SalesMethods

Plan2Prosper & Plan2Close

Installation Instructions

Version 4.0+

sales
methods

Contents

What's new in v4?

SalesMethods Lightning Experience

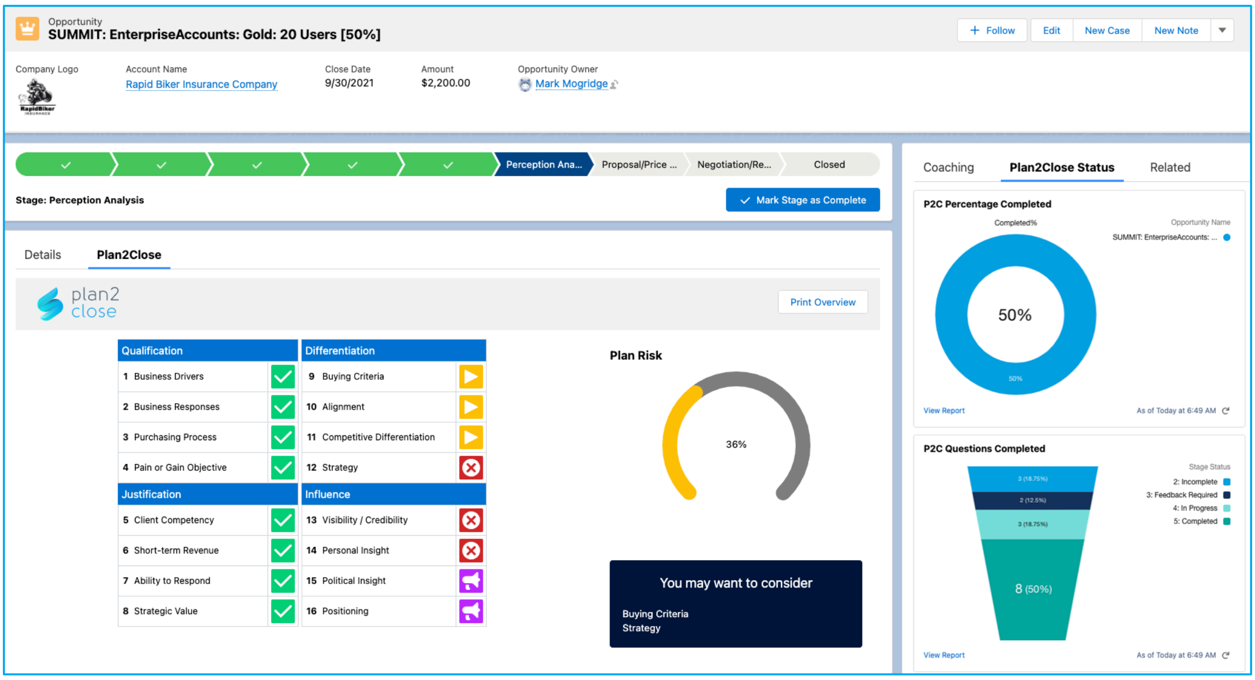
With the Plan2Prosper & Plan2Close fresh, clean and contemporary Lightning look we now offer our customers a more intuitive experience.

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.



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=04t1E0000016I21

Sandbox... https://test.salesforce.com/packaging/installPackage.apexp?p0=04t1E0000016I21

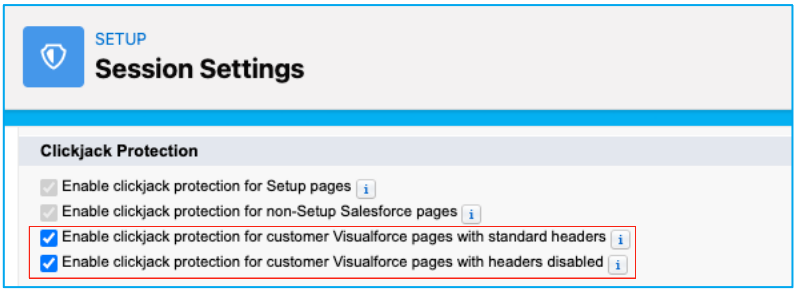
IMPORTANT: Do you have Clickjack Protection Enabled?

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…



…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.

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

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

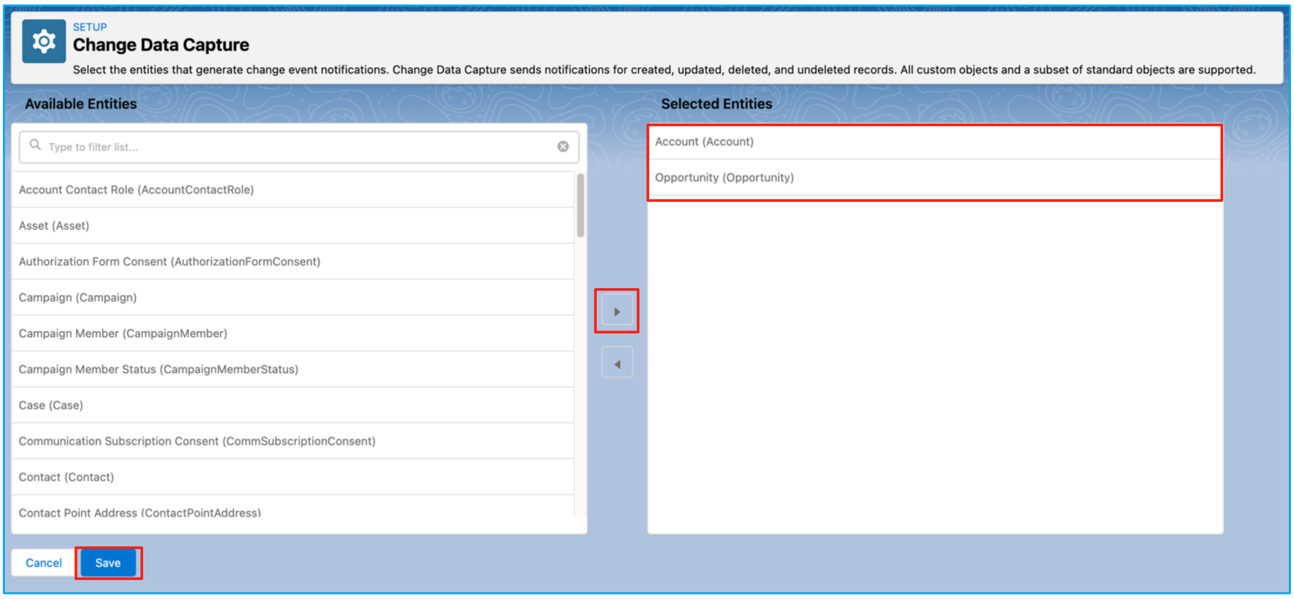
NOTE: *If your Org is a mix of Classic and Lightning users, then you will need to switch to the other {Mode} and also add that domain URL as a* ***Trusted Domain****.*

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

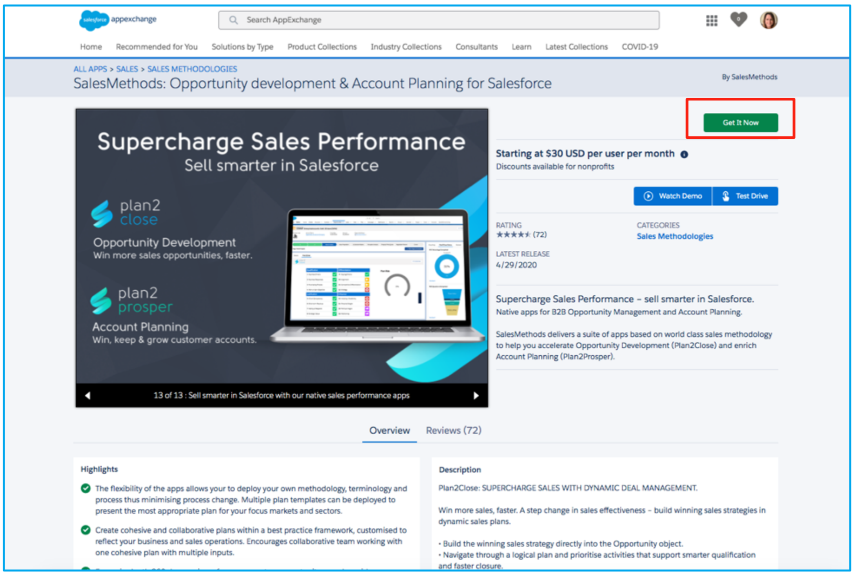
IMPORTANT: You need to run a data update <u>after</u> the installation

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.

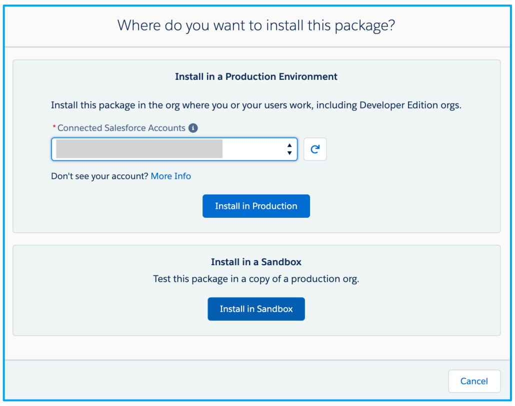
Install SalesMethods

1. **Click here to download SalesMethods from the App Exchange**
   https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000003J1KWEA0

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.

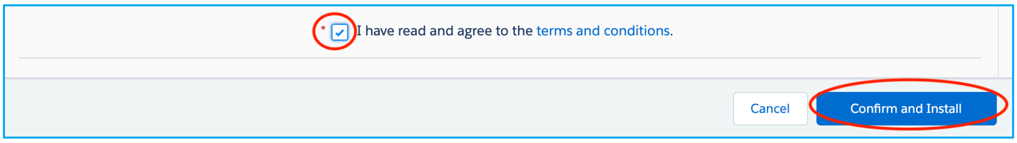


NOTE:

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

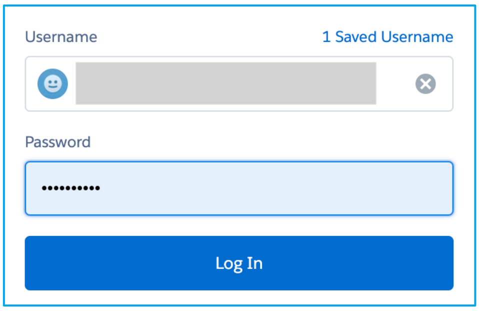
If you are installing a fresh copy of **SalesMethods App** you should install it into a Sandbox first, so click on **[Install in Sandbox]**.

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

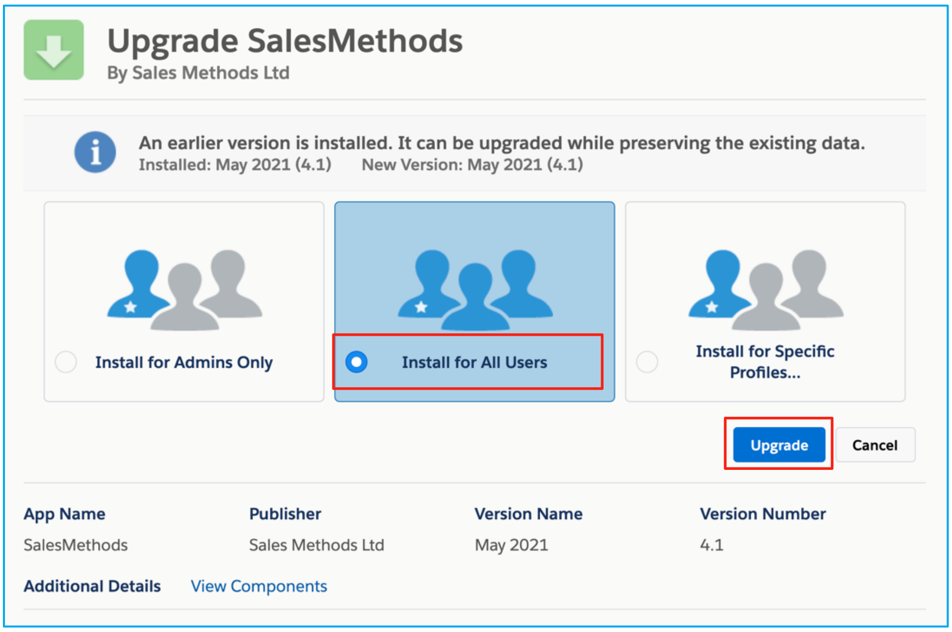


NOTE: If you have already purchased SalesMethods licences ignore the 'Free Trial' status in this installation form, your licences will remain in place.

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

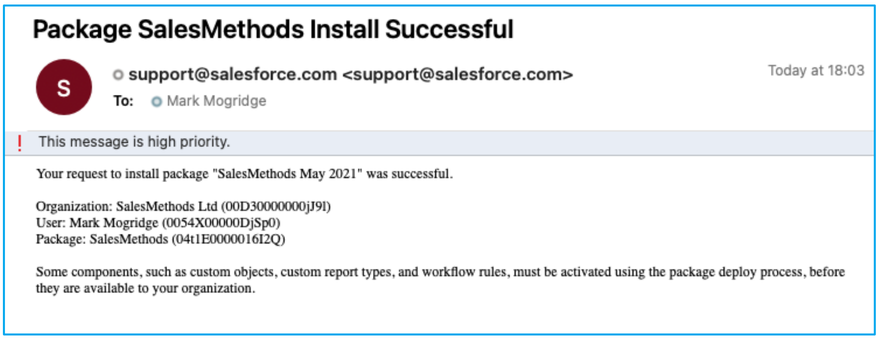


6. We recommend installing for all users. Select "Install for All Users" and click **[Install]** / **[Upgrade]**. (In the screen below we are running an Update on an existing install, so it shows an **[Upgrade]** button).



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

8. 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.



Package SalesMethods Install Successful

S support@salesforce.com <support@salesforce.com> Today at 18:03

To: Mark Mogridge

! This message is high priority.

Your request to install package "SalesMethods May 2021" was successful.

Organization: SalesMethods Ltd (00D30000000jJ9I)
User: Mark Mogridge (0054X00000DjSp0)
Package: SalesMethods (04t1E0000016I2Q)

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

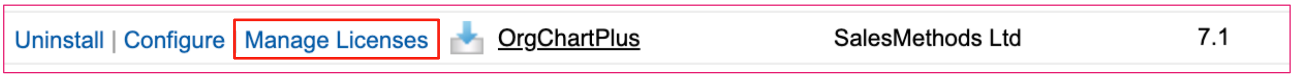
(ONLY APPLIES TO 'PRODUCTION' ORGS – SANDBOXES DO NOT NEED LICENCES)

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.*

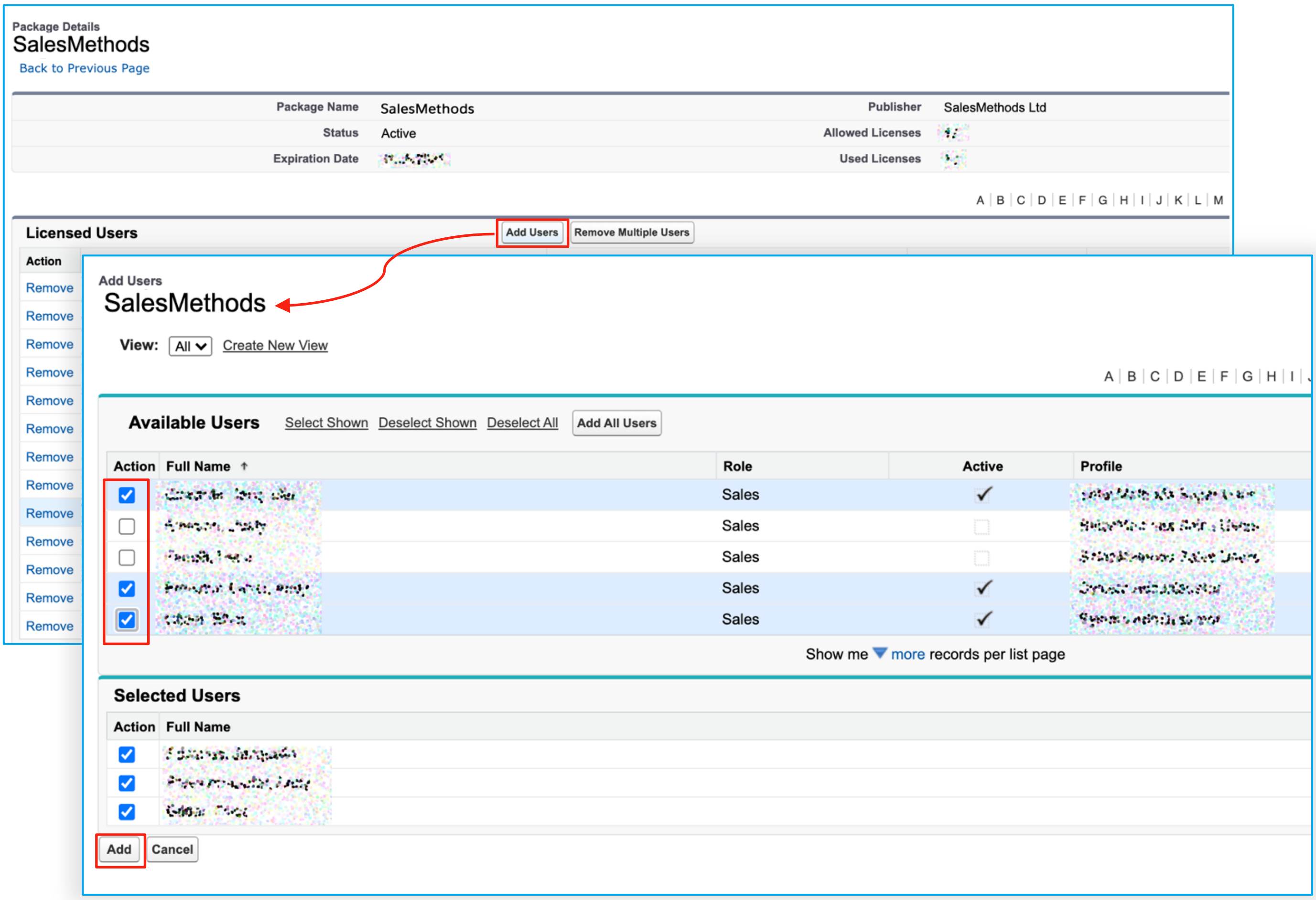
Classic | Setup > Installed Packages

Lightning | Setup > Apps > Packaging > Installed Packages

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



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 …



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

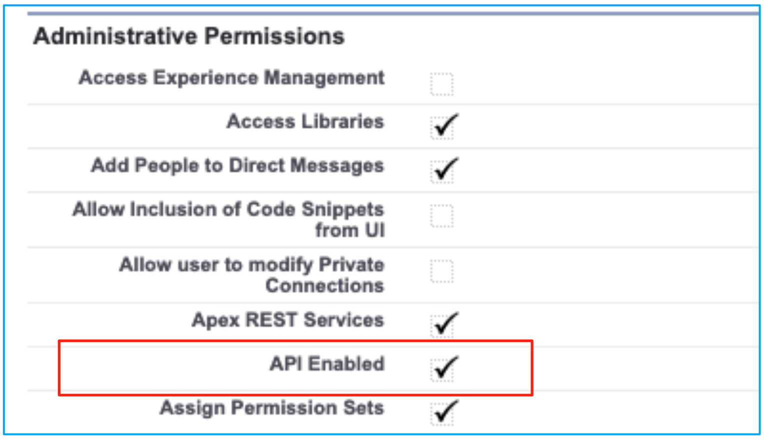
Note: If you use a 'standard' Profile for your sales Users, you will need to make that a 'custom' Profile so that you can make the changes below…

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…



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
ADP BlueSpace	✓	✓	✓	✓
ADP BlueSpace Competitor	✓	✓	✓	✓
ADP BlueSpace Data	✓	✓	✓	✓
ADP BlueSpace Regions	✓	✓	✓	✓
ADP BlueSpace Unit	✓	✓	✓	✓
ADP CompetingForces	✓	✓	✓	✓
ADP CompetingForces Statements	✓	✓	✓	✓
ADP CompetingForces Threat	✓	✓	✓	✓
ADP Objectives	✓	✓	✓	✓
ADP OrgCharts	✓	✓	✓	✓
ADP OrgChart Entities	✓	✓	✓	✓
ADP OrgChart Entity Common	✓	✓	✓	✓
ADP OrgChart Relationships	✓	✓	✓	✓
ADP OrgChart TeamMembers	✓	✓	✓	✓
ADP Questions	✓	✓	✓	✓
ADP Question Comments	✓	✓	✓	✓
ADP SWOT Statements	✓	✓	✓	✓
Business Units	✓	✓	✓	✓
Business Unit Groups	✓	✓	✓	✓
Company Accounts	✓	✓	✓	✓
Competitors	✓	✓	✓	✓
Competitor Families	✓	✓	✓	✓
Competitor Products	✓	✓	✓	✓
Contact Intimacies	✓	✓	✓	✓
MSO Buying Criteria	✓	✓	✓	✓
MSO Objectives	✓	✓	✓	✓
MSO Offerings	✓	✓	✓	✓
MSO Offering Items	✓	✓	✓	✓
MSO Offering Ratings	✓	✓	✓	✓

	Read	Create	Edit	Delete
MSO OrgCharts	✓	✓	✓	✓
MSO OrgChart Entities	✓	✓	✓	✓
MSO OrgChart Entity Common	✓	✓	✓	✓
MSO OrgChart Relationships	✓	✓	✓	✓
MSO OrgChart TeamMembers	✓	✓	✓	✓
MSO Questions	✓	✓	✓	✓
MSO Question Comments	✓	✓	✓	✓
MSO ValueMill	✓	✓	✓	✓
MSO VMStatements	✓	✓	✓	✓
Non-SFDC People	✓	✓	✓	✓
Product Families	✓	✓	✓	✓
Product Features	✓	✓	✓	✓
Product Feature Types	✓	✓	✓	✓
Question Sets	✓	✓	✓	✓
Question Set Groups	✓	✓	✓	✓
Question Set Localizations	✓	✓	✓	✓
Question Set Migrations	✓	✓	✓	✓
Question Set Questions	✓	✓	✓	✓
Question Set Risk Rules	✓	✓	✓	✓
Sales Regions	✓	✓	✓	✓
Sales Region Groupings	✓	✓	✓	✓
Sales Region Sets	✓	✓	✓	✓
Sales Region Set Entries	✓	✓	✓	✓

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
ADP BlueSpace	✓	✓	✓	✓
ADP BlueSpace Competitor	✓	✓	✓	✓
ADP BlueSpace Data	✓	✓	✓	✓
ADP BlueSpace Regions	✓	✓	✓	✓
ADP BlueSpace Unit	✓	✓	✓	✓
ADP CompetingForces	✓	✓	✓	✓
ADP CompetingForces Statements	✓	✓	✓	✓
ADP CompetingForces Threat	✓	✓	✓	✓
ADP Objectives	✓	✓	✓	✓
ADP OrgCharts	✓	✓	✓	✓
ADP OrgChart Entities	✓	✓	✓	✓
ADP OrgChart Entity Common	✓	✓	✓	✓
ADP OrgChart Relationships	✓	✓	✓	✓
ADP OrgChart TeamMembers	✓	✓	✓	✓
ADP Questions	✓	✓	✓	✓
ADP Question Comments	✓	✓	✓	✓
ADP SWOT Statements	✓	✓	✓	✓
Business Units	✓			
Business Unit Groups	✓	✓	✓	✓
Company Accounts	✓	✓	✓	✓
Competitors	✓	✓	✓	✓
Competitor Families	✓	✓	✓	✓
Competitor Products	✓	✓	✓	✓
Contact Intimacies	✓	✓	✓	✓
MSO Buying Criteria	✓	✓	✓	✓
MSO Objectives	✓	✓	✓	✓
MSO Offerings	✓	✓	✓	✓
MSO Offering Items	✓	✓	✓	✓
MSO Offering Ratings	✓	✓	✓	✓

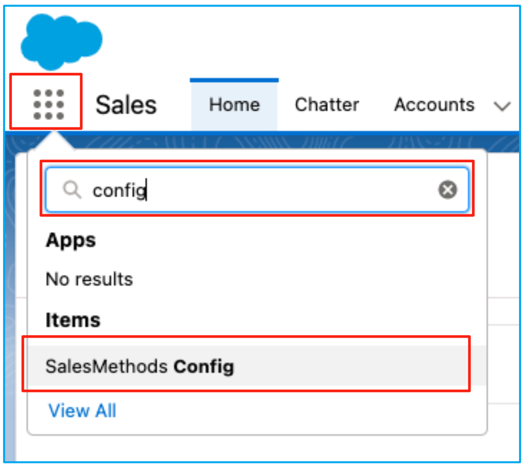
	Read	Create	Edit	Delete
MSO OrgCharts	✓	✓	✓	✓
MSO OrgChart Entities	✓	✓	✓	✓
MSO OrgChart Entity Common	✓	✓	✓	✓
MSO OrgChart Relationships	✓	✓	✓	✓
MSO OrgChart TeamMembers	✓	✓	✓	✓
MSO Questions	✓	✓	✓	✓
MSO Question Comments	✓	✓	✓	✓
MSO ValueMill	✓	✓	✓	✓
MSO VMStatements	✓	✓	✓	✓
Non-SFDC People	✓			
Product Families	✓			
Product Features	✓	✓	✓	✓
Product Feature Types	✓			
Question Sets	✓			
Question Set Groups	✓			
Question Set Localizations	✓			
Question Set Migrations	✓			
Question Set Questions	✓			
Question Set Risk Rules	✓			
Sales Regions	✓			
Sales Region Groupings	✓			
Sales Region Sets	✓			
Sales Region Set Entries	✓			

Adding the SalesMethods Configuration Tab

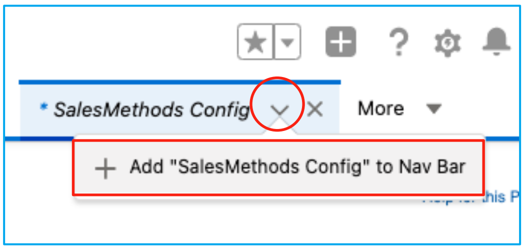
For Lightning Orgs and Admins Only…
REQUIRED: {My Domain} needs to be deployed

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

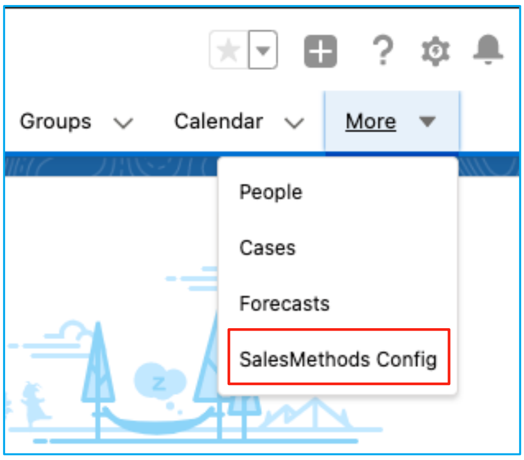
- Click on the 'App' icon (9 grey dots)
- Type "Config" in the search box
- Select 'SalesMethods Config'



- 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



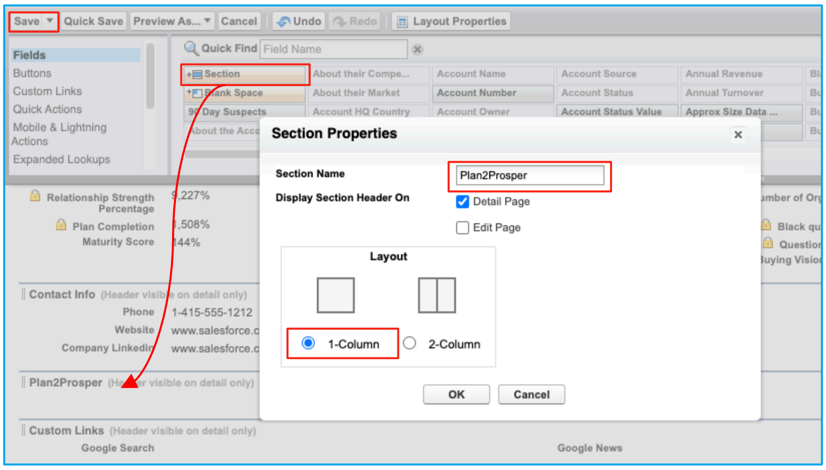
View Plan2Prosper in Salesforce

Classic | Embedding Plan2Prosper into a Page Layout

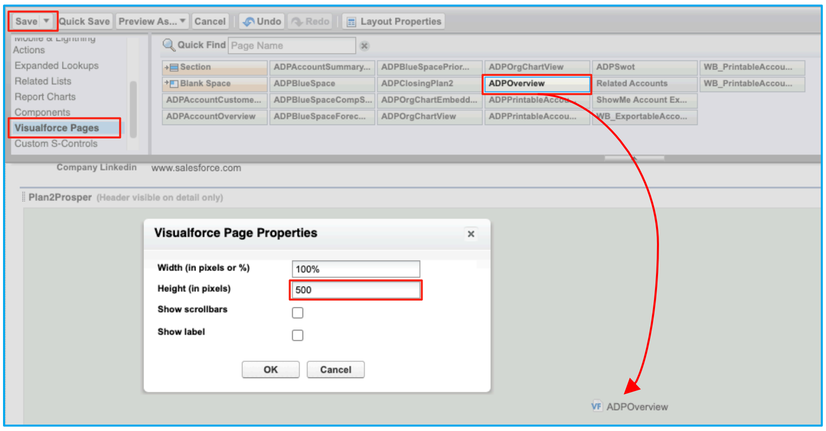
To place Plan2Prosper into a page layout, follow this process for the [**Account**] object...

Classic | Setup > Customize > <u>Account</u> > 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]

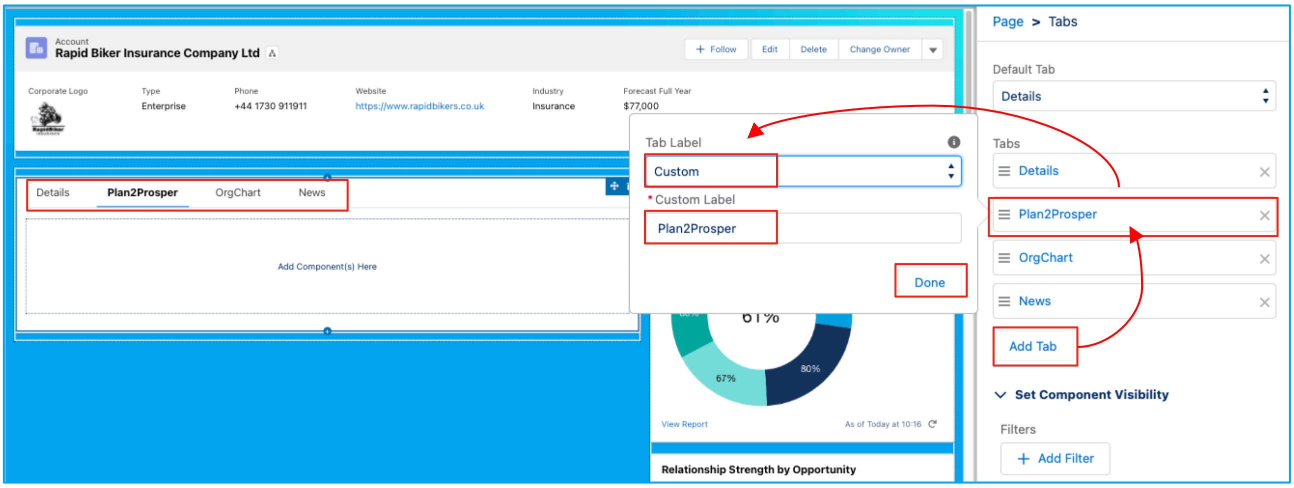


Lightning | Adding a Plan2Prosper Lightning Tab

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

To add a new {Lightning Tab}

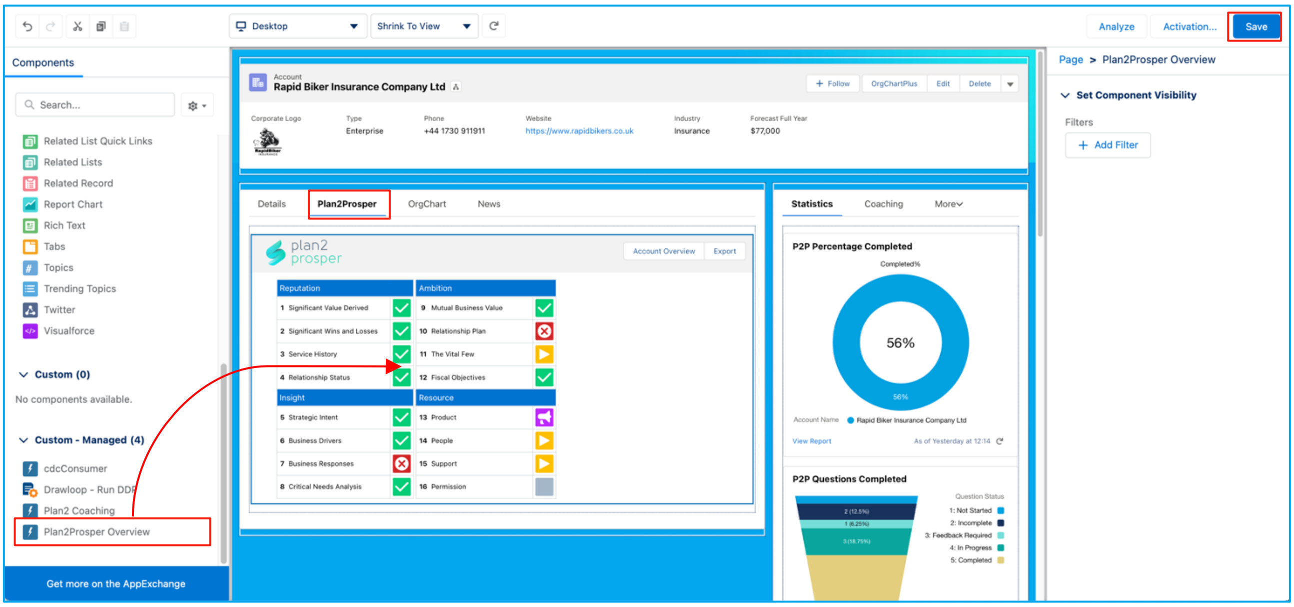
1. Select the relevant [**Account**] record page and click [**Edit**]



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...



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**]

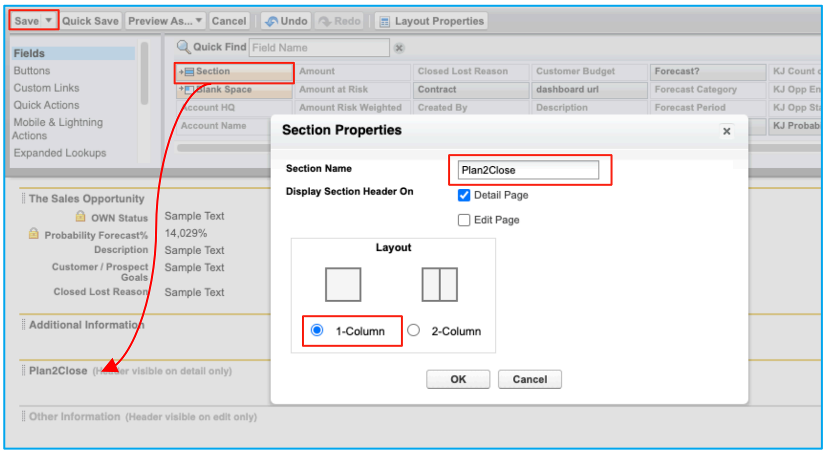
View Plan2Close in Salesforce

Classic | Embedding Plan2Close into a Page Layout

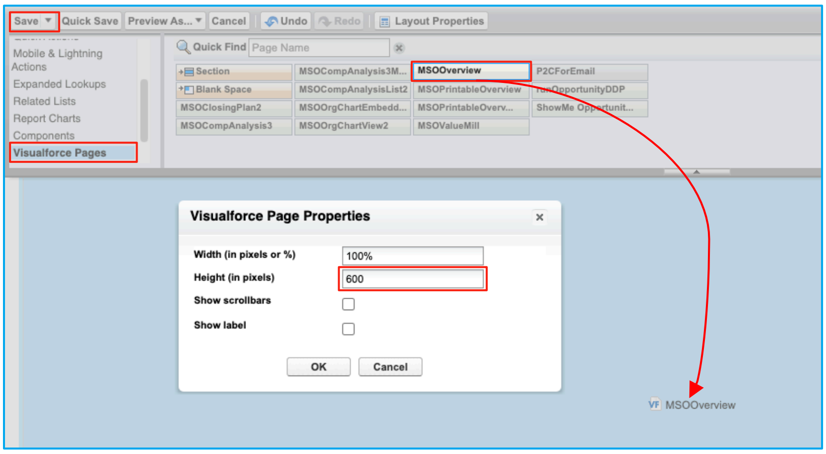
To place Plan2Close into a page layout, follow this process for the [Opportunity] object…

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]

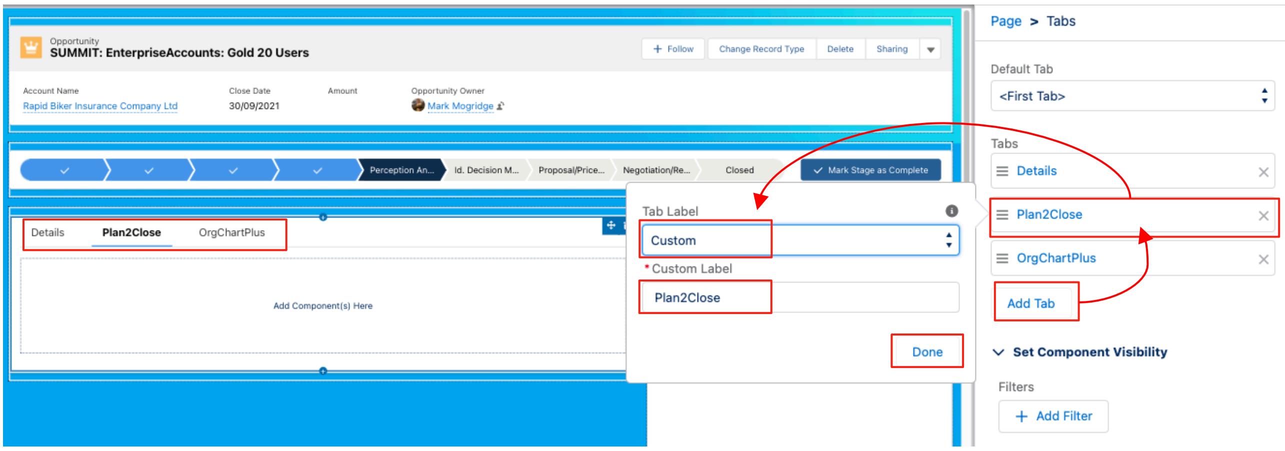


Lightning | Adding a Plan2Close Lightning Tab

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

To add a new {Lightning Tab}

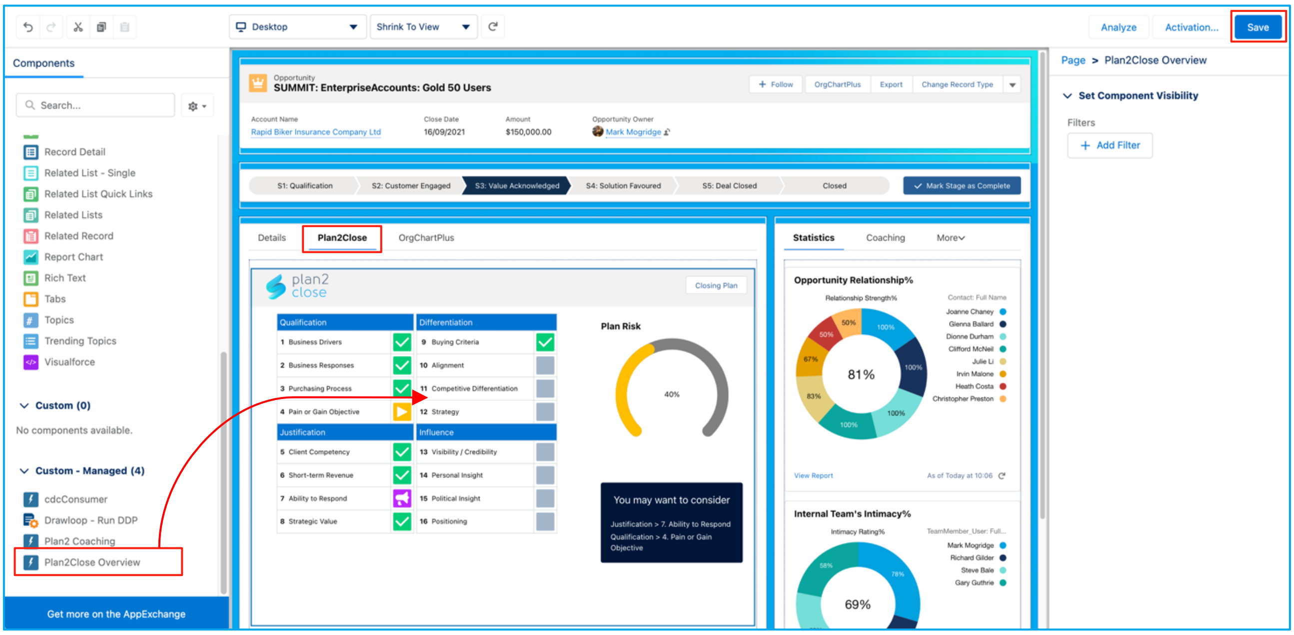
1. Select the relevant [**Opportunity**] record page and click [**Edit**]



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...



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

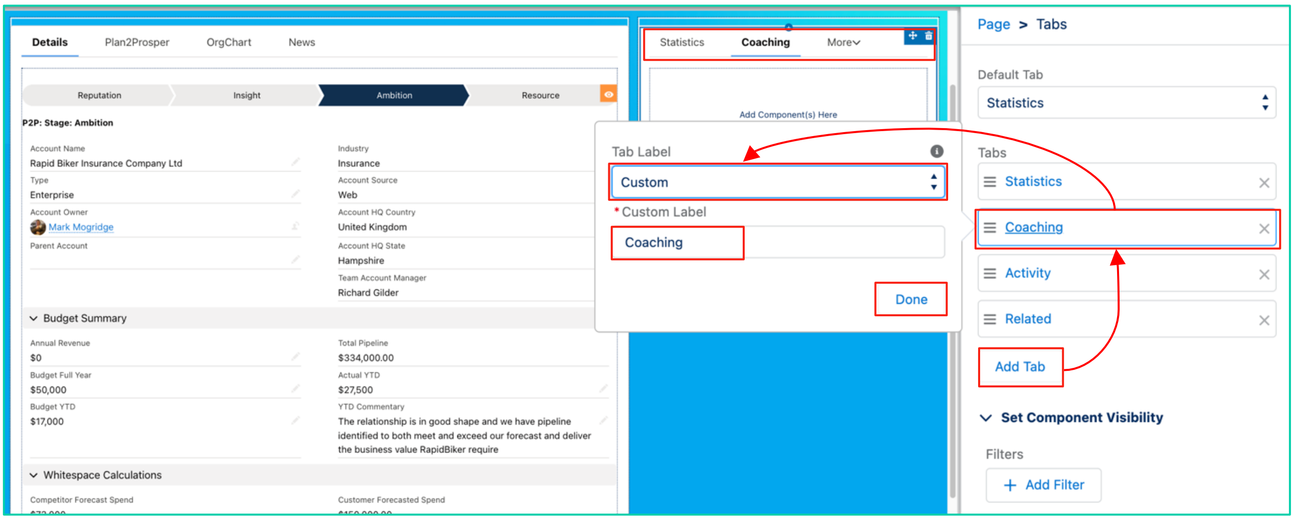
You can add the Coaching (Guidelines) Tab to the right-hand column in both the Account Plan2Prosper and Opportunity Plan2Close layouts.

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}

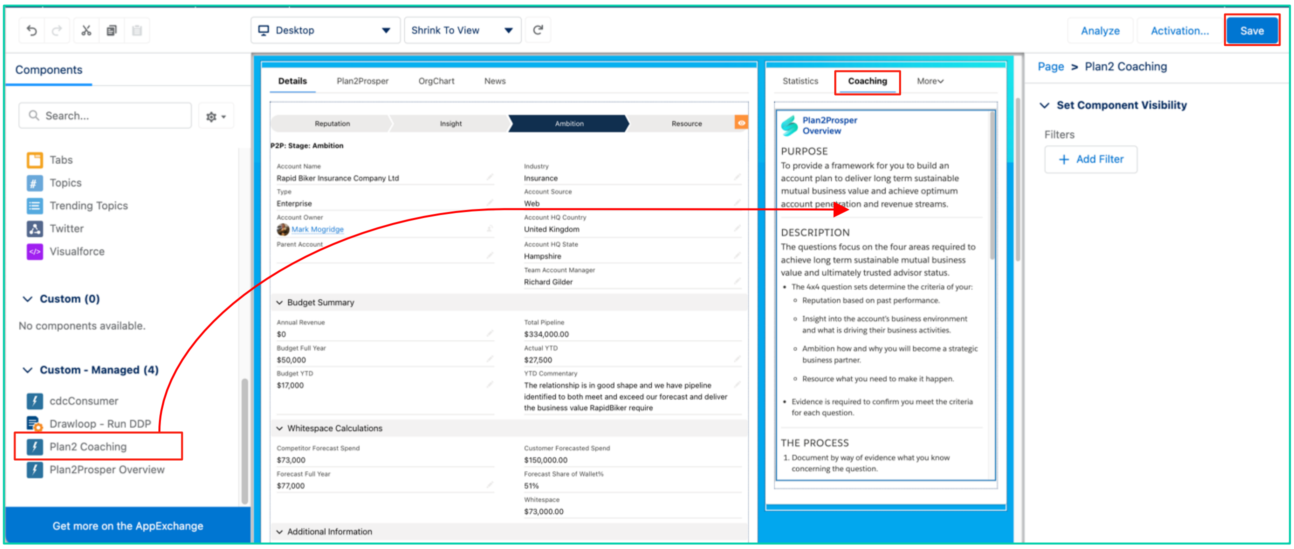
1. Select the relevant [**Account**] record page and click [**Edit**]



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...



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

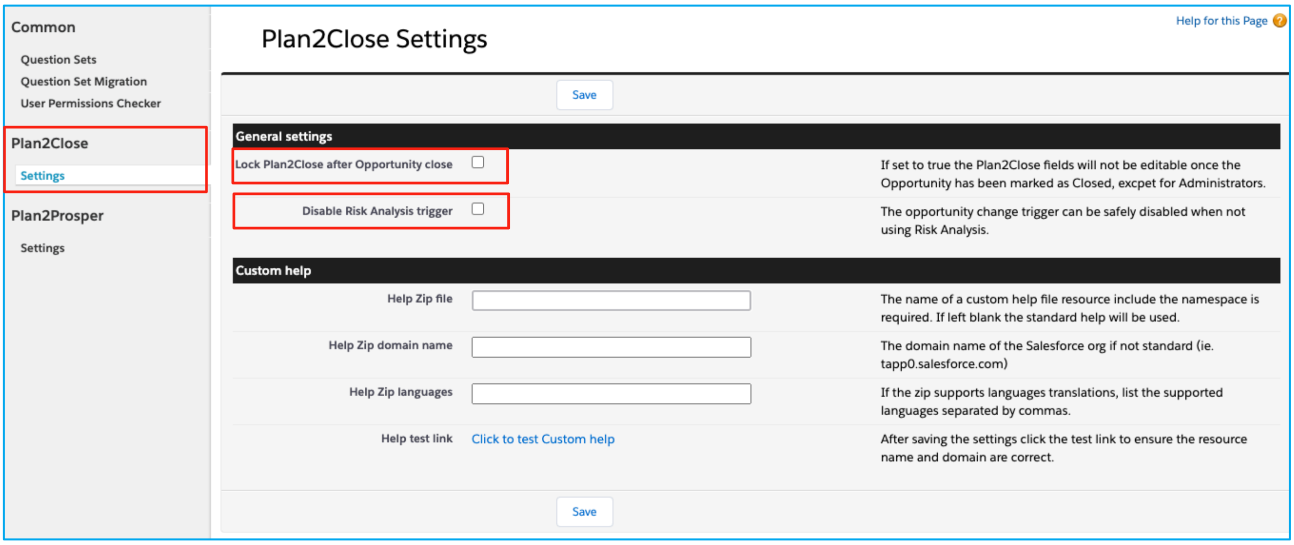
Configure Plan2Close: Settings

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**]

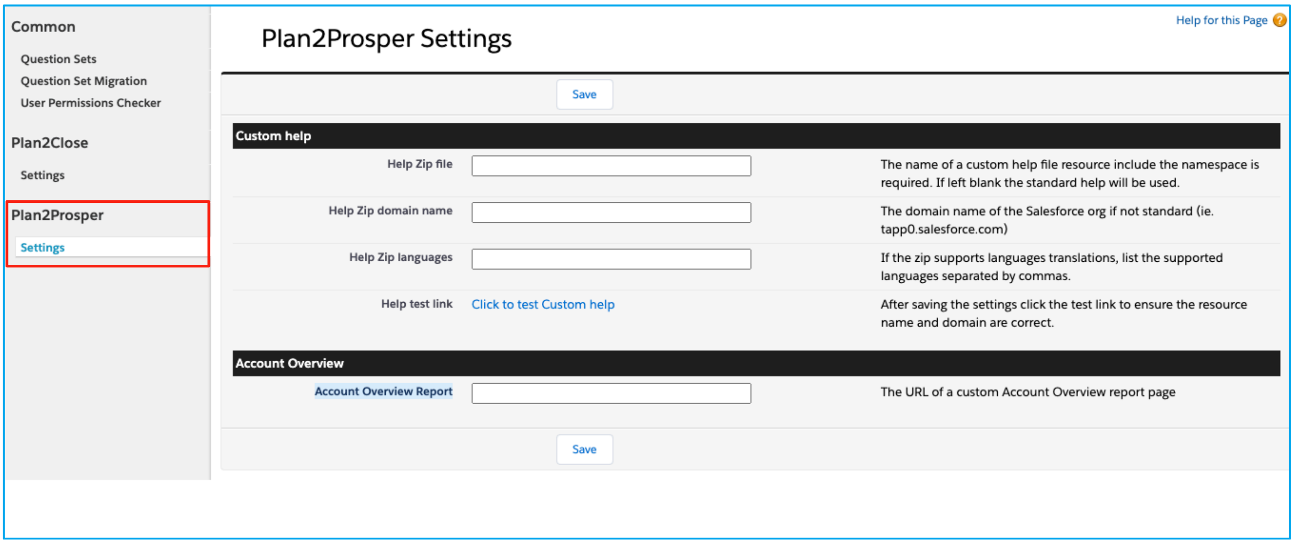


You can choose to customise the Plan2Close help. You would most likely do this to provide guidance to sales staff that is unique to your organisation. We recommend that this is done in cooperation with our SalesMethods consulting advisors.

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

Configure Plan2Prosper: Settings

Click on {**Plan2Prosper**} > [**Settings**]



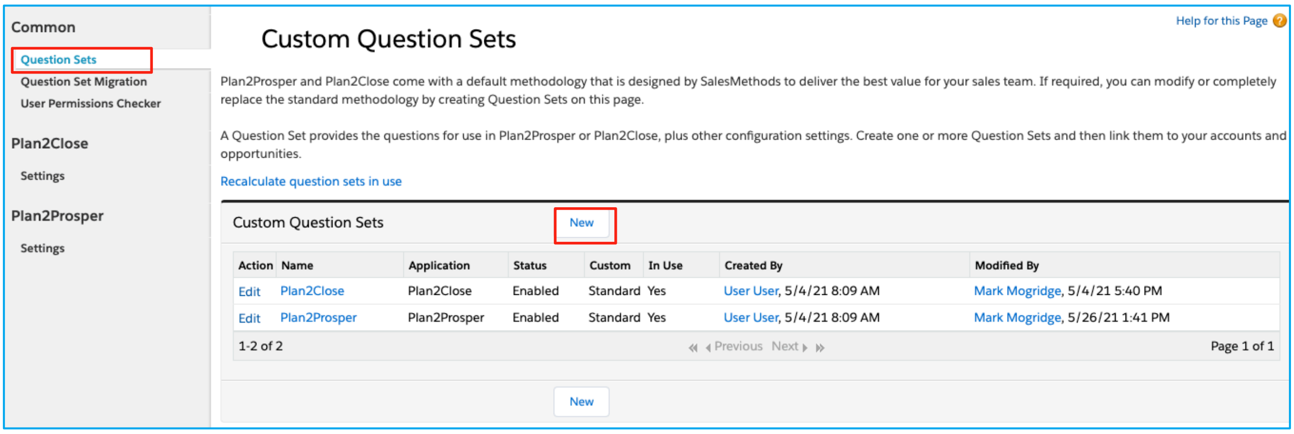
You can choose to customise the Plan2Prosper help. You would most likely do this to provide guidance to sales staff that is unique to your organisation. We recommend that this is done in cooperation with our SalesMethods consulting advisors.

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

Help for this Page

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

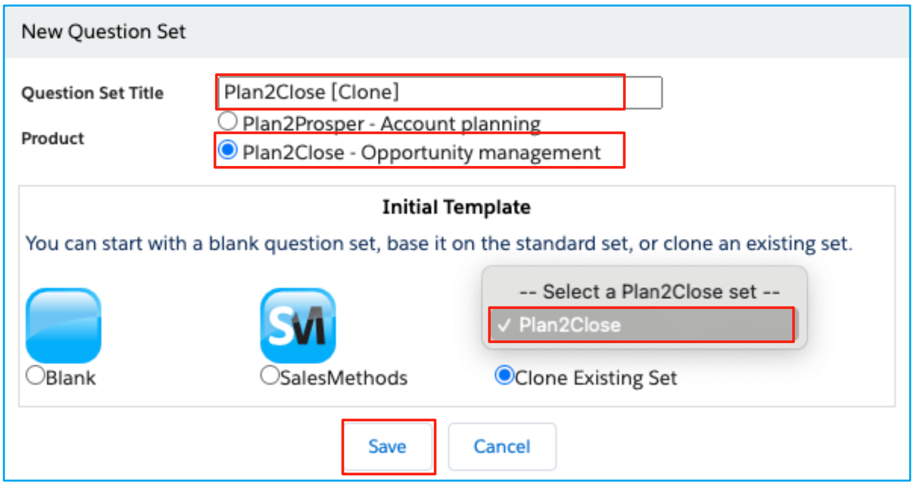
1-2 of 2 Previous Next Page 1 of 1

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.

-- Select a Plan2Close set --
✓ Plan2Close

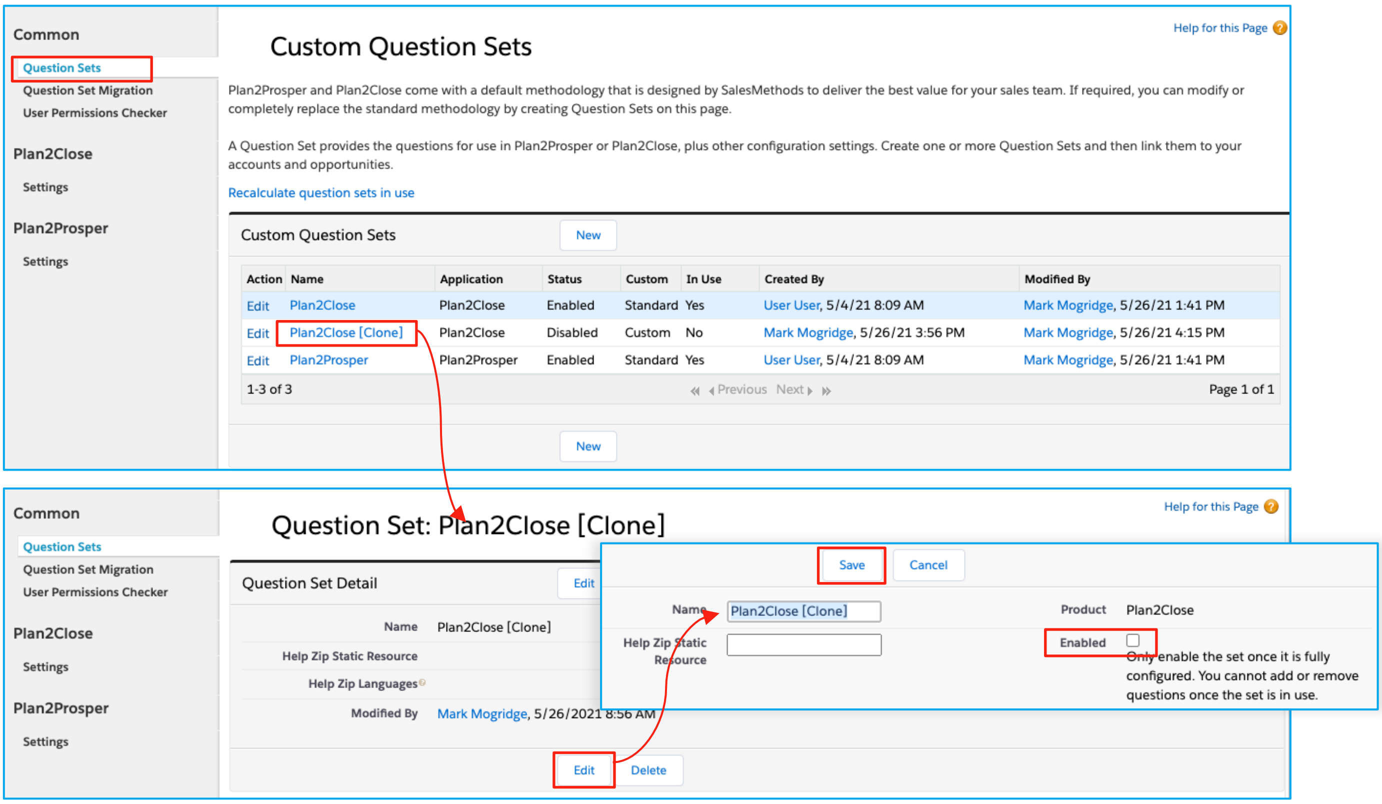
Blank SalesMethods Clone Existing Set

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...



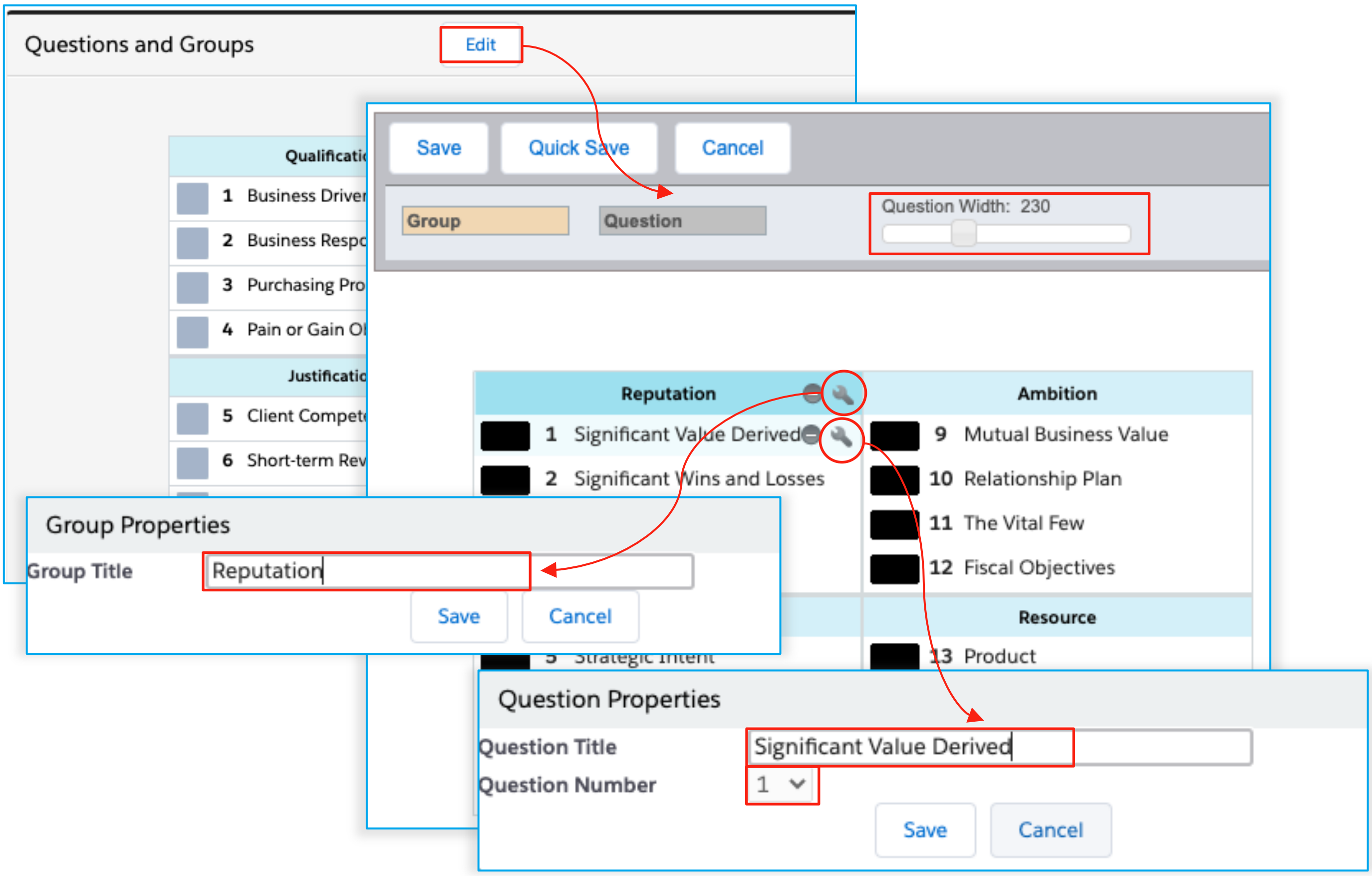
Question Set Detail

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…

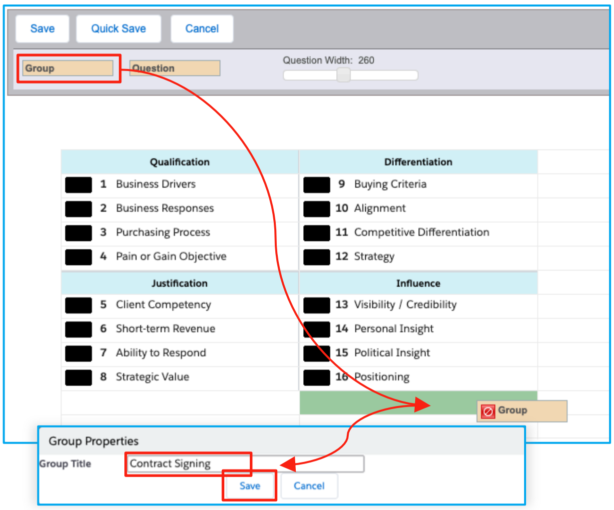


1. Change the plan's column widths.
2. Click on the {**Wrench Icon**} in the Question Group header to edit the Question Group name. Click [**Save**]
3. Click on the {**Wrench Icon**} next to the question to edit the Question title and the select Question order number. Click [**Save**]
4. Click [**Save**]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

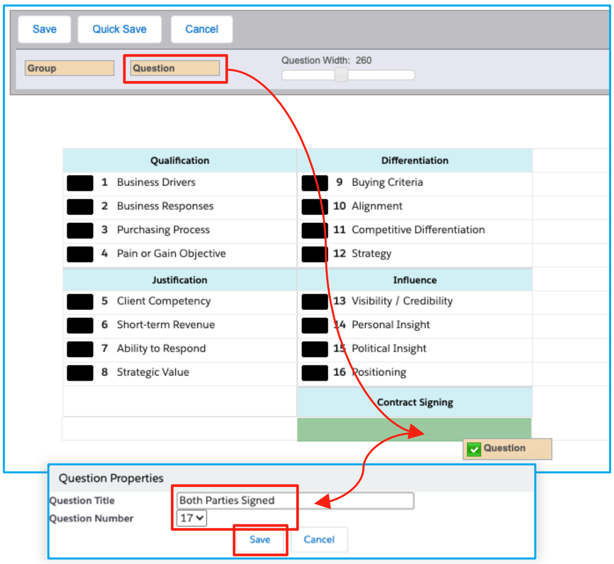
Questions and Groups continued...

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...



Creating a Question within the Group...



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...

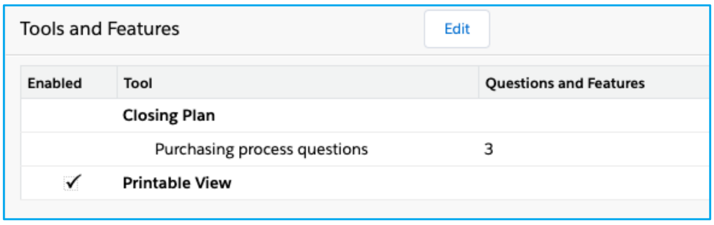
Qualification		**Differentiation**	
1	Business Drivers	9	Buying Criteria
2	Business Responses	10	Alignment
3	Purchasing Process	11	Competitive Differentiation
4	Pain or Gain Objective	12	Strategy
Justification		**Influence**	
5	Client Competency	13	Visibility / Credibility
6	Short-term Revenue	14	Personal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

Tools and Features

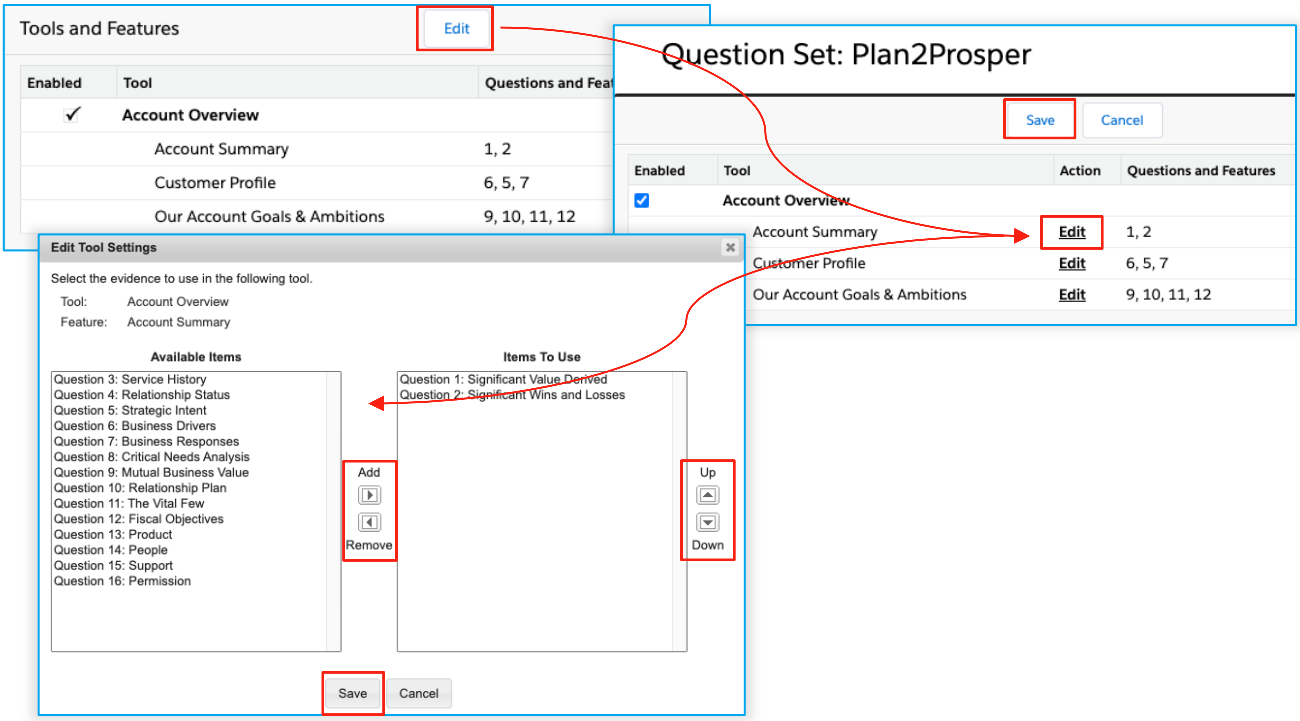
Scroll down to see the **Tools & Features** section.

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 …



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

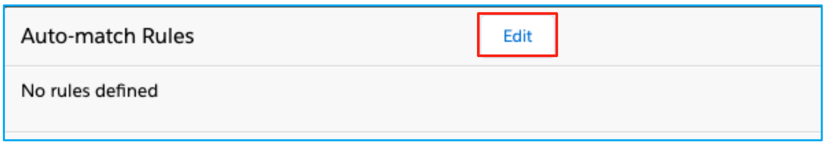


To change a Feature List…

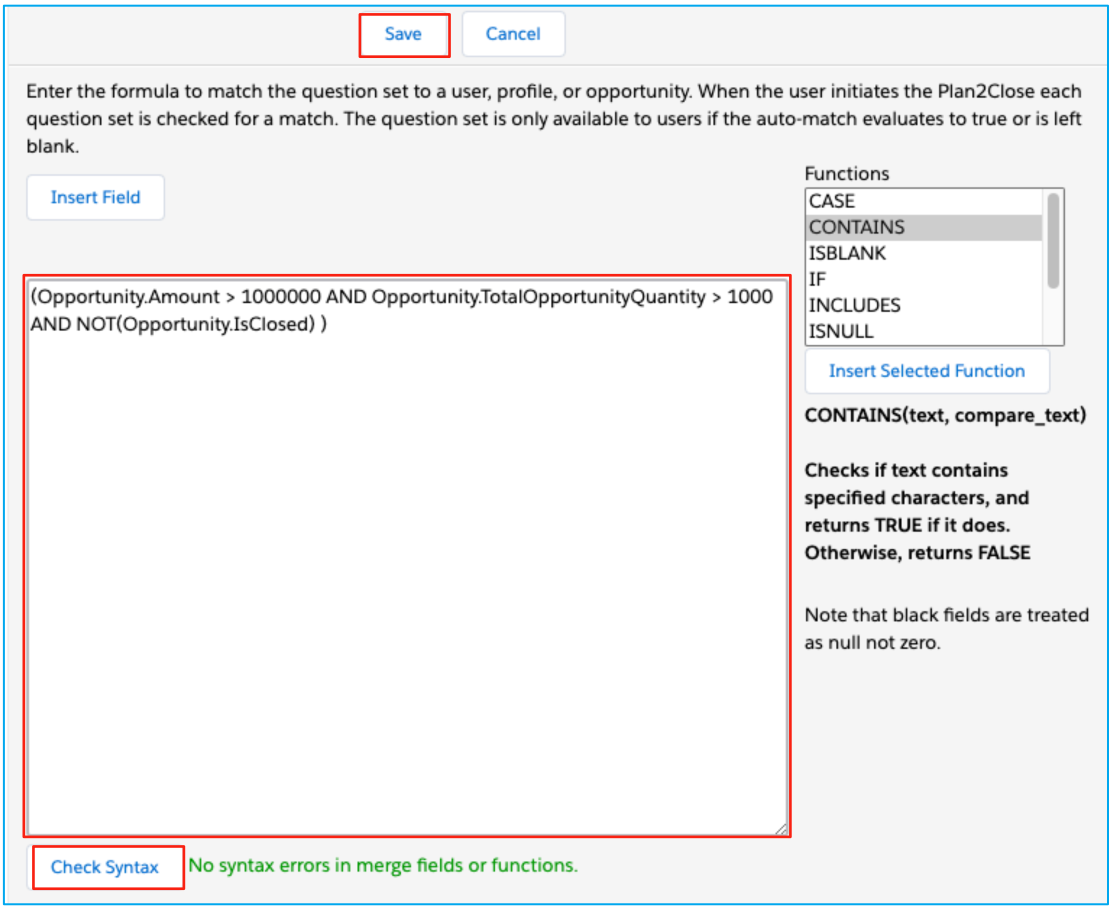
1. Click on the **[Edit]** button in the header to be able to edit the features.
2. Click **[Edit]** for the Feature you wish to modify.
3. {**Add** ►}or {**Remove** ◄} questions from the Feature List.
4. {**Promote** ▲} or {**Demote** ▼} questions within the Feature List, click **[Save]**.
5. Click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

Auto-Match Rules

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



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).



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

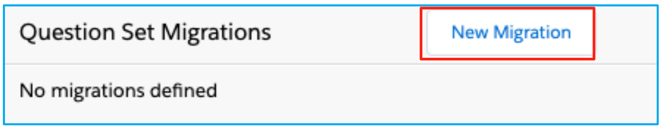
Each subsequent (**Target**) **Question Set** should include all the questions from the prior (**Source**) **Question Sets** to show the plan's overall status at each subsequent stage.

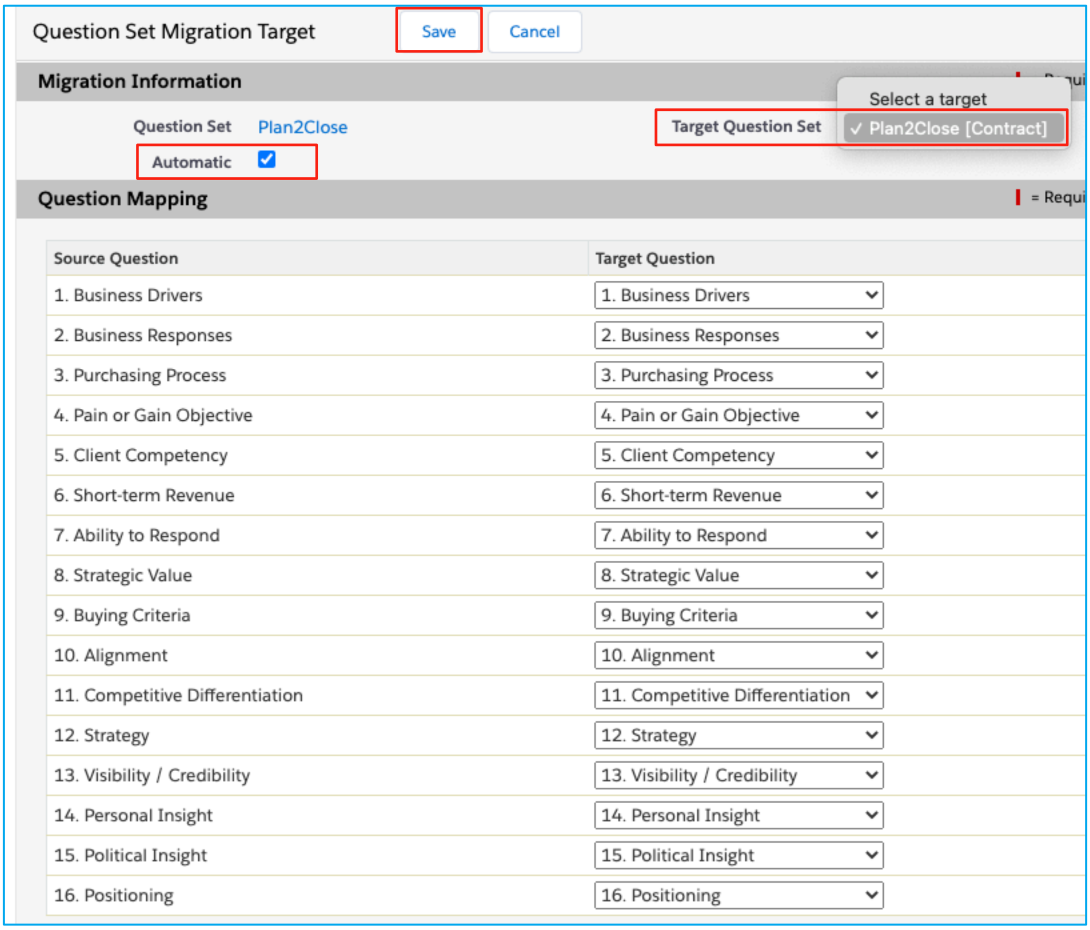
In this example we will migrate from '**Plan2Close**' (the standard P2C plan) to '**Plan2Close [Contact]**' that also manages with the Contract Signing process…

*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.





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**].

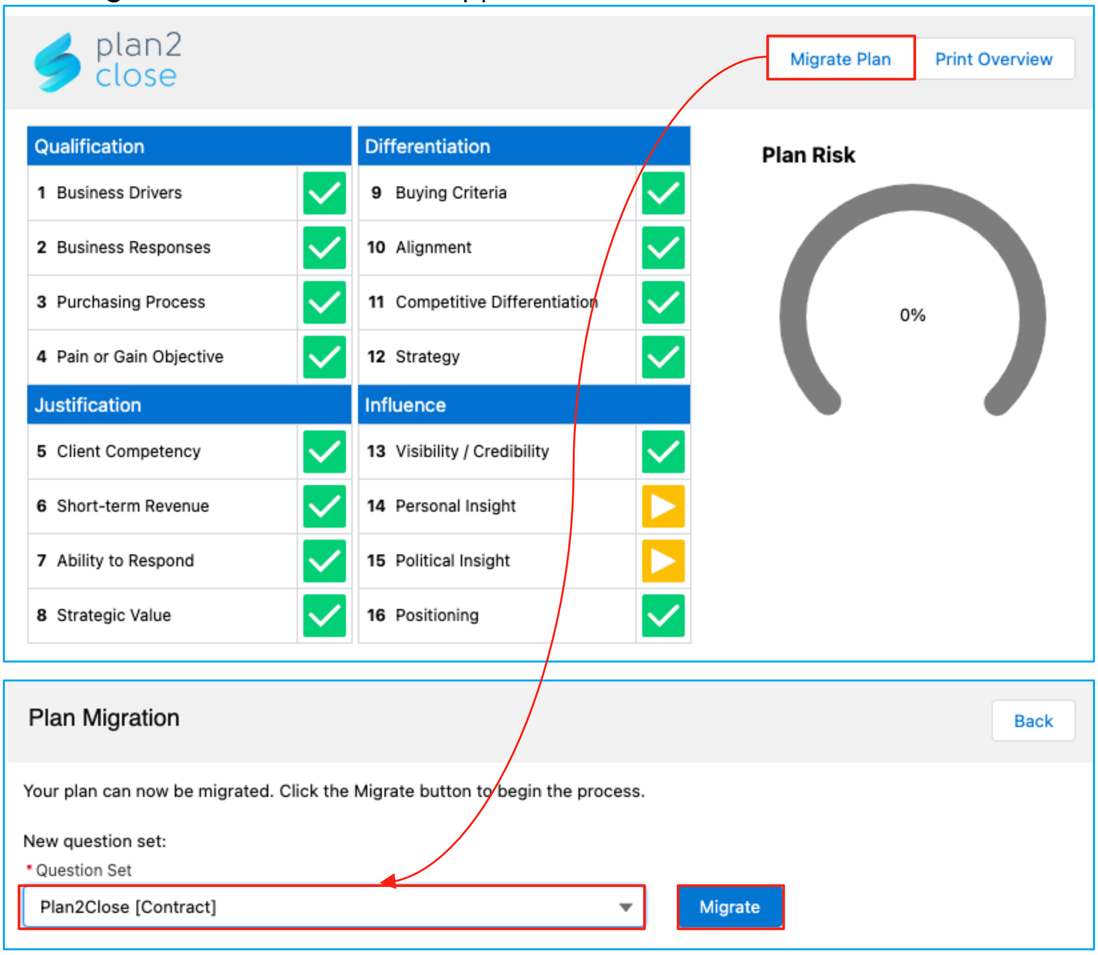
Question Set Migrations continued…

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…

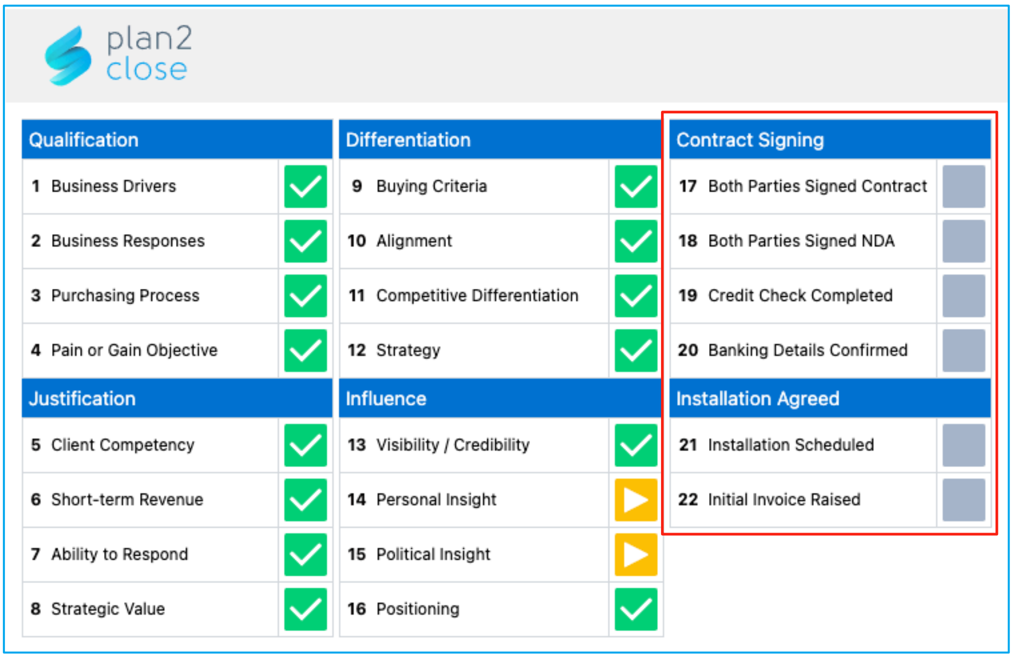


1. Click [**Migrate Plan**]
2. Confirm which **Question Set** you wish to Migrate to
3. Click [**Migrate**]

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…



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** <u>when Questions are missing evidence</u>.

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 <u>is scheduled to be provided</u>, 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...

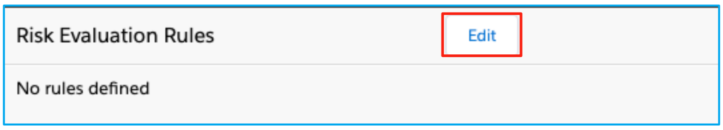
Using the **Questions** (Y) / **Stages** (X) table we showed above, here are some suggestions on how to calculate the **Risk%** for the different Question/Stage combinations. The explanation below use **Questions 6-9**.

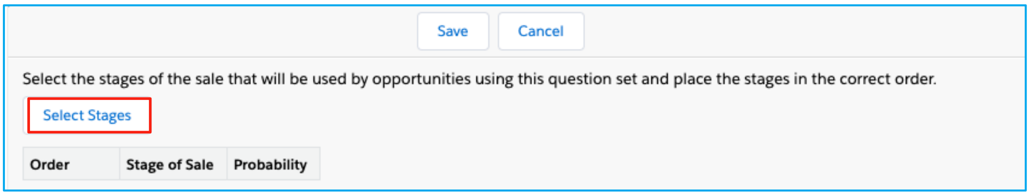
Current Risk	This is the percentage Risk if this question remains unanswered in the <u>Scheduled Stage</u>. *Typically, there is 0% Risk in the Scheduled Stage* *Stage: 'Value Proposition' = **0%***
Next Risk	This is the percentage Risk if this question remains unanswered <u>one Stage after the Scheduled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

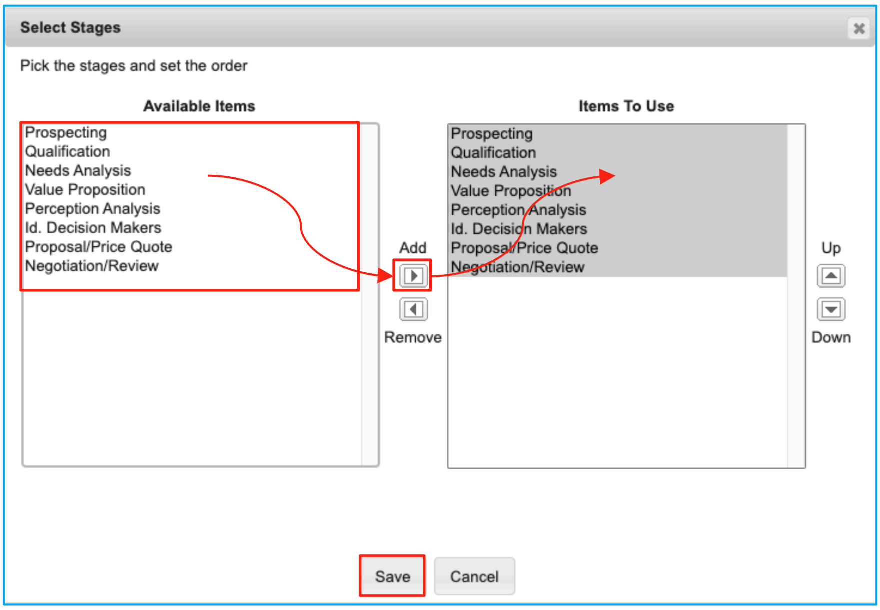
	Prospecting	Qualification	Needs Analysis	Value Proposition	Perception Analysis	Id. Decision Makers	Proposal/Price Quote	Negotiation/Review
1. Business Drivers	0%	50%	100%	100%	100%	100%	100%	100%
2. Business Responses		0%	30%	50%	50%	50%	50%	50%
3. Purchasing Process		0%	30%	50%	50%	50%	50%	50%
4. Pain 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.

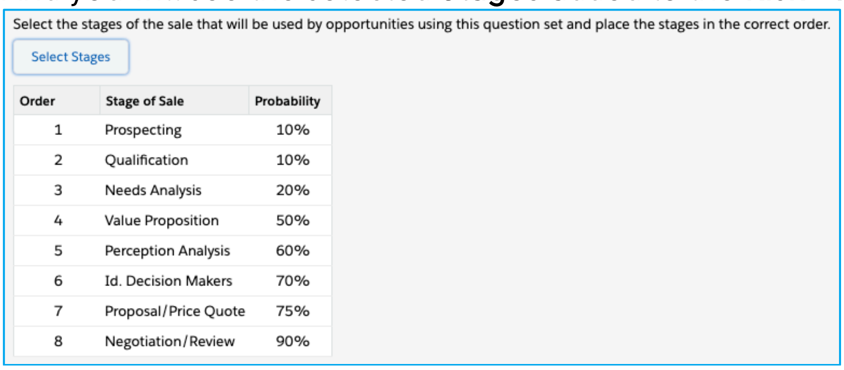






1. Click **[Edit]**
2. Click **[Select Stages]**
3. Select all the Opportunity Stages in the Available items
4. Click [▶] to add them to the Use items
5. Click **[Save]**

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.

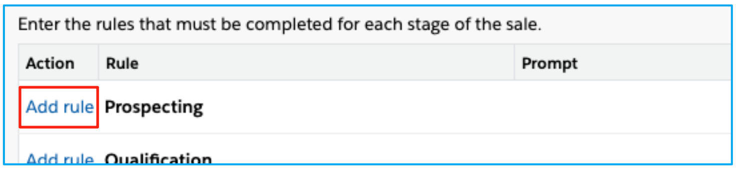
Select Stages

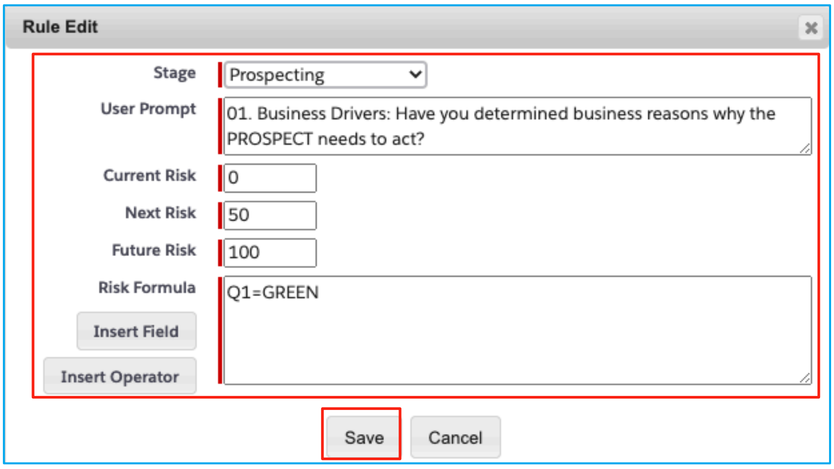
Order	Stage of Sale	Probability
1	Prospecting	10%
2	Qualification	10%
3	Needs Analysis	20%
4	Value Proposition	50%
5	Perception Analysis	60%
6	Id. Decision Makers	70%
7	Proposal/Price Quote	75%
8	Negotiation/Review	90%

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 …





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 <u>Scheduled Stage</u>, which is 'Prospecting'. *We are putting the risk at 0%*
4.	Next Risk	This is the percentage Risk if this question remains unanswered <u>one Stage after the Scheduled Stage</u>, 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 <u>*more than one Stage* after the Scheduled Stage</u>, 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**]

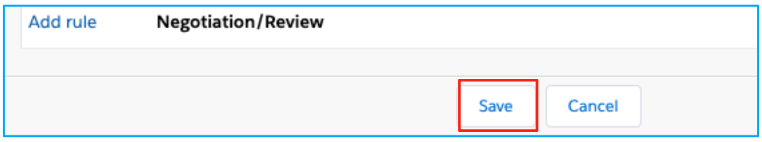
AMBER = In progress

REVIEW = Manager requests reassessment

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

```
Q1 = GREEN
```

7. Click [**Save**]



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

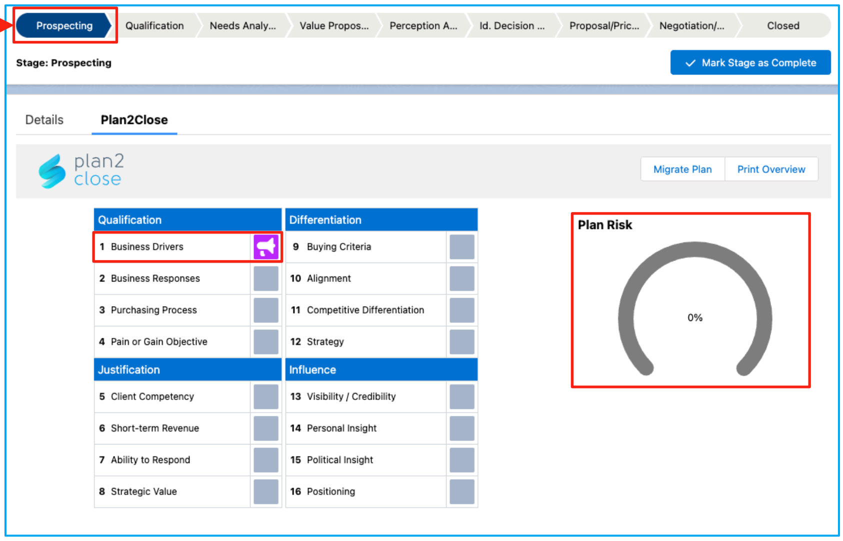
Risk Evaluation Rules continued…

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

Current Risk

Current Risk | 0

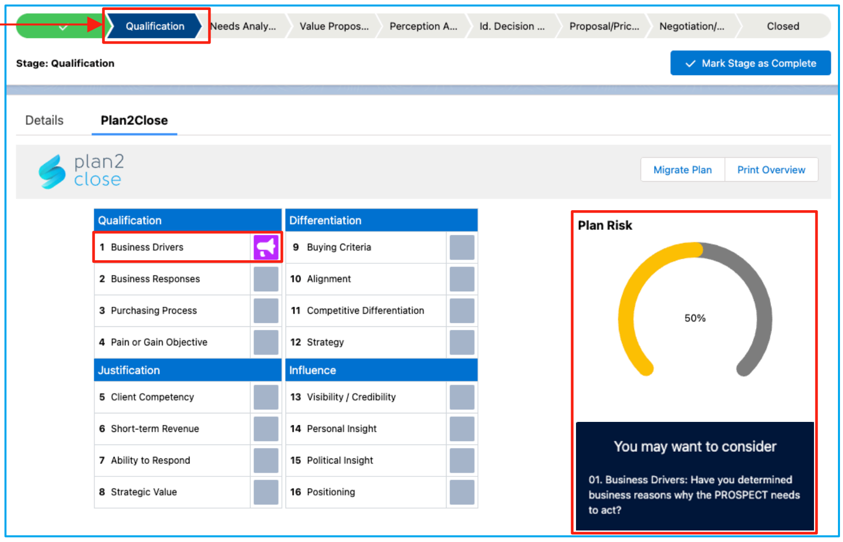
The '**Prospecting**' Stage is when the '**1. Business Drivers**' question is scheduled to be answered, so it uses the **Current Risk** score and returns a **0% Risk.**



Next Risk

Next Risk | 50

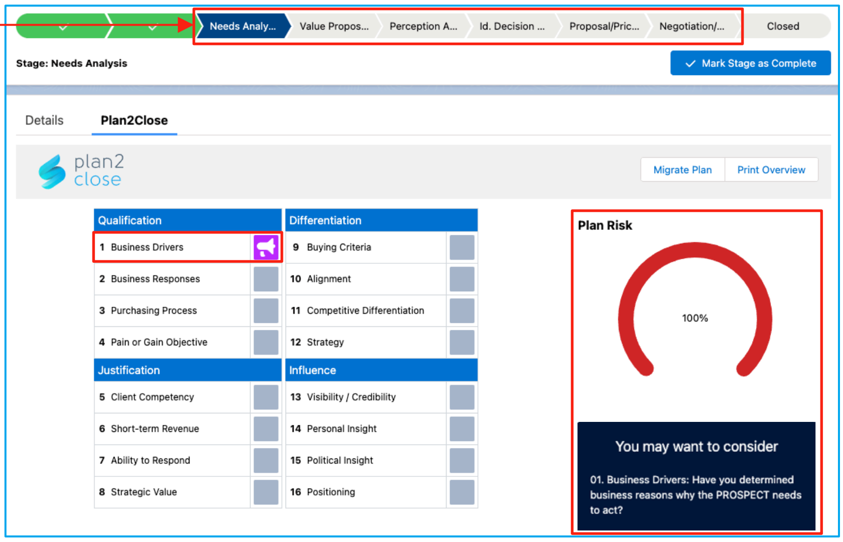
The '**Qualification**' Stage is **one** Stage behind schedule so the <u>unanswered</u> '**1. Business Drivers**' question uses the **Next Risk** score and returns a **50% Risk**.



Future Risk

Future Risk | 100

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



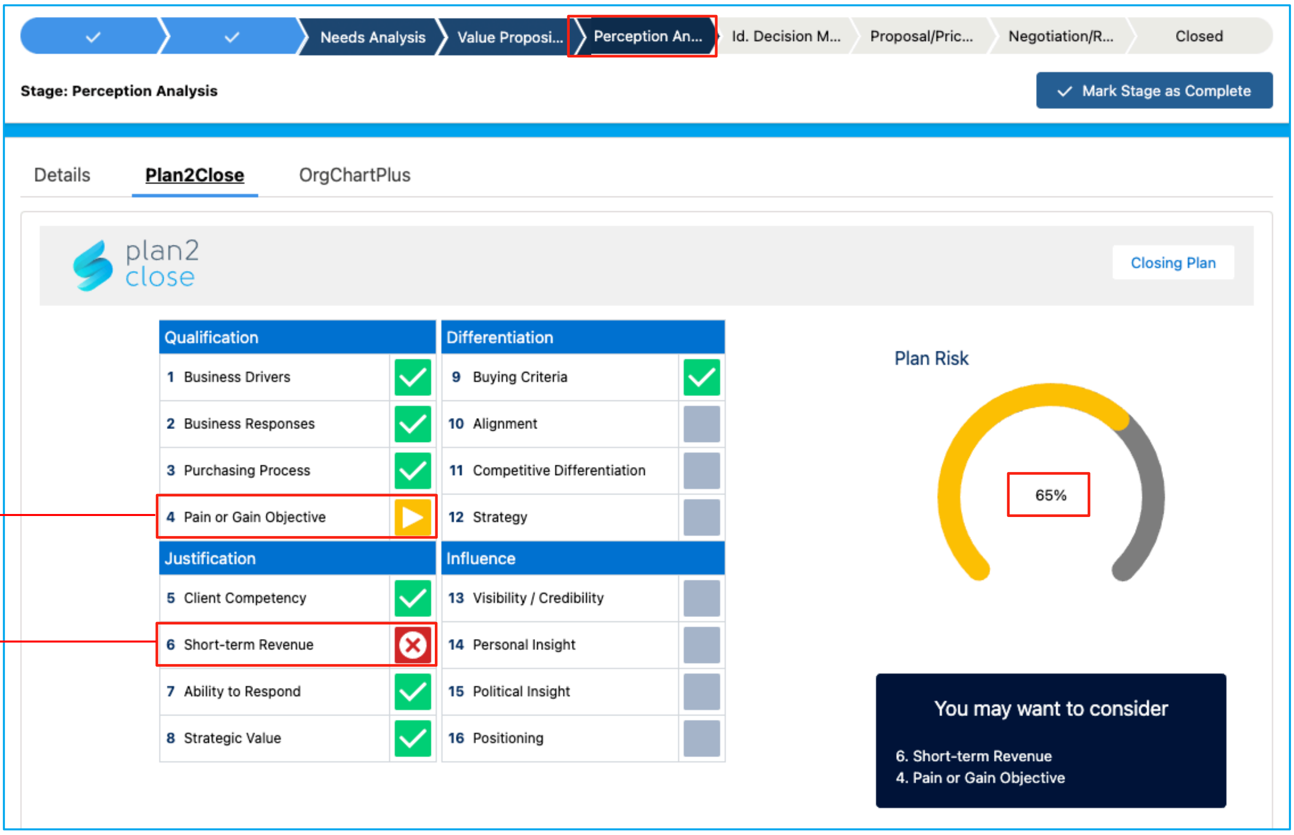
Risk Evaluation Rules continued...

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



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

Needs Analysis		Current Risk	Next Risk	Future Risk
Q4 = GREEN	4. Pain or Gain Objective: Are there clear consequences for the client to implement a 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 <u>one Stage behind</u> the scheduled completion Stage: '**Value Proposition**'.

Value Proposition		Current Risk	Next Risk	Future Risk
Q6 = GREEN	6. Short-term Revenue: Is the short term revenue if you win this opportunity worth 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.

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