



# Transforming the business to a top industry innovator using Salesforce.

ACCOUNT RELATIONSHIP  
Rebe De La Paz

Key Contact: John Smith  
Actual Relationship Strength: [Progress Bar]  
Relationship Goal Strength: [Progress Bar]

OVERVIEW

Account Relationship ID: AR-008  
Key Contact: John Smith  
Account Relationship Owner: Rebe De La Paz  
Account Plan: Rightpoint Consulting LLC - Account Plan\_RD

Relationship Goals

Actual Relationship Strength: [Progress Bar]  
Relationship Goal Strength: [Progress Bar]

Actual Relationship: 3  
Relationship Goal: Trusted Advisor

System Information

Created By: Rebe De La Paz, 7/7/2017 4:03 PM  
Last Modified By: Rebe De La Paz, 7/7/2017 4:03 PM

Execution Strategies (0)

ACTIVITY CHATTER

SAM Tasks (2)

- Test AR Task Demo UAT\_RD  
Name: John Smith  
Related To: Rightpoint Consulting LLC - Account Plan\_RD  
Task: [ ]
- Test AR Event Demo UAT\_RD  
Name: John Smith  
Related To: Rightpoint Consulting LLC - Account Plan\_RD  
Task: [ ]

FTI Sales

BIDSMART  
BidSmart - New Office Building #Test

Opportunity: New Office Building #Test  
BidSmart Score: 100%  
Approval Status: BidSmart Score Over 75%

DETAILS APPROVALS

Est. \$ Size Points: 293  
Point Total: 293

Opportunity: New Office Building #Test  
BidSmart Name: BidSmart - New Office Building #Test

Basic Info (From Opportunity)

Group: Specialty Systems

Est. \$ Size Points: 0  
Type of Work Points: 5  
Job Location Points: 10

100%

BidSmart Score is above 75%, proceed with bid

UPDATE HISTORY APPROVALS

Latest Posts

This record was updated: July 13, 2017 at 10:03 AM

Negotiated or Bid Bid to Negotiated  
Point Total: 111 to 293  
Show All Updates

FTI Sales

BIDSMART  
Test Industrial 0007

Opportunity: Test Industrial  
BidSmart Score: 57%  
Approval Status: BidSmart Score Under 75%

DETAILS APPROVALS

Est. \$ Size Points: 103  
Point Total: 103

Opportunity: Test Industrial  
BidSmart Name: 0007

Basic Info (From Opportunity)

Group: Specialty Systems

Est. \$ Size: \$400,000  
Est. \$ Size Points: 1  
Type of Work Points: 0  
Job Location Points: 0

57%

BidSmart must be above 75% or be approved by your Group President

UPDATE HISTORY APPROVALS

Latest Posts

Steven Schorn updated this record. June 26, 2017 at 9:32 AM

Negotiated or Bid Bid to Negotiated  
Point Total: 285 to 103

Seen by 1

Like Comment

Write a comment...