



Kraytix
FRONTRUNNER

Kraytix FrontRunner User 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

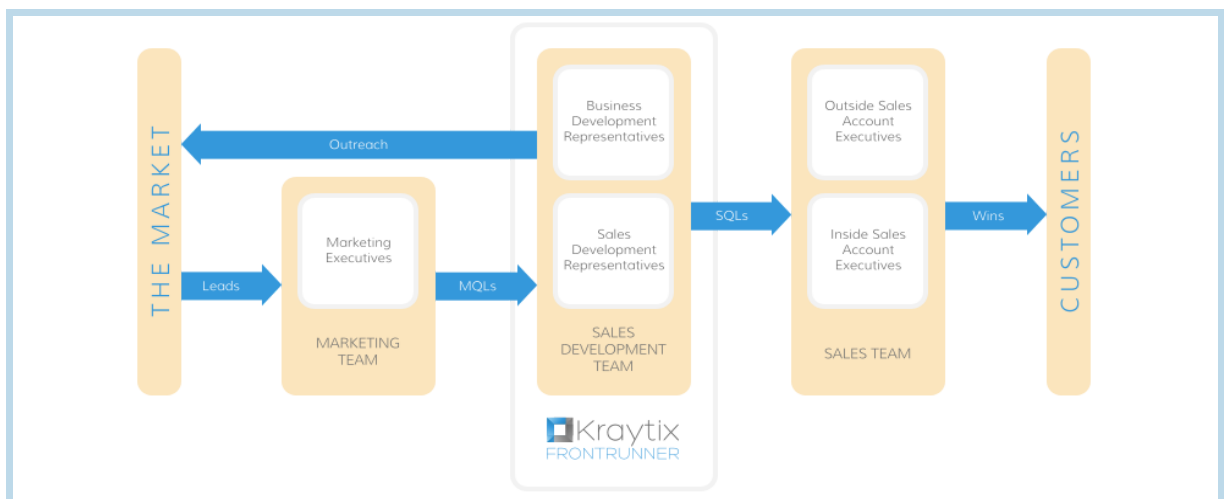
This document is compatible with Kraytix FrontRunner Version 1.11.

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 User Guide describes how sales development representatives can use FrontRunner Scorecards to consistently generate higher quality leads that are passed to account executives.



Note: For an overview of FrontRunner Scorecards, please read the Kraytix FrontRunner - Scorecard 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>).

Scorecards are created from Template Scorecards and attached to Salesforce® Leads or Opportunities. Those Scorecards are then populated with answers (Criterion Outcomes) to the questions (Criteria), that you need to ask prospects. The set of Criteria defines your company's ideal customer profile and qualification criteria. Collecting positive outcomes helps 'qualify in' prospects that are a good fit with your business and where your account executives will have a greater chance of converting them into customers. Prospects that fail to collect enough positive outcomes can be 'qualified out' so that you and your account executives can focus on the best prospects.

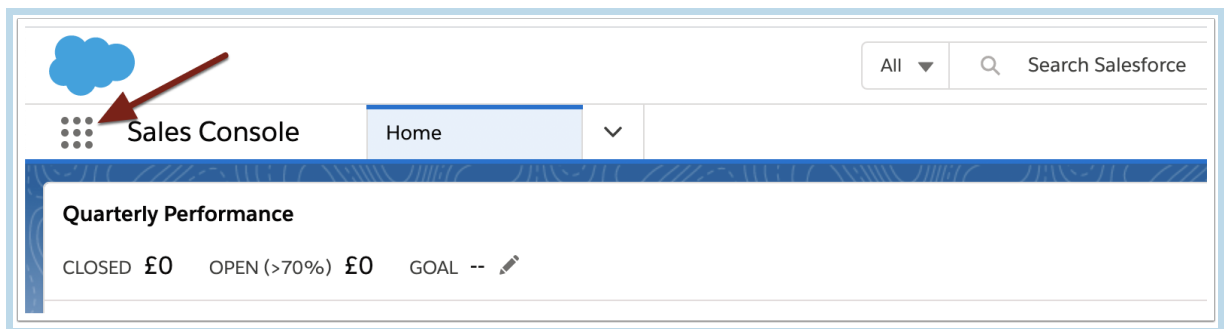
Snapshot Scorecards capture a Scorecard's status at a point in time. Weekly snapshotting allows you to view how your Scorecards are trending and whether or not they are likely to reach their 'qualified in' threshold. You can then decide whether to 'qualify out' the prospect or revisit some of the negative outcomes and determine how to turn them into positive ones.

3 Scorecard Reference

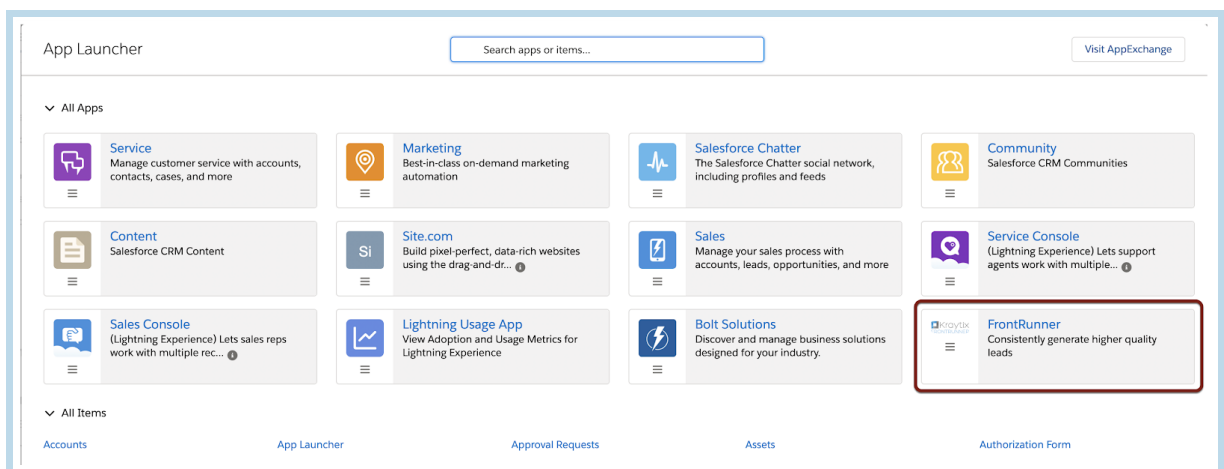
This section familiarises you with Scorecard key concepts before you progress to creating and working with Scorecards.

3.1 Accessing the FrontRunner App

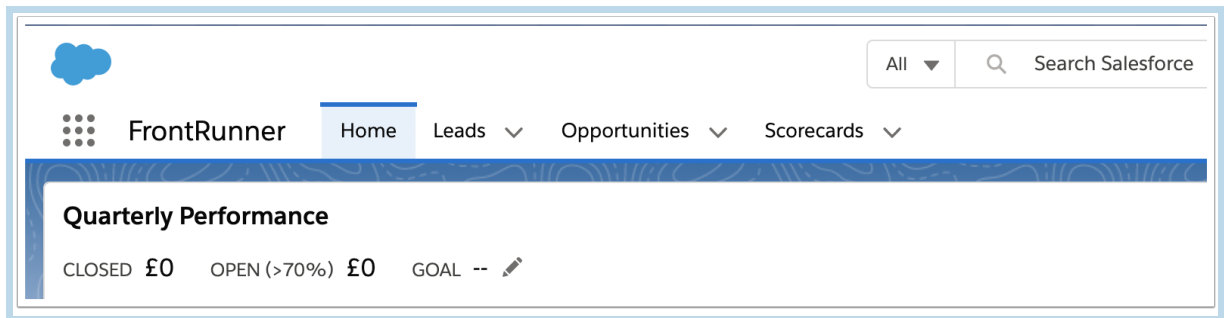
To access the FrontRunner app, open the App Launcher by clicking the  icon on the left side of the navigation bar.



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

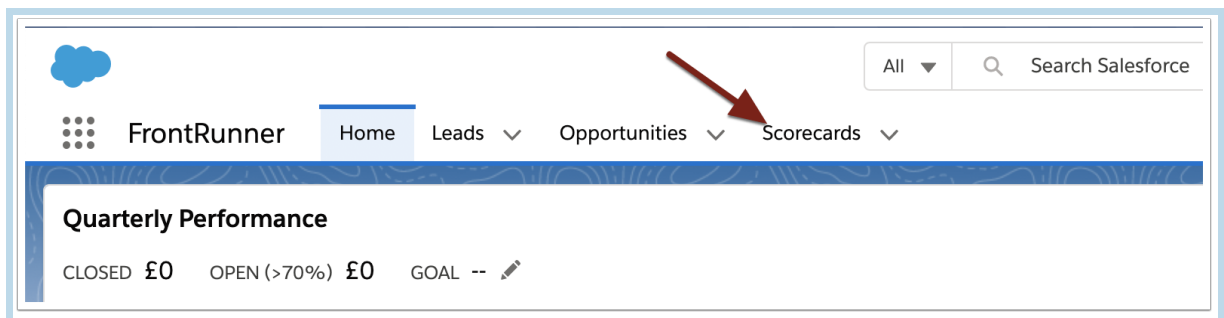


As a FrontRunner User, the following tabs will be visible. The **Home**, **Lead** and **Opportunities** tabs are standard Salesforce® tabs. The **Scorecards** tab allows you to view all the Scorecards that you have permission to see.



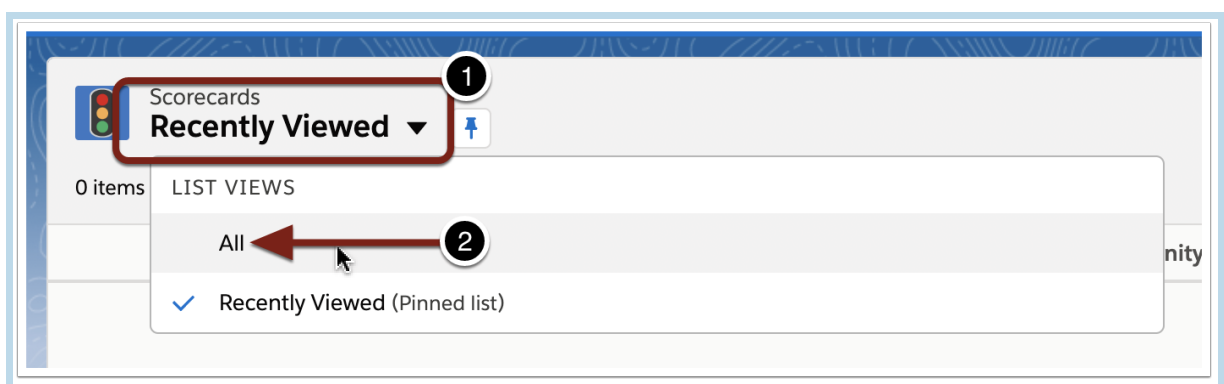
3.2 View all Scorecards

Click on the **Scorecards** tab to see recently viewed Scorecards.



Then perform the following steps:

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



Your list of Scorecards should look similar to the following:

Scorecard Name	Lead	Opportunity	Score	Score Percent	RAG Status
Scorecard: Alan Taylor, Kraytix Shipping	Alan Taylor		16	51.11%	Amber
Scorecard: Jane Jones, Kraytix Autosport	Jane Jones		6	40.00%	Red
Scorecard: John Smith, Kraytix Telecom	John Smith		0	33.33%	Red
Scorecard: Kraytix Aerospace - December Fuel		Kraytix Aerospace - December Fuel	-100	0.00%	Grey
Scorecard: Kraytix Aerospace - September Fuel		Kraytix Aerospace - September Fuel	94	64.67%	Amber



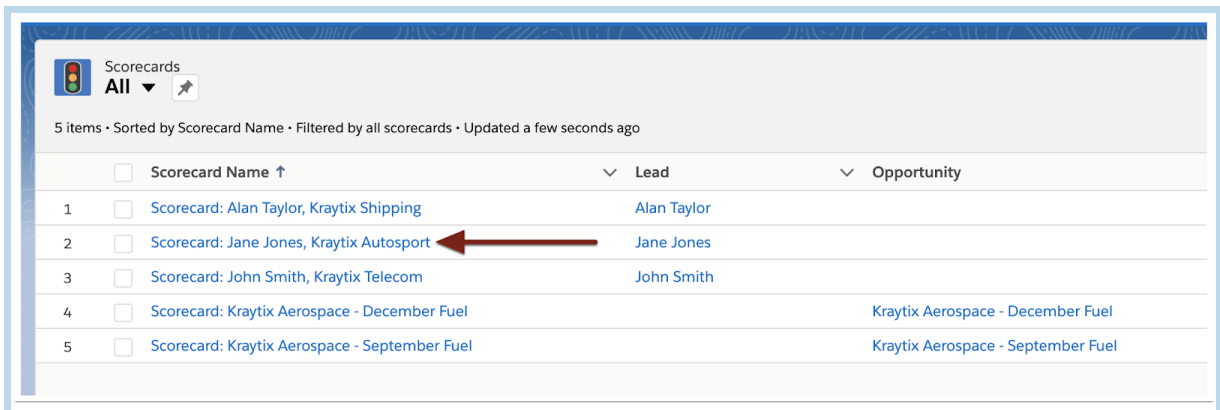
Note: The Scorecards shown are created as an optional step during the Kraytix FrontRunner app installation. For further information, please refer to the Kraytix FrontRunner - Installation Guide, which can be found on the Kraytix website (<http://www.kraytix.com/>) or on the Kraytix FrontRunner Salesforce®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

The columns in the view summarise the current status of all Scorecards that you have permission to see.

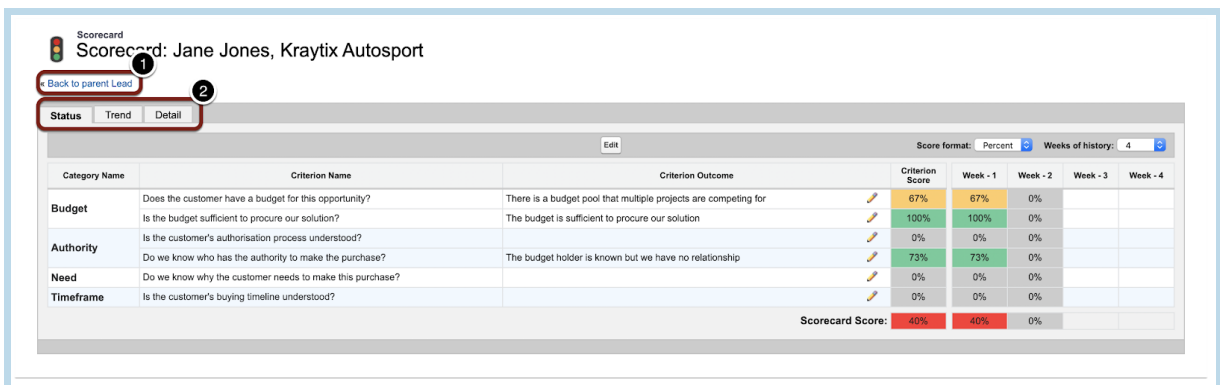
Column	Description
Scorecard Name	A friendly name for the Scorecard that's set when the Scorecard is created from a Template Scorecard.
Lead	If the Scorecard is attached to a Lead, this column will contain the Lead name.
Opportunity	If the Scorecard is attached to an Opportunity, this column will contain the Opportunity name.
Score	The Scorecard's current score.
Score Percent	The Scorecard's current score as a percentage of its range. For example, if a Scorecard's range is -5 to 10 and its Score is 5, the Score Percent would be 66.67%.
RAG Status	The Scorecard can be in one of the following RAG Statuses: - Grey: the FrontRunner User has not started populating the Scorecard yet - Red: the Scorecard's Score is below the Amber threshold - Amber: the Scorecard's Score is between the Amber and Green thresholds - Green: The Scorecard's Score is above the Green threshold Your FrontRunner Administrator sets the thresholds in the Template Scorecard that the Scorecard is created from. The thresholds are used when displaying a Scorecard so that you can easily visualise a Scorecard's status using red/amber/green (RAG) "traffic light" colours and for automating actions such as using Flow to automatically convert a Lead to an Opportunity when the Scorecard's score passes the green threshold.

3.3 View a Scorecard

Later in this guide you will learn how to access a Scorecard from its parent Lead or Opportunity. To view an individual Scorecard from the Scorecard list view in the FrontRunner app, click on the Scorecard name. For example, click on the **Scorecard: Jane Jones, Kraytix Autosport** link.



The Scorecard will be displayed as follows:



The Scorecard includes the following control elements:

Id	Name	Description
1	Back to parent Lead	A link to navigate to the parent Lead's record. Note that this link is named Back to parent Opportunity if the Scorecard is attached to an Opportunity.
2	Status, Trend and Detail tabs	Each tab displays a different view of the Scorecard. Status displays the red/amber/green (RAG) status view. Trend shows a graph that illustrates how the Scorecard's status is trending over time. Detail shows the standard Salesforce detail view for the Scorecard.

3.3.1 Scorecard Status View

If the Scorecard's Status view is not already displayed, click on the **Status** tab.

Scorecard: Jane Jones, Kraytix Autosport

« Back to Lead

1 2 3 4 5 6 7 8 9 10

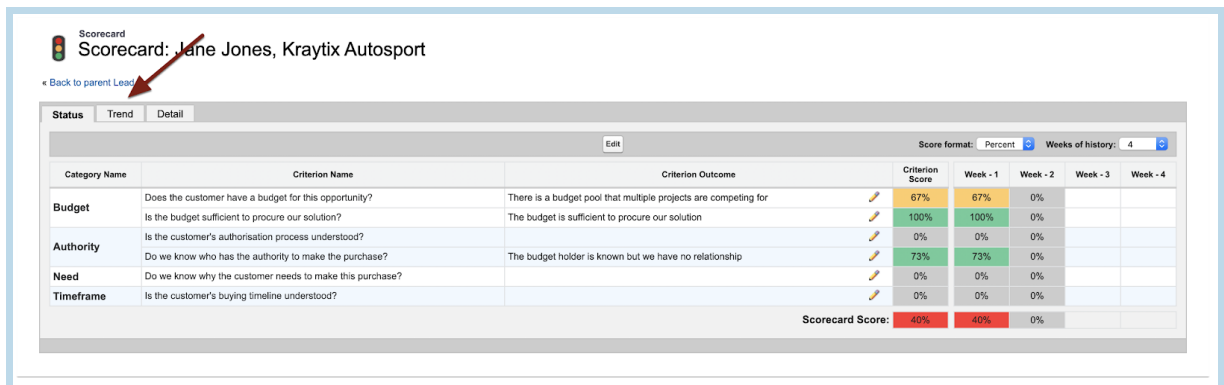
Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for	67%	67%	0%		
	Is the budget sufficient to procure our solution?	The budget is sufficient to procure our solution	100%	100%	0%		
Authority	Is the customer's authorisation process understood?		0%	0%	0%		
	Do we know who has the authority to make the purchase?	The budget holder is known but we have no relationship	73%	73%	0%		
Need	Do we know why the customer needs to make this purchase?		0%	0%	0%		
	Is the customer's buying timeline understood?		0%	0%	0%		
Timeframe							
Scorecard Score:			40%	40%	0%		

The Scorecard Status view consists of the following:

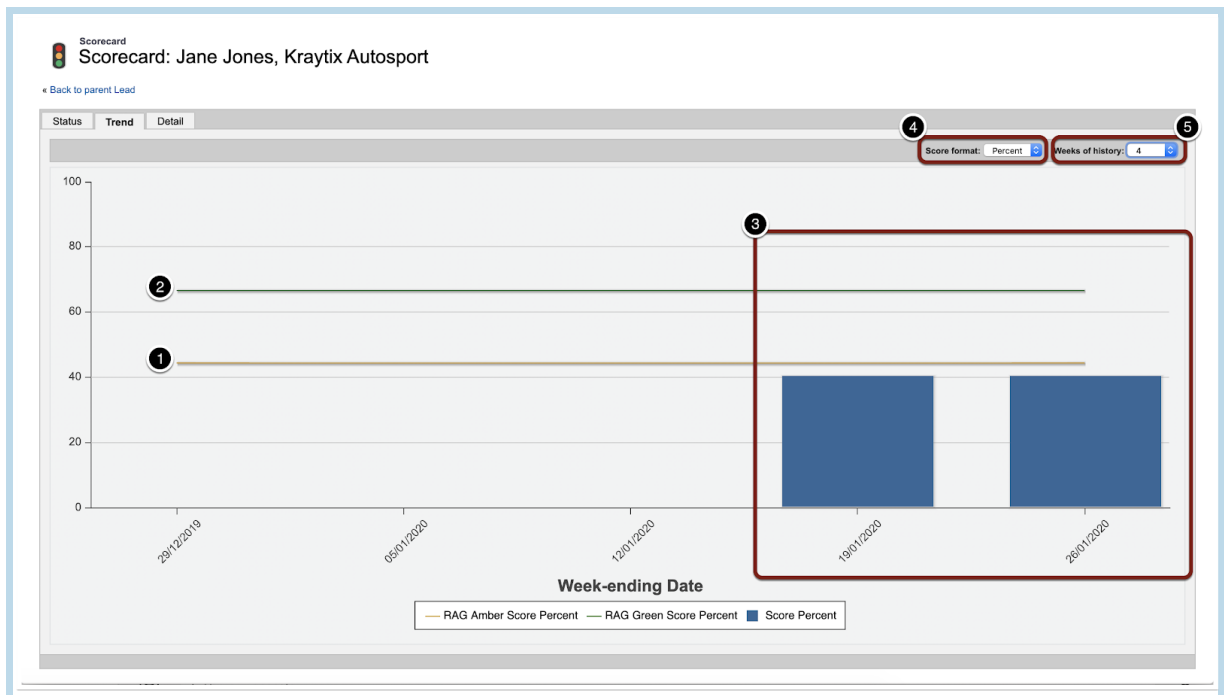
Id	Name	Description
1	Category Names	The names of all the Categories in the Scorecard.
2	Criterion Names	The names of the Criteria in each Category.
3	Criterion Outcomes	The selected answer for each Criterion 'question'.
4	Edit Pencils	Used to place an individual Criterion into single Criterion edit mode.
5	Criterion Scores	The score associated with the selected Criterion Outcome.
6	Snapshot Scorecards	The weekly Scorecard snapshots. Note that regardless of how many Snapshot Scorecards are created in a week, only the latest one in the week is shown.
7	Scorecard Scores	The current Scorecard score and the scores for the weekly Snapshot Scorecards, which are the sum of the child Categories and Snapshot Categories respectively.
8	Edit	Places the Scorecard into bulk Criterion edit mode where multiple Criteria can be updated and saved concurrently.
9	Score Format	Selects whether the Scorecard's Score or Score Percent is displayed.
10	Weeks of History	Changes the number of weeks of Snapshot Scorecards that are displayed.

3.3.2 Scorecard Trend View

Click the **Trend** tab to activate the **Trend** view.



The Scorecard **Trend** view is displayed.



The Scorecard **Trend** view consists of the following:

Id	Name	Description
1	RAG Amber Threshold	A line that indicates when the Scorecard colour will change from red to amber.
2	RAG Green Threshold	A line that indicates when the Scorecard colour will change from amber to green.
3	Scorecard Scores or Score Percentages	Graphs the current Scorecard and historical Snapshot Scorecard Score (if the Score Format is set to <i>Score</i>) or Score Percent (if the Score Format is set to <i>Percent</i>).

- | | | |
|---|-------------------------|--|
| 4 | Score Format | Selects whether the Scorecard's Score or Score Percent is displayed. |
| 5 | Weeks of History | Changes the number of weeks of Snapshot Scorecards that are displayed. |

3.3.3 Scorecard Detail View

Click the **Detail** tab to activate the **Detail** view.

Scorecard: Jane Jones, Kraytix Autosport

« Back to parent Lead

Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for	67%	67%	0%		
	Is the budget sufficient to procure our solution?	The budget is sufficient to procure our solution	100%	100%	0%		
Authority	Is the customer's authorisation process understood?		0%	0%	0%		
	Do we know who has the authority to make the purchase?	The budget holder is known but we have no relationship	73%	73%	0%		
Need	Do we know why the customer needs to make this purchase?		0%	0%	0%		
Timeframe	Is the customer's buying timeline understood?		0%	0%	0%		
Scorecard Score:				40%	40%	0%	

The Scorecard **Detail** view is displayed.

Scorecard: Jane Jones, Kraytix Autosport

« Back to parent Lead

Scorecard Detail

Scorecard Name: Scorecard: Jane Jones, Kraytix Autosport
 Description:
 Template Scorecard: BANT
 Lead: Jane Jones, Kraytix Autosport
 Opportunity:
 Started: ☒
 Score: 6
 Score Percent: 40.00%
 RAG Status: Red
 Created By: Ivan Harris, 24/01/2020 09:02
 Owner: Ivan Harris (Change)
 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%
 Last Modified By: Ivan Harris, 24/01/2020 09:03

Snapshot Scorecards

New Snapshot Scorecard

Action	Snapshot Scorecard Name	Started	Snapshot Datetime	Score	Score Percent	RAG Status
Edit	Scorecard: Jane Jones, Kraytix Autosport	☒	14/01/2020 09:03	6	40.00	Red
Edit	Scorecard: Jane Jones, Kraytix Autosport	☐	10/01/2020 09:03	-30	0.00	Grey

Categories

Action	Category Name	Sort Order	Started	Score	Score Percent	RAG Status
Edit Del	Budget	0	☒	15	83.33	Green
Edit Del	Authority	1	☒	1	36.57	Red
Edit Del	Need	2	☐	-5	0.00	Grey
Edit Del	Timeframe	3	☐	-5	0.00	Grey

« Back To Top

Always show me [more records per related list](#)

The Scorecard **Detail** view consists of the following sections:

Id	Name	Description
1	Scorecard Detail	In addition to standard Salesforce fields, such as Created By and Last Modified By , this section includes Scorecard custom fields such as Score , Score Percent and RAG Status .
2	Snapshot Scorecards	This section shows all of the Snapshot Scorecards for this Scorecard.
3	Categories	This Scorecard's child Categories are shown in this section.

3.4 View a Category

Occasionally you may want to focus on a specific Category, in which case you can drill down to the Category by clicking on the Category Name in the Scorecard. For example, click on the **Authority** Category.

Scorecard: Jane Jones, Kraytix Autosport

« Back to parent Lead

Status Trend Detail

Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for	67%	67%	0%		
	Is the budget sufficient to procure our solution?	The budget is sufficient to procure our solution	100%	100%	0%		
Authority	Is the customer's authorisation process understood?		0%	0%	0%		
	Do we know who has the authority to make the purchase?	The budget holder is known but we have no relationship	73%	73%	0%		
Need	Do we know why the customer needs to make this purchase?		0%	0%	0%		
	Is the customer's buying timeline understood?		0%	0%	0%		
Timeframe							
			Scorecard Score:	40%	40%	0%	

The layout is similar to the Scorecard layout.

Category: Authority

« Back to parent Lead

« Back to Scorecard: Scorecard: Jane Jones, Kraytix Autosport

Status Trend Detail

Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Authority	Is the customer's authorisation process understood?		0%	0%	0%		
	Do we know who has the authority to make the purchase?	The budget holder is known but we have no relationship	73%	73%	0%		
			Category Score:	37%	37%	0%	

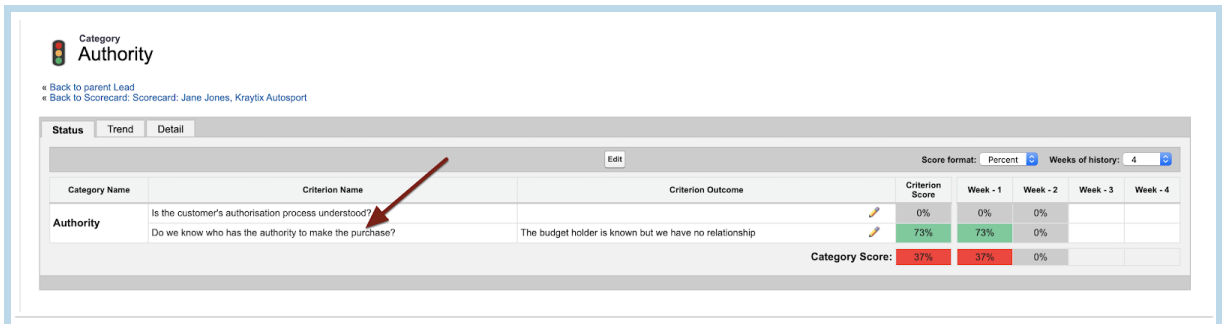
The differences between the Scorecard layout and the Category layout are:

Id	Name	Description
1	Scorecard link	This link lets you easily navigate back to the parent Scorecard.
2	Category Scores	The current Category score and the scores for the weekly Snapshot Categories, which are the sum of the child Criteria and Snapshot Criteria respectively.

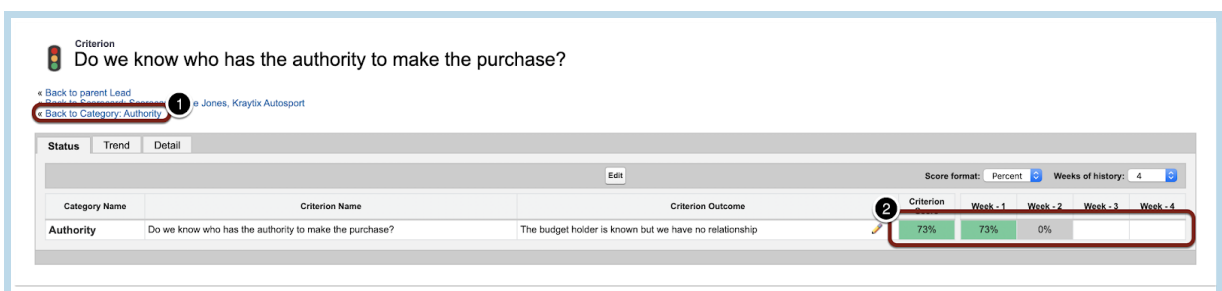
Note that the Category **Trend** and **Detail** views are also similar to the Scorecard equivalents so we will not explain further here. Feel free to explore!

3.5 View a Criterion

You can also drill down to a specific Criterion by clicking on the Criterion Name in either a Scorecard or a Category. For example, click on the **Do we know who has the authority to make the purchase?** Criterion.



The layout is similar to the Scorecard and Category layout.



The differences between the Scorecard and Category layouts and the Criterion layout are:

Id	Name	Description
1	Category link	In addition to the Scorecard link, which will take you back to the grand-parent Scorecard, this link lets you navigate back to the parent Category.
2	Criterion Scores	There are no summed scores for Criteria as they do not drill down to multiple child elements. So the current Criterion score and the scores for the weekly Snapshot Criteria are shown.

Note that as with Categories, the Criterion **Trend** and **Detail** views are also similar to the Scorecard and Category equivalents so we will not explain further here.

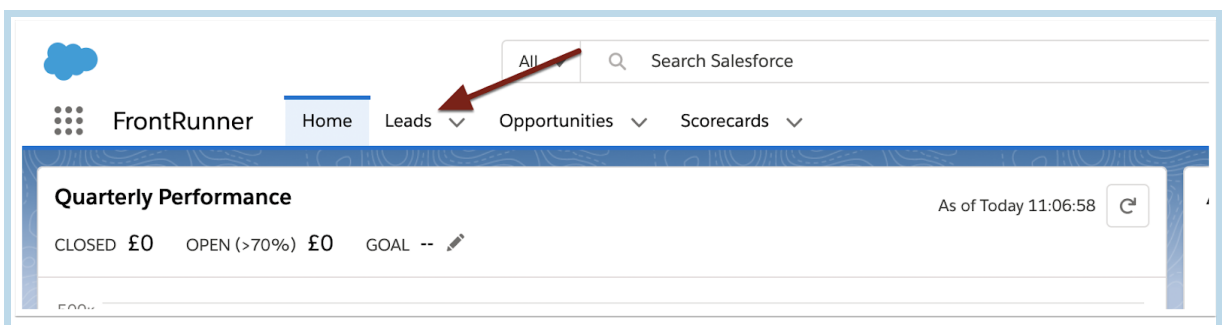
3.6 Scorecard Related Lists

You will find that Salesforce Leads and Opportunities have had a new related list added by your FrontRunner Administrator when the app was installed and configured. This list shows all the Scorecards that have been attached to a Lead or Opportunity. This guide will use Leads; however, Opportunities behave in the same way.



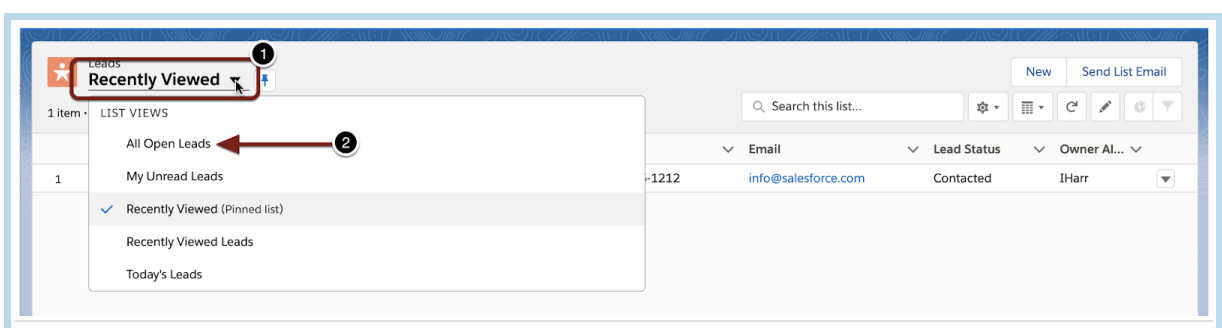
Note: In most circumstances a Lead or Opportunity will only have a single Scorecard attached; however, you may want to use multiple Scorecards for Lead or Opportunity qualification, for example a Scorecard for your ideal customer profile and another for lead qualification criteria. The former may be completed by the marketing team and the latter completed by the sales development team.

Navigate to the Lead list view by clicking the **Leads** tab.

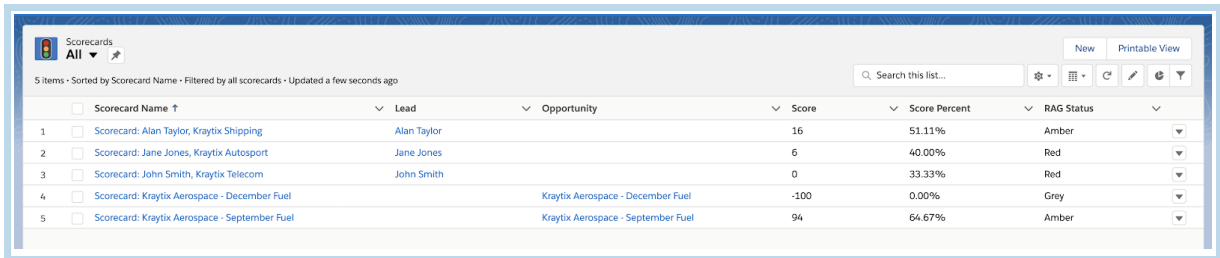


Then perform the following steps:

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



Your list of Leads should look similar to the following:

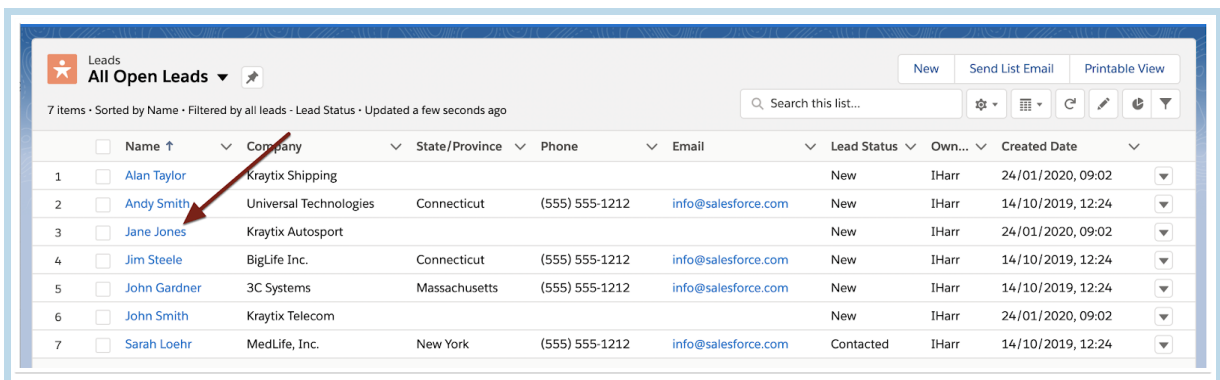


	Scorecard Name ↑	Lead	Opportunity	Score	Score Percent	RAG Status
1	Scorecard: Alan Taylor, Kraytix Shipping	Alan Taylor		16	51.11%	Amber
2	Scorecard: Jane Jones, Kraytix Autosport	Jane Jones		6	40.00%	Red
3	Scorecard: John Smith, Kraytix Telecom	John Smith		0	33.33%	Red
4	Scorecard: Kraytix Aerospace - December Fuel		Kraytix Aerospace - December Fuel	-100	0.00%	Grey
5	Scorecard: Kraytix Aerospace - September Fuel		Kraytix Aerospace - September Fuel	94	64.67%	Amber



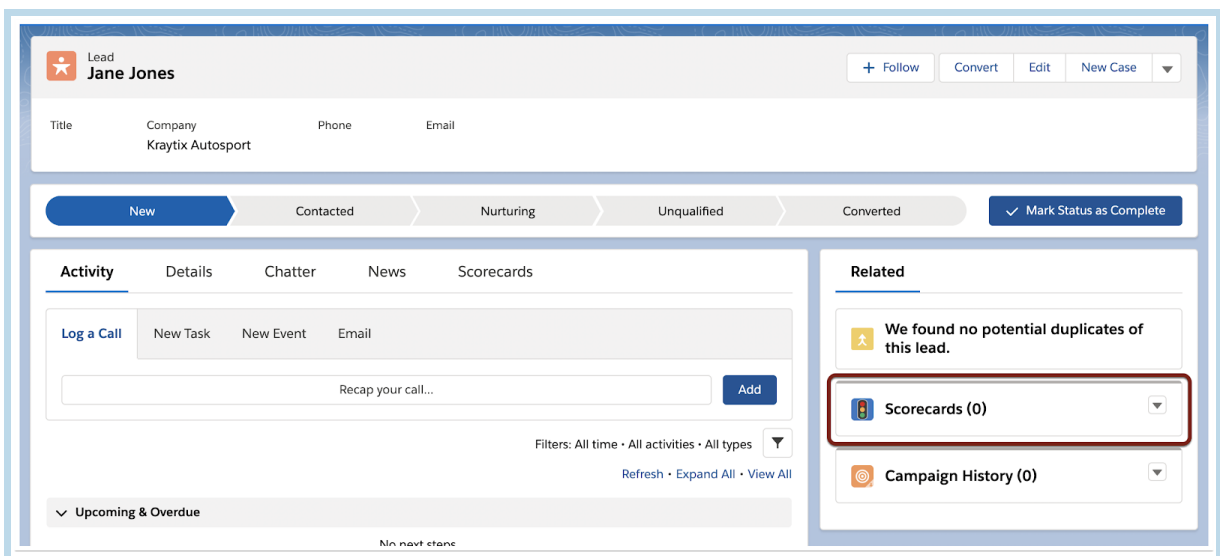
Note: The Leads for the companies Kraytix Shipping, Kraytix Autosport and Kraytix Telecom are created as an optional step during the Kraytix FrontRunner app installation. For further information, please refer to the Kraytix FrontRunner - Installation Guide, which can be found on the Kraytix website (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

Click on a Lead's **Name** link, for example the **Jane Jones** link.



	Name ↑	Company	State/Province	Phone	Email	Lead Status	Own...	Created Date
1	Alan Taylor	Kraytix Shipping				New	IHarr	24/01/2020, 09:02
2	Andy Smith	Universal Technologies	Connecticut	(555) 555-1212	info@salesforce.com	New	IHarr	14/10/2019, 12:24
3	Jane Jones	Kraytix Autosport				New	IHarr	24/01/2020, 09:02
4	Jim Steele	BigLife Inc.	Connecticut	(555) 555-1212	info@salesforce.com	New	IHarr	14/10/2019, 12:24
5	John Gardner	3C Systems	Massachusetts	(555) 555-1212	info@salesforce.com	New	IHarr	14/10/2019, 12:24
6	John Smith	Kraytix Telecom				New	IHarr	24/01/2020, 09:02
7	Sarah Loehr	MedLife, Inc.	New York	(555) 555-1212	info@salesforce.com	Contacted	IHarr	14/10/2019, 12:24

If the Lead has not yet had a Scorecard attached to it, the related list will look like the following:



Lead: Jane Jones

Follow Convert Edit New Case

Title Company Phone Email

Kraytix Autosport

New Contacted Nurturing Unqualified Converted Mark Status as Complete

Activity Details Chatter News Scorecards

Log a Call New Task New Event Email

Recap your call... Add

Filters: All time • All activities • All types Refresh Expand All View All

Upcoming & Overdue No next steps

Related

We found no potential duplicates of this lead.

Scorecards (0)

Campaign History (0)

You will learn how to create a Scorecard in a later section.

If the Lead has at least one Scorecard attached to it, the related list will look like the following. To view the Scorecard, simply click on the Scorecard link, in this example click the **Scorecard: Jane Jones, Kraytix Autosport** link.

Lead: Jane Jones

Follow Convert Edit New Case

Title Company Phone Email
Kraytix Autosport

New Contacted Nurturing Unqualified Converted Mark Status as Complete

Activity Details Chatter News Scorecards

Log a Call New Task New Event Email

Recap your call... Add

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity.
Past meetings and tasks marked as done show up here.

Related

We found no potential duplicates of this lead.

Scorecards (1)

Scorecard: Jane Jones, Kraytix Autosport

Score: 6
Score Perce... 40.00%
RAG Status: Red

View All

Campaign History (0)

This will take you to the FrontRunner app and the Scorecard's **status** view that we explored earlier.

Scorecard: Jane Jones, Kraytix Autosport

Back to parent Lead

Status Trend Detail

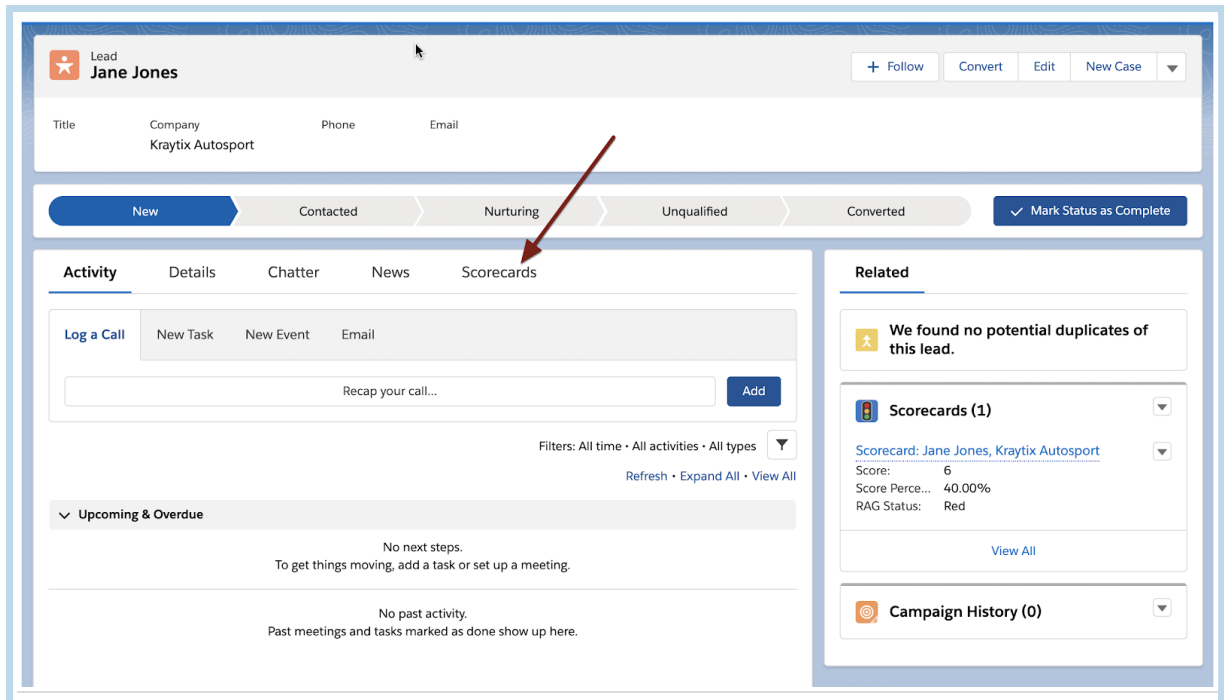
Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for	67%	67%	0%		
	Is the budget sufficient to procure our solution?	The budget is sufficient to procure our solution	100%	100%	0%		
Authority	Is the customer's authorisation process understood?		0%	0%	0%		
	Do we know who has the authority to make the purchase?	The budget holder is known but we have no relationship	73%	73%	0%		
Need	Do we know why the customer needs to make this purchase?		0%	0%	0%		
	Is the customer's buying timeline understood?		0%	0%	0%		
Timeframe							
Scorecard Score:				40%	40%	0%	

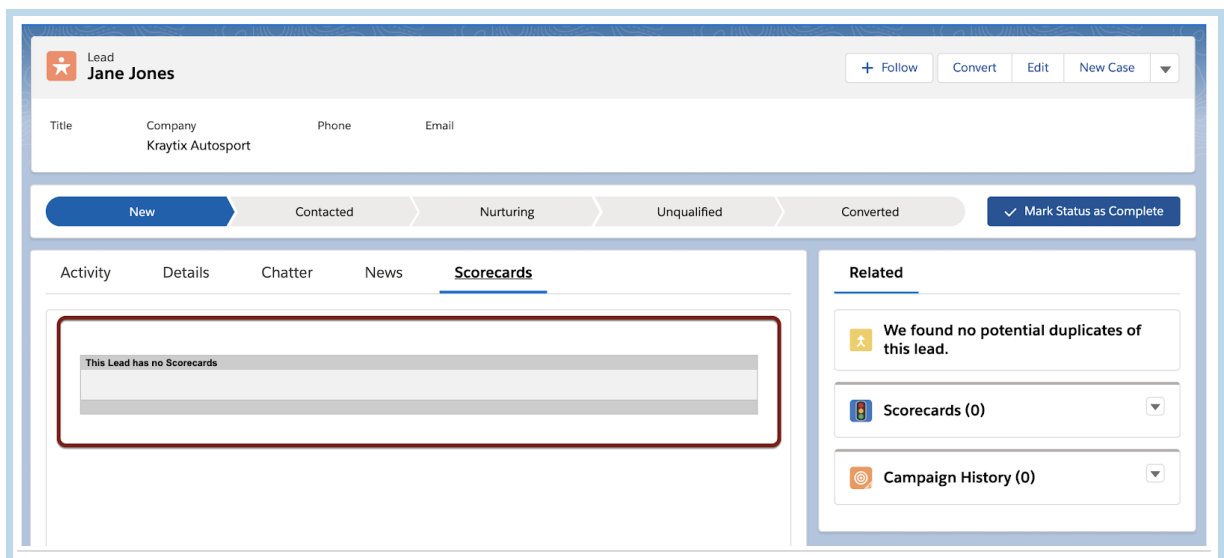
3.7 Scorecard Component

During the FrontRunner app installation and configuration, your FrontRunner Administrator will also have added a Scorecard Component to your Lead and Opportunity Lightning Experience Record Pages so that you can view and update the Scorecard directly from within the Lead or Opportunity.

To access the Scorecard Component, click the **Scorecards** tab when viewing a Lead.



If the Lead has not yet had a Scorecard attached to it, the Scorecard Component will look like the following:



If the Lead has at least one Scorecard attached to it, the Scorecard Component will look like the following:

The screenshot displays the Kraytix Lead interface for Jane Jones, Kraytix Autosport. The lead is in the 'New' stage of the pipeline. The 'Scorecards' tab is selected, showing a detailed scorecard for Jane Jones, Kraytix Autosport. The scorecard is a table with columns for Category Name, Criterion Name, Criterion Outcome, Criterion Score, and a 4-week history. The total Scorecard Score is 40%.

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week -1	Week -2	Week -3	Week -4
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for	67%	67%	0%		
	Is the budget sufficient to procure our solution?	The budget is sufficient to procure our solution	100%	100%	0%		
Authority	Is the customer's authorisation process understood?		0%	0%	0%		
	Do we know who has the authority to make the purchase?	The budget holder is known but we have no relationship	73%	73%	0%		
Need	Do we know why the customer needs to make this purchase?		0%	0%	0%		
	Is the customer's buying timeline understood?		0%	0%	0%		
Timeframe							
Scorecard Score:			40%	40%	0%		

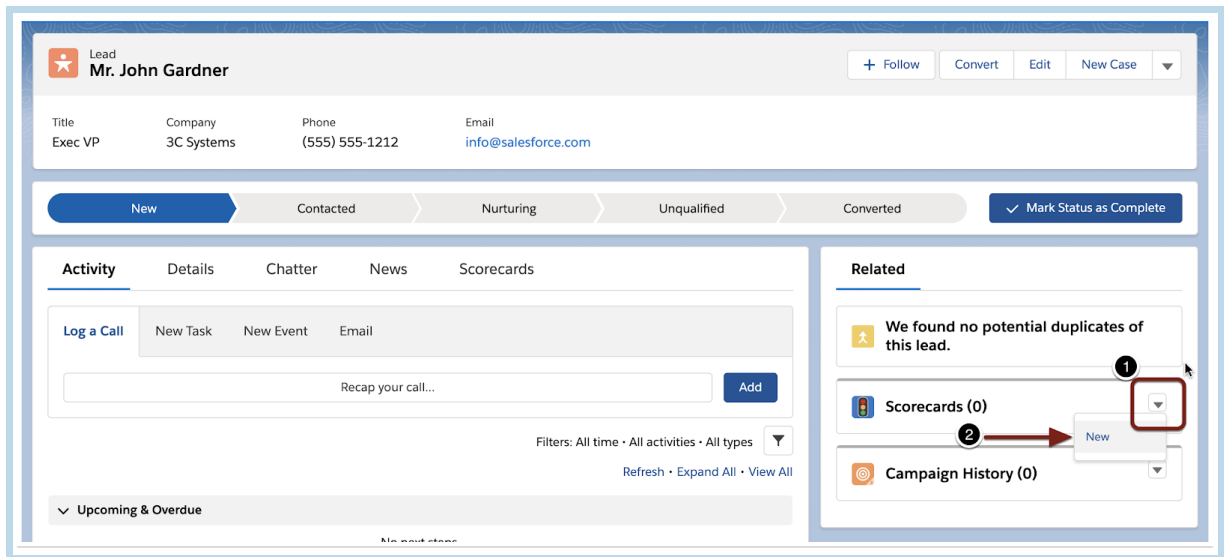
The right sidebar shows a 'Related' section with a message: 'We found no potential duplicates of this lead.' Below this, there is a 'Scorecards (1)' section showing the scorecard for Jane Jones, Kraytix Autosport with a score of 6, a score percentage of 40.00%, and a RAG status of Red. There is also a 'Campaign History (0)' section.

Note that the Scorecard Component only shows the Scorecard's **Status** view. To see the Scorecard's **Trend** and **Detail** views, navigate to the Scorecard in the Scorecard app using the related list. You can interact with the Scorecard **Status** view in exactly the same way you did when interacting with the Scorecard **Status** view in the Scorecard App, as described earlier.

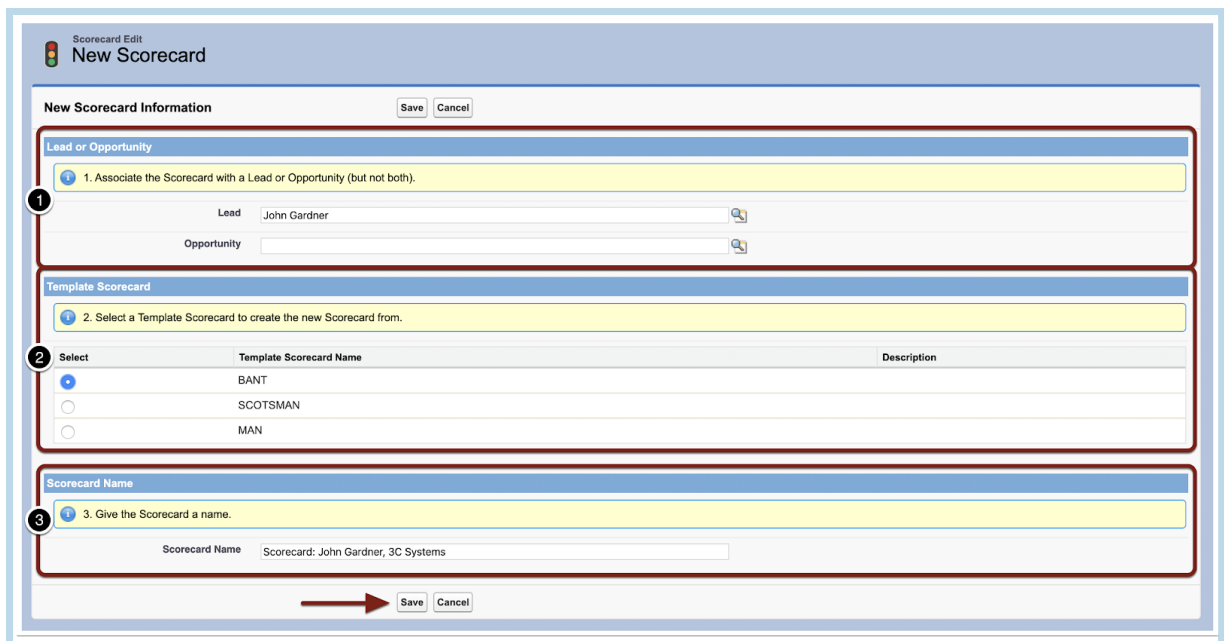
4 How To: Create a Scorecard

To create a Scorecard, open a Lead or Opportunity and in the Scorecard related list perform the following steps:

1. Click the **action menu** in the Scorecard related list
2. Click the **New** menu item



The **New Scorecard** page will open as follows:



The New Scorecard page consists of the following sections:

Id	Name	Description
1	Lead or Opportunity	The Lead or Opportunity that the new Scorecard will be attached to. This section defaults to the Lead or Opportunity that the new Scorecard is being created from. Leave the default value.
2	Template Scorecard	This section lists the Template Scorecards that you can create the Scorecard from. The Template Scorecards are built and maintained in your company's Template Scorecard Library by your FrontRunner Administrator. Select the BANT Template Scorecard.
3	Scorecard Name	A friendly name that helps you locate the Scorecard in a list of Scorecards. Leave the default value.

Note: For Leads the Scorecard name defaults to 'Scorecard: {Lead First Name} {Lead Last Name}, {Lead Company}'. For Opportunities the Scorecard name defaults to 'Scorecard: {Opportunity Name}'.

Click the Save button to view the newly created Scorecard.

Scorecard: John Gardner, 3C Systems

« Back to parent Lead

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?		0%				
	Is the budget sufficient to procure our solution?		0%				
Authority	Is the customer's authorisation process understood?		0%				
	Do we know who has the authority to make the purchase?		0%				
Need	Do we know why the customer needs to make this purchase?		0%				
Timeframe	Is the customer's buying timeline understood?		0%				
Scorecard Score:				0%			

5 How To: Edit a Scorecard

Scorecards can be edited in two modes: 1) single Criterion edit mode and 2) bulk Criterion edit mode.

5.1 Single Criterion Edit Mode

Navigate to a Scorecard from a Lead or Opportunity related list, or from the Scorecard list view in the Scorecard app as described above. We will edit the Scorecard that you have just created for the John Gardner lead.

To edit a single Criterion, click the **Edit Pencil** next to the Criterion that you want to edit. For example, click on the **Edit Pencil** next to the **Does the customer have a budget for this opportunity?** Criterion.

Scorecard: John Gardner, 3C Systems

« Back to parent Lead

Status Trend Detail

Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?		0%				
	Is the budget sufficient to procure our solution?		0%				
Authority	Is the customer's authorisation process understood?		0%				
	Do we know who has the authority to make the purchase?		0%				
Need	Do we know why the customer needs to make this purchase?		0%				
Timeframe	Is the customer's buying timeline understood?		0%				
Scorecard Score:			0%				

The Scorecard will enter single Criterion edit mode.

Scorecard: John Gardner, 3C Systems

« Back to parent Lead

Status Trend Detail

Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?	---None---	0%				
	Is the budget sufficient to procure our solution?		0%				
Authority	Is the customer's authorisation process understood?		0%				
	Do we know who has the authority to make the purchase?		0%				
Need	Do we know why the customer needs to make this purchase?		0%				
Timeframe	Is the customer's buying timeline understood?		0%				
Scorecard Score:			0%				

The Scorecard Status View now has the following elements:

Id	Name	Description
1	Save and Cancel buttons	To save your changes and exit single Criterion edit mode, click the Save button. To exit single Criterion edit mode without saving your changes, click the Cancel button.
2	Criterion Outcome	This picklist contains the Criterion Outcome options that you can

picklist

select from for this Criterion. Think of Criterion Outcomes as the possible 'answers' to the 'question' asked by the Criterion.

Click on the **Criterion Outcome** picklist to view the Criterion Outcomes available for this Criterion. Select the **There is a budget pool that multiple projects are competing for (5)** Criterion Outcome.

Scorecard
Scorecard: John Gardner, 3C Systems

« Back to parent Lead

Status Trend Detail

Save Cancel Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for (5)			
	Is the budget sufficient to procure our				

0%



Note: The number after the Criterion Outcome name is the Criterion Outcome score, which was allocated by your FrontRunner Administrator when the Template Scorecard was created. The selected Criterion Outcome score becomes the Criterion's score. Criterion scores are summed to become Category scores and Category scores are summed to become the Scorecard score. The higher the Scorecard score, the better qualified your Lead or Opportunity is!

Click the **Save** button.

Scorecard
Scorecard: John Gardner, 3C Systems

« Back to parent Lead

Status Trend Detail

Save Cancel Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for (5)	0%				
	Is the budget sufficient to procure our solution?		0%				
Authority	Is the customer's authorisation process understood?		0%				
	Do we know who has the authority to make the purchase?		0%				
Need	Do we know why the customer needs to make this purchase?		0%				
	Is the customer's buying timeline understood?		0%				
Timeframe	Is the customer's buying timeline understood?		0%				

Scorecard Score: 0%

Note that the Criterion and Scorecard scores have been updated and the Criterion's red/amber/green colour has changed to amber.

Scorecard: John Gardner, 3C Systems

« Back to parent Lead

Status Trend Detail

Edit

Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for	67%				
	Is the budget sufficient to procure our solution?		0%				
Authority	Is the customer's authorisation process understood?		0%				
	Do we know who has the authority to make the purchase?		0%				
Need	Do we know why the customer needs to make this purchase?		0%				
	Is the customer's buying timeline understood?		0%				
Scorecard Score:			11%				

5.2 Bulk Criterion Edit Mode

Multi Criterion edit mode is entered by clicking the **Edit** button on the Scorecard Status View.

Scorecard: John Gardner, 3C Systems

« Back to parent Lead

Status Trend Detail

Edit

Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for	67%				
	Is the budget sufficient to procure our solution?		0%				
Authority	Is the customer's authorisation process understood?		0%				
	Do we know who has the authority to make the purchase?		0%				
Need	Do we know why the customer needs to make this purchase?		0%				
	Is the customer's buying timeline understood?		0%				
Scorecard Score:			11%				

You will notice that all of the Criterion Outcomes have become editable. Use the Criterion Outcome picklists to change the values for the remaining Criteria, then click the **Save** button.

Scorecard: John Gardner, 3C Systems

« Back to parent Lead

Status Trend Detail

Save Cancel

Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for (5)	67%				
	Is the budget sufficient to procure our solution?	--None--	0%				
Authority	Is the customer's authorisation process understood?	--None--	0%				
	Do we know who has the authority to make the purchase?	--None--	0%				
Need	Do we know why the customer needs to make this purchase?	--None--	0%				
	Is the customer's buying timeline understood?	--None--	0%				
Scorecard Score:			11%				

The updated Scorecard might look like the following, depending on what Criterion Outcomes you selected.

Scorecard: John Gardner, 3C Systems

« Back to parent Lead

Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for	67%				
	Is the budget sufficient to procure our solution?	The budget is insufficient to procure our solution, but the opp is must win	80%				
Authority	Is the customer's authorisation process understood?	The customer's authorisation process has been shared with us	100%				
	Do we know who has the authority to make the purchase?	The customer will not share the budget holder's details with us	0%				
Need	Do we know why the customer needs to make this purchase?	The procurement drivers are partially understood from a range of sources	80%				
Timeframe	Is the customer's buying timeline understood?	The buying timelines have been officially shared with us	100%				
Scorecard Score:				71%			

6 How To: Snapshot a Scorecard

Snapshot Scorecards allow you to see how your Scorecards are trending over time so you can decide which prospects to focus on. Snapshots are created from the Scorecard Detail View. Click on the **Detail** tab.

Scorecard: John Gardner, 3C Systems

« Back to parent Lead

Score format: Percent Weeks of history: 4

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for	67%				
	Is the budget sufficient to procure our solution?	The budget is insufficient to procure our solution, but the opp is must win	80%				
Authority	Is the customer's authorisation process understood?	The customer's authorisation process has been shared with us	100%				
	Do we know who has the authority to make the purchase?	The customer will not share the budget holder's details with us	0%				
Need	Do we know why the customer needs to make this purchase?	The procurement drivers are partially understood from a range of sources	80%				
Timeframe	Is the customer's buying timeline understood?	The buying timelines have been officially shared with us	100%				
Scorecard Score:				71%			

Scroll down to the Snapshot Scorecards related list and click the **New Snapshot Scorecard** button.

Scorecard: John Gardner, 3C Systems

« Back to parent Lead

Status Trend Detail

Scorecard Detail

Scorecard Name	Scorecard: John Gardner, 3C Systems	Min Score	-30
Description		Max Score	60
Template Scorecard	BANT	RAG Amber Score	10
Lead	John Gardner, 3C Systems	RAG Green Score	30
Opportunity		RAG Amber Score Percent	44.44%
Started	✓	RAG Green Score Percent	66.67%
Score	34		
Score Percent	71.11%		
RAG Status	Green		
Created By	Jim Brown, 24/01/2020 11:53	Last Modified By	Jim Brown, 24/01/2020 12:04
Owner	Jim Brown (Change)		

Snapshot Scorecards

New Snapshot Scorecard

No records to display

Categories

Action	Category Name	Sort Order	Started	Score	Score Percent	RAG Status
Edit Del	Budget	0	✓	12	73.33	Green

A confirmation page will open. Click on the **Snapshot** button to confirm that you want to create a new Snapshot Scorecard.

Scorecard: John Gardner, 3C Systems

Create Snapshot Scorecard Confirmation

Create Snapshot Scorecard

Snapshot Cancel

Click Snapshot to confirm that you wish to create a snapshot of the 'Scorecard: John Gardner, 3C Systems' Scorecard.

A new Snapshot Scorecard will be shown in the Snapshot Scorecards related list.

Created By Jim Brown, 24/01/2020 11:53 Last Modified By Jim Brown, 24/01/2020 12:04

Owner Jim Brown (Change)

Snapshot Scorecards

New Snapshot Scorecard

Action	Snapshot Scorecard Name	Started	Snapshot Subtime	Score	Score Percent	RAG Status
Edit	Scorecard: John Gardner, 3C Systems	✓	24/01/2020 12:06	34	71.11	Green

Categories

Action	Category Name	Sort Order	Started	Score	Score Percent	RAG Status
Edit Del	Budget	0	✓	12	73.33	Green



Note: You can see the Snapshot Scorecards in the Scorecard Status view (as columns in the Snapshot Scorecards section) and the Scorecard Trend view (as a graph); however, both only show the most recent Snapshot Scorecard from the previous weeks. So if you create snapshots every day the one created on the last day of the week will be shown. Therefore, you won't see the snapshot that you just created until next week! The end of your week depends on your locale settings.

Below is an example of a Scorecard with six weeks of Snapshot Scorecards in both **Status** view and **Trend** view:

Scorecard

Scorecard: Kraytix Aerospace - September Fuel

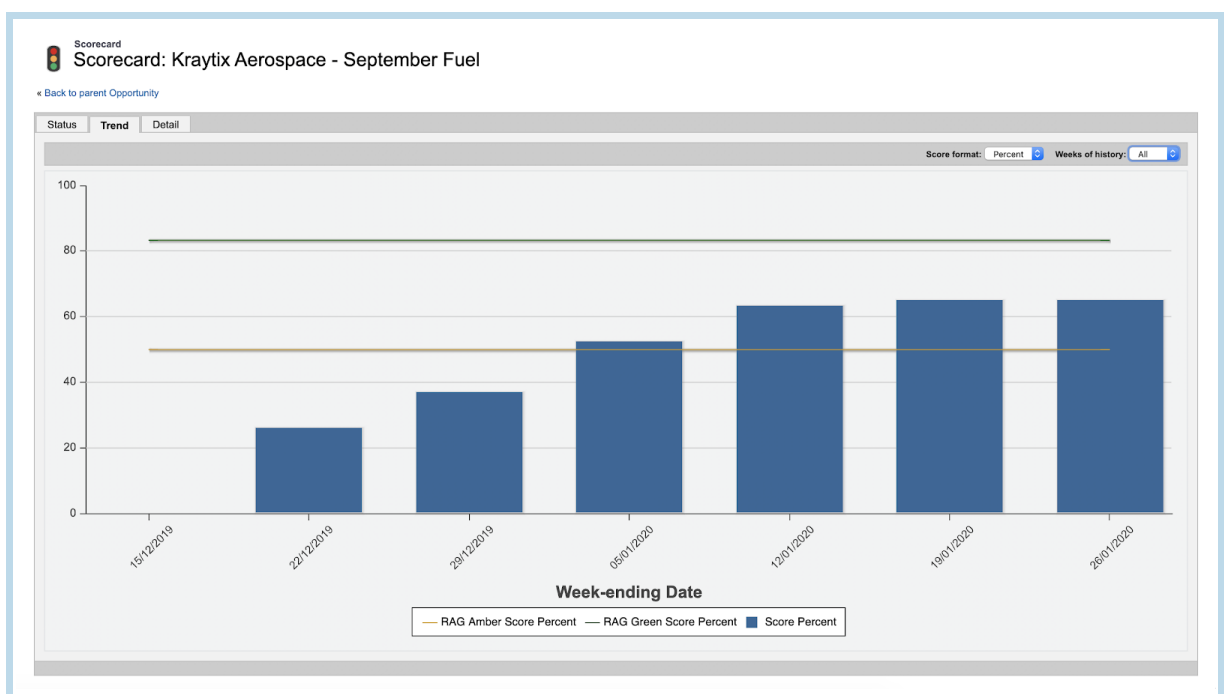
Back to parent Opportunity

StatusTrendDetail

Edit

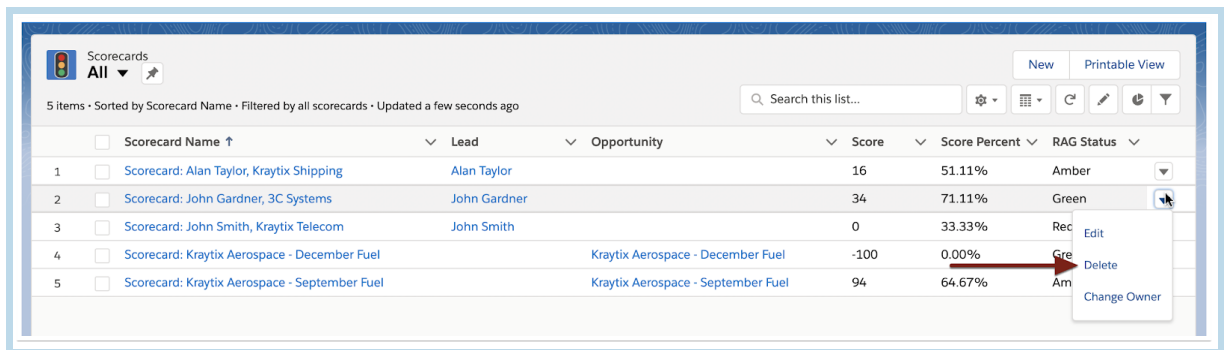
Score format: PercentWeeks of history: All

Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4	Week - 5	Week - 6
Solution	Are the solution requirements well understood?	A requirements document has been shared with us	80%	80%	80%	80%	80%	80%	0%
	Can the solution be delivered using our current capabilities?	Our solution meets most of the requirements, other features are on the roadmap	67%	67%	67%	67%	67%	67%	0%
	Do we have experience of delivering a similar solution?	This would be our first customer but we are well prepared to deliver	80%	80%	80%	80%	0%	0%	0%
Competition	Have we identified who the competitors are for this opportunity?	All of the competitors are known	100%	100%	100%	100%	0%	0%	0%
	Do we understand our competitive strengths and weaknesses?	Competitive strength and weaknesses are known against some of the competitors	53%	53%	53%	0%	0%	0%	0%
Originality	Does our solution have one or more USPs?	Our USPs match at least 1 of the 3 most important requirements	67%	67%	67%	0%	0%	0%	0%
	Does the customer value our USPs?	The customer understands and values our USPs	100%	100%	100%	0%	0%	0%	0%
Timescales	Do we understand the customer's procurement cycle and milestones?		0%	0%	0%	0%	0%	0%	0%
	Are we engaged early in the procurement cycle?	We were engaged with the executives when the requirements were developed	100%	100%	67%	67%	67%	67%	0%
Size	Does the opportunity value exceed our minimum deal size?	The opportunity value exceeds our minimum deal size	100%	100%	100%	100%	100%	100%	0%
	Is the opportunity value less than our maximum deal size?	The opportunity value is in the upper quartile of our deal size range	100%	100%	100%	100%	100%	100%	0%
	Could this opportunity lead to additional up-sell/cross-sell opportunities?	There are up-sell/cross-sell opportunities but no interest yet	53%	53%	53%	53%	0%	0%	0%
Money	Do we have the capacity to deliver this solution?		0%	0%	0%	0%	0%	0%	0%
	Has the customer allocated a budget specifically for this solution?	There is a budget pool that multiple projects are competing for	67%	67%	67%	67%	67%	0%	0%
Authority	Is the budget sufficient to procure our solution?		0%	0%	0%	0%	0%	0%	0%
	Is the customer's authorisation process understood?	We have followed the authorisation process in a previous procurement	100%	100%	100%	100%	100%	100%	0%
	Do we know who has budgetary authority to procure the solution?		0%	0%	0%	0%	0%	0%	0%
Need	Do we know who has technical authority to approve the solution?	The technical authority is known but we have no relationship	73%	73%	73%	73%	0%	0%	0%
	Have we identified the drivers for procuring the solution?	The procurement drivers have been officially shared with us	100%	100%	100%	100%	100%	0%	0%
	Is there a compelling event that mandates the procurement?	There is a compelling event but 'do nothing' is still an option	53%	53%	53%	53%	53%	0%	0%
Scorecard Score:			65%	65%	63%	52%	37%	26%	0%

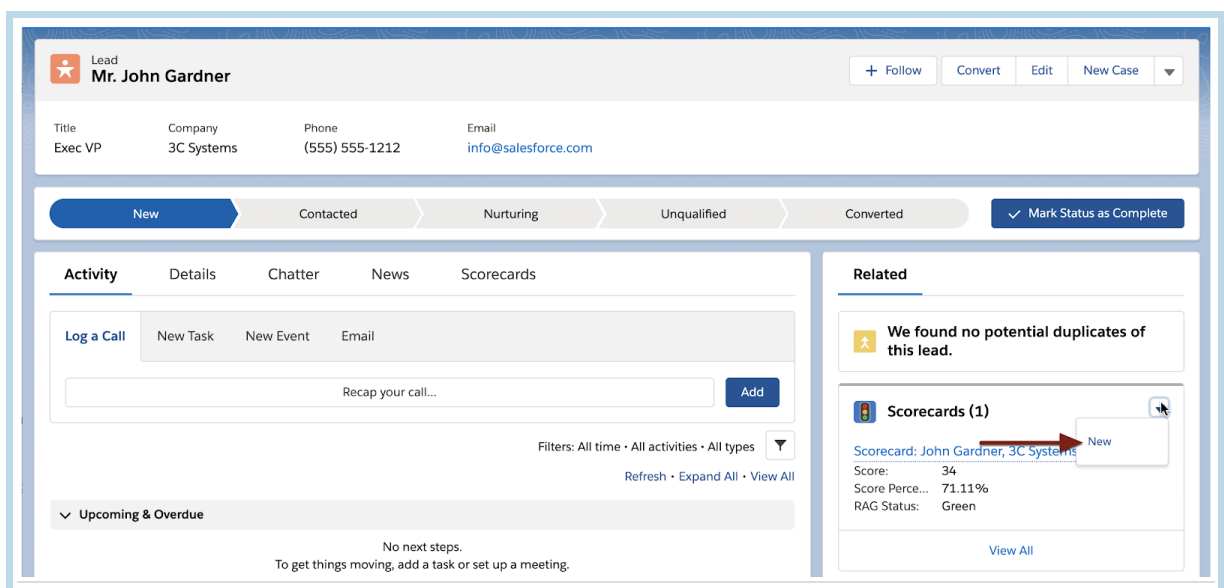


7 How To: Delete a Scorecard

You may wish to delete a Scorecard, maybe because you selected the wrong Template Scorecard for example. You can delete a Scorecard from the Scorecard list view by clicking the **Delete** menu item in the Scorecard's **action menu**.



You can also delete a Scorecard by clicking the **Delete** menu item in the Scorecard's related list **action menu**.



8 Summary

Salesforce is a very flexible platform that allows you to perform tasks in many different ways, and as a 100% native Salesforce app, Kraytix FrontRunner is no exception! Some of the above screenshots may differ depending on how your FrontRunner Administrator has configured your Salesforce org and the FrontRunner app. Now that you have learned the core tasks needed to create and manage your FrontRunner Scorecards we suggest that you enjoy exploring further.