



Kraytix FrontRunner Administration Guide

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Conventions

This document uses a number of typographical conventions to highlight text that refers to a user's interaction with Salesforce and/or FrontRunner:

- **Courier New Bold** font draws the reader's attention to user interface elements, such as buttons, command links and fields. Example: "Click the **Save** button."
- `Courier New` font indicates values that need to be entered by the user. Example: "Enter `Profiles` in the **Quick Find** box."
- *Italicised Courier New* font indicates values that are displayed by Salesforce or FrontRunner. Example: "Check that the user is assigned the *Standard User* profile."

Document Version

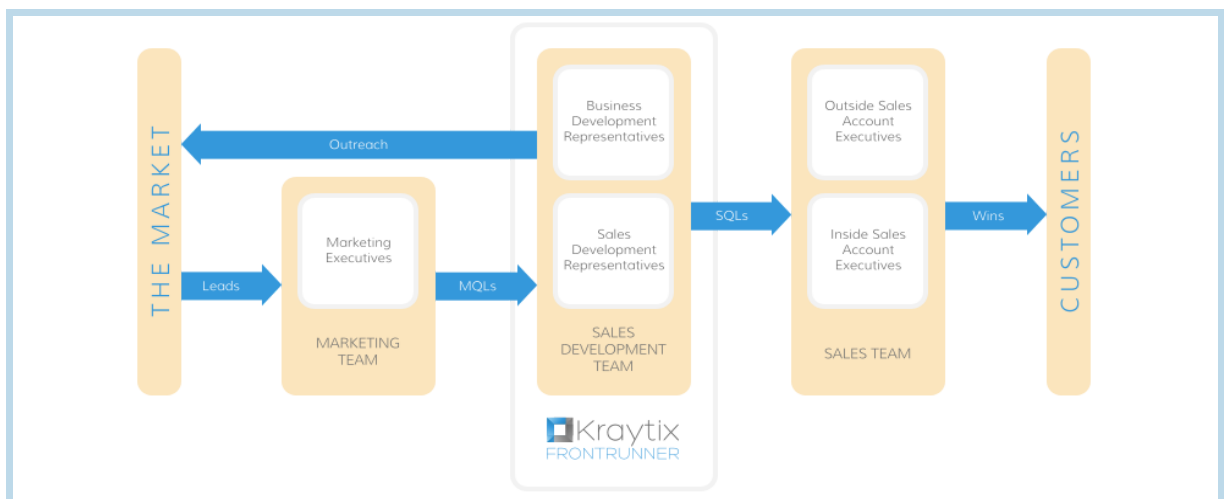
This document is compatible with Kraytix FrontRunner Version 1.11.

1 About FrontRunner

FrontRunner is a 100% native Salesforce® app that helps sales development teams consistently generate higher quality leads. It uses a structured approach to lead qualification to build a more accurate pipeline, improve close rates and increase revenue. With FrontRunner, companies can:

1. Build a library of Template Scorecards tailored to its products or services and to its ideal customer profiles. FrontRunner comes preconfigured with BANT, MAN and SCOTSMAN sample Template Scorecards that can be used as-is or cloned and modified. New Template Scorecards can also be created from scratch.
2. Create Snapshot Scorecards to see current, historical and trended levels of qualification using FrontRunner's red/amber/green traffic light views. Use Salesforce's standard and custom reports to analyse lead qualification performance.
3. Integrate FrontRunner with other apps; for example, automatically attach a Scorecard to a Lead when a marketing automation app nurtures a lead to a predefined score or convert Lead to an Opportunity when the lead becomes qualified.

FrontRunner helps sales development teams to convert leads received from the marketing team into qualified leads to pass over to the sales team. The result is a more effective sales development team, a sales team that wastes less time on poorly qualified leads and a better customer experience.



Companies define their ideal customer profile and qualification criteria in FrontRunner, enabling sales development and business development representatives to have a dialogue with a prospect to determine the level of fit between the prospect's needs and the products/services offered by the business.

FrontRunner provides a repeatable, scalable workflow that can be measured and improved to support performance management, on-boarding, coaching, demonstrable team ROI and more accurate pipelines and forecasts.

2 Introduction

This Administration Guide explains how FrontRunner Administrators can build a library of Template Scorecards from which FrontRunner Users create Scorecards that are attached to Salesforce® Leads and Opportunities. This document assumes that Kraytix FrontRunner has been installed and configured in your Salesforce org.



Note: For an overview of FrontRunner Scorecards, please read the Kraytix FrontRunner - Scorecard Guide. For installation and configuration instructions, please refer to the Kraytix FrontRunner - Installation Guide. Both guides can be found on the Kraytix website (<http://www.kraytix.com/>) or on the Kraytix FrontRunner Salesforce® AppExchange® listing (<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DvLDWUA3>).

3 Template Scorecard Reference

This section familiarises you with Template Scorecard key concepts before you progress to creating Template Scorecards.

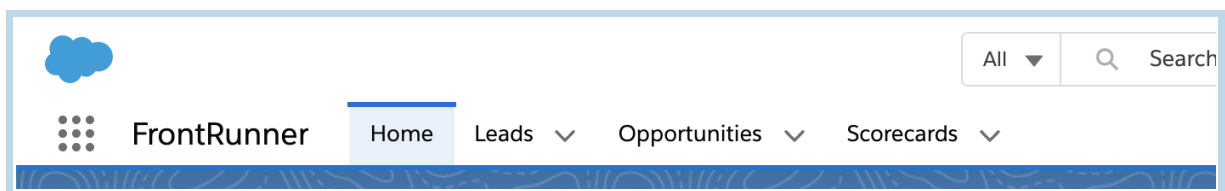


Note: It is assumed that you understand the hierarchical structure of Template Scorecards by reading the Kraytix FrontRunner - Scorecard Guide.

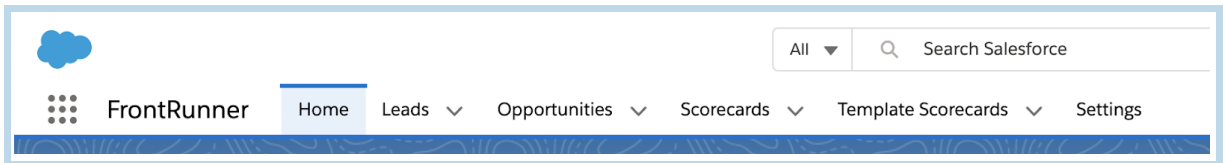
3.1 Types of FrontRunner Users

FrontRunner supports two types of user:

FrontRunner User: Allows users to create Scorecards from Template Scorecards, attach those Scorecards to either a Lead or Opportunity and create Snapshot Scorecards that show how Scorecards have changed over time. FrontRunner Users will see the following tabs when the FrontRunner app is selected in the App Launcher:



FrontRunner Administrator: In addition to everything that a FrontRunner User can do, a FrontRunner Administrator can create a library of Template Scorecards that FrontRunner Users can create Scorecards from. Unlike a FrontRunner User, a FrontRunner Administrator can also delete Snapshot Scorecards. FrontRunner Administrators will see the following tabs when the FrontRunner app is selected in the App Launcher:

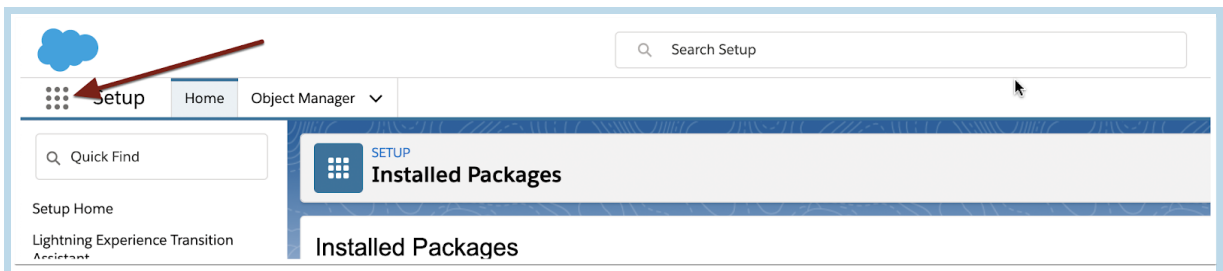


This document assumes that the user is logged in using an account that has been assigned the FrontRunner Administrator permission set.

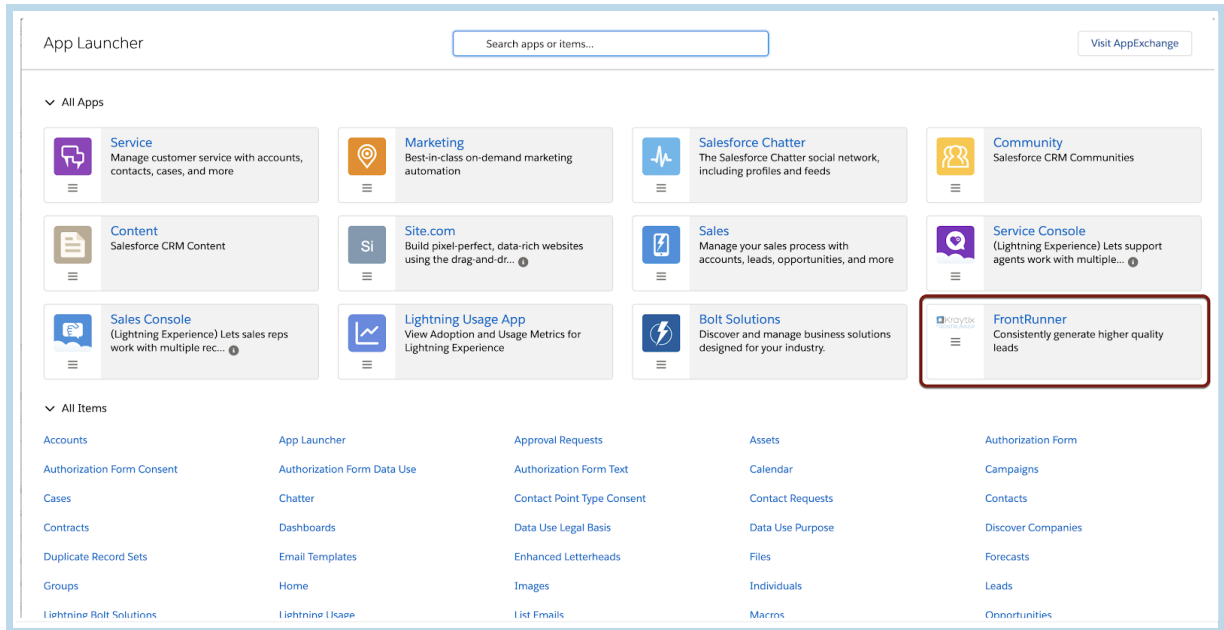
3.2 Template Scorecard Library

Although it's possible to have a single Template Scorecard from which all Scorecards are created, it's likely that you will want to create multiple Template Scorecards for different situations. You may wish to have a Template Scorecard for each product or service that your company sells, or separate Template Scorecards for qualifying leads from channel or lead generation partners and leads sourced from your own marketing department. Your collection of Template Scorecards are stored in your Template Scorecard Library.

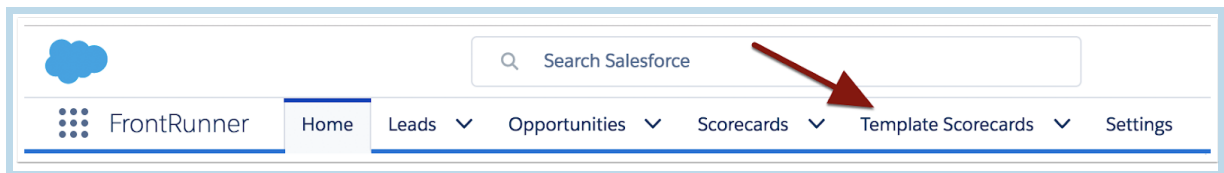
To navigate to your Template Scorecard Library in Salesforce Lightning Experience, open the App Launcher by clicking the  icon on the left side of the navigation bar.



From the **App Launcher** window, click the **FrontRunner** tile.

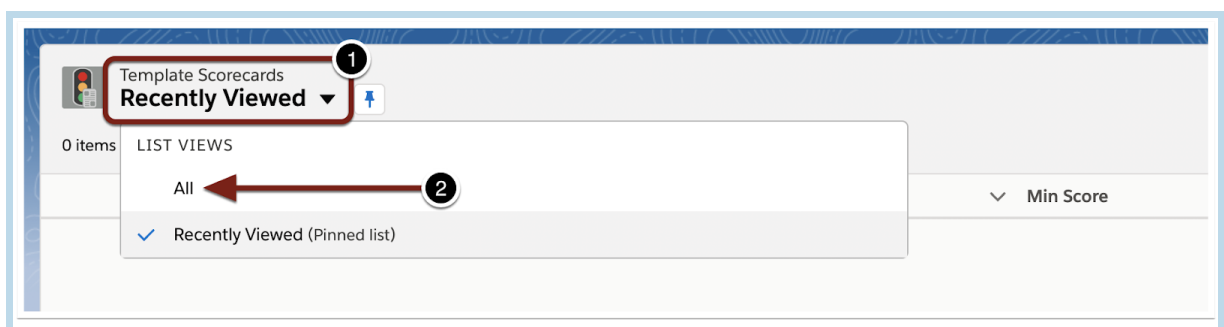


Your Template Scorecard Library is then accessed by clicking the **Template Scorecards** tab.

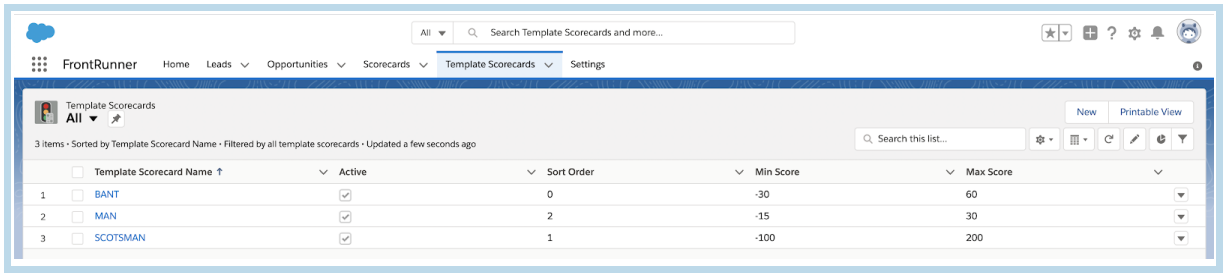


Then perform the following steps:

1. Click the **list views menu** in the Template Scorecards list view
2. Click the **All** menu item



Your Template Scorecard Library should look similar to the following list view:



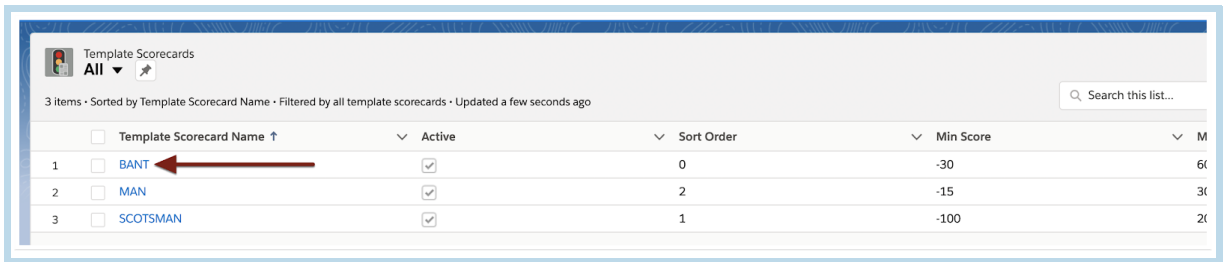
Template Scorecard Name	Active	Sort Order	Min Score	Max Score
1 BANT	☒	0	-30	60
2 MAN	☒	2	-15	30
3 SCOTSMAN	☒	1	-100	200



Note: The BANT, MAN and SCOTSMAN Template Scorecards are created as an optional step during the Kraytix FrontRunner app installation. For further information, please refer to the Kraytix FrontRunner - Installation Guide, which can be found on the Kraytix website (<http://www.kraytix.com/>) or on the Kraytix FrontRunner Salesforce® AppExchange® listing (<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DvLDWUA3>).

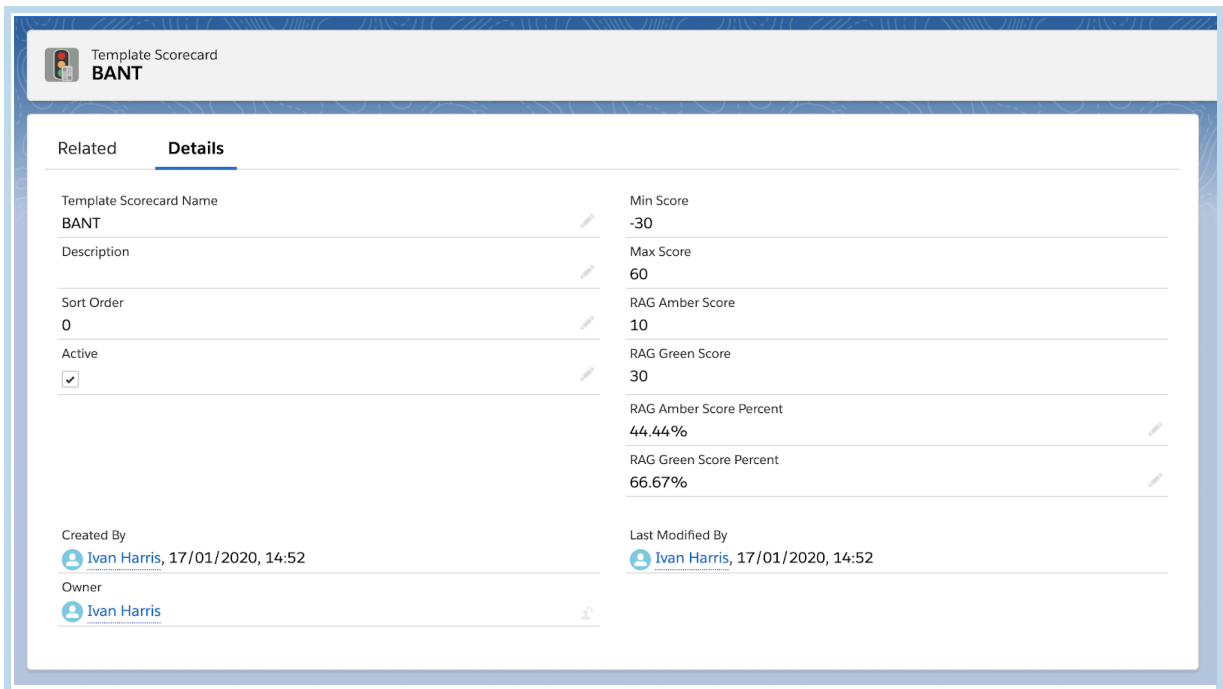
3.3 Template Scorecard Fields and Relationships

To view a Template Scorecard, click on the **BANT** Template Scorecard.



Template Scorecard Name	Active	Sort Order	Min Score	Max Score
1 BANT	☒	0	-30	60
2 MAN	☒	2	-15	30
3 SCOTSMAN	☒	1	-100	200

The Template Scorecard defaults to the **Details** tab, which will be displayed as follows:



Template Scorecard BANT	
Template Scorecard Name	BANT
Description	
Sort Order	0
Active	☒
Min Score	-30
Max Score	60
RAG Amber Score	10
RAG Green Score	30
RAG Amber Score Percent	44.44%
RAG Green Score Percent	66.67%
Created By	Ivan Harris, 17/01/2020, 14:52
Owner	Ivan Harris
Last Modified By	Ivan Harris, 17/01/2020, 14:52

The custom fields shown in the **Details** tab are:

Field	Required?	Description
Template Scorecard Name	Y	A friendly name that helps identify the Template Scorecard. Often this is the name of a lead qualification framework such as BANT; however, you can create your own framework and name.
Description	N	An optional description that will help your FrontRunner Users understand the purpose of this Template Scorecard and how to use it.
Sort Order	Y	To order Template Scorecards in your Template Scorecard Library you define the order that this Template Scorecard appears in lists views. The values are relative to other Template Scorecards and therefore do not have to start from zero.
Active	N/A ¹	Indicates whether or not this Template Scorecard is available to FrontRunner Users to create Scorecards from.
Min Score	N/A ²	The minimum possible Template Scorecard score, which is calculated by summing all Template Category minimum possible scores, which in turn sum all Template Criterion minimum possible scores.
Max Score	N/A ²	The maximum possible Template Scorecard score, which is calculated by summing all Template Category maximum possible scores, which in turn sum all Template Criterion maximum possible scores.
RAG Amber Score	N/A ³	The score that a Scorecard must exceed to change from red to amber.
RAG Green Score	N/A ³	The score that a Scorecard must exceed to change from amber to green.
RAG Amber Score Percent	Y	The percentage score that a Scorecard must exceed to change from red to amber.
RAG Green Score Percent	Y	The percentage score that a Scorecard must exceed to change from amber to green.

Notes:

1. This field is a Checkbox field, which always has a value - either true or false.
2. These fields are Roll-up Summary fields, which calculate their values by summing Template Category scores, which in turn sum their Template Criterion scores.
3. These fields are Formula fields, which calculate their values using Min Score, Max Score, RAG Amber Score Percent and RAG Green Score Percent.

The **Related** tab is shown below:

Template Scorecard BANT

Related Details

Scorecards (2)

SCORECARD NAME	CREATED DATE	LEAD	OPPORTUNITY
Scorecard: Jane Jones, Kraytix Aut...	17/01/2020, 14:52	Jane Jones	
Scorecard: Alan Taylor, Kraytix Ship...	17/01/2020, 14:52	Alan Taylor	

[View All](#)

Template Categories (4) [New](#)

TEMPLATE CATEGORY NAME	SORT ORDER	MIN SCORE	MAX SCORE
Budget	0	-10	20
Authority	1	-10	20
Need	2	-5	10
Timeframe	3	-5	10

[View All](#)

The highlighted related lists are:

Id	Name	Description
1	Scorecards	Shows all of the Scorecards that have been created from this Template Scorecard.
2	Template Categories	Lists this Template Scorecard's child Template Categories.

3.4 Template Category Fields and Relationships

To view a Template Category, click on the **Budget** Template Category in the **Template Categories** section.

Template Categories (4) [New](#)

TEMPLATE CATEGORY NAME	SORT ORDER	MIN SCORE	MAX SCORE
Budget	0	-10	20
Authority	1	-10	20
Need	2	-5	10
Timeframe	3	-5	10

The Template Category defaults to the **Details** tab, which will be displayed as follows:

The custom fields shown in the **Details** tab are:

Field	Required?	Description
Template Category Name	Y	A friendly name for the Template Category. In this example the name is Budget, which is the 'B' in the BANT Template Scorecard.
Description	N	An optional description that will help your FrontRunner Users understand the purpose of this Template Category and how to use it.
Template Scorecard	Y	The Template Category's parent Template Scorecard.
Sort Order	Y	Used to order Template Categories so that they match the Template Scorecard Name when displayed in Template Category lists. For example, so that BANT is spelt rather than TNBA. The values are relative to other Template Categories and therefore do not have to start from zero.
Min Score	N/A ¹	The minimum possible Template Category score, which is calculated by summing all child Template Criterion minimum possible scores.
Max Score	N/A ¹	The maximum possible Template Category score, which is calculated by summing all child Template Criterion maximum possible scores.
RAG Amber Score	N/A ²	The score that a Category must exceed to change from red to amber.
RAG Green Score	N/A ²	The score that a Category must exceed to change from amber to green.

RAG Amber Score Percent	N/A ³	The percentage score that a Category must exceed to change from red to amber.
RAG Green Score Percent	N/A ³	The percentage score that a Category must exceed to change from amber to green.

Notes:

1. These fields are Roll-up Summary fields, which calculate their values by summing all child Template Criterion scores.
2. These fields are Formula fields, which calculate their values using Min Score, Max Score, RAG Amber Score Percent and RAG Green Score Percent.
3. These fields are Formula fields, which calculate their values from the parent Template Scorecard's fields of the same name.

The **Related** tab is shown below:

The highlighted related list is:

Id	Name	Description
1	Template Criteria	Lists this Template Category's child Template Criteria.

3.5 Template Criterion Fields and Relationships

To view a Template Criterion, click on the **Does the customer have a budget for this opportunity?** Template Criterion in the **Template Criteria** section.

The Template Criterion defaults to the **Details** tab, which will be displayed as follows:

Template Criterion
Does the customer have a budget for this opportunity?

Related **Details**

Information

Template Criterion Name Does the customer have a budget for this opportunity?	Min Score -5
Description	Max Score 10
Template Category Budget	RAG Amber Score 2
SortOrder 0	RAG Green Score 5
	RAG Amber Score Percent 44.44%
	RAG Green Score Percent 66.67%

Created By
[Ivan Harris](#), 17/01/2020, 14:52

Last Modified By
[Ivan Harris](#), 17/01/2020, 14:52

The custom fields shown in the **Details** tab are:

Field	Required?	Description
Template Criterion Name	Y	A friendly name for the Template Criterion in the form of a question that must be answered by a prospect.
Description	N	An optional description that will help your FrontRunner Users understand the purpose of this Template Criterion and how to use it.
Template Category	Y	The Template Criterion's parent Template Category.
Sort Order	Y	Used to order Template Criterion in Template Criterion lists.
Min Score	N/A ¹	The minimum possible Template Criterion score, which is set to the score associated with the child Template Criterion Outcome with the lowest score.
Max Score	N/A ¹	The maximum possible Template Criterion score, which is set to the score associated with the child Template Criterion Outcome with the highest score.
RAG Amber Score	N/A ²	The score that a Criterion must exceed to change from red to amber.
RAG Green Score	N/A ²	The score that a Criterion must exceed to change from amber to green.
RAG Amber Score Percent	N/A ³	The percentage score that a Criterion must exceed to change from red to amber.
RAG Green Score	N/A ³	The percentage score that a Criterion must exceed to change

Percent from amber to green.

Notes:

1. These fields are Roll-up Summary fields, which calculate their values by taking the MIN/MAX Template Criterion Outcome scores.
2. These fields are Formula fields, which calculate their values using Min Score, Max Score, RAG Amber Score Percent and RAG Green Score Percent.
3. These fields are Formula fields, which calculate their values from the grandparent Template Scorecard's fields of the same name.

The **Related** tab is shown below:

Template Criterion
Does the customer have a budget for this opportunity?

Related Details

Template Criterion Outcomes (3) [New](#)

TEMPLATE CRITERION OUTCOME NAME	SCORE
The customer won't share their budget information with us	-5
There is a budget pool that multiple projects are competing for	5
A budget has been allocated specifically for this solution	10

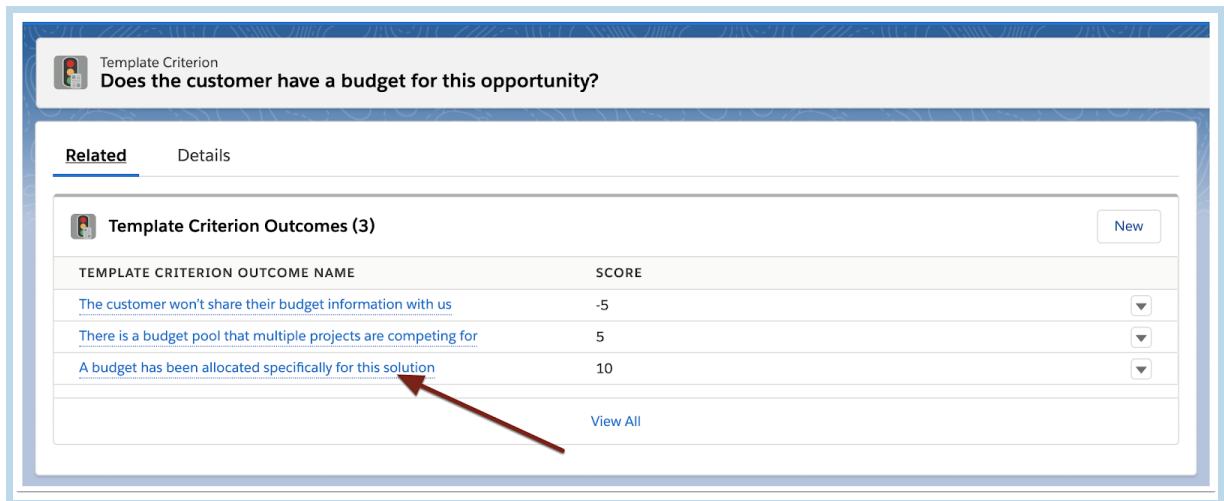
[View All](#)

The highlighted related list is:

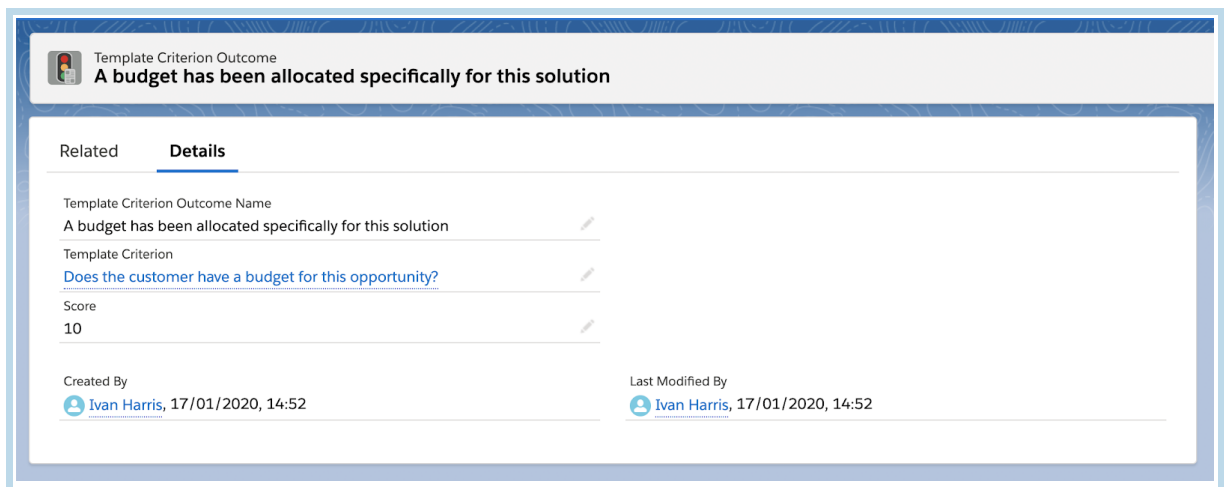
Id	Name	Description
1	Template Criterion Outcomes	Lists this Template Criterion's child Template Criterion Outcomes.

3.6 Template Criterion Outcome Fields and Relationships

To view a Template Criterion Outcome, click on the **A budget has been allocated specifically for this solution** Template Criterion Outcome in the **Template Criterion Outcomes** section.



The Template Criterion Outcome defaults to the **Details** tab, which will be displayed as follows:



The custom fields shown in the **Details** tab are:

Field	Required?	Description
Template Criterion Outcome Name	Y	The Template Criterion Outcome name in the form of one of the possible answers to the Template Criterion question.
Template Criterion	Y	The Template Criterion Outcome's parent Template Criterion.
Score	Y	The score associated with the Template Criterion Outcome.

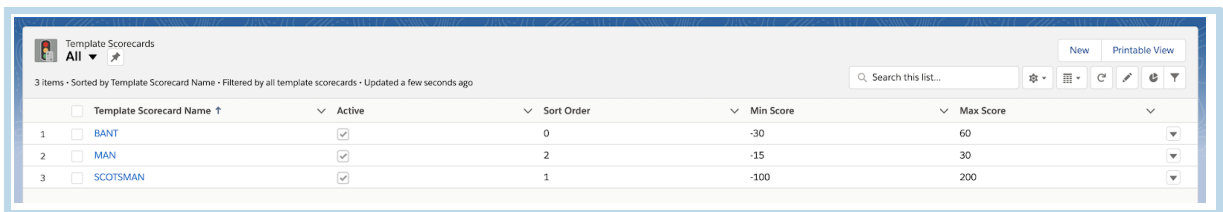
4 How To: Create a Template Scorecard From Scratch

This section will walk you through the steps to add a new Template Scorecard to your Template Scorecard Library. Section 5 will show you how to clone an existing Template Scorecard and modify it to suit your needs.

The Template Scorecard that we are going to create implements the PACT (Pain, Authority, Consequences and Target Profile) lead qualification framework proposed in the “The Sales Development Playbook” (Bertuzzi, 2016) .

4.1 Create the PACT Template Scorecard

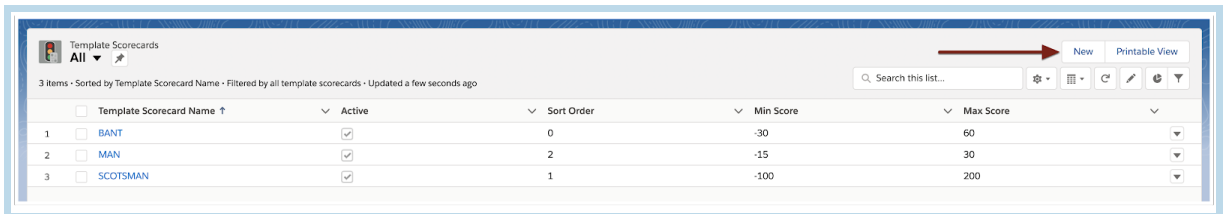
First of all, make sure that you are in your Template Scorecard Library, which should look similar to the following:



The screenshot shows the 'Template Scorecards' library interface. At the top, there's a header with 'Template Scorecards', a dropdown menu set to 'All', and a 'New' button. Below the header, a search bar and a 'Printable View' button are visible. The main content is a table with 3 items, sorted by 'Template Scorecard Name'. The table has columns for 'Template Scorecard Name', 'Active', 'Sort Order', 'Min Score', and 'Max Score'. The items listed are BANT, MAN, and SCOTSMAN, all of which are active and have their respective sort orders and score ranges.

	Template Scorecard Name ↑	Active	Sort Order	Min Score	Max Score
1	BANT	☒	0	-30	60
2	MAN	☒	2	-15	30
3	SCOTSMAN	☒	1	-100	200

Click on the **New** button.



This screenshot is identical to the one above, but with a red arrow pointing to the 'New' button in the top right corner of the interface.

	Template Scorecard Name ↑	Active	Sort Order	Min Score	Max Score
1	BANT	☒	0	-30	60
2	MAN	☒	2	-15	30
3	SCOTSMAN	☒	1	-100	200

Which will display the **New Template Scorecard** edit view:

New Template Scorecard

Information

* Template Scorecard Name

Description

* Sort Order

Active

* RAG Amber Score Percent

60.00%

* RAG Green Score Percent

80.00%

System Information

Owner

Elvira Curro

Cancel Save & New Save

Enter the following field values and click the **Save** button:

Field	Value
Template Scorecard Name	PACT
Description	This Scorecard implements Trish Bertuzzi's PACT lead qualification framework.
Sort Order	3 ²
Active	Leave this unchecked for now, we will activate the Template Scorecard once it is complete.
RAG Amber Score	Accept the default value of 60%, or choose your own value.
RAG Green Score	Accept the default value of 80%, or choose your own value.

Notes:

1. As you already have BANT, MAN and SCOTSMAN Template Scorecards in your Template Scorecard Library and PACT will be placed at the end of the Library the sort order is 3 in the zero-based index.

The created Template Scorecard will default to the **Details** tab and will look like this:

The screenshot shows the 'Details' tab of a 'Template Scorecard' named 'PACT'. The interface is divided into two columns. The left column contains fields for 'Template Scorecard Name' (PACT), 'Description' (This Scorecard1 implements Trish Bertuzzi's PACT lead qualification framework), 'Sort Order' (3), and 'Active' (checkbox). The right column contains fields for 'Min Score' (0), 'Max Score' (0), 'RAG Amber Score' (0), 'RAG Green Score' (0), 'RAG Amber Score Percent' (60.00%), and 'RAG Green Score Percent' (80.00%). At the bottom, it shows 'Created By' and 'Owner' as Elvira Curro, and 'Last Modified By' as Elvira Curro, 19/01/2020, 11:50.

Field	Value
Template Scorecard Name	PACT
Description	This Scorecard1 implements Trish Bertuzzi's PACT lead qualification framework.
Sort Order	3
Active	☐
Min Score	0
Max Score	0
RAG Amber Score	0
RAG Green Score	0
RAG Amber Score Percent	60.00%
RAG Green Score Percent	80.00%
Created By	Elvira Curro, 19/01/2020, 11:50
Owner	Elvira Curro
Last Modified By	Elvira Curro, 19/01/2020, 11:50

4.2 Create the Pain Template Category and Criteria

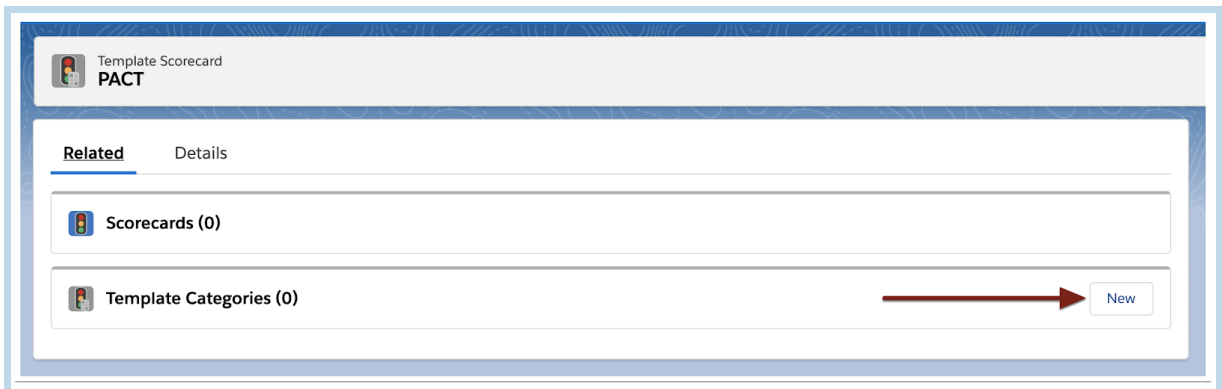
A Template Scorecard must have at least one Template Category. The PACT Template Scorecard will have four, corresponding to the 'P', 'A', 'C' and 'T' in the 'PACT' acronym.

First, switch to the Template Scorecard's **Related** tab by clicking the tab:

The screenshot shows the 'Related' tab of the 'PACT' Template Scorecard. A red arrow points to the 'Related' tab. The interface is identical to the 'Details' tab, showing the same fields and values.

Field	Value
Template Scorecard Name	PACT
Description	This Scorecard1 implements Trish Bertuzzi's PACT lead qualification framework.
Sort Order	3
Active	☐
Min Score	0
Max Score	0
RAG Amber Score	0
RAG Green Score	0
RAG Amber Score Percent	60.00%
RAG Green Score Percent	80.00%
Created By	Elvira Curro, 19/01/2020, 11:50
Owner	Elvira Curro
Last Modified By	Elvira Curro, 19/01/2020, 11:50

To create the first Template Category, click the **New** button in the **Template Categories** related list.



Which will display the **New Template Category** edit view:

A screenshot of the 'New Template Category' edit view form. The form has a title 'New Template Category' and a close button (X) in the top right corner. Below the title is a section labeled 'Information'. It contains four fields: 'Template Category Name' (a text input field), 'Description' (a text area), 'Template Scorecard' (a dropdown menu showing 'PACT'), and 'Sort Order' (a text input field). At the bottom right of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

Enter the following field values and click the **Save** button:

Field	Value
Template Category Name	Pain
Description	This Category helps us understand the prospect's business issues and the pain points that they want to

address by purchasing our services.

Template Scorecard

Leave this set to its parent *PACT* Template Scorecard.

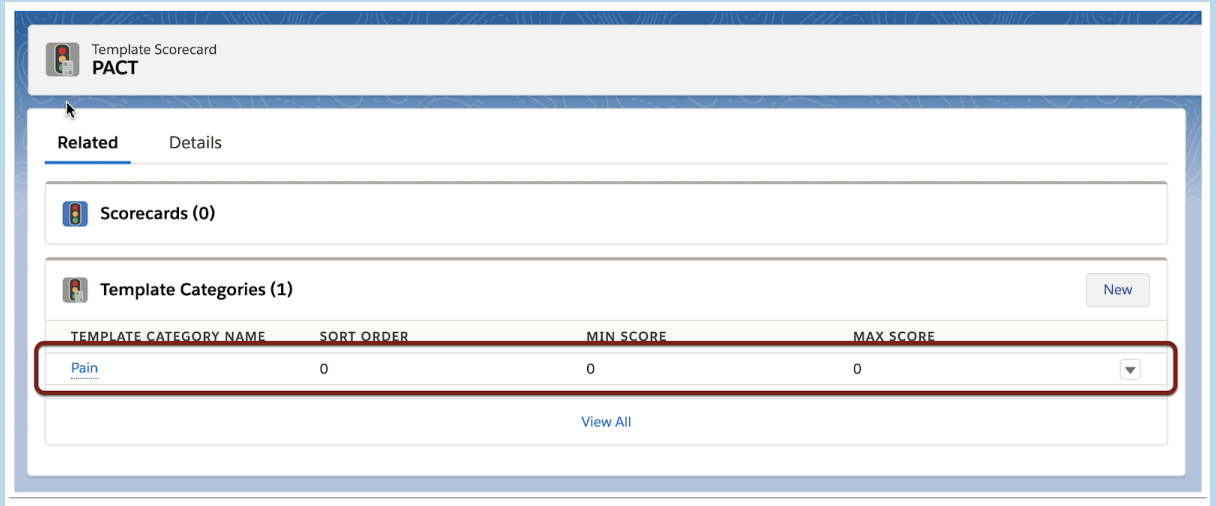
Sort Order

0¹

Notes:

1. This is the first Template Category for this Template Scorecard, the sort order is therefore 0 in the zero-based index.

The created Template Category will be added to the **Template Categories** related list:

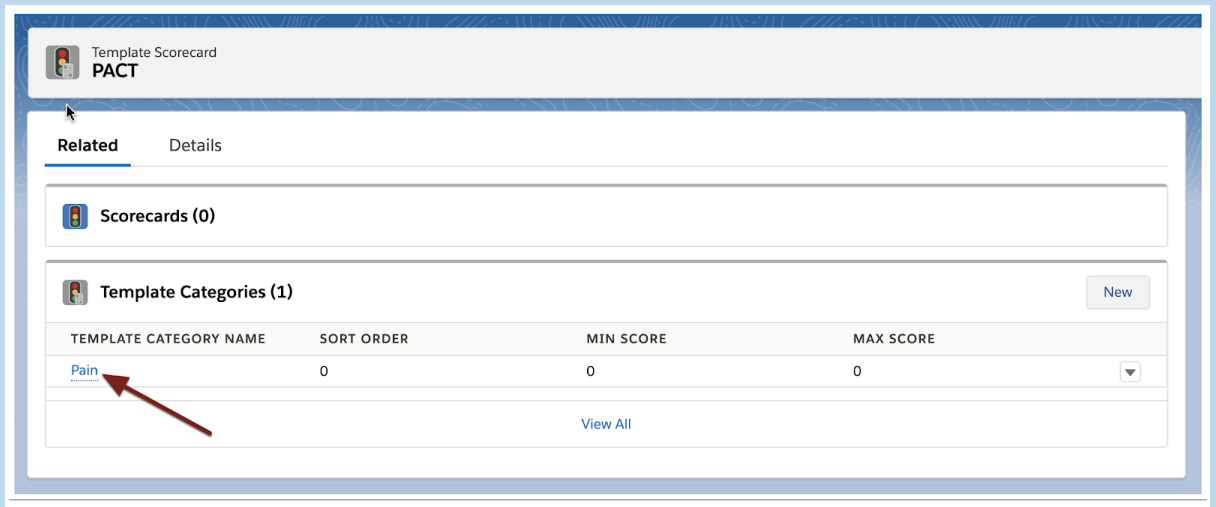


The screenshot shows the 'Related' tab for the 'PACT' Template Scorecard. It displays two sections: 'Scorecards (0)' and 'Template Categories (1)'. The 'Template Categories (1)' section contains a table with the following data:

TEMPLATE CATEGORY NAME	SORT ORDER	MIN SCORE	MAX SCORE
Pain	0	0	0

A red box highlights the 'Pain' category row. A 'View All' link is visible below the table.

A Template Category must have at least one Template Criterion. Click the **Pain** Template Category link.



This screenshot is identical to the previous one, but with a red arrow pointing to the 'Pain' link in the 'Template Categories' table, indicating where to click to view the category details.

Then click on the Template Category's **Related** tab.

Template Category
Pain

Related Details

Template Category Name	Pain	Min Score	0
Description	This Category helps us understand the prospect's business issues and the pain points that they want to address by purchasing our services.	Max Score	0
Template Scorecard	PACT	RAG Amber Score	0
Sort Order	0	RAG Green Score	0
		RAG Amber Score Percent	60.00%
		RAG Green Score Percent	80.00%
Created By	Elvira Curro, 19/01/2020, 11:57	Last Modified By	Elvira Curro, 19/01/2020, 11:57

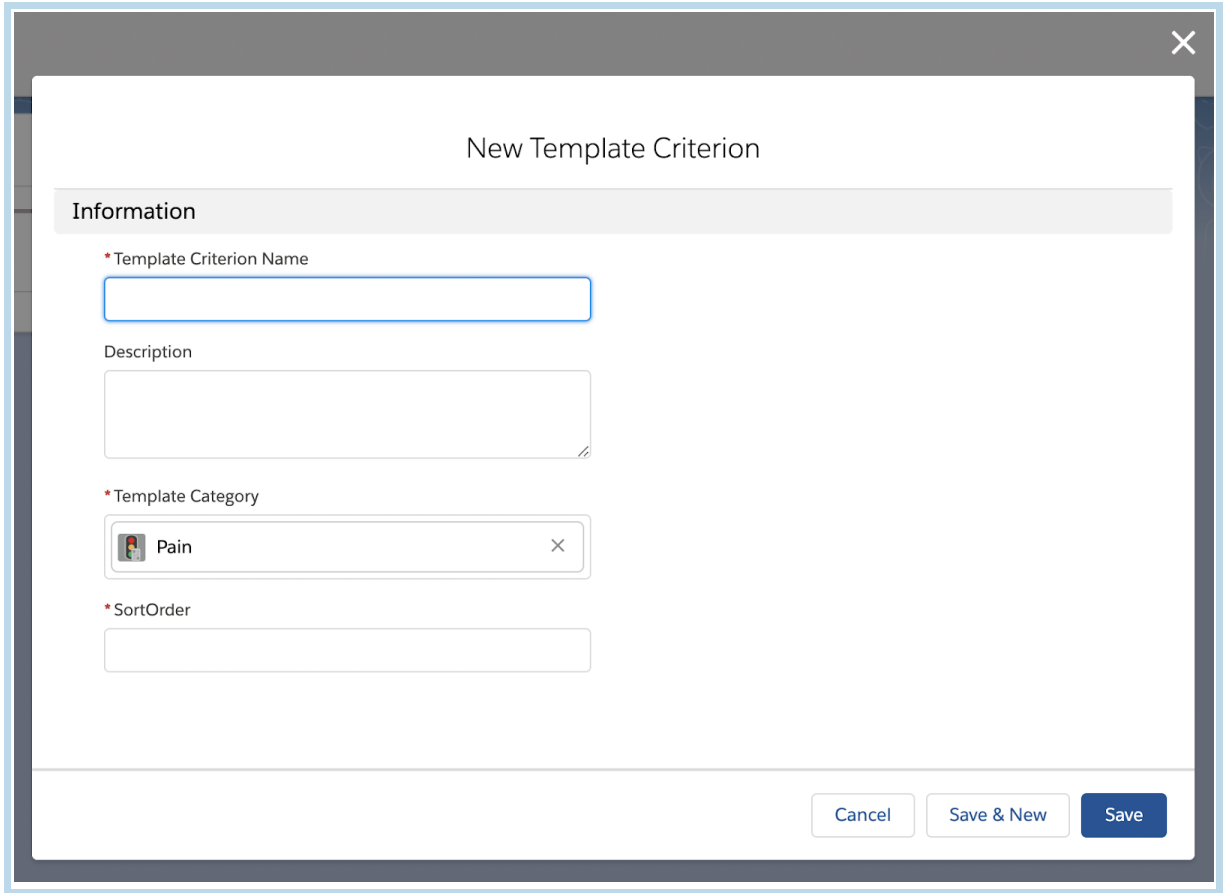
To create the first Template Criterion, click the **New** button in the **Template Criteria** related list.

Template Category
Pain

Related Details

Template Criteria (0) [New](#)

Which will display the **New Template Criterion** edit view:



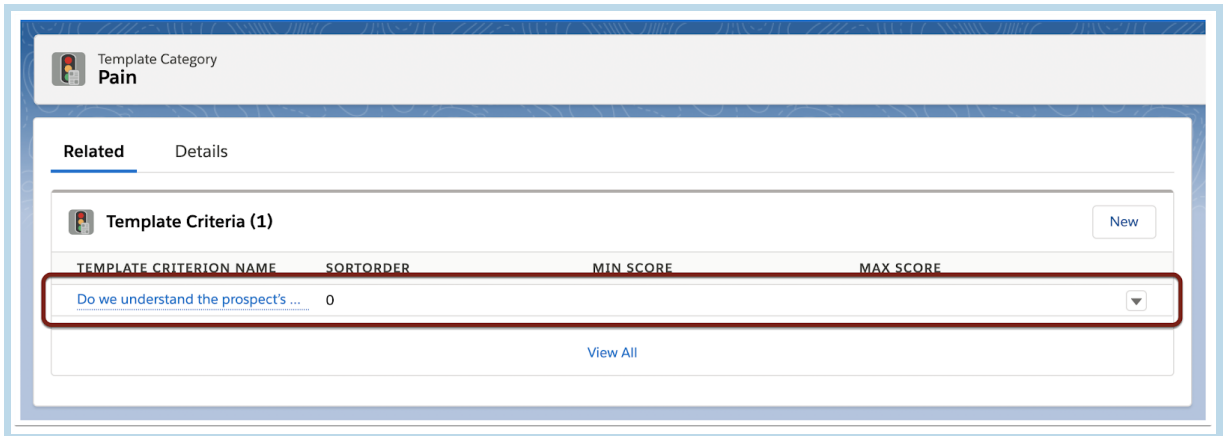
Enter the following field values and click the **Save** button:

Field	Value
Template Criterion Name	Do we understand the prospect's business issue?
Description	Our services must be able to address a pressing business need.
Template Category	Leave this set to its parent <i>Pain</i> Template Category.
Sort Order	0 ¹

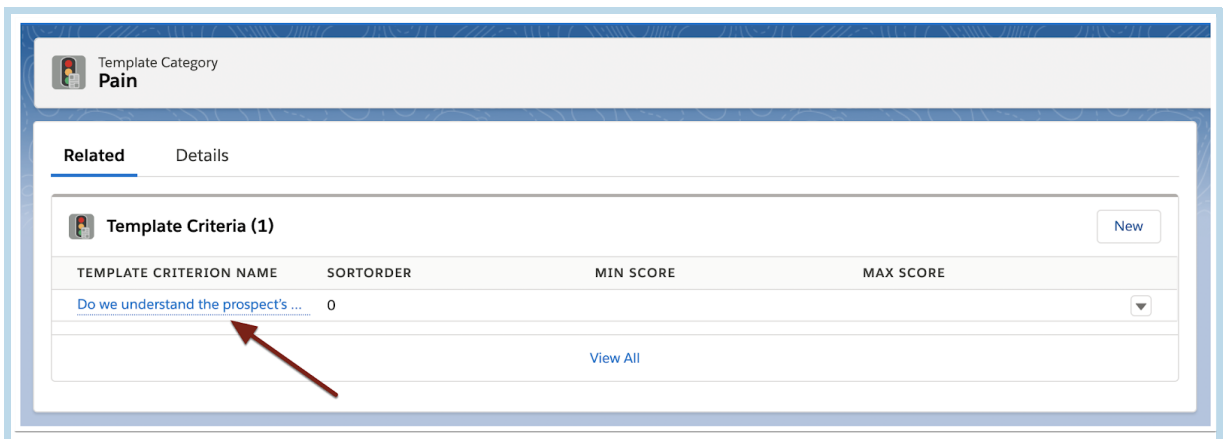
Notes:

1. This is the first Template Criterion for this Template Category, the sort order is therefore 0 in the zero-based index.

The created Template Criterion will be added to the **Template Criteria** related list.



A Template Criterion must have at least one Template Criterion Outcome. Click the **Do we understand the prospect's business issue?** Template Criterion link.



Then click on the Template Criterion's **Related** tab.

Template Criterion
Do we understand the prospect's business issue?

Related **Details**

Information

Template Criterion Name	Do we understand the prospect's business issue?	Min Score	
Description	Our services must be able to address a pressing business need.	Max Score	
Template Category	Pain	RAG Amber Score	0
SortOrder	0	RAG Green Score	0
		RAG Amber Score Percent	60.00%
		RAG Green Score Percent	80.00%

Created By
Elvira Curro, 19/01/2020, 12:06

Last Modified By
Elvira Curro, 19/01/2020, 12:06

To create the first Template Criterion Outcome, click the **New** button in the **Template Criterion Outcomes** related list.

Template Criterion
Do we understand the prospect's business issue?

Related Details

Template Criterion Outcomes (0) [New](#)

Which will display the **New Template Criterion Outcome** edit view:

Enter the following field values and click the **Save & New** button:

Field	Value
Template Criterion Outcome Name	This is the highest priority business issue at the moment.
Template Criterion	Leave this set to its parent <i>Do we understand the prospect's business issue?</i> Template Criterion.
Score	10

Enter the following field values and click the **Save & New** button:

Field	Value
Template Criterion Outcome Name	This is a known business issue but not the highest priority.
Template Criterion	Leave this set to its parent <i>Do we understand the prospect's business issue?</i> Template Criterion.
Score	5

Enter the following field values and click the **Save** button:

Field	Value
Template Criterion Outcome Name	The prospect will not share their business issues with us.
Template Criterion	Leave this set to its parent <i>Do we understand the prospect's business issue?</i> Template Criterion.
Score	-2

The created Template Criterion Outcomes will be added to the **Template Criterion Outcomes** related list:

Template Criterion
Do we understand the prospect's business issue?

Related Details

Template Criterion Outcomes (3) [New](#)

TEMPLATE CRITERION OUTCOME NAME	SCORE
The prospect will not share their business issues with us.	-2
This is a known business issue but not the highest priority.	5
This is the highest priority business issue at the moment.	10

[View All](#)

At this point you have completed the minimum requirements for a Template Scorecard; a Template Scorecard must have at least one Template Category, which must have at least one Template Criterion, which in turn must have at least one Template Criterion Outcome.

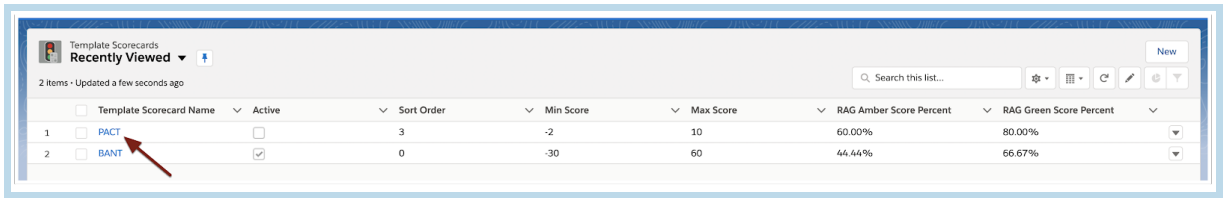
To view the Template Scorecard, click on the **Template Scorecards** tab.

FrontRunner Home Leads Opportunities Scorecards **Template Scorecards** Settings

Template Criterion
Do we understand the prospect's business issue?

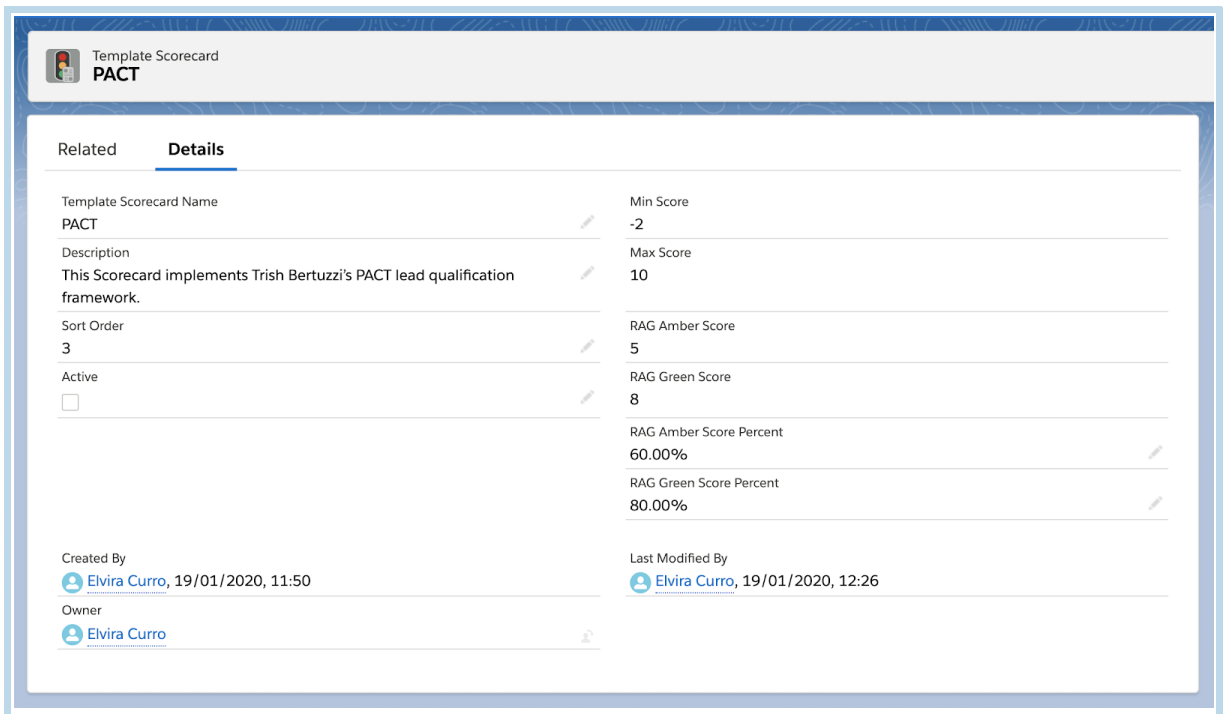
Related Details

Then click on the **PACT** Template Scorecard link.



	Template Scorecard Name	Active	Sort Order	Min Score	Max Score	RAG Amber Score Percent	RAG Green Score Percent
1	PACT	☐	3	-2	10	60.00%	80.00%
2	BANT	☒	0	-30	60	44.44%	66.67%

You can see that FrontRunner has calculated the **Min Score** and **Max Score** fields by summing the minimum and maximum Template Criterion Outcomes scores. As the names suggest, these are the minimum and maximum scores that any Scorecards created from this Template Scorecard can have. FrontRunner has also calculated the **RAG Amber Score** and **RAG Green Score** fields by using the **RAG Amber Score Percent** and **RAG Green Score Percent** values that you entered when creating the Template Scorecard.



Template Scorecard	
PACT	
Related	Details
Template Scorecard Name	Min Score
PACT	-2
Description	Max Score
This Scorecard implements Trish Bertuzzi's PACT lead qualification framework.	10
Sort Order	RAG Amber Score
3	5
Active	RAG Green Score
☐	8
	RAG Amber Score Percent
	60.00%
	RAG Green Score Percent
	80.00%
Created By	Last Modified By
Elvira Curro , 19/01/2020, 11:50	Elvira Curro , 19/01/2020, 12:26
Owner	
Elvira Curro	

The PACT lead qualification framework has three further categories, namely Authority, Consequence and Target Profile. Follow the above steps to populate the remainder of the Template Scorecard with the information below.

4.3 Create the Authority Template Category and Criteria

Create the Authority Template Category with the following field values:

Field	Value
Template Category Name	Authority
Description	This Category helps us identify the various

	stakeholders in the prospect's business who must authorise the purchase, such as the economic buyer and technical buyer.
Template Scorecard	Leave this set to its parent <i>PACT</i> Template Scorecard.
Sort Order	1

Create a child Template Criterion with the following field values:

Field	Value
Template Criterion Name	Do we know who the budget holder is?
Description	A good relationship with the budget holder will improve our chances of winning the business.
Template Category	Leave this set to its parent <i>Authority</i> Template Category.
Sort Order	0

Create three Template Criterion Outcomes with the following values:

Field	Value
Template Criterion Outcome Name	We have a relationship with the budget holder.
Template Criterion	Leave this set to its parent <i>Do we know who the budget holder is?</i> Template Criterion.
Score	10

Field	Value
Template Criterion Outcome Name	We know who the budget holder is but we have no relationship yet.
Template Criterion	Leave this set to its parent <i>Do we know who the budget holder is?</i> Template Criterion.
Score	2

Field	Value
Template Criterion Outcome Name	The prospect will not allow us access to the budget holder.
Template Criterion	Leave this set to its parent <i>Do we know who the budget holder is?</i> Template Criterion.
Score	-2

4.4 Create the Consequence Template Category and Criteria

Create the Consequence Template Category with the following field values:

Field	Value
Template Category Name	Consequence
Description	This Category helps us understand the impact on the prospect's business if the prospect decides to do nothing rather than purchase our services.
Template Scorecard	Leave this set to its parent <i>PACT</i> Template Scorecard.
Sort Order	2

Create a child Template Criterion with the following field values:

Field	Value
Template Criterion Name	What is the 'do nothing' impact to the business?
Description	Knowing the impact of doing nothing helps us determine the urgency of the purchase and allows us to create a compelling value proposition.
Template Category	Leave this set to its parent <i>Consequence</i> Template Category.
Sort Order	0

Create three Template Criterion Outcomes with the following values:

Field	Value
Template Criterion Outcome Name	Business performance will be severely impacted.
Template Criterion	Leave this set to its parent <i>What is the 'do nothing' impact to the business?</i> Template Criterion.
Score	10

Field	Value
Template Criterion Outcome Name	The business will be able to continue operating at current levels.
Template Criterion	Leave this set to its parent <i>What is the 'do nothing' impact to the business?</i> Template Criterion.
Score	2

Field	Value
Template Criterion Outcome Name	The prospect can renew with an incumbent supplier and continue to operate.
Template Criterion	Leave this set to its parent <i>What is the 'do nothing' impact to the business?</i> Template Criterion.
Score	-5

4.5 Create the Target Profile Template Category and Criteria

Create the Target Profile Template Category with the following field values:

Field	Value
Template Category Name	Target Profile
Description	This Category defines our ideal customer profile where there is a great fit between the prospect and our business.
Template Scorecard	Leave this set to its parent <i>PACT</i> Template Scorecard.
Sort Order	3

Create a child Template Criterion with the following field values:

Field	Value
Template Criterion Name	Is the prospect a US-based SaaS provider with more than 500 employees?
Description	Our specialism is delivering consultancy to Software as a Service (SaaS) businesses; however, if they are not US-based or have less than 500 employees we are either not competitively priced and/or not profitable enough.
Template Category	Leave this set to its parent <i>Target Profile</i> Template Category.
Sort Order	0

Create three Template Criterion Outcomes with the following values:

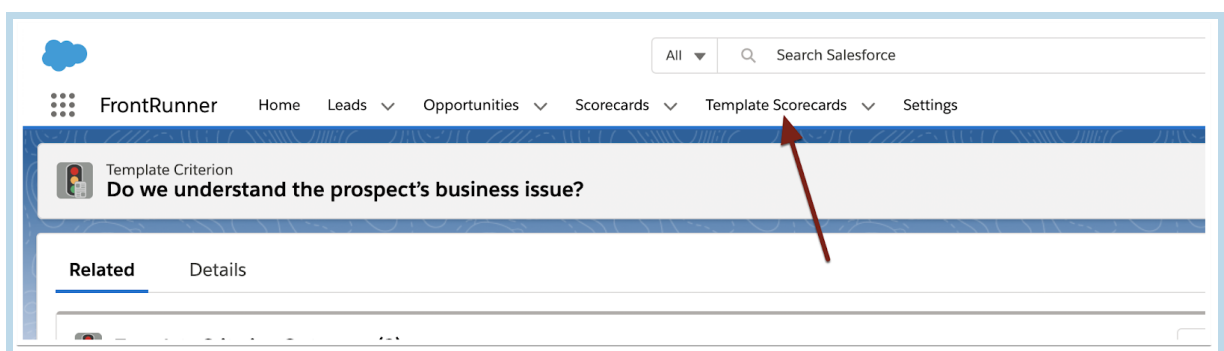
Field	Value
Template Criterion Outcome Name	A US-based SaaS provider with more than 500 employees.
Template Criterion	Leave this set to its parent <i>Is the prospect a US-based SaaS provider with more than 500 employees?</i> Template Criterion.
Score	10

Field	Value
Template Criterion Outcome Name	A US-based SaaS provider with less than 500 employees.
Template Criterion	Leave this set to its parent <i>Is the prospect a US-based SaaS provider with more than 500 employees?</i> Template Criterion.
Score	4

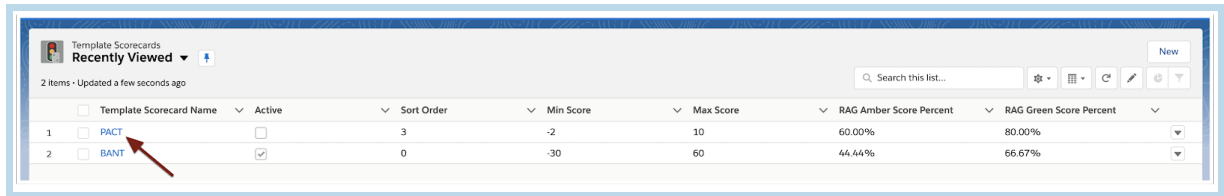
Field	Value
Template Criterion Outcome Name	Not US-based and/or not a SaaS provider.
Template Criterion	Leave this set to its parent <i>Is the prospect a US-based SaaS provider with more than 500 employees?</i> Template Criterion.
Score	-10

4.6 Activating the PACT Template Scorecard

Now that the Template Scorecard has been completed, there is one task left to do before FrontRunner Users can create Scorecards from your new Template Scorecard: activate the Template Scorecard. Click on the **Template Scorecards** tab.

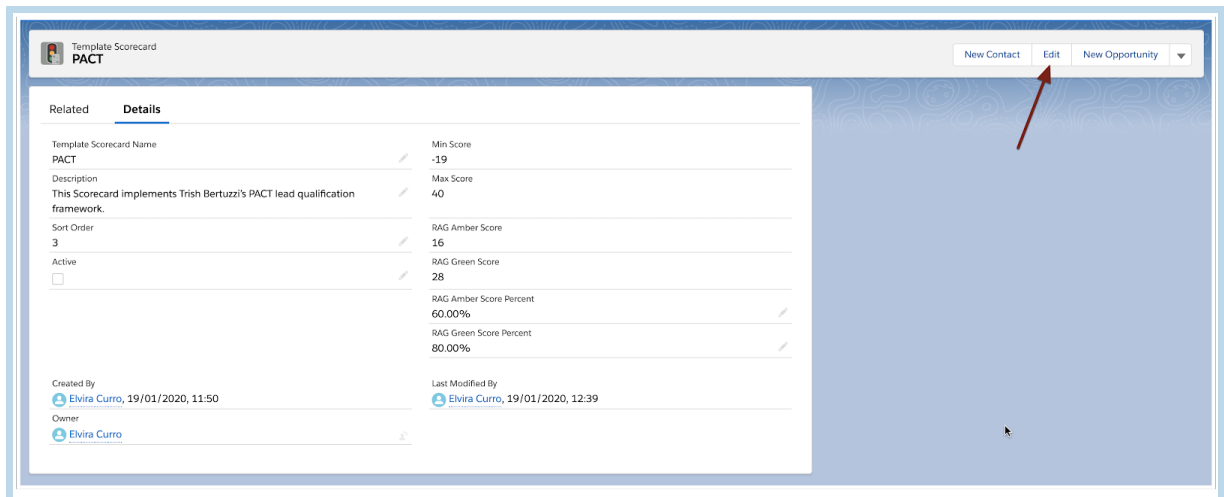


Then click on the **PACT** Template Scorecard link.



	Template Scorecard Name	Active	Sort Order	Min Score	Max Score	RAG Amber Score Percent	RAG Green Score Percent
1	PACT	☐	3	-2	10	60.00%	80.00%
2	BANT	☒	0	-30	60	44.44%	66.67%

Click the **Edit** button.



Template Scorecard
PACT

New Contact Edit New Opportunity

Related

Details

Template Scorecard Name
PACT

Description
This Scorecard implements Trish Bertuzzi's PACT lead qualification framework.

Sort Order
3

Active
☐

Created By
Elvira Curro, 19/01/2020, 11:50

Owner
Elvira Curro

Min Score
-19

Max Score
40

RAG Amber Score
16

RAG Green Score
28

RAG Amber Score Percent
60.00%

RAG Green Score Percent
80.00%

Last Modified By
Elvira Curro, 19/01/2020, 12:39

In the **Edit PACT** window, enable **Active** and click the **Save** button.

Logged in as Elvira Curro (50913dfa-497f-4952-8359-84535b04ce41@kraytix.com) [Log out as Elvira Curro](#)

Edit PACT

*Template Scorecard Name	PACT	Min Score	-19
Description	This Scorecard implements Trish Bertuzzi's PACT lead qualification framework.	Max Score	40
*Sort Order	3	RAG Amber Score	16
Active	☒	RAG Green Score	28
		*RAG Amber Score Percent	60.00%
		*RAG Green Score Percent	80.00%

Created By
Elvira Curro, 19/01/2020, 11:50

Last Modified By
Elvira Curro, 19/01/2020, 12:39

Owner
Elvira Curro

[Cancel](#) [Save & New](#) [Save](#)

Your completed Template Scorecard should look like the following:

The screenshot shows the 'Template Scorecard' interface for 'PACT'. It features a 'Details' tab with the following information:

Field	Value
Template Scorecard Name	PACT
Description	This Scorecard implements Trish Bertuzzi's PACT lead qualification framework.
Sort Order	3
Active	☒
Min Score	-19
Max Score	40
RAG Amber Score	16
RAG Green Score	28
RAG Amber Score Percent	60.00%
RAG Green Score Percent	80.00%
Created By	Elvira Curro, 19/01/2020, 11:50
Last Modified By	Elvira Curro, 19/01/2020, 12:43
Owner	Elvira Curro

4.7 Using the PACT Template Scorecard

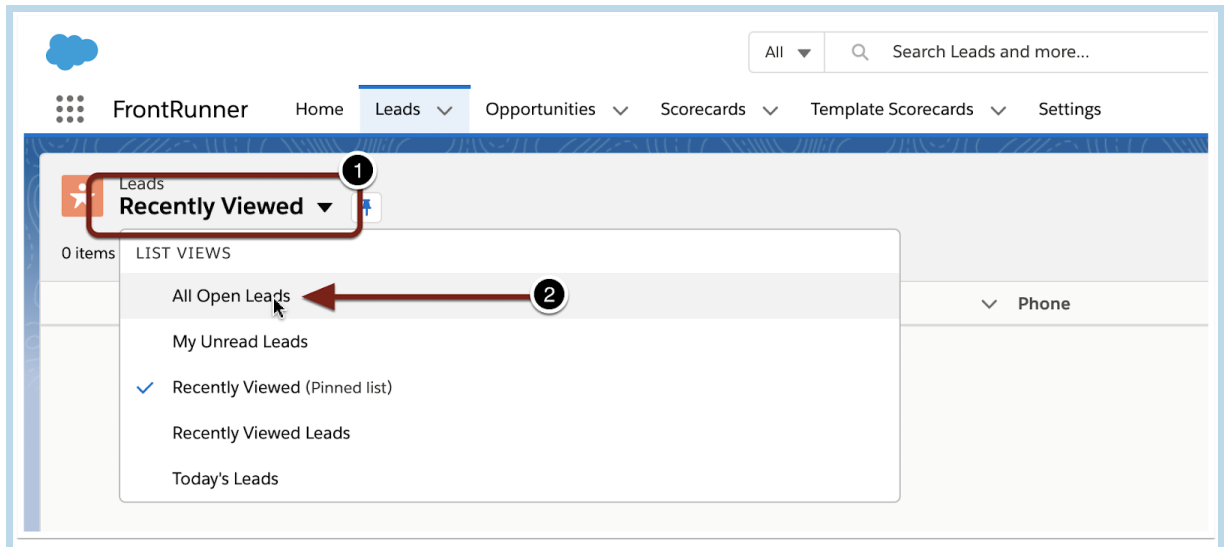
To illustrate using the PACT Template Scorecard, you will now create a Scorecard from the Template Scorecard and attach it to a Lead.

Click the **Leads** tab.

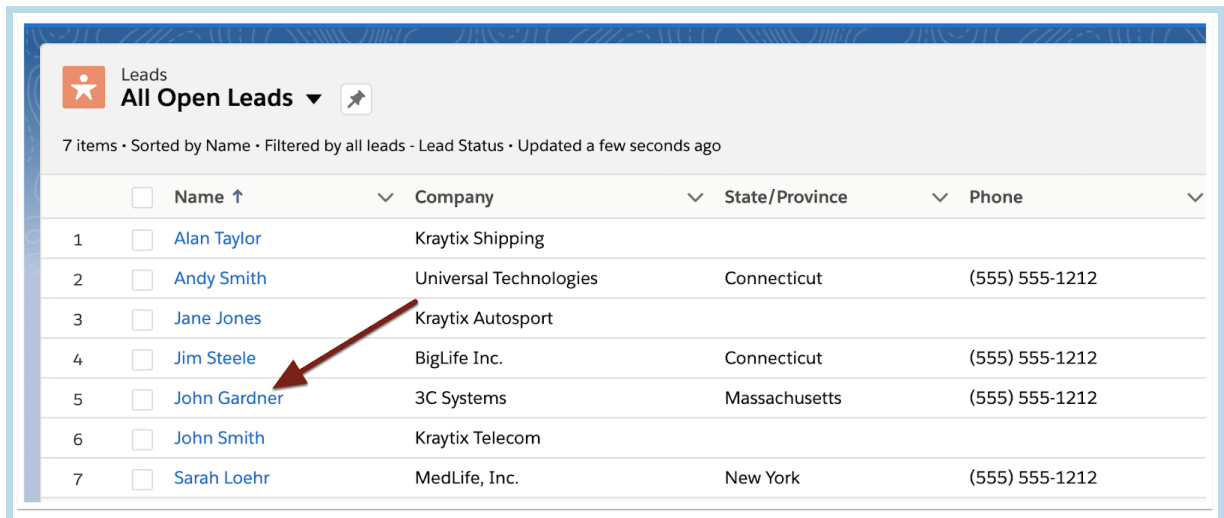
The screenshot shows the 'FrontRunner' application interface. The 'Leads' tab is selected in the top navigation bar, indicated by a red arrow. The 'Template Scorecard' section for 'PACT' is visible below the navigation bar.

Then perform the following steps:

1. Click the **list views menu** in the Leads list view
2. Click the **All Open Leads** menu item



Click on a Lead.



In the **Scorecards** related list, click the **action menu** and click the **New** menu item.

The screenshot shows the Lead record for Mr. John Gardner. The top navigation bar includes buttons for Follow, Convert, Edit, and New Case. Below this is a tabbed interface with tabs for New, Contacted, Nurturing, Unqualified, and Converted. The 'New' tab is active. On the right side, the 'Related' section shows a message: 'We found no potential duplicates of this lead.' Below this, there are two sections: 'Scorecards (0)' and 'Campaign History (0)'. In the 'Scorecards (0)' section, a red box highlights a dropdown menu with a 'New' button next to it, indicating where to click to create a new scorecard.

In the **New Scorecard** window, select the **PACT Template Scorecard** and click the **Save** button.

The screenshot shows the 'New Scorecard' window. The title is 'New Scorecard'. Below the title, there are 'Save' and 'Cancel' buttons. The window is divided into three main sections: 'Lead or Opportunity', 'Template Scorecard', and 'Scorecard Name'.
1. **Lead or Opportunity**: This section contains a message: '1. Associate the Scorecard with a Lead or Opportunity (but not both).' Below this, there are fields for 'Lead' (John Gardner) and 'Opportunity' (empty).
2. **Template Scorecard**: This section contains a message: '2. Select a Template Scorecard to create the new Scorecard from.' Below this is a table with columns: 'Select', 'Template Scorecard Name', 'Description', 'RAG Amber Score', and 'RAG Green Score'. The table lists four options: BANT, SCOTSMAN, MAN, and PACT. The 'PACT' option is selected, and its row is highlighted with a red box. The description for PACT is 'This Scorecard implements Trish Bertuzzi's PACT lead qualification framework.' The RAG Amber Score is 10 and the RAG Green Score is 30.
3. **Scorecard Name**: This section contains a message: '3. Give the Scorecard a name.' Below this is a text field for 'Scorecard Name' with the value 'Scorecard: John Gardner, 3C Systems'. At the bottom of the window, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

Select	Template Scorecard Name	Description	RAG Amber Score	RAG Green Score
☐	BANT		10	30
☐	SCOTSMAN		50	150
☐	MAN		5	20
☒	PACT	This Scorecard implements Trish Bertuzzi's PACT lead qualification framework.	10	30

The newly created Scorecard will open and look like the following:

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Pain	Do we understand the prospect's business issue?		0%				
Authority	Do we know who the budget holder is?		0%				
Consequence	What is the 'do nothing' impact to the business?		0%				
Target Profile	Is the prospect a US-based SaaS provider with more than 500 employees?		0%				
Scorecard Score:			0%				

5 How To: Create a Template Scorecard Using Cloning

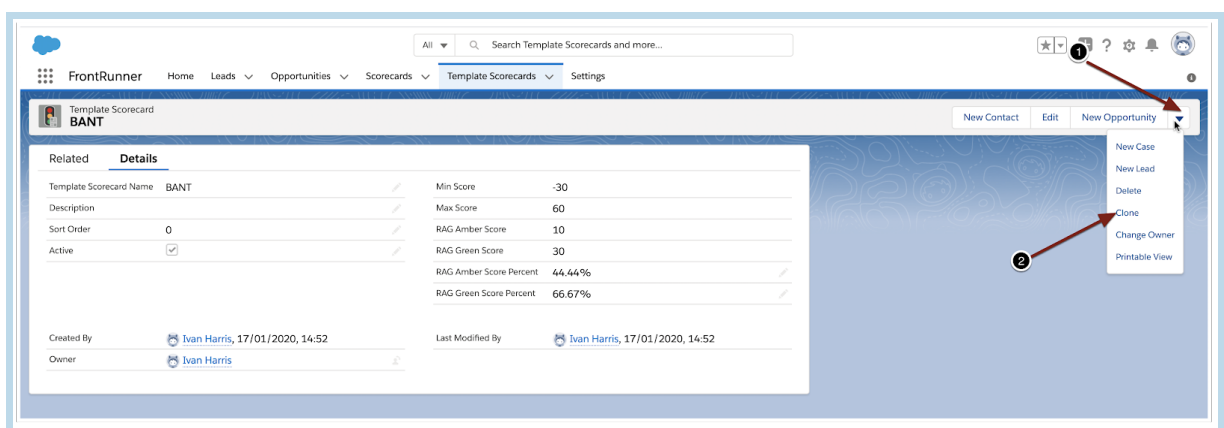


Note: This section assumes that you have familiarised yourself with creating a Template Scorecard from scratch by completing the previous section.

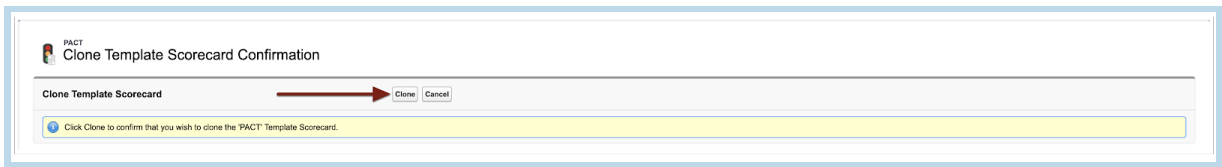
If you already have Template Scorecards in your Template Scorecard Library you can base a new Template Scorecard on an existing one using cloning. Trish Bertuzzi's "The Sales Development Playbook" points out that in mature markets you might want to add a Timing category to the PACT lead qualification framework, to ensure that sales development representatives find out what the prospect's buying time frame is; for example, it's useful to know when a contract with an incumbent supplier is due for renewal. In this section you will clone the PACT Template Scorecard and add a Timing Template Category.

Open the **PACT** Template Scorecard in your Template Scorecard Library and perform the following steps:

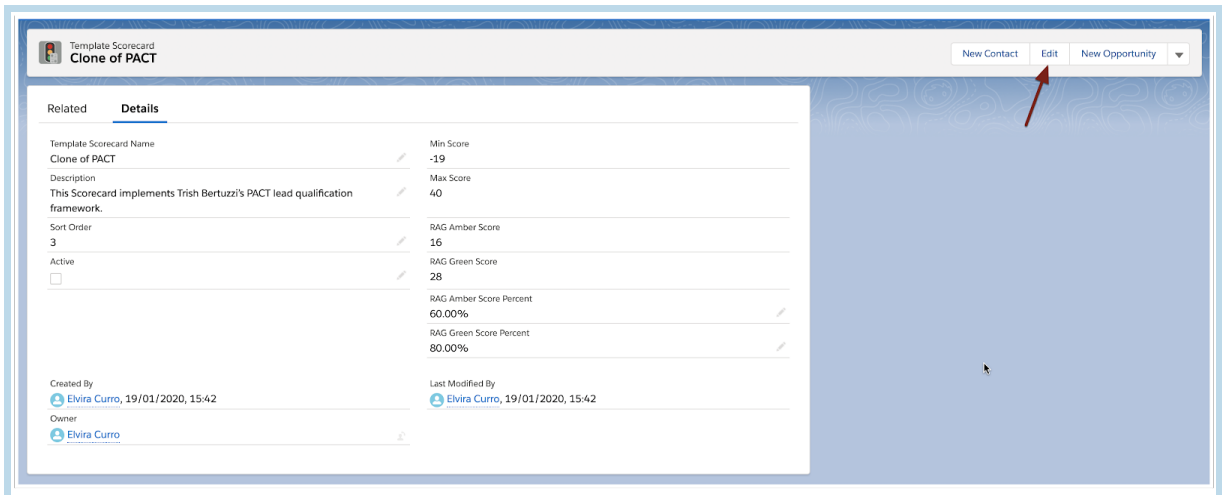
1. Click the **page-level action menu** in the record's highlights panel
2. Click the **Clone** button



In the **Clone Template Scorecard Confirmation** page, click the **Clone** button to confirm that you want to clone the PACT Template Scorecard.



You will now be viewing the cloned Template Scorecard. Click the **Edit** button.



Change the **Template Scorecard Name** from *Clone of PACT* (the default name given by FrontRunner when the Template Scorecard was cloned) to **PACT2** and click the **Save** button.

Logged in as Elvira Curro (50913dfa-497f-4952-8359-84535b04ce41@kraytix.com) [Log out as Elvira Curro](#)

Edit Clone of PACT

* Template Scorecard Name
PACT2

Min Score
-19

Max Score
40

Description
This Scorecard implements Trish Bertuzzi's PACT lead qualification framework.

* Sort Order
3

Active
☐

RAG Amber Score
16

RAG Green Score
28

* RAG Amber Score Percent
60.00%

* RAG Green Score Percent
80.00%

Created By
Elvira Curro, 19/01/2020, 15:42

Last Modified By
Elvira Curro, 19/01/2020, 15:42

Owner
Elvira Curro

Cancel Save & New **Save**

Click on the **PACT2** Template Scorecard's **Related** tab.

Template Scorecard
PACT2

Related Details

Template Scorecard Name	PACT2	Min Score	-19
Description	This Scorecard implements Trish Bertuzzi's PACT lead qualification framework.	Max Score	40
Sort Order	3	RAG Amber Score	16
Active	☐	RAG Green Score	28
		RAG Amber Score Percent	60.00%
		RAG Green Score Percent	80.00%

Created By
Elvira Curro, 19/01/2020, 15:42

Owner
Elvira Curro

Last Modified By
Elvira Curro, 19/01/2020, 15:44

Click on the **New** button in the Template Categories related list.

Template Scorecard
PACT2

Related Details

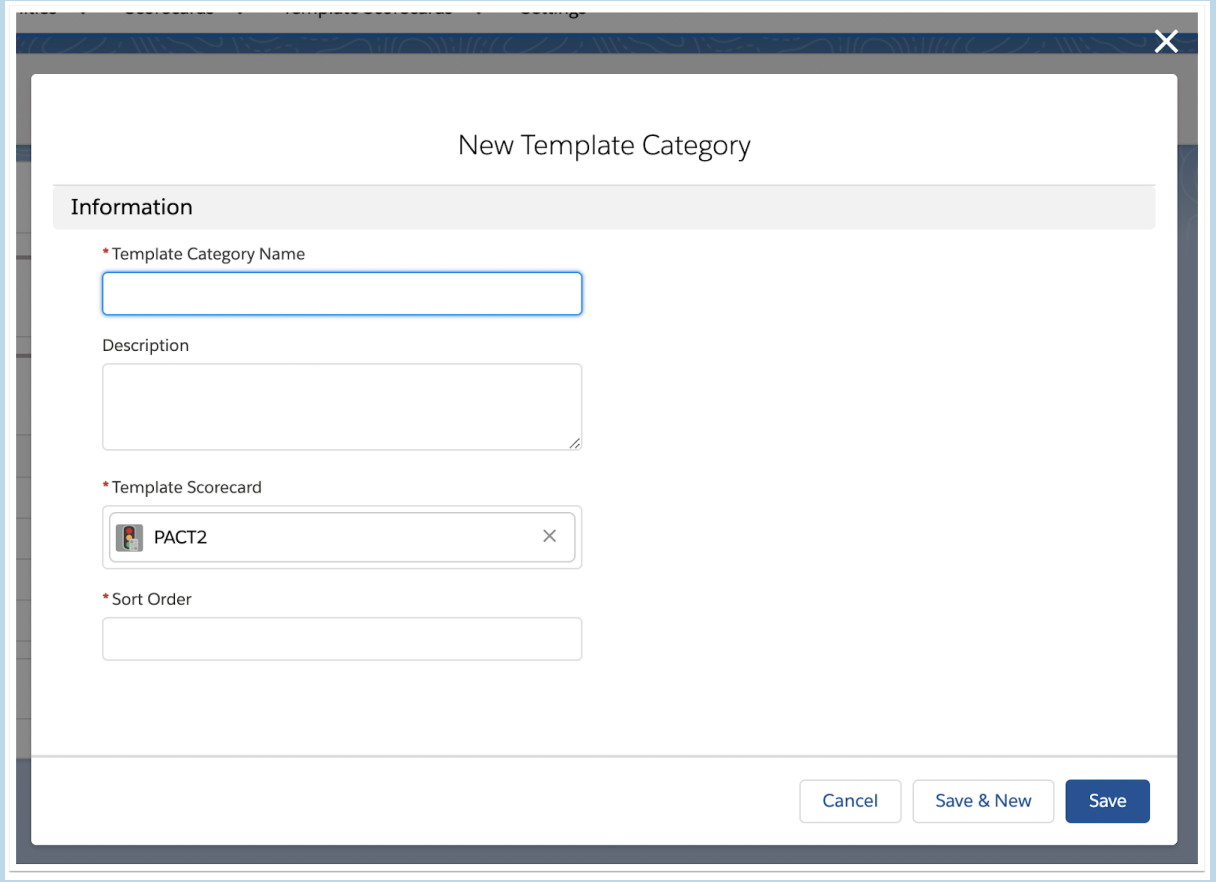
Scorecards (0)

Template Categories (4) [New](#)

TEMPLATE CATEGORY NAME	SORT ORDER	MIN SCORE	MAX SCORE
Pain	0	-2	10
Authority	1	-2	10
Consequence	2	-5	10
Target Profile	3	-10	10

[View All](#)

Which will display the **New Template Category** edit view.



Follow the instructions in the section “How To: Create a Template Scorecard From Scratch” above, to create a new Template Category, Template Criterion and Template Criterion Outcomes as follows. First, create a new Template Category with the following field values:

Field	Value
Template Category Name	Timing
Description	This Category helps us to understand the prospect's buying cycle.
Template Scorecard	Leave this set to its parent <i>PACT2</i> Template Scorecard.
Sort Order	4

Create a child Template Criterion with the following field values:

Field	Value
Template Criterion Name	Does the prospect want to make a purchase within the next 6-months?
Description	Our typical sales cycle is 3-months so any purchases

beyond 6-months should be a lower priority.

Template Category Leave this set to its parent *Timing* Template Category.

Sort Order 0

Create three Template Criterion Outcomes with the following values:

Field	Value
Template Criterion Outcome Name	The prospect wishes to purchase within the next 3-months.
Template Criterion	Leave this set to its parent <i>Does the prospect want to make a purchase within the next 6-months?</i> Template Criterion.
Score	10

Field	Value
Template Criterion Outcome Name	The prospect wishes to purchase within the next 6-months.
Template Criterion	Leave this set to its parent <i>Does the prospect want to make a purchase within the next 6-months?</i> Template Criterion.
Score	7

Field	Value
Template Criterion Outcome Name	The prospect won't be purchasing within the next 6-months.
Template Criterion	Leave this set to its parent <i>Does the prospect want to make a purchase within the next 6-months?</i> Template Criterion.
Score	-2

Now activate the Template Scorecard and create a Scorecard from it, which should look like the following:

Scorecard

Scorecard: John Gardner, 3C Systems

Back to parent Lead

StatusTrendDetail

Full

Score format: PercentWeeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Pain	Do we understand the prospect's business issue?		0%				
Authority	Do we know who the budget holder is?		0%				
Consequence	What is the 'do nothing' impact to the business?		0%				
Target Profile	Is the prospect a US-based SaaS provider with more than 500 employees?		0%				
Timing	Does the prospect want to make a purchase within the next 6-months?		0%				
Scorecard Score:			0%				

6 Summary

In this guide you will have learned how to create a Template Scorecard from scratch and by cloning an existing one. You can now start building your library of Template Scorecards to turbocharge your sales development team!