expert enabled.

Figure 30: Sales Environment button

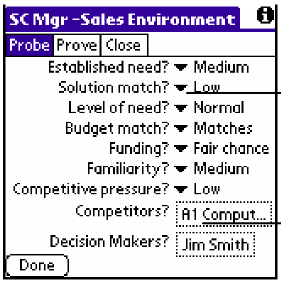
The Sales Environment screen is divided into three main sections corresponding to the phases of the sales cycle (Probe, Prove, Close).

Probing Information:

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

Probe tab of the Sales Environment screen allows you to record the details of your questioning and information gathering regarding the sale.

Tap the Done button to close the Sales Environment screen.



Tap on the black arrow next to each question to fill in the answer.

Tap on the dotted rectangle to fill in competitors and decision makers.

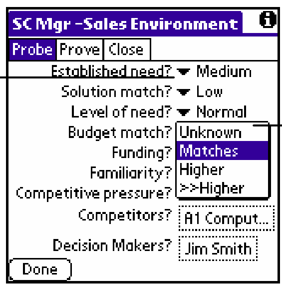
Figure 31: Sales Environment Probe Screen

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 tap on the black 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 tap on it once.

Tap once on the black arrow to the right of the question to fill in an answer to the question.



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

Figure 32: Answering Probing Questions

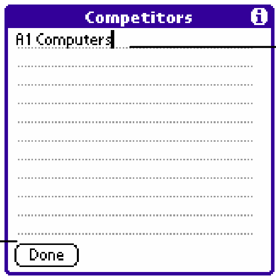
Competitors

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 tap once on the dotted rectangle to the right of the competitors field. This will display the Competitors screen where you can enter the names of one or more competitors. Enter the name of each competitor on a separate line.

Competitors screen allows you to record the names of the various competitors who are competing with you on this sale.

Tap once on the Done button to close the Competitors screen.

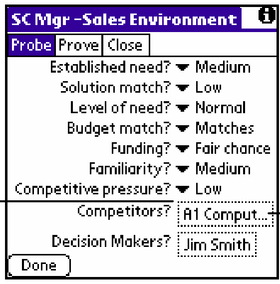


Enter the name of each competitor on a separate line in the Competitors list.

Figure 33: Competitors Screen

The first competitor that you enter into the competitors list will appear on the Probe information page of the Sales Environment screen. If you enter more than one competitor, or a long competitor name in the competitors screen a "…" symbol will appear after the name of the competitor to indicate that there is more information than can be displayed on the main screen.

The first competitor in the competitors list will be displayed on the Probe tab of the Sales Environment screen.



"…" symbol after competitor indicates that not all information is displayed..

Figure 34: Display of Multiple Competitors

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.

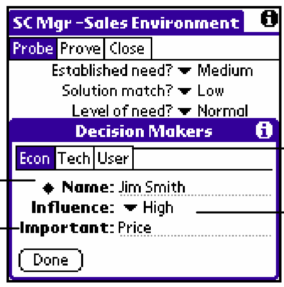
It is important to remember that these various decision making roles may be filled by the same person. A single customer contact may be responsible for all three roles, or alternately the roles may be filled by different contacts within the organization.

To modify the list of decision makerstap once on the dotted rectangle to the right of the decision makers field. This will display the Decision Makers screen where you can enter the names of the Economic, Technical, and User Decision Makers, along with their influence and interests.

Decision Makers screen is divided into three different tabbed pages. (Econ, Tech, User)

Select the name of the decision maker by tapping on the black diamond.

What is most important to this decision maker?



Choose the Economic, Technical or User decision maker by tapping once on the Econ, Tech, or User tab.

What is this decision maker's level of influence on the sale?

Figure 35: Decision Makers Screen

You may enter the name of the decision maker either by typing it into the Name field or by performing a look up to the Palm address list by tapping on the black diamond to the left of the Name field.

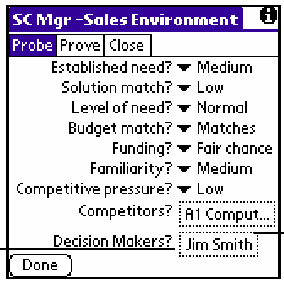
Note: If you use the look up feature to select a decision maker only those contacts with both a first and last name are listed (ie. if a contact in the Palm address list only has a first name and no last name they will not appear in the look up list for decision makers). You may still enter the name manually.

Choose a level of influence that this decision maker has on the overall sale by tapping on the black 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.)

The first decision maker that you enter in the Decision Makers screen will appear on the Probe information page of the Sales Environment screen.

The first decision maker will be displayed on the Probe tab of the Sales Environment screen.



Tap on Decision Makers field to see names of other decision makers listed.

Figure 36: Display of Decision Makers

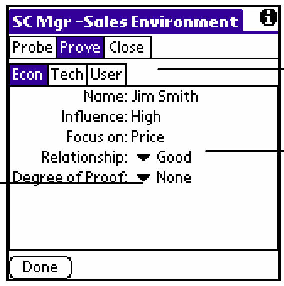
Proving Information:

The Prove tab of the Sales Environment screen 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 is further divided into a separate tabbed page for each of the three decision makers. Each of the three tabs displays the name, level of influence, and important areas to prove determined during the probing phase. 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 screen is divided into tabbed pages for each of the three decision makers.

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

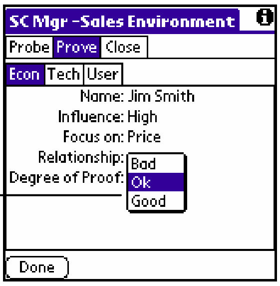


Tap once on the Econ, Tech, or User tabs to view proving information for a specific decision maker.

How well do you get along with the decision maker?

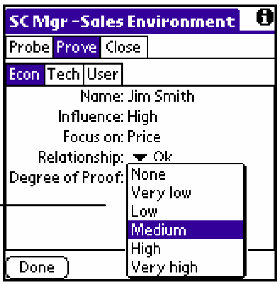
Figure 37: Sales Environment Prove Screen

To update the information on your relationship with the decision maker or the degree of proof tap once on the black 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.



Tap once on the black 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.



Tap 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 38: Relationship and Degree of Proof

Closing Information:

The Close tab of the Sales Environment screen 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.

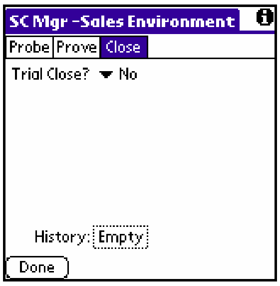
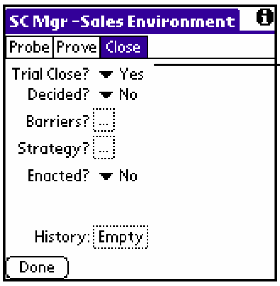


Figure 39: Sales Environment Close Information

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?

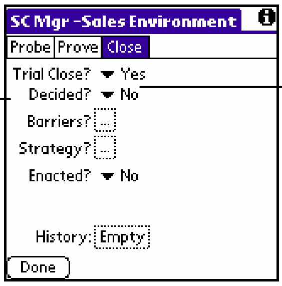


Answering Yes to Trial Close? will display a number of additional questions regarding the trial close.

Figure 40: 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 screen.

Figure 41: 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?

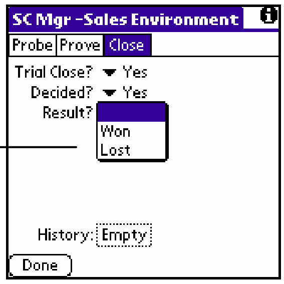


Figure 42: Win or Lose Result

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 tapping once on the dotted rectangle to the right of the Date field.

Tap once on the dotted rectangle next to the Date field to select the Date Won/Lost

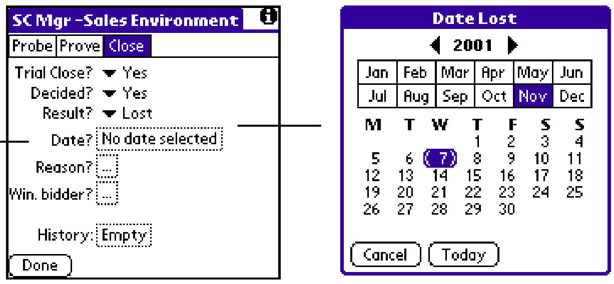
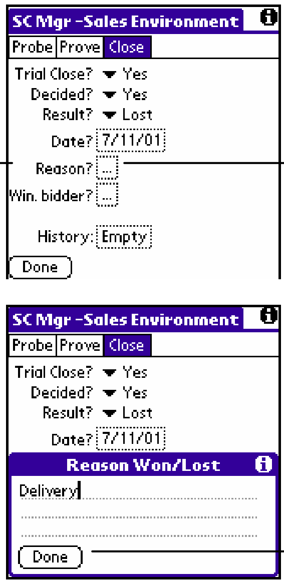


Figure 43: Date Won/Lost

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 tapping 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.

Tap once in the dotted rectangle next to the Reason field to view or edit the reason(s) that the sale was won or lost.



The Reason Won/Lost screen displays the entered reason for winning or losing the sale and allows you to modify it.

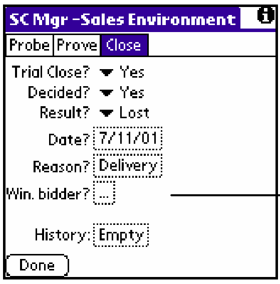
Tap the Done button to close the Reason Won/Lost screen.

Figure 44: 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 tap once on the dotted rectangle next to the Win. bidder field. The Winning Bidder screen 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.

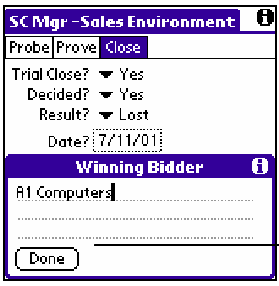
The winning bidder field allows you to record who won the sale in the instance where the sale has been lost.



Tap once on the dotted rectangle next to the Win. bidder field to update or modify the name of the company who won the sale.

Figure 45: Winning Bidder

Enter or modify the name of the winning bidder in the Winning Bidder screen.



Tap the Done button to close the screen.

Figure 46: Winning Bidder screen

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 screen.

Tap the dotted rectangle next to the Barriers field to modify the list of closing barriers.

Figure 47: Barriers to close

To edit or modify the list of closing barriers tap once on the dotted rectangle next to the Barriers field. The Barriers screen will display allowing you to enter a list of barriers hampering your ability to win the sale.

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 screen.

Tap the dotted rectangle next to the Strategy field to modify the strategy to overcome barriers.

Figure 48: Strategy

To edit or modify your strategy for closing the sale tap once on the dotted rectangle next to the Strategy field. The Strategy screen will display allowing you to enter your strategy for closing the sale in your favor.

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 screen 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 screen for the next trial close.

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

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

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.

Figure 49: Enacted strategy

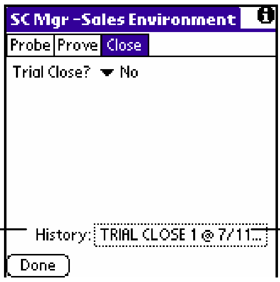
Trial Close History:

The Trial Close History field 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 field 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, tap once on the dotted rectangle next to the History field. This will display the Trial Close History screen, which contains a list of your enacted trial close strategies.

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

The first trial close is displayed next to the History field.



To view the history of trial closes tap on the dotted rectangle next to the History field.

The Trial Close History screen displays a list of all past trial closes and the enacted strategy.

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

Tap the Done button to close the Trial Close History screen.

Figure 50: Trial Close History

Using Menu Options

The majority of activities in Sales Cycle Manager can be performed directly from whatever screen you find yourself. There are however a few activities that require the use of a menu option to carry out.

To open the menu bar tap once in the "menu" option in the bottom left silk screen area of the device. In Palm OS v3.5 or higher you can tap once on the title bar at the top of any SC Manager screen to display the menu.

Tap once on the SC Manager title bar at the top of any screen for a list of available menu options.

Or, tap once on the menu icon in the bottom left silk screen area of the device.

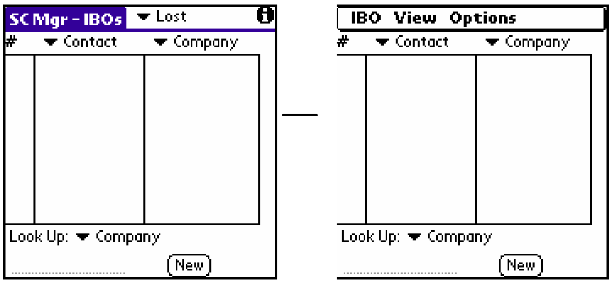


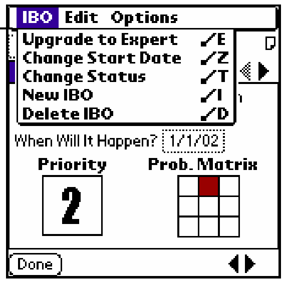
Figure 51: Menu Bar

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.

Upgrade to Expert option converts an opportunity to provide you with Sales Environment and the extra level of feedback.



Upgrading to Expert will display the Advisor and Sales Environment buttons

Figure 52: Upgrade to Expert

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 Start Date option allows you to modify the start of the sales cycle.

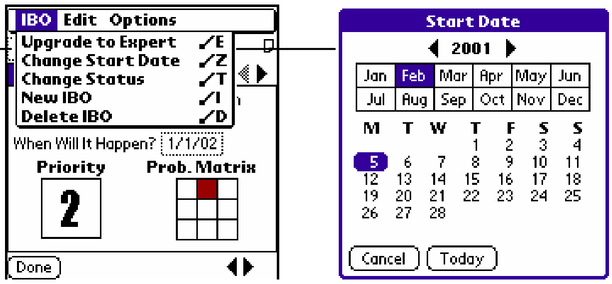


Figure 53: Change Start Date

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 the upper right corner of the Opportunity screen.
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.

Change Status menu option allows you to choose a new status for the currently open opportunity.

Status can be - Open, Won, Lost, Cancelled

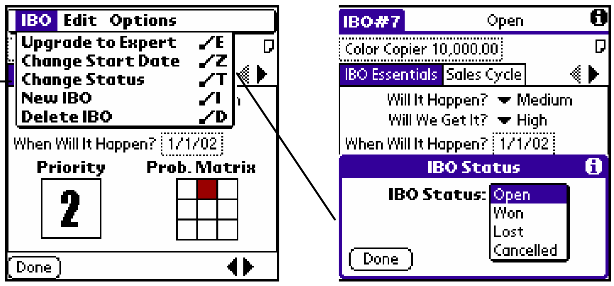


Figure 54: Change Status

New IBO

The New IBO menu option allows you to create a new IBO entry, the same as clicking the New button.

New IBO menu option and New button both start the process of adding a new IBO.

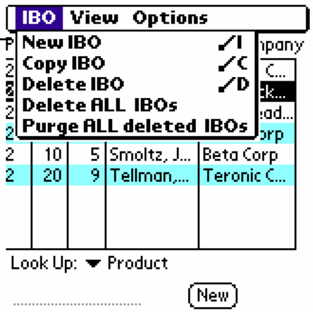


Figure 55: New IBO

Copy IBO

The Copy IBO menu option allows you to copy an existing IBO entry.

The Copy IBO menu option. Highlighting an IBO and using this option, copies all information from a highlighted IBO to a New IBO. Once this option is selected, you are immediately taken through the steps of the new IBO wizard and you can change all relevant information.

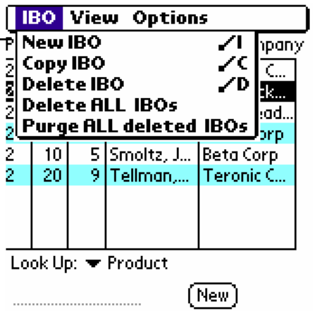


Figure 56: New IBO

Delete IBO

The Delete IBO menu option allows you to erase the currently open sales opportunity.
To delete the currently open IBO select the Delete IBO option from the IBO menu.

choose Delete IBO menu option to erase the currently active IBO .

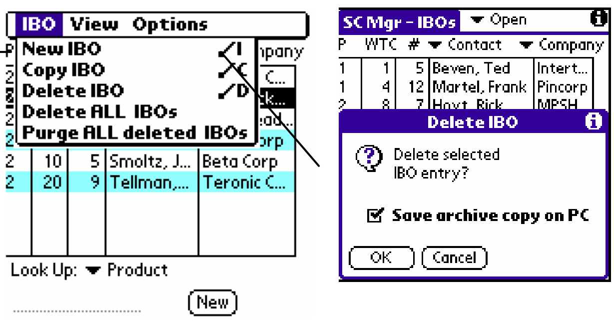


Figure 57: Delete IBO

The “Save archive copy on PC” option is used in conjunction with the desktop version of Sales Cycle manager. Selecting this option will remove the IBO from the Palm device but leave a backup copy on the desktop version of Sales Cycle Manager. This option has no effect if you are not synchronizing the Palm Sales Cycle Manager application with a desktop version.

Delete All IBOs

The Delete All IBOs menu option allows you to delete all of the opportunities in the Sales Cycle Manager database. This option is useful for removing any test or old information that you have entered but no longer need.

the Delete ALL IBOs menu option can be used to erase all IBOs from Sales Cycle Manager

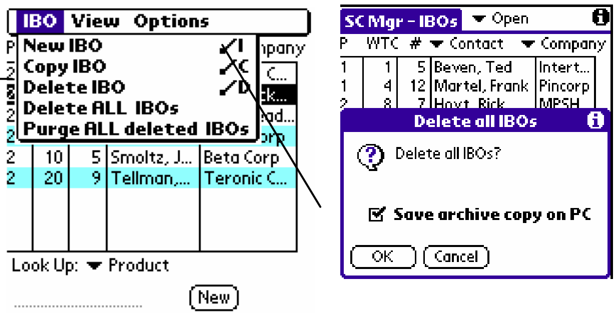


Figure 58: Delete ALL IBO records

The "Save archive copy on PC" option is used in conjunction with the desktop version of Sales Cycle manager. Selecting this option will remove the IBO from the Palm device but leave a backup copy on the desktop version of Sales Cycle Manager. This option has no effect if you are not synchronizing the Palm Sales Cycle Manager application with a desktop version.

Purge ALL deleted IBOs

The Purge ALL deleted IBOs menu option allows you to recover unused space by removing all references to any previously deleted IBO records. By default SC Manager keeps copies of deleted IBO records for use in synchronizing with your PC. Purging the deleted records will recover wasted space in your SC Manager database.

Note: This option should not be used if you are synchronizing your SC Manager for the Palm with SC Manager for the Desktop. Doing so will result in inconsistent data between your Palm and the SC Manager Desktop application.

the Purge ALL deleted IBOs menu option can be used to recover wasted space from Sales Cycle Manager

Do not use this option if your are synchronizing with SC Manager for the Desktop

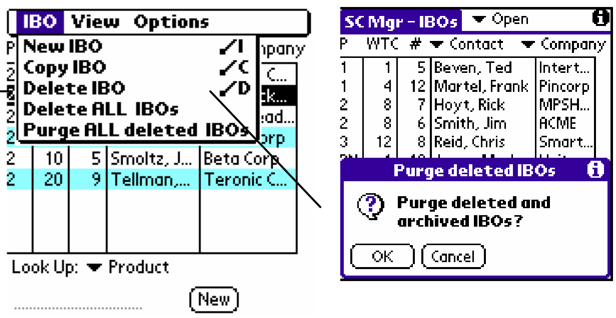


Figure 59: Purge ALL deleted IBOs

Edit Menu

The Edit menu lists a variety of standard Palm Computing organizer features.

Edit menu contains a number of standard editing and navigation tools.

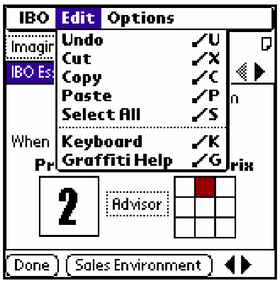


Figure 60: Sales Forecast Menu Option

View Menu

Sales Forecast

The Sales Forecast menu option opens the Sales Forecast screen where you can view up to a five year sales forecast. The sales forecast screen displays a weighted or unweighted total of your monthly sales based on the expected dates of all the IBOs entered into your Palm device.

The View menu provides access to the Sales Forecast screen.

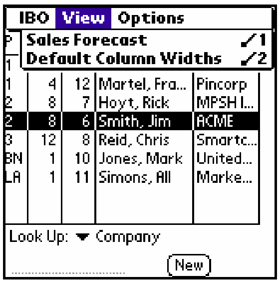


Figure 61: Sales Forecast Menu Option

Default Column Widths

The Default Column Widths menu option resets IBO list view column widths to their default.

The Default Column Widths option resets the column widths to their standard sizes. Colum n widths can be customized by tapping on the column dividers and dragging them left or right.

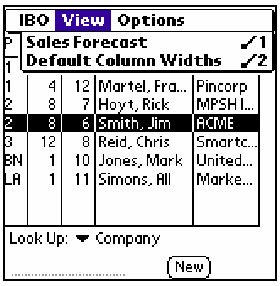


Figure 62: Default Column Widths

Options Menu

Preferences

The Preferences menu option allows you to select which telephone number you want retrieved from the lookup contact feature.
Each contact record in the Palm address list can contain multiple telephone numbers (eg. Home, Work, Fax, etc.). When you look up a contact using the lookup feature (black diamond icon) the name, address, e-mail, and phone number of the contact is retrieved into the current IBO. The Preferences menu option allows you to select which telephone number to retrieve.
Note: contacts that do not have the phone number type entered will not appear in the look up list.

Preferences menu option allows you to select which telephone number to retrieve during a look up to the address list.

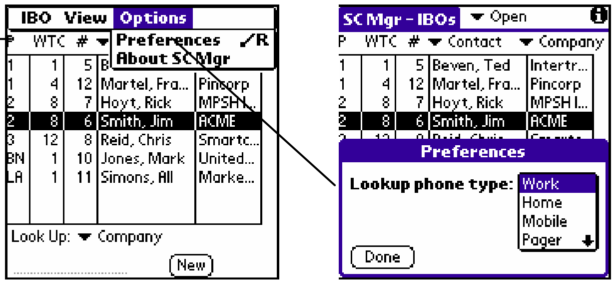
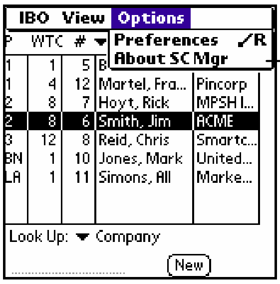


Figure 63: Preferences

About SC Mgr

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

About SC Mgr displays the system splash screen.



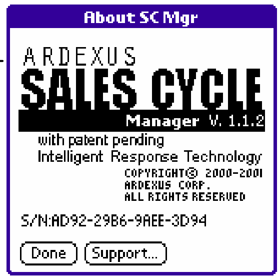


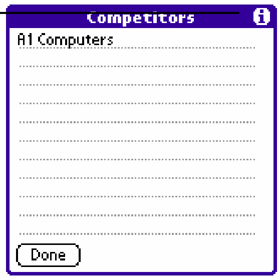
Figure 64: About SC Mgr

Getting Help

Information Icon

Help on using SC Manager is available at any time by tapping once on the information icon at the top right of each screen or window.

Tap on the Information icon at the top of any screen to get Help information on the current area of Sales Cycle Manager.



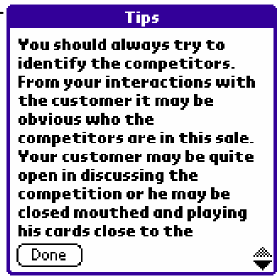


Figure 65: Information Icon

Help Enabled Fields

In addition to using the Information icon 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 tap once on the field label. If the field is help enabled a window will appear displaying help information on the field and its meaning.

When in doubt try clicking on the field or image. Chances are good that pop up help will appear.

Many fields and images in SC Manager are Help Enabled.

Tap on the field or image to display field level help providing more detail on the field.

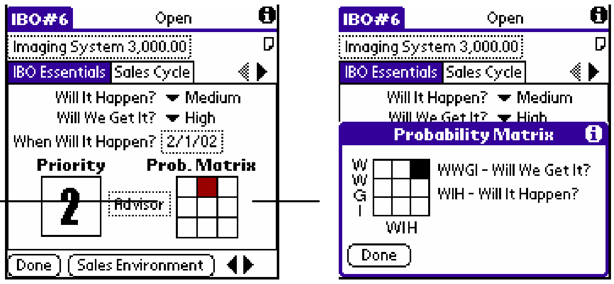


Figure 66: Help Enabled Fields

Technical Support

If you have any questions or concerns regarding Ardexus' Sales Cycle Manager for the Palm Computing Platform, 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

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.