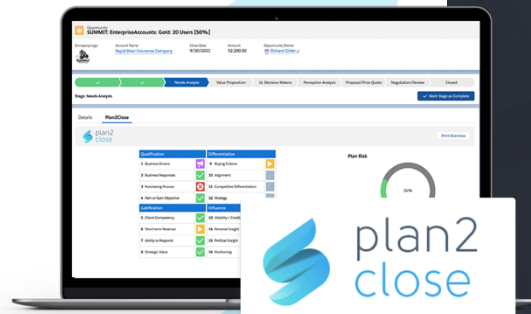
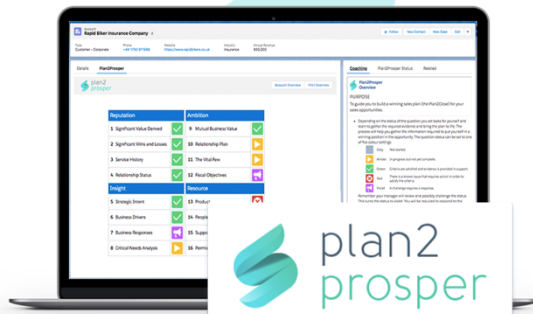




SalesMethods

Plan2Prosper & Plan2Close

Installation Instructions

Version 4.0+



Contents

What's new in v4?	3
SalesMethods Lightning Experience	3
Quick Install.....	4
System Requirements.....	4
IMPORTANT: Do you have Clickjack Protection Enabled?	5
IMPORTANT: Enable Change Data Capture.....	6
IMPORTANT: You need to run a data update after the installation.....	6
Install SalesMethods	7
Manage Licences.....	9
Post Installation: Event & Task data update.....	10
Post Installation: Configure Profiles.....	11
Adding the SalesMethods Configuration Tab.....	14
View Plan2Prosper in Salesforce	15
Classic Embedding Plan2Prosper into a Page Layout	15
Lightning Adding a Plan2Prosper Lightning Tab.....	16
View Plan2Close in Salesforce.....	18
Classic Embedding Plan2Close into a Page Layout	18
Lightning Adding a Plan2Close Lightning Tab.....	19
View Coaching in Salesforce	21
Configuring SalesMethods	23
Configure Plan2Close: Settings	23
Configure Plan2Prosper: Settings.....	24
Configure: Question Sets.....	25
Create a new Plan2Close Question Set.....	25
Modify a Question Set	26
Question Set Detail.....	26
Questions and Groups	27
Tools and Features.....	29
Auto-Match Rules	30
Question Set Migrations.....	31
Question Set Translations	34
Risk Evaluation Rules	35



What's new in v4?

SalesMethods Lightning Experience

With the **Plan2Prosper** & **Plan2Close** fresh, clean and contemporary Lightning look we now offer our customers a more intuitive experience.

We have also improved and enhanced the workflow, which means less clicks, so you can see your results with less effort.

We have added some new features that enable your Team to provide evidence and gain Management approval more rapidly and effectively...

- The **Question Chat** facility to enable discussion on each Question.
- The **Evidence File** attachment to provide proof of the Evidence.
- New Statuses: **'in Progress'** and **'Management Request'** to complete the process.

And very importantly, the back-end technology and structure remain the same, so as with previous releases, there won't be any continuity or security issues when you upgrade to v4.

The screenshot displays the Plan2Close interface for an opportunity named "SUMMIT: EnterpriseAccounts: Gold: 20 Users [50%]". The interface includes a top navigation bar with options like "Follow", "Edit", "New Case", and "New Note". Below this, there's a section for "Details" and "Plan2Close" with a "Print Overview" button. The main content area is divided into several sections:

- Qualification and Differentiation:** A table with 16 items, each with a status icon (green checkmark, yellow triangle, or red X).
- Justification and Influence:** A table with 8 items, each with a status icon (green checkmark or red X).
- Plan Risk:** A circular progress indicator showing 36% completion.
- Coaching:** A section titled "Plan2Close Status" with a "Related" link.
- P2C Percentage Completed:** A donut chart showing 50% completion.
- P2C Questions Completed:** A funnel chart showing 8 (50%) questions completed.

On the right side, there's a "View Report" button and a timestamp "As of Today at 6:49 AM".



Quick Install

Thank you for choosing to evaluate or purchase **SalesMethods Plan2Prosper & Plan2Close**. These instructions will guide you through the installation and configuration of the product. Please follow the guide carefully and complete all instructions before trying to use the product.

If you have any problems, please go to <https://salesmethods.com/support/> and complete the form.

System Requirements

To upgrade to **SalesMethods v4** your current version must be **v3.27** or higher.

If your current version is below **v3.22.2** then you will need to upgrade to this version first, click on the appropriate link...

Production... <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1E000000gb9C>

Sandbox... <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t1E000000gb9C>

Then you need to upgrade to **v3.27**, click on the appropriate link...

Production... <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1E0000016I2I>

Sandbox... <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t1E0000016I2I>



IMPORTANT: Do you have Clickjack Protection Enabled?

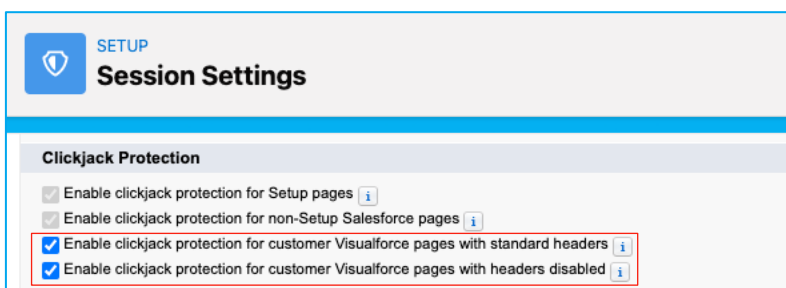
If you have enabled Clickjack Protection, you also need to add your Salesforce domain as a Trusted Domain.

Please check your **Session Settings**...

 **Classic** | Setup > Security Controls > Session Settings

 **Lightning** | Setup > Security > Session Settings

If your 'Session Settings' have either of these option boxes ticked...



Session Settings

Clickjack Protection

- ☒ Enable clickjack protection for Setup pages 
- ☒ Enable clickjack protection for non-Setup Salesforce pages 
- ☒ Enable clickjack protection for customer Visualforce pages with standard headers 
- ☒ Enable clickjack protection for customer Visualforce pages with headers disabled 

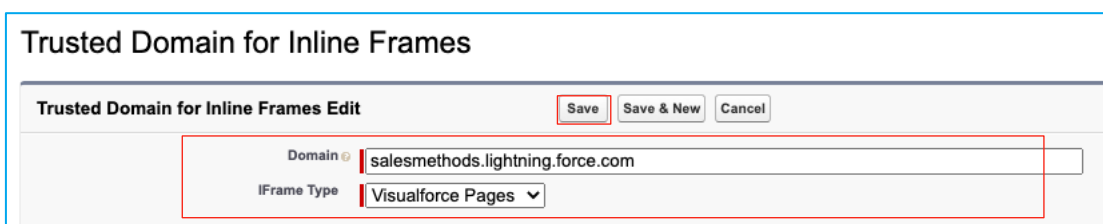
...then you need to add your Visualforce domain to the **Trusted Domains**.

1. From the browser's URL line, select the domain part of the URL, excluding the protocol (https://), and {**Edit > Copy**} that text.



https://salesmethods.lightning.force.com/lightning/setup/SecuritySession/home

2. Return to 'Session Settings' and scroll down to the **Trusted Domains** area...
3. Click on the [Add Domains] button.



Trusted Domain for Inline Frames

Trusted Domain for Inline Frames Edit Save Save & New Cancel

Domain  salesmethods.lightning.force.com

IFrame Type  Visualforce Pages

4. {**Edit > Paste**} the domain text into the 'Domain' field.
5. Ensure that the 'IFrame Type' picklist has 'Visualforce Pages' selected.
6. Click [**Save**].

NOTE: If your Org is a mix of Classic and Lightning users, then you will need to switch to the other {Mode} and also add that domain URL as a **Trusted Domain**.

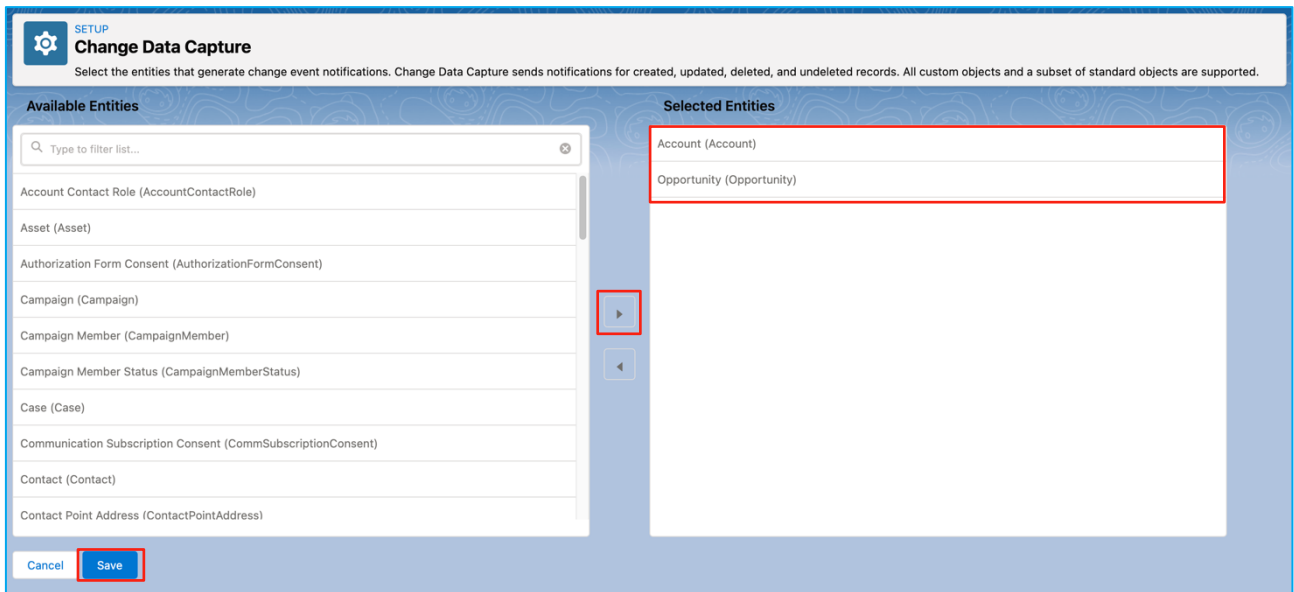


IMPORTANT: Enable Change Data Capture

(ONLY APPLIES TO ENTERPRISE AND UNLIMITED EDITIONS OF SALESFORCE)

We need to allow the new Lightning Components to communicate with each other.

 **Lightning | Setup > Integrations > Change Data Capture**



- Select **[Account]** and **[Opportunity]** in the 'Available Entities' column and move them to the 'Selected Entities' column using the {▶ icon}.
- Click **[Save]**

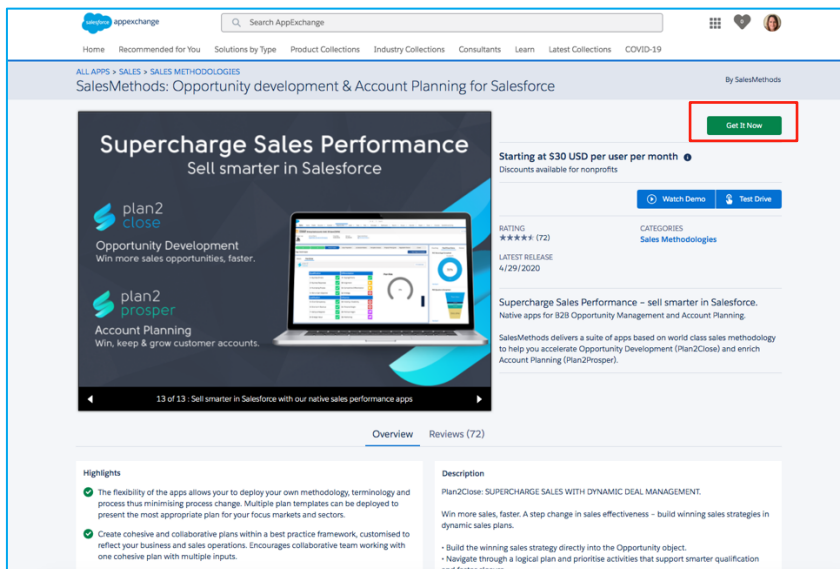
IMPORTANT: You need to run a data update after the installation

We need you to run a data update on your current **SalesMethods** data after you run the upgrade to **SalesMethods v4**. Please see the Post-Installation section below.



Install SalesMethods

1. Click here to download SalesMethods from the App Exchange
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N300000003J1KWEA0>
2. Click on the [Get It Now] button. You can install SalesMethods (**Plan2Prosper** & **Plan2Close**) into a Sandbox, a Developer org, or a Production org.



3. You may be asked to sign into your Trailhead Account, and then it will ask where you wish to install OCP, in your Production (Live) Org, or into a Sandbox.

NOTE:

If you are updating your **SalesMethods App** choose a Salesforce Account and then click on [Install in Production].

If you are installing a fresh copy of **SalesMethods App** you should install it into a Sandbox first, so click on [Install in Sandbox].

4. Tick to agree the Terms & Conditions, then click [Confirm and Install].

NOTE: If you have already purchased SalesMethods licences ignore the 'Free Trial' status in this installation form, your licences will remain in place.



- You will then be asked to sign into Salesforce. Depending on your choice above use your Production or Sandbox User ID.

A Salesforce login form with a 'Username' field containing '1 Saved Username', a 'Password' field with masked characters, and a 'Log In' button.

- We recommend installing for all users. Select "Install for All Users" and click [Install] / [Upgrade]. (In the screen below we are running an Update on an existing install, so it shows an [Upgrade] button).

The 'Upgrade SalesMethods' dialog box shows an information message: 'An earlier version is installed. It can be upgraded while preserving the existing data. Installed: May 2021 (4.1) New Version: May 2021 (4.1)'. It offers three installation options: 'Install for Admins Only', 'Install for All Users' (selected and highlighted with a red box), and 'Install for Specific Profiles...'. An 'Upgrade' button (also highlighted with a red box) and a 'Cancel' button are at the bottom right. Below the options is a table with details:

App Name	Publisher	Version Name	Version Number
SalesMethods	Sales Methods Ltd	May 2021	4.1

Additional Details View Components

- It will sit there for a while as it runs the install/upgrade...



- And when it is installed and ready to configure Salesforce will send you an email. Now you can get going with the next part of the setup.

An email notification titled 'Package SalesMethods Install Successful' from support@salesforce.com to Mark Mogridge. It states: 'Your request to install package "SalesMethods May 2021" was successful.' and provides details: Organization: SalesMethods Ltd (00D30000000j9I), User: Mark Mogridge (0054X00000DjSp0), Package: SalesMethods (04t1E0000016I2Q). It also includes a note: 'Some components, such as custom objects, custom report types, and workflow rules, must be activated using the package deploy process, before they are available to your organization.'



Manage Licences

(ONLY APPLIES TO 'PRODUCTION' ORGS – SANDBOXES DO NOT NEED LICENCES)

Note. Do not be alarmed if the number of licences does not match the number you have purchased. SalesMethods need to manually configure your licence and this can only be done after you have installed your product.

Classic | Setup > Installed Packages

Lightning | Setup > Apps > Packaging > Installed Packages

Find the OrgChartPlus package and click on **{Manage Licences}**.

Uninstall Configure Manage Licenses	OrgChartPlus	SalesMethods Ltd	7.1
---	------------------------------	------------------	-----

1. Click the **[Add Users]** button
2. Tick/check the Users in the **{Available Users}** list you wish to access OrgChartPlus,
3. When you have selected all required Users, click the **[Add]** button and the Licenced Users list will be updated ...

Package Details

SalesMethods

[Back to Previous Page](#)

Package Name	SalesMethods	Publisher	SalesMethods Ltd
Status	Active	Allowed Licenses	4
Expiration Date		Used Licenses	4

A B C D E F G H I J K L M

Licensed Users

Add Users

Remove Multiple Users

Action

Remove

Remove

Remove

Remove

Remove

Remove

Remove

Remove

Remove

Remove

Remove

Add Users

SalesMethods

View:

All

[Create New View](#)

A B C D E F G H I J

Available Users

[Select Shown](#) [Deselect Shown](#) [Deselect All](#) [Add All Users](#)

Action	Full Name	Role	Active	Profile
☒	[Profile Picture]	Sales	☒	[Profile Picture]
☐	[Profile Picture]	Sales	☐	[Profile Picture]
☐	[Profile Picture]	Sales	☐	[Profile Picture]
☒	[Profile Picture]	Sales	☒	[Profile Picture]
☒	[Profile Picture]	Sales	☒	[Profile Picture]

Show me

more

 records per list page

Selected Users

Action	Full Name
☒	[Profile Picture]
☒	[Profile Picture]
☒	[Profile Picture]

Add

Cancel



Post Installation: Event & Task data update

You need to run this data update which will...

- Relate P2P Tasks and Events to the parent Account
- Relate P2C Tasks and Events to the parent Opportunity

To run this data update...



Classic | Setup > Developer Console > {New Console Window}



Lightning | Setup > Developer Console > {New Console Window}

- In the Console Window:
 - Menu bar > Debug > Open Execute Anonymous Window
 - *[Copy/Paste the code from the box below]*
 - Click the [Execute] button

```
Set<Id> objIds = new Set<Id>();
Map<Id, Id> objToAcc = new Map<Id, Id>();
for (SalesMethods__ADP_Objective__c obj : [SELECT Id, SalesMethods__Account__c FROM
SalesMethods__ADP_Objective__c WHERE SalesMethods__IsCompleted__c=false]) {
    objIds.add(obj.Id);
    objToAcc.put(obj.Id, obj.SalesMethods__Account__c);
}
List<Event> events = [SELECT Id, WhatId FROM Event WHERE WhatId IN :objIds AND IsDeleted=false];
for (Event e : events)
    e.WhatId = objToAcc.get(e.WhatId);
update events;

List<Task> tasks = [SELECT Id, WhatId FROM Task WHERE WhatId IN :objIds AND IsDeleted=false AND
IsClosed=false];
for (Task t : tasks)
    t.WhatId = objToAcc.get(t.WhatId);
update tasks;

objIds = new Set<Id>();
Map<Id, Id> objToOpp = new Map<Id, Id>();
for (SalesMethods__MSO_Objective__c obj : [SELECT Id, SalesMethods__Opportunity__c FROM
SalesMethods__MSO_Objective__c WHERE SalesMethods__IsCompleted__c=false]) {
    objIds.add(obj.Id);
    objToOpp.put(obj.Id, obj.SalesMethods__Opportunity__c);
}

events = [SELECT Id, WhatId FROM Event WHERE WhatId IN :objIds AND IsDeleted=false];
for (Event e : events)
    e.WhatId = objToOpp.get(e.WhatId);
update events;

tasks = [SELECT Id, WhatId FROM Task WHERE WhatId IN :objIds AND IsDeleted=false AND IsClosed=false];
for (Task t : tasks)
    t.WhatId = objToOpp.get(t.WhatId);
update tasks;
```

If you need assistance, please go to <https://salesmethods.com/support/> and request 'P2 V4 Data Update Support'.



Post Installation: Configure Profiles

(ONLY APPLIES TO ENTERPRISE AND UNLIMITED EDITIONS OF SALESFORCE)

Now you need to check the access for the Admin and Sales Users.

 Classic +  Lightning | Setup > Users > Profiles

Note: If you use a 'standard' Profile for your sales Users, you will need to make that a 'custom' Profile so that you can make the changes below...

1. Open the 'standard' Profile, click [View Users] and make a note of all the Users.
2. Then 'back page' and click [Edit] and then click [Clone] and name the new Profile.
3. Then go into each User record and change their Profile to the new one you just created.

Go into each Profile that needs access to OrgChartPlus and make sure that the following object permissions are set as follows...

1. Administrative Permissions: **For ALL Users**

Tick the 'API Enabled' permission in the Administrative Permissions Section...

Administrative Permissions	
Access Experience Management	☐
Access Libraries	☒
Add People to Direct Messages	☒
Allow Inclusion of Code Snippets from UI	☐
Allow user to modify Private Connections	☐
Apex REST Services	☒
API Enabled	☒
Assign Permission Sets	☒



2. Custom Object Permissions: For ADMIN Users

(See next page for Standard Users)

Tick the **Read, Create, Edit, Delete** permissions for all the following objects for access to **Plan2Prosper** (ADP Prefix) and **Plan2Close** (MSO Prefix).

If a Profile should not have access to **Plan2Prosper** or **Plan2Close**, then un-tick the in the objects in the matching coloured boxes.

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
ADP BlueSpace	✓	✓	✓	✓	MSO OrgCharts	✓	✓	✓	✓
ADP BlueSpace Competitor	✓	✓	✓	✓	MSO OrgChart Entities	✓	✓	✓	✓
ADP BlueSpace Data	✓	✓	✓	✓	MSO OrgChart Entity Common	✓	✓	✓	✓
ADP BlueSpace Regions	✓	✓	✓	✓	MSO OrgChart Relationships	✓	✓	✓	✓
ADP BlueSpace Unit	✓	✓	✓	✓	MSO OrgChart TeamMembers	✓	✓	✓	✓
ADP CompetingForces	✓	✓	✓	✓	MSO Questions	✓	✓	✓	✓
ADP CompetingForces Statements	✓	✓	✓	✓	MSO Question Comments	✓	✓	✓	✓
ADP CompetingForces Threat	✓	✓	✓	✓	MSO ValueMill	✓	✓	✓	✓
ADP Objectives	✓	✓	✓	✓	MSO VMStatements	✓	✓	✓	✓
ADP OrgCharts	✓	✓	✓	✓	Non-SFDC People	✓	✓	✓	✓
ADP OrgChart Entities	✓	✓	✓	✓	Product Families	✓	✓	✓	✓
ADP OrgChart Entity Common	✓	✓	✓	✓	Product Features	✓	✓	✓	✓
ADP OrgChart Relationships	✓	✓	✓	✓	Product Feature Types	✓	✓	✓	✓
ADP OrgChart TeamMembers	✓	✓	✓	✓	Question Sets	✓	✓	✓	✓
ADP Questions	✓	✓	✓	✓	Question Set Groups	✓	✓	✓	✓
ADP Question Comments	✓	✓	✓	✓	Question Set Localizations	✓	✓	✓	✓
ADP SWOT Statements	✓	✓	✓	✓	Question Set Migrations	✓	✓	✓	✓
Business Units	✓	✓	✓	✓	Question Set Questions	✓	✓	✓	✓
Business Unit Groups	✓	✓	✓	✓	Question Set Risk Rules	✓	✓	✓	✓
Company Accounts	✓	✓	✓	✓	Sales Regions	✓	✓	✓	✓
Competitors	✓	✓	✓	✓	Sales Region Groupings	✓	✓	✓	✓
Competitor Families	✓	✓	✓	✓	Sales Region Sets	✓	✓	✓	✓
Competitor Products	✓	✓	✓	✓	Sales Region Set Entries	✓	✓	✓	✓
Contact Intimacies	✓	✓	✓	✓					
MSO Buying Criteria	✓	✓	✓	✓					
MSO Objectives	✓	✓	✓	✓					
MSO Offerings	✓	✓	✓	✓					
MSO Offering Items	✓	✓	✓	✓					
MSO Offering Ratings	✓	✓	✓	✓					



3. Custom Object Permissions: For Standard Users

(See previous page for Admin Users)

Tick the Read, Create, Edit, Delete permissions for all the following objects for access to **Plan2Prosper** (ADP Prefix) and **Plan2Close** (MSO Prefix).

If a Profile should not have access to **Plan2Prosper** or **Plan2Close**, then un-tick the in the objects in the matching coloured boxes.

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
ADP BlueSpace	☒	☒	☒	☒	MSO OrgCharts	☒	☒	☒	☒
ADP BlueSpace Competitor	☒	☒	☒	☒	MSO OrgChart Entities	☒	☒	☒	☒
ADP BlueSpace Data	☒	☒	☒	☒	MSO OrgChart Entity Common	☒	☒	☒	☒
ADP BlueSpace Regions	☒	☒	☒	☒	MSO OrgChart Relationships	☒	☒	☒	☒
ADP BlueSpace Unit	☒	☒	☒	☒	MSO OrgChart TeamMembers	☒	☒	☒	☒
ADP CompetingForces	☒	☒	☒	☒	MSO Questions	☒	☒	☒	☒
ADP CompetingForces Statements	☒	☒	☒	☒	MSO Question Comments	☒	☒	☒	☒
ADP CompetingForces Threat	☒	☒	☒	☒	MSO ValueMill	☒	☒	☒	☒
ADP Objectives	☒	☒	☒	☒	MSO VMStatements	☒	☒	☒	☒
ADP OrgCharts	☒	☒	☒	☒	Non-SFDC People	☒	☐	☐	☐
ADP OrgChart Entities	☒	☒	☒	☒	Product Families	☒	☐	☐	☐
ADP OrgChart Entity Common	☒	☒	☒	☒	Product Features	☒	☒	☒	☒
ADP OrgChart Relationships	☒	☒	☒	☒	Product Feature Types	☒	☐	☐	☐
ADP OrgChart TeamMembers	☒	☒	☒	☒	Question Sets	☒	☐	☐	☐
ADP Questions	☒	☒	☒	☒	Question Set Groups	☒	☐	☐	☐
ADP Question Comments	☒	☒	☒	☒	Question Set Localizations	☒	☐	☐	☐
ADP SWOT Statements	☒	☒	☒	☒	Question Set Migrations	☒	☐	☐	☐
Business Units	☒	☐	☐	☐	Question Set Questions	☒	☐	☐	☐
Business Unit Groups	☒	☒	☒	☒	Question Set Risk Rules	☒	☐	☐	☐
Company Accounts	☒	☒	☒	☒	Sales Regions	☒	☐	☐	☐
Competitors	☒	☒	☒	☒	Sales Region Groupings	☒	☐	☐	☐
Competitor Families	☒	☒	☒	☒	Sales Region Sets	☒	☐	☐	☐
Competitor Products	☒	☒	☒	☒	Sales Region Set Entries	☒	☐	☐	☐
Contact Intimacies	☒	☒	☒	☒					
MSO Buying Criteria	☒	☒	☒	☒					
MSO Objectives	☒	☒	☒	☒					
MSO Offerings	☒	☒	☒	☒					
MSO Offering Items	☒	☒	☒	☒					
MSO Offering Ratings	☒	☒	☒	☒					

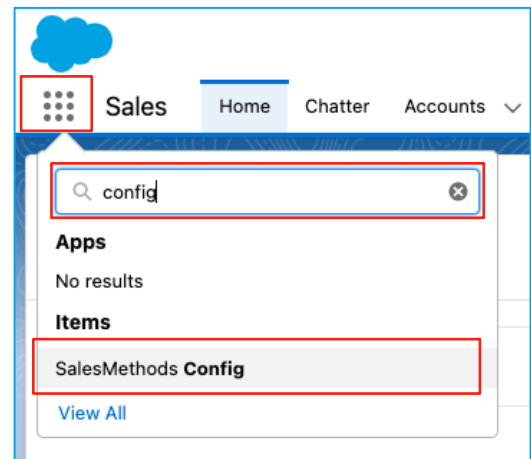


Adding the SalesMethods Configuration Tab

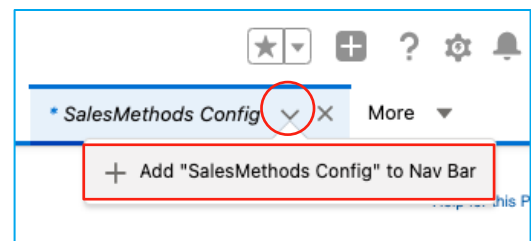
- ⚡ For Lightning Orgs and Admins Only...
REQUIRED: {My Domain} needs to be deployed

1. Lightning Orgs can add the new v6.x 'SalesMethods Config' Tab to the Admin Users Navigation Bar.

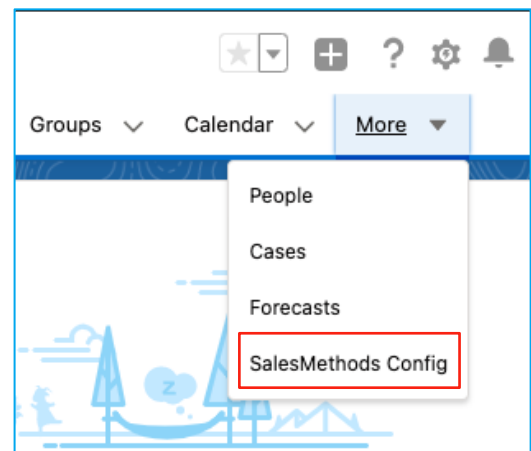
- Click on the 'App' icon (9 grey dots)
- Type "Config" in the search box
- Select 'SalesMethods Config'



- The new Tab will appear in the right of the Nav Bar
- Click the {▼ icon} in the new 'SalesMethods Config' Tab
- And select the {+ Add "SalesMethods Config" to the Nav Bar} option



- Now the "SalesMethods Config" Tab will remain permanently in your Nav Bar





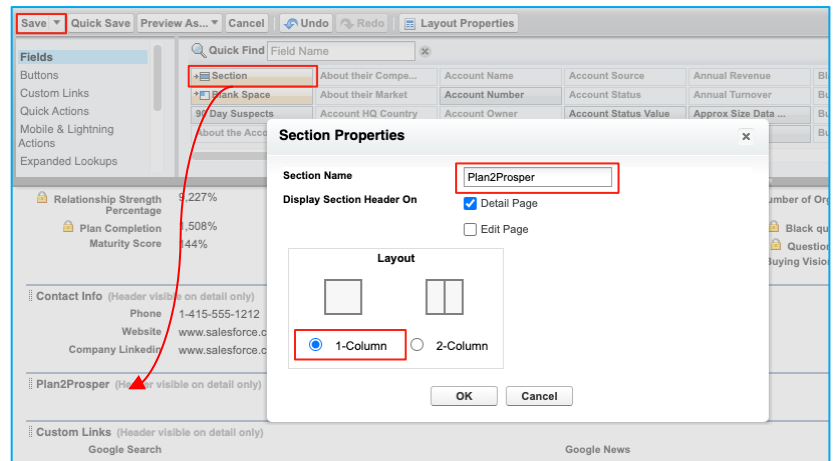
View Plan2Prosper in Salesforce

Classic | Embedding Plan2Prosper into a Page Layout

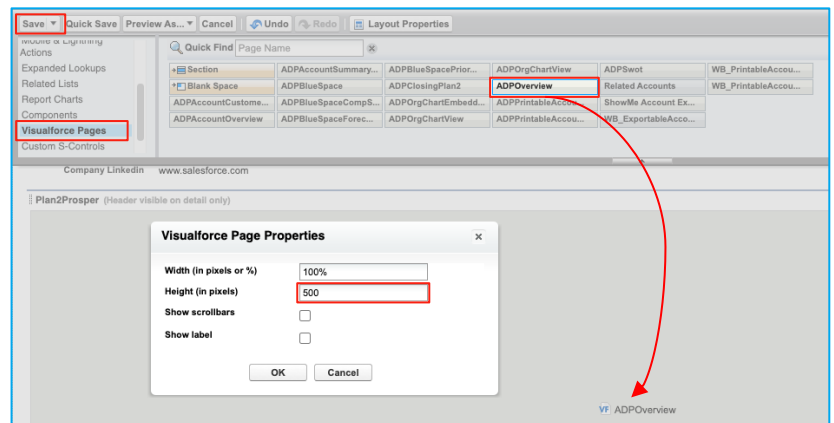
To place **Plan2Prosper** into a page layout, follow this process for the **[Account]** object...

Classic | Setup > Customize > Account > Page Layouts

1. Click [Edit] on the relevant **[Account]** Page Layout.
2. Drag down a new **{Section}** into the Page Layout and name it 'Plan2Prosper' and make it **1-Column** wide.
3. Click [OK] > [Save]



4. Then click on 'Visualforce Pages' in the top left-hand Nav bar and drag **{ADPOverview}** into the new Plan2Prosper **{Section}**, and set the height to 500 pixels.
5. Click [OK] > [Save]



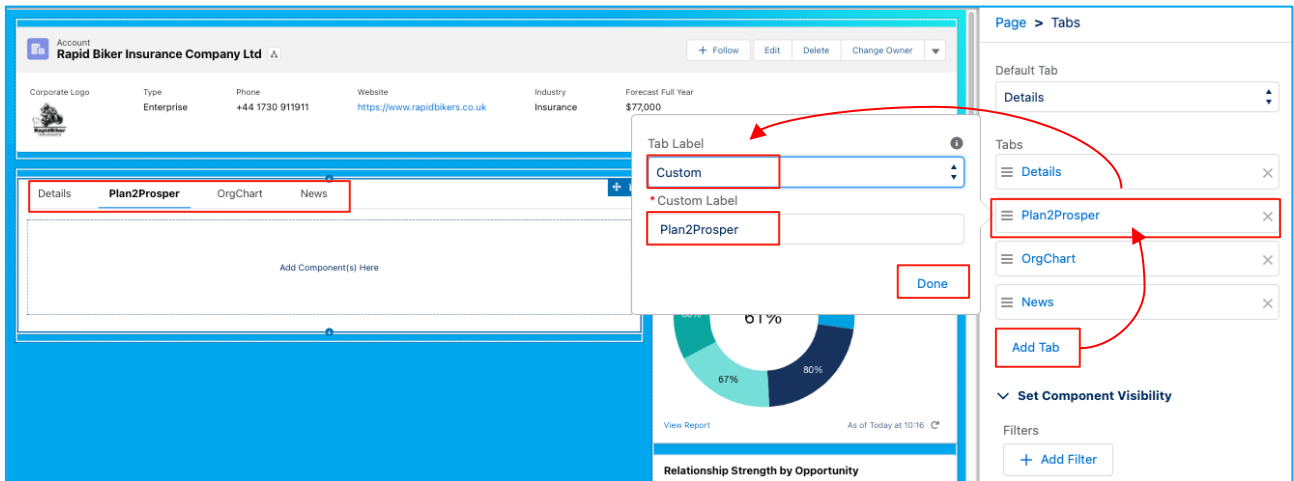


Lightning | Adding a Plan2Prosper Lightning Tab

 Lightning | Setup > Objects & Fields > Object Manager > Account > Lightning Record Pages

To add a new {Lightning Tab}

1. Select the relevant [Account] record page and click [Edit]



2. Click on the {Tab Bar} of the main page area, in the right-hand panel you'll see the list of Tabs...
 - Click on the [Add Tab] button
 - Select 'Custom' from the top of the {Tab Label} picklist
 - Type in "Plan2Prosper" in the {Custom Label} field, {tab} out of the field, click [Done]

Continued on the next page ...



Lightning | Adding a Plan2Prosper Lightning Tab continued...

The screenshot shows the Salesforce Lightning interface. On the left, the 'Components' panel is open, displaying a list of components under 'Custom - Managed (4)'. The 'Plan2Prosper Overview' component is highlighted with a red box. A red arrow points from this component to the 'Plan2Prosper' tab in the main content area. The main content area shows the 'Plan2Prosper Overview' for 'Rapid Biker Insurance Company Ltd'. It includes a table with 16 items, a donut chart showing 'P2P Percentage Completed' at 56%, and a bar chart showing 'P2P Questions Completed'. The 'Save' button in the top right corner is also highlighted with a red box.

Reputation		Ambition	
1 Significant Value Derived	✓	9 Mutual Business Value	✓
2 Significant Wins and Losses	✓	10 Relationship Plan	✗
3 Service History	✓	11 The Vital Few	✗
4 Relationship Status	✓	12 Fiscal Objectives	✓

Insight		Resource	
5 Strategic Intent	✓	13 Product	✗
6 Business Drivers	✓	14 People	✗
7 Business Responses	✗	15 Support	✗
8 Critical Needs Analysis	✓	16 Permission	✗

P2P Percentage Completed
Completed: 56%

P2P Questions Completed

Question Status	Count	Percentage
1: Not Started	2	12.5%
2: Incomplete	1	6.25%
3: Feedback Required	3	18.75%
4: In Progress	1	6.25%
5: Completed	9	56.25%

3. In the left-hand panel you will see a list of Components...

- Drag the {Plan2Prosper Overview} component into the new Tab area
- Click [Save] [Activate] [<-Back]



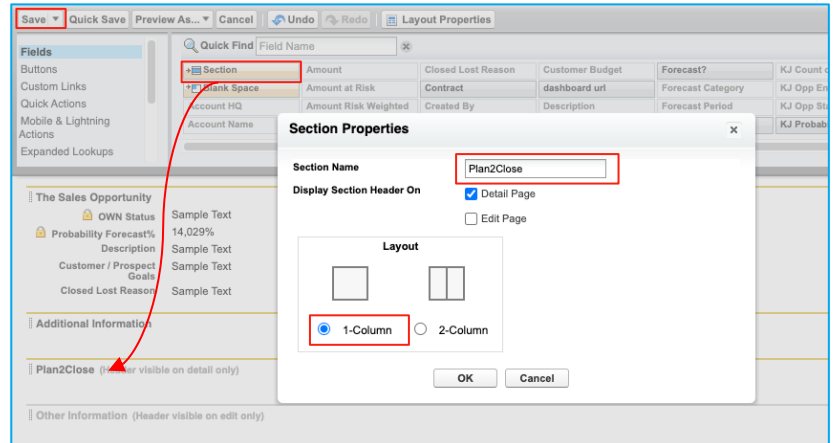
View Plan2Close in Salesforce

Classic | Embedding Plan2Close into a Page Layout

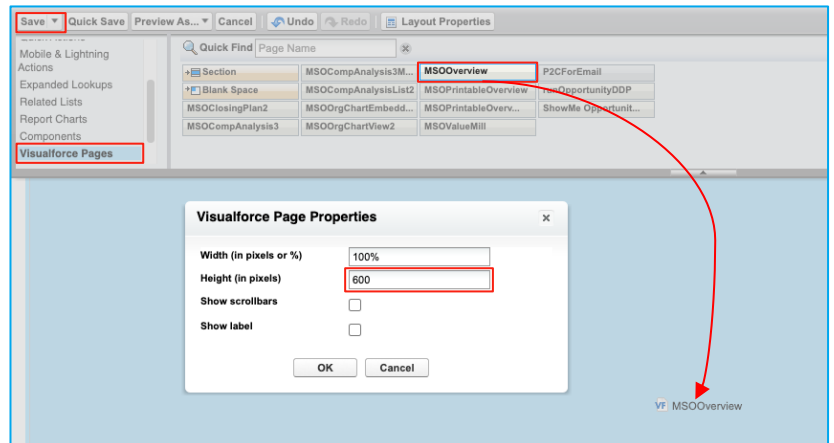
To place **Plan2Close** into a page layout, follow this process for the [Opportunity] object...

Classic | Setup > Customize > Opportunity > Page Layouts

1. Click [Edit] on the relevant [Opportunity] Page Layout.
2. Drag down a new {Section} into the Page Layout and name it 'Plan2Close' and make it 1-Column wide.
3. Click [OK] > [Save]



4. Then click on 'Visualforce Pages' in the top left-hand Nav bar and drag {MSOOverview} into the new Plan2Close {Section}, and set the height to 600 pixels (or more).
5. Click [OK] > [Save]



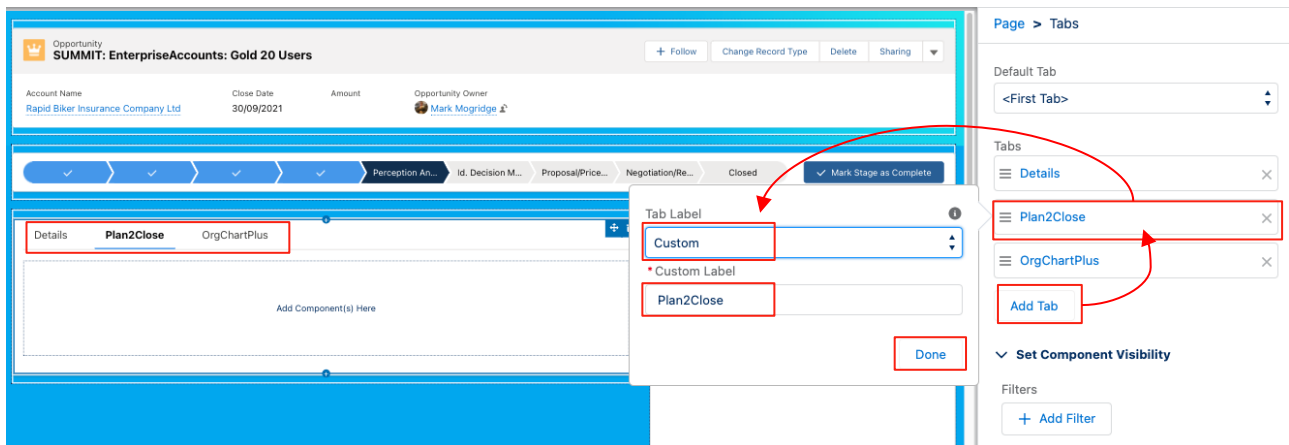


Lightning | Adding a Plan2Close Lightning Tab

Lightning | Setup > Objects & Fields > Object Manager > Opportunity > Lightning Record Pages

To add a new {Lightning Tab}

1. Select the relevant [Opportunity] record page and click [Edit]



2. Click on the {Tab Bar} of the main page area, in the right-hand panel you'll see the list of Tabs...
 - Click on the [Add Tab] button
 - Select 'Custom' from the top of the {Tab Label} picklist
 - Type in "Plan2Close" in the {Custom Label} field, {tab} out of the field, click [Done]

Continued on the next page ...



Lightning | Adding a Plan2Close Lightning Tab continued...

The screenshot displays the Salesforce Lightning interface. On the left, the 'Components' panel is open, showing a list of components under 'Custom - Managed (4)'. The 'Plan2Close Overview' component is highlighted with a red box. A red arrow points from this component to the 'Plan2Close' tab in the main content area. The main content area shows the 'Plan2Close' tab selected, displaying a detailed view of the 'SUMMIT: EnterpriseAccounts: Gold 50 Users' opportunity. The 'Plan2Close' tab includes a table of qualification criteria, a 'Plan Risk' gauge, and a 'You may want to consider' section. The right sidebar shows the 'Plan2Close Overview' component being added to the tab. The 'Save' button in the top right corner is highlighted with a red box.

Components

Record Detail
Related List - Single
Related List Quick Links
Related Lists
Related Record
Report Chart
Rich Text
Tabs
Topics
Trending Topics
Visualforce

Custom (0)
No components available.

Custom - Managed (4)
cdcConsumer
Drawloop - Run DDP
Plan2 Coaching
Plan2Close Overview

Get more on the AppExchange

Desktop Shrink To View

Analyze Activation... **Save**

Page > Plan2Close Overview

Set Component Visibility

Filters
+ Add Filter

Opportunity
SUMMIT: EnterpriseAccounts: Gold 50 Users
+ Follow OrgChartPlus Export Change Record Type

Account Name: Rapid Biker Insurance Company Ltd
Close Date: 16/09/2021
Amount: \$150,000.00
Opportunity Owner: Mark Mogridge

51: Qualification 52: Customer Engaged **53: Value Acknowledged** 54: Solution Favoured 55: Deal Closed Closed Mark Stage as Complete

Details **Plan2Close** OrgChartPlus

plan2close Closing Plan

Qualification	Differentiation
1 Business Drivers	9 Buying Criteria
2 Business Responses	10 Alignment
3 Purchasing Process	11 Competitive Differentiation
4 Pain or Gain Objective	12 Strategy
Justification	
5 Client Competency	13 Visibility / Credibility
6 Short-term Revenue	14 Personal Insight
7 Ability to Respond	15 Political Insight
8 Strategic Value	16 Positioning

Plan Risk
40%

You may want to consider
Justification > 7. Ability to Respond
Qualification > 4. Pain or Gain Objective

Statistics Coaching More

Opportunity Relationship%
Relationship Strength%
81%

Internal Team's Intimacy%
Intimacy Rating%
69%

View Report As of Today at 10:06

Contact: Full Name
Joanna Chaney
Gemma Ballard
Dionne Durham
Clifford McNeil
Julie Li
Irish Malone
Heath Costa
Christopher Preston

TeamMember User: Full...
Mark Mogridge
Richard Gilder
Steve Bale
Gary Guthrie

3. In the left-hand panel you will see a list of Components...

- Drag the {Plan2Close Overview} component into the new Tab area
- Click [Save] [Activate] [<-Back]



View Coaching in Salesforce

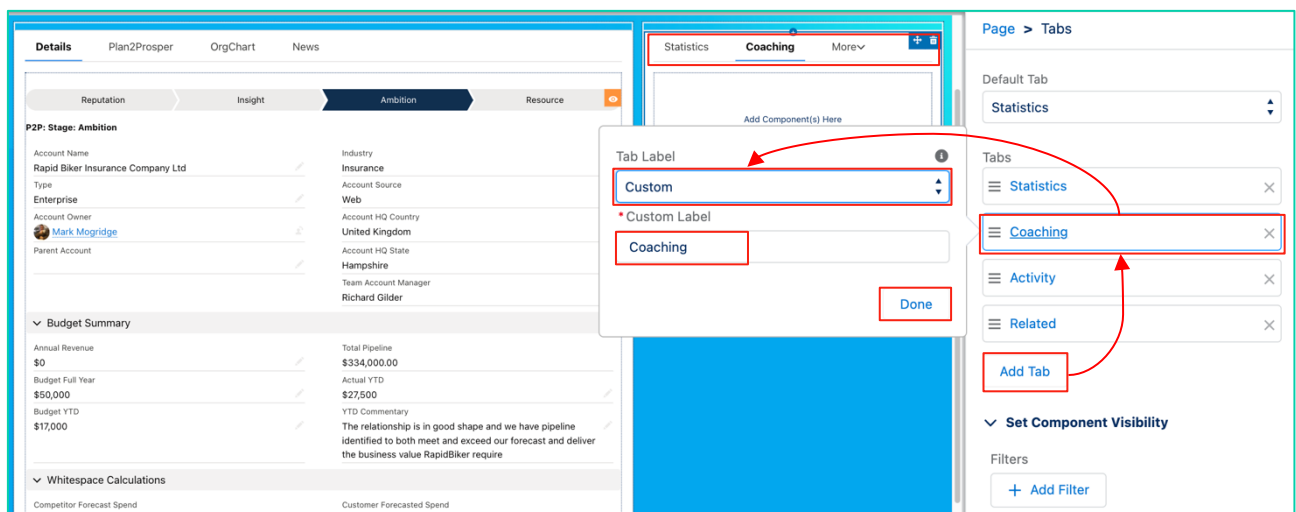
You can add the Coaching (Guidelines) Tab to the right-hand column in both the Account **Plan2Prosper** and Opportunity **Plan2Close** layouts.

We will start with the Account **Plan2Prosper** layout first.

 **Lightning | Setup > Objects & Fields > Object Manager > Account > Lightning Record Pages**

To add a new {Lightning Tab}

1. Select the relevant [Account] record page and click [Edit]



2. Click on the {Tab Bar} of the right-hand column area, in the right-hand panel you'll see the list of Tabs...
 - Click on the [Add Tab] button
 - Select 'Custom' from the top of the {Tab Label} picklist
 - Type in "Coaching" in the {Custom Label} field, {tab} out of the field, click [Done]

Continued on the next page ...



Viewing Coaching in Salesforce continued...

The screenshot displays the Salesforce Plan2Prosper interface. On the left, the 'Components' panel lists various components, with 'Plan2 Coaching' highlighted. A red arrow points from this component to the 'Coaching' tab in the main content area. The 'Coaching' tab shows a detailed overview of the Plan2Prosper coaching framework, including sections for Purpose, Description, and The Process. The main content area also displays a 'Details' tab for 'Plan2Prosper' with various metrics and a 'Budget Summary' table.

Budget Summary	
Annual Revenue	\$0
Budget Full Year	\$50,000
Budget YTD	\$17,000
YTD Commentary	The relationship is in good shape and we have pipeline identified to both meet and exceed our forecast and deliver the business value RapidBiker require

Whitespace Calculations	
Competitor Forecast Spend	\$73,000
Forecast Full Year	\$77,000
Whitespace	\$73,000.00

3. In the left-hand panel you will see a list of Components...

- Drag the {Plan2 Coaching} component into the new Tab area
- Click [Save] [Activate] [<-Back]

NOTE: Repeat the same process in the Opportunity Plan2Close layout.

⚡ Lightning | Setup > Objects & Fields > Object Manager > Opportunity > Lightning Record Pages



Configuring SalesMethods

Configure Plan2Close: Settings

Click on {Plan2Close} > [Settings]

1. If you have a policy that locks Opportunities after being closed you can also lock the Plan2Close data also. To do this tick the '**Lock Plan2Close after Opportunity close**' checkbox which will remove the New, Edit, or Delete links and buttons in the related Plan2Close screens.
2. You can switch off the '**Risk Analysis**' feature by ticking the '**Disable Risk Analysis trigger**' checkbox, which will remove the risk percentage/chart fields from all the Plan2Close screens.

Click [Save]

Common

- Question Sets
- Question Set Migration
- User Permissions Checker

Plan2Close

- Settings

Plan2Prosper

- Settings

Plan2Close Settings

Save

General settings

Lock Plan2Close after Opportunity close	☐	If set to true the Plan2Close fields will not be editable once the Opportunity has been marked as Closed, except for Administrators.
Disable Risk Analysis trigger	☐	The opportunity change trigger can be safely disabled when not using Risk Analysis.

Custom help

Help Zip file		The name of a custom help file resource include the namespace is required. If left blank the standard help will be used.
Help Zip domain name		The domain name of the Salesforce org if not standard (ie. tapp0.salesforce.com)
Help Zip languages		If the zip supports languages translations, list the supported languages separated by commas.
Help test link	Click to test Custom help	After saving the settings click the test link to ensure the resource name and domain are correct.

Save

You can choose to customise the Plan2Close help. You would most likely do this to provide guidance to sales staff that is unique to your organisation. We recommend that this is done in cooperation with our SalesMethods consulting advisors.

To request assistance please go to <https://salesmethods.com/support/> and make your request.



Configure Plan2Prosper: Settings

Click on {Plan2Prosper} > [Settings]

Common

- Question Sets
- Question Set Migration
- User Permissions Checker

Plan2Close

- Settings

Plan2Prosper

- Settings**

Plan2Prosper Settings Help for this Page

Save

Custom help

Help Zip file		The name of a custom help file resource include the namespace is required. If left blank the standard help will be used.
Help Zip domain name		The domain name of the Salesforce org if not standard (ie. tapp0.salesforce.com)
Help Zip languages		If the zip supports languages translations, list the supported languages separated by commas.
Help test link	Click to test Custom help	After saving the settings click the test link to ensure the resource name and domain are correct.

Account Overview

Account Overview Report		The URL of a custom Account Overview report page
---	----------------------	--

Save

You can choose to customise the Plan2Prosper help. You would most likely do this to provide guidance to sales staff that is unique to your organisation. We recommend that this is done in cooperation with our SalesMethods consulting advisors.

Additionally, you can export the Plan2Prosper '**Account Overview**' in a PDF format to a pre-determined URL, and again we recommend that this is done in cooperation with our SalesMethods consulting advisors.

To request assistance please go to <https://salesmethods.com/support/> and make your request.



Configure: Question Sets

Click on {Question Sets}

Common

Question Sets

Question Set Migration

User Permissions Checker

Plan2Close

Settings

Plan2Prosper

Settings

Custom Question Sets

Plan2Prosper and Plan2Close come with a default methodology that is designed by SalesMethods to deliver the best value for your sales team. If required, you can modify or completely replace the standard methodology by creating Question Sets on this page.

A Question Set provides the questions for use in Plan2Prosper or Plan2Close, plus other configuration settings. Create one or more Question Sets and then link them to your accounts and opportunities.

Recalculate question sets in use

Custom Question Sets

New

Action	Name	Application	Status	Custom	In Use	Created By	Modified By
Edit	Plan2Close	Plan2Close	Enabled	Standard	Yes	User User, 5/4/21 8:09 AM	Mark Mogridge, 5/4/21 5:40 PM
Edit	Plan2Prosper	Plan2Prosper	Enabled	Standard	Yes	User User, 5/4/21 8:09 AM	Mark Mogridge, 5/26/21 1:41 PM

1-2 of 2

« Previous Next »

Page 1 of 1

New

SalesMethods comes with standard methodologies for use in **Plan2Prosper** or **Plan2Close** plans. Both comprise of the 16 Questions (in a 4x4 grid) and guide sheets.

Create a new Plan2Close Question Set

By clicking on the [New] button you can...

New Question Set

Question Set Title

Plan2Close [Clone]

Product

☐ Plan2Prosper - Account planning

☒ Plan2Close - Opportunity management

Initial Template

You can start with a blank question set, base it on the standard set, or clone an existing set.

☐ Blank

☐ SalesMethods

-- Select a Plan2Close set --

☒ Plan2Close

☒ Clone Existing Set

Save

Cancel

1. Give the new Question Set a title.
2. Select either the **Plan2Close** or **Plan2Prosper** product type, in this example we are using **Plan2Close**.
3. Choose the initial template ...
 - Create a new Blank Question Set.
 - Use the system Standard **Plan2Close** Question Set.
 - Clone an existing **Plan2Close** Question Sets, as in this example.
4. Click [Save].



Modify a Question Set

Using the **Plan2Close [Clone]** Question Set plan in this example...

The screenshot shows the 'Custom Question Sets' interface. On the left, a sidebar contains 'Common' (with 'Question Sets' highlighted), 'Plan2Close', and 'Plan2Prosper'. The main area displays a table of custom question sets. A red box highlights the 'Plan2Close [Clone]' row, and a red arrow points from it to the 'Question Set: Plan2Close [Clone]' detail view. In the detail view, the 'Name' field is 'Plan2Close [Clone]', the 'Product' is 'Plan2Close', and the 'Enabled' checkbox is checked. A red box highlights the 'Enabled' checkbox, and a red arrow points from it to the 'Save' button. The 'Save' button is also highlighted with a red box.

Action	Name	Application	Status	Custom	In Use	Created By	Modified By
Edit	Plan2Close	Plan2Close	Enabled	Standard	Yes	User User, 5/4/21 8:09 AM	Mark Mogridge, 5/26/21 1:41 PM
Edit	Plan2Close [Clone]	Plan2Close	Disabled	Custom	No	Mark Mogridge, 5/26/21 3:56 PM	Mark Mogridge, 5/26/21 4:15 PM
Edit	Plan2Prosper	Plan2Prosper	Enabled	Standard	Yes	User User, 5/4/21 8:09 AM	Mark Mogridge, 5/26/21 1:41 PM

1-3 of 3

« Previous Next » Page 1 of 1

Question Set: Plan2Close [Clone]

Question Set Detail

Name: Plan2Close [Clone]

Help Zip Static Resource: [Empty]

Help Zip Languages: [Empty]

Modified By: Mark Mogridge, 5/26/2021 8:56 AM

Product: Plan2Close

Enabled: ☒

Only enable the set once it is fully configured. You cannot add or remove questions once the set is in use.

Save Cancel

Edit Delete

Question Set Detail

By clicking on the **[Edit]** button in the **Question Set Detail** section you can...

1. Rename the plan
2. Change Static Resource that holds the .zip file containing the Help web pages
3. Enable the plan. But please note, you cannot add any more questions once this Plan is used within an Opportunity.
4. Click **[Save]** to change any changes.



Questions and Groups

Scroll down to see the **Question and Groups** section. By clicking on the **[Edit]** button you can...

The screenshot illustrates the 'Questions and Groups' interface. At the top, there is a header with an 'Edit' button. Below it, a table lists various groups and questions. A 'Group Properties' dialog is open, showing the 'Group Title' as 'Reputation'. A 'Question Properties' dialog is also open, showing the 'Question Title' as 'Significant Value Derived' and the 'Question Number' as '1'. Red arrows indicate the flow of actions: from the 'Edit' button to the 'Group Properties' dialog, then to the 'Question Properties' dialog, and finally to the 'Save' button in the top header.

Questions and Groups

Qualification

- 1 Business Driver
- 2 Business Response
- 3 Purchasing Process
- 4 Pain or Gain Opportunity

Justification

- 5 Client Competitor
- 6 Short-term Revenue

Group Properties

Group Title: Reputation

Question Properties

Question Title: Significant Value Derived

Question Number: 1

1. Change the plan's column widths.
2. Click on the {Wrench Icon} in the Question Group header to edit the Question Group name. Click **[Save]**
3. Click on the {Wrench Icon} next to the question to edit the Question title and the select Question order number. Click **[Save]**
4. Click **[Save]** in the top header to confirm all changes.



Questions and Groups continued...

You can add new Question Groups and Questions by simply drag-dropping the icon from the top bar into the plan...

Creating a new Question Group...

Qualification	Differentiation
1 Business Drivers	9 Buying Criteria
2 Business Responses	10 Alignment
3 Purchasing Process	11 Competitive Differentiation
4 Pain or Gain Objective	12 Strategy
Justification	
5 Client Competency	13 Visibility / Credibility
6 Short-term Revenue	14 Personal Insight
7 Ability to Respond	15 Political Insight
8 Strategic Value	16 Positioning

Group Properties

Group Title:

Creating a Question within the Group...

Qualification	Differentiation
1 Business Drivers	9 Buying Criteria
2 Business Responses	10 Alignment
3 Purchasing Process	11 Competitive Differentiation
4 Pain or Gain Objective	12 Strategy
Justification	
5 Client Competency	13 Visibility / Credibility
6 Short-term Revenue	14 Personal Insight
7 Ability to Respond	15 Political Insight
8 Strategic Value	16 Positioning
Contract Signing	
17 Both Parties Signed	

Question Properties

Question Title:

Question Number:

1. Drag-Drop the {Group} icon into the new area.
2. Name the Question Group and click [Save].
3. Drag-Drop the {Question} icon under the Group Header.
4. Give the Question a title and provide its order number and click [Save].
5. Click [Save] in the top header to confirm all changes.

The modified Plan2Close plan...

Qualification	Differentiation
☐ 1 Business Drivers	☐ 9 Buying Criteria
☐ 2 Business Responses	☐ 10 Alignment
☐ 3 Purchasing Process	☐ 11 Competitive Differentiation
☐ 4 Pain or Gain Objective	☐ 12 Strategy
Justification	Influence
☐ 5 Client Competency	☐ 13 Visibility / Credibility
☐ 6 Short-term Revenue	☐ 14 Personal Insight
☐ 7 Ability to Respond	☐ 15 Political Insight
☐ 8 Strategic Value	☐ 16 Positioning
Contract Signing	
☐ 17 Both Parties Signed	



Tools and Features

Scroll down to see the **Tools & Features** section.

This is where you can 'point' the Questions in your customised plans to the standard features of the **Account Overview (P2P)** or the **Closing Plan (P2C)** reports.

If you are viewing a **P2C** plan you will see this option ...

Tools and Features			Edit
Enabled	Tool	Questions and Features	
	Closing Plan		
	Purchasing process questions	3	
✓	Printable View		

If you are viewing a **P2P** plan you will see these options, let's edit the {Account Summary} Feature List...

The screenshot illustrates the process of editing a feature list for a P2P plan. It shows three main components:

- Tools and Features Table:** A table with columns 'Enabled', 'Tool', and 'Questions and Features'. It lists 'Account Overview' as an enabled tool.
- Question Set: Plan2Prosper Table:** A table with columns 'Enabled', 'Tool', 'Action', and 'Questions and Features'. It lists 'Account Overview' as an enabled tool with an 'Edit' button next to it.
- Edit Tool Settings Dialog:** A dialog box for editing the 'Account Overview' tool. It contains two lists: 'Available Items' (a list of questions) and 'Items To Use' (a list of questions). The 'Add' button is used to move items from 'Available Items' to 'Items To Use'. The 'Remove' button is used to move items from 'Items To Use' back to 'Available Items'. The 'Up' and 'Down' buttons are used to reorder items within the 'Items To Use' list. The 'Save' button is used to confirm changes.

To change a Feature List...

1. Click on the **[Edit]** button in the header to be able to edit the features.
2. Click **[Edit]** for the Feature you wish to modify.
3. **{Add ►}** or **{Remove ◀}** questions from the Feature List.
4. **{Promote ▲}** or **{Demote ▼}** questions within the Feature List, click **[Save]**.
5. Click **[Save]** in the header to confirm all changes.



Auto-Match Rules

Scroll down to see the **Auto-Match Rules** section.

Auto-match Rules	Edit
No rules defined	

By default, the user must manually select which Question Set they are going to use. But this feature allows you to define which Question Set is **automatically** assigned to an Account (**P2P**) or an Opportunity (**P2C**).

[Save](#) [Cancel](#)

Enter the formula to match the question set to a user, profile, or opportunity. When the user initiates the Plan2Close each question set is checked for a match. The question set is only available to users if the auto-match evaluates to true or is left blank.

[Insert Field](#)

(Opportunity.Amount > 1000000 AND Opportunity.TotalOpportunityQuantity > 1000 AND NOT(Opportunity.IsClosed))

[Check Syntax](#) No syntax errors in merge fields or functions.

Functions

CASE
CONTAINS
ISBLANK
IF
INCLUDES
ISNULL

[Insert Selected Function](#)

CONTAINS(text, compare_text)

Checks if text contains specified characters, and returns TRUE if it does. Otherwise, returns FALSE

Note that black fields are treated as null not zero.

Using standard Salesforce formula syntax, you can define the criteria as to which type of Account or Opportunity the Question Set is automatically assigned to.

1. Click **[Edit]** in the Auto-Match Rules header.
2. Enter your formula into the code area.
3. Click **[Check Syntax]** to ensure the code is working.
4. Click **[Save]**.



Question Set Migrations

With **Question Set Migrations** you can **progress** from one **Question Set** to another. This means that you can present the relevant Question Sets in 'stages', as and when you need them.

First, prepare all the **Question Sets** that will cover the business processes...

- All of them must be 'Enabled'
- Ensure the 'Auto-Match Rules' are consistent

Each subsequent (**Target**) **Question Set** should include all the questions from the prior (**Source**) **Question Sets** to show the plan's overall status at each subsequent stage.

In this example we will migrate from 'Plan2Close' (the standard P2C plan) to 'Plan2Close [Contract]' that also manages with the Contract Signing process...

Question Set #1 (Source)	Migrates >	Question Set #2 (Target)
'Plan2Close'	>	'Plan2Close [Contract]'
1. Business Drivers	>	1. Business Drivers
2. Business Responses	>	2. Business Responses
3. Purchasing Process	>	3. Purchasing Process
4. Pain or Gain Objective	>	4. Pain or Gain Objective
5. Client Competency	>	5. Client Competency
6. Short-term Revenue	>	6. Short-term Revenue
7. Ability to Respond	>	7. Ability to Respond
8. Strategic Value	>	8. Strategic Value
9. Buying Criteria	>	9. Buying Criteria
10. Alignment	>	10. Alignment
11. Competitive Differentiation	>	11. Competitive Differentiation
12. Strategy	>	12. Strategy
13. Visibility / Credibility	>	13. Visibility / Credibility
14. Personal Insight	>	14. Personal Insight
15. Political Insight	>	15. Political Insight
16. Positioning	>	16. Positioning
	New	17. Both Parties Signed Contract
	New	18. Both Parties Signed NDA
	New	19. Credit Check Completed
	New	20. Banking Details Confirmed
	New	21. Installation Scheduled
	New	22. Initial Invoice Raised



Question Set Migrations continued...

In the **Source Question Set** (in this example it is '**Plan2Close**') scroll down to see the **Question Set Migrations** section.

Question Set Migrations	New Migration
No migrations defined	

Question Set Migration Target		Save	Cancel
Migration Information			
Question Set	Plan2Close	Target Question Set	Select a target ✓ Plan2Close [Contract]
Automatic	☒		
Question Mapping			
Source Question	Target Question		
1. Business Drivers	1. Business Drivers		
2. Business Responses	2. Business Responses		
3. Purchasing Process	3. Purchasing Process		
4. Pain or Gain Objective	4. Pain or Gain Objective		
5. Client Competency	5. Client Competency		
6. Short-term Revenue	6. Short-term Revenue		
7. Ability to Respond	7. Ability to Respond		
8. Strategic Value	8. Strategic Value		
9. Buying Criteria	9. Buying Criteria		
10. Alignment	10. Alignment		
11. Competitive Differentiation	11. Competitive Differentiation		
12. Strategy	12. Strategy		
13. Visibility / Credibility	13. Visibility / Credibility		
14. Personal Insight	14. Personal Insight		
15. Political Insight	15. Political Insight		
16. Positioning	16. Positioning		

1. Click [New Migration] in the Question Set Migrations header.
2. Select the {Target Question Set}.
3. Check {Automatic} if you want the Users to authorise the Migration, or leave it unchecked if you only want the Administrator to perform the Migration.
4. You may have to manually map the questions between the **Question Sets**, but where they match **SalesMethods** will do this automatically.
5. Click [Save].



Question Set Migrations continued...

After clicking [Save] you will see the list of the **Migrations** for the currently viewed **Question Set ...**

Question Set Migrations		New Migration
Target Question Set	Automatic	
Plan2Close [Contract]	☒	

And when this **Question Set** is completed in an Account (P2P) or Opportunity (P2C) the **[Migrate Plan]** button will appear...



Migrate Plan

Print Overview

Qualification		Differentiation	
1 Business Drivers	☒	9 Buying Criteria	☒
2 Business Responses	☒	10 Alignment	☒
3 Purchasing Process	☒	11 Competitive Differentiation	☒
4 Pain or Gain Objective	☒	12 Strategy	☒
Justification		Influence	
5 Client Competency	☒	13 Visibility / Credibility	☒
6 Short-term Revenue	☒	14 Personal Insight	☐
7 Ability to Respond	☒	15 Political Insight	☐
8 Strategic Value	☒	16 Positioning	☒

Plan Risk

0%

Plan Migration

Back

Your plan can now be migrated. Click the Migrate button to begin the process.

New question set:

* Question Set

Plan2Close [Contract]

Migrate

1. Click **[Migrate Plan]**
2. Confirm which **Question Set** you wish to Migrate to
3. Click **[Migrate]**

See the next page to see the result...



Question Set Migrations continued...

After **Migrating** you will see the next **Question Set** in the sequence '**Plan2Close [Contract]**', which in this example, contains the Contract Signing & Installation processes...

plan2 close					
Qualification		Differentiation		Contract Signing	
1 Business Drivers	✓	9 Buying Criteria	✓	17 Both Parties Signed Contract	☐
2 Business Responses	✓	10 Alignment	✓	18 Both Parties Signed NDA	☐
3 Purchasing Process	✓	11 Competitive Differentiation	✓	19 Credit Check Completed	☐
4 Pain or Gain Objective	✓	12 Strategy	✓	20 Banking Details Confirmed	☐
Justification		Influence		Installation Agreed	
5 Client Competency	✓	13 Visibility / Credibility	✓	21 Installation Scheduled	☐
6 Short-term Revenue	✓	14 Personal Insight	▶	22 Initial Invoice Raised	☐
7 Ability to Respond	✓	15 Political Insight	▶		
8 Strategic Value	✓	16 Positioning	✓		

Question Set Translations

Please contact SalesMethods Support if you wish to activate the multi-language facilities.



Risk Evaluation Rules

Risk Rules only apply to **Plan2Close** Opportunity **Question Sets**.

This feature allows you to calculate the **Risk** (as a percentage) of moving through the **Sales Process** from one Opportunity **Stage** to the next **Stage** when Questions are missing evidence.

To do this we assign **Plan2Close** Questions to each Opportunity **Stage** and then assign a **Risk%** against each piece of missing evidence.

In the example below, we have used the Standard **Plan2Close** Opportunity **Question Set**. And we have used the Standard **Salesforce** Opportunity **Stages** with one exception; we have placed 'Id. Decision Makers' after 'Perception Analysis' in the Stage order to better suit our **Question Set**.

If we cross-reference the **Questions (Y)** with the **Stages (X)** and identify the Stage at which the evidence is scheduled to be provided, we get this matrix...

	Prospecting	Qualification	Needs Analysis	Value Proposition	Perception Analysis	Id. Decision Makers	Proposal/Price Quote	Negotiation/Review
1. Business Drivers								
2. Business Responses								
3. Purchasing Process								
4. Pain or Gain Objective								
5. Client Competency								
6. Short-term Revenue								
7. Ability to Respond								
8. Strategic Value								
9. Buying Criteria								
10. Alignment								
11. Competitive Differentiation								
12. Strategy								
13. Visibility / Credibility								
14. Personal Insight								
15. Political Insight								
16. Positioning								

NOTE: It is highly likely that the Stages you use within your Org are different, but this will give you some ideas on how you setup your own Risk Evaluation Rules.



Risk Evaluation Rules continued...

Using the **Questions (Y) / Stages (X)** table we showed above, here are some suggestions on how to calculate the **Risk%** for the different Question/Stage combinations. The explanation below use **Questions 6-9**.

Current Risk	This is the percentage Risk if this question remains unanswered in the Scheduled Stage. <i>Typically, there is 0% Risk in the Scheduled Stage</i> Stage: 'Value Proposition' = 0%
Next Risk	This is the percentage Risk if this question remains unanswered one Stage after the Scheduled Stage. <i>Formula Used: $50\% \div \{\text{\# of Questions within the Stage}\}$</i> Stage: 'Perception Analysis': $50\% \div 4 \text{ Questions} = 15\%$ <i>Rounded</i>
Future Risk	This is the percentage Risk if this question remains unanswered more than one Stage after the Scheduled Stage <i>Formula Used: $100\% \div \{\text{\# of Questions within the Stage}\}$</i> Stage: 'Id. Decision Makers': $100\% \div 4 \text{ Questions} = 25\%$

	Prospecting	Qualification	Needs Analysis	Value Proposition	Perception Analysis	Id. Decision Makers	Proposal/Price Quote	Negotiation/Review
1. Business Drivers	0%	50%	100%	100%	100%	100%	100%	100%
2. Business Responses		0%	30%	50%	50%	50%	50%	50%
3. Purchasing Process		0%	30%	50%	50%	50%	50%	50%
4. Pain or Gain Objective			0%	30%	50%	50%	50%	50%
5. Client Competency			0%	30%	50%	50%	50%	50%
6. Short-term Revenue				0%	15%	25%	25%	25%
7. Ability to Respond				0%	15%	25%	25%	25%
8. Strategic Value				0%	15%	25%	25%	25%
9. Buying Criteria				0%	15%	25%	25%	25%
10. Alignment					0%	15%	25%	25%
11. Competitive Differentiation					0%	15%	25%	25%
12. Strategy					0%	15%	25%	25%
13. Visibility / Credibility					0%	15%	25%	25%
14. Personal Insight						0%	20%	30%
15. Political Insight						0%	20%	30%
16. Positioning						0%	20%	30%



Risk Evaluation Rules continued...

In the SalesMethods Config, scroll down to see the **Risk Evaluation Rules** section.

Risk Evaluation Rules Edit

No rules defined

Save Cancel

Select the stages of the sale that will be used by opportunities using this question set and place the stages in the correct order.

Select Stages

Order Stage of Sale Probability

Select Stages

Pick the stages and set the order

Available Items
Prospecting
Qualification
Needs Analysis
Value Proposition
Perception Analysis
Id. Decision Makers
Proposal/Price Quote
Negotiation/Review

Add
Remove

Items To Use
Prospecting
Qualification
Needs Analysis
Value Proposition
Perception Analysis
Id. Decision Makers
Proposal/Price Quote
Negotiation/Review
Up
Down

Save Cancel

1. Click **[Edit]**
2. Click **[Select Stages]**
3. Select all the Opportunity Stages in the Available items
4. Click **[►]** to add them to the Use items
5. Click **[Save]**

And you will see the selected **Stages** added to the **Risk Evaluation...**

Select the stages of the sale that will be used by opportunities using this question set and place the stages in the correct order.

Select Stages

Order	Stage of Sale	Probability
1	Prospecting	10%
2	Qualification	10%
3	Needs Analysis	20%
4	Value Proposition	50%
5	Perception Analysis	60%
6	Id. Decision Makers	70%
7	Proposal/Price Quote	75%
8	Negotiation/Review	90%



Risk Evaluation Rules continued...

Next we add **Rules** for each **Question** within each **Stage**.

Let's start with the '**1. Business Drivers**' Question (Q1), which should be answered during the '**Prospecting**' Stage ...

Enter the rules that must be completed for each stage of the sale.

Action	Rule	Prompt
Add rule	Prospecting	
Add rule	Qualification	

Rule Edit

Stage:

User Prompt:

Current Risk:

Next Risk:

Future Risk:

Risk Formula:

1. Stage
This is the **Stage** during which the question (identified as Q1 in the formula below) is scheduled to be answered/completed.
2. User Prompt
Provide a prompt that helps the User to provide the required evidence to answer the question. This prompt will be listed under the Plan Risk Chart in the **Plan2Close** screen.
3. Current Risk
This is the percentage Risk if this question remains unanswered in the **Scheduled Stage**, which is 'Prospecting'.
We are putting the risk at 0%
4. Next Risk
This is the percentage Risk if this question remains unanswered **one Stage after the Scheduled Stage**, which is 'Qualification'.
We are putting the risk at 50% if this happens.
5. Future Risk
This is the percentage Risk if this question remains unanswered **more than one Stage after the Scheduled Stage**, which are 'Needs Analysis', 'Value Proposition' and all the subsequent Stages.
We are putting the risk at 100% if this happens.

Section continued ...



Risk Evaluation Rules continued...

6. Risk Formula

The formula criteria must equal **TRUE** to a **0% Risk Status**.

A: You **Identify** a Question is by its Order number...

Q1 = 1. Business Drivers

Q2 = 2. Business Responses

Q3 = 3. Purchasing Process

etc

B: The '**Statuses**' of a question are...

BLACK =  Not yet started

RED =  Cannot satisfy question

GREEN =  Question satisfied. **[0% Risk]**

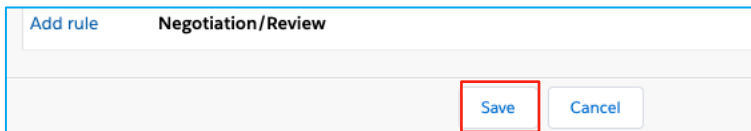
AMBER =  In progress

REVIEW =  Manager requests reassessment

So the **0% Risk** formula text for Question '**1. Business Drivers**' is...

Q1 = GREEN

7. Click [Save]



8. Click [Save] again to save all the Risk Evaluation Rules. *This is very important.*



Risk Evaluation Rules continued...

Here are the results of the three different Risk scores defined in this Rule ...

Current Risk

Current Risk | 0

The 'Prospecting' Stage is when the '1. Business Drivers' question is scheduled to be answered, so it uses the **Current Risk** score and returns a **0% Risk**.

Stage: Prospecting

Details: Plan2Close

Qualification	Differentiation
1 Business Drivers	9 Buying Criteria
2 Business Responses	10 Alignment
3 Purchasing Process	11 Competitive Differentiation
4 Pain or Gain Objective	12 Strategy
Justification	Influence
5 Client Competency	13 Visibility / Credibility
6 Short-term Revenue	14 Personal Insight
7 Ability to Respond	15 Political Insight
8 Strategic Value	16 Positioning

Plan Risk: 0%

Next Risk

Next Risk | 50

The 'Qualification' Stage is **one** Stage behind schedule so the unanswered '1. Business Drivers' question uses the **Next Risk** score and returns a **50% Risk**.

Stage: Qualification

Details: Plan2Close

Qualification	Differentiation
1 Business Drivers	9 Buying Criteria
2 Business Responses	10 Alignment
3 Purchasing Process	11 Competitive Differentiation
4 Pain or Gain Objective	12 Strategy
Justification	Influence
5 Client Competency	13 Visibility / Credibility
6 Short-term Revenue	14 Personal Insight
7 Ability to Respond	15 Political Insight
8 Strategic Value	16 Positioning

Plan Risk: 50%

You may want to consider

01. Business Drivers: Have you determined business reasons why the PROSPECT needs to act?

Future Risk

Future Risk | 100

The 'Needs Analysis' Stage is **two** Stages behind schedule so the unanswered '1. Business Drivers' question uses the **Future Risk** score and returns a **100% Risk**.

Stage: Needs Analysis

Details: Plan2Close

Qualification	Differentiation
1 Business Drivers	9 Buying Criteria
2 Business Responses	10 Alignment
3 Purchasing Process	11 Competitive Differentiation
4 Pain or Gain Objective	12 Strategy
Justification	Influence
5 Client Competency	13 Visibility / Credibility
6 Short-term Revenue	14 Personal Insight
7 Ability to Respond	15 Political Insight
8 Strategic Value	16 Positioning

Plan Risk: 100%

You may want to consider

01. Business Drivers: Have you determined business reasons why the PROSPECT needs to act?



Risk Evaluation Rules continued...

Here is the full list of Risk Evaluation Rules for this example...

Action	Rule	Prompt	Current Risk	Next Risk	Future Risk
Add rule	Prospecting				
Edit Delete	Q1 =	1. Business Drivers: Have you determined business reasons why the PROSPECT needs GREEN to act?	0%	50%	100%
Add rule	Qualification				
Edit Delete	Q2 =	2. Business Responses: Has the client initiated a formal response to address the GREEN opportunity or threat that the business driver represents?	0%	30%	50%
Edit Delete	Q3 =	3. Purchasing Process: Has a formal purchasing process been initiated and do you GREEN understand what it constitutes and who is involved in sanctioning it?	0%	30%	50%
Add rule	Needs Analysis				
Edit Delete	Q4 =	4. Pain or Gain Objective: Are there clear consequences for the client to implement a GREEN solution by a specific event so that the decision has to be made by a specific time?	0%	30%	50%
Edit Delete	Q5 =	5. Client Competency: Is the PROSPECT capable of both project managing the GREEN decision and the implementation of the solution?	0%	30%	50%
Add rule	Value Proposition				
Edit Delete	Q6 =	6. Short-term Revenue: Is the short term revenue if you win this opportunity worth GREEN the resource you will need to commit to win it?	0%	15%	25%
Edit Delete	Q7 =	7. Ability to Respond: Do YOU have the time, competence and resource in order to GREEN run the sales plan?	0%	15%	25%
Edit Delete	Q8 =	8. Strategic Value: Is there a strategic value to you if you win the opportunity? GREEN	0%	15%	25%
Edit Delete	Q9 =	9. Buying Criteria: Are there formal buying criteria that the PROSPECT has articulated GREEN and do you understand them?	0%	15%	25%
Add rule	Perception Analysis				
Edit Delete	Q10 =	10. Alignment: Are you able to demonstrate your organisation's value that you can GREEN deliver through the sales process and the delivery of the solution?	0%	15%	25%
Edit Delete	Q11 =	11. Competitive Differentiation: Have you determined a differentiated value GREEN proposition that addresses the buying criteria and positions you to win the opportunity versus the competition?	0%	15%	25%
Edit Delete	Q12 =	12. Strategy: Have you a sales strategy to win the business? GREEN	0%	15%	25%
Edit Delete	Q13 =	13. Visibility / Credibility: Are you known by the most influential people in the GREEN PROSPECT and are we credible enough to positively affect the decision?	0%	15%	25%
Add rule	Id. Decision Makers				
Edit Delete	Q14 =	14. Personal Insight: Are you connected to a key supporter to the extent that you are GREEN aware of their and other's personal and business agendas?	0%	20%	30%
Edit Delete	Q15 =	15. Political Insight: Do you understand the non-formal as well as formal decision GREEN making process and the key influences?	0%	20%	30%
Edit Delete	Q16 =	16. Positioning: Is your virtual team positioned with the key influencers and decision GREEN makers and are you using these relationships to win the opportunity?	0%	20%	30%
Add rule	Proposal/Price Quote				
Add rule	Negotiation/Review				



Risk Evaluation Rules continued...

Below is a **Plan2Close** screen showing the Risk Calculation based on two unanswered questions (Q4 + Q6) at the 'Perception Analysis' Stage.

Stage: Perception Analysis

Details **Plan2Close** OrgChartPlus

plan2 close Closing Plan

Qualification		Differentiation	
1 Business Drivers	✓	9 Buying Criteria	✓
2 Business Responses	✓	10 Alignment	
3 Purchasing Process	✓	11 Competitive Differentiation	
4 Pain or Gain Objective	▶	12 Strategy	
Justification		Influence	
5 Client Competency	✓	13 Visibility / Credibility	
6 Short-term Revenue	✗	14 Personal Insight	
7 Ability to Respond	✓	15 Political Insight	
8 Strategic Value	✓	16 Positioning	

Plan Risk

65%

You may want to consider

- 6. Short-term Revenue
- 4. Pain or Gain Objective

The unanswered Q4: '4. Pain or Gain Objective' triggers the Future Risk of 50% because the current Stage 'Perception Analysis' is more than one Stage behind the scheduled completion Stage: 'Needs Analysis'.

Needs Analysis		Current Risk	Next Risk	Future Risk
Q4	4. Pain or Gain Objective: Are there clear consequences for the client to implement a GREEN solution by a specific event so that the decision has to be made by a specific time?	0%	30%	50%

The unanswered Q6: '6. Client Competency' triggers the Next Risk of 15% because the current Stage 'Perception Analysis' is one Stage behind the scheduled completion Stage: 'Value Proposition'.

Value Proposition		Current Risk	Next Risk	Future Risk
Q6	6. Short-term Revenue: Is the short term revenue if you win this opportunity worth GREEN the resource you will need to commit to win it?	0%	15%	25%

Total Plan Risk: 50% + 15% = **65% Risk**

Thank you for reading this

For any questions or further support on
install **Plan2Prosper** & **Plan2Close** please
go to <https://salesmethods.com/support/>
and complete the form.

