# Next Quarter Platform 1.0 User Guide

JANUARY 2023

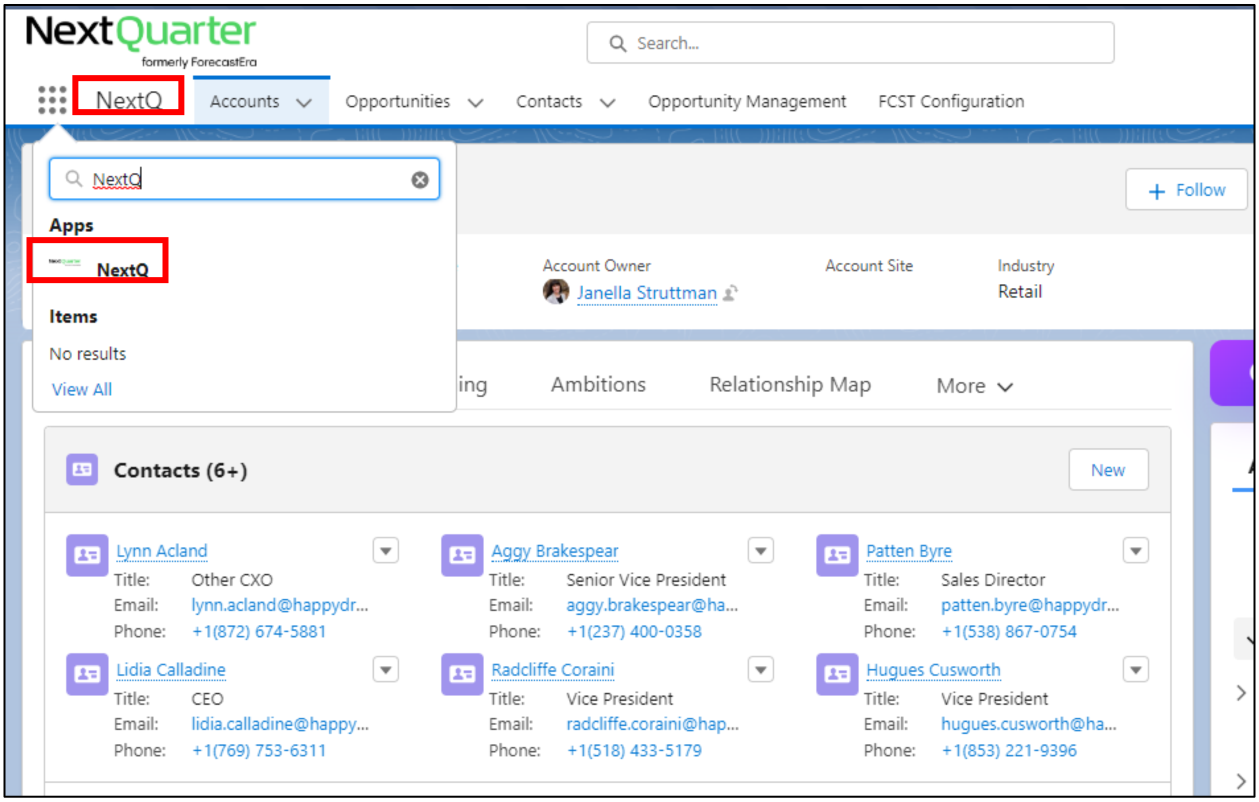
# TABLE OF CONTENTS

# 1. Introduction

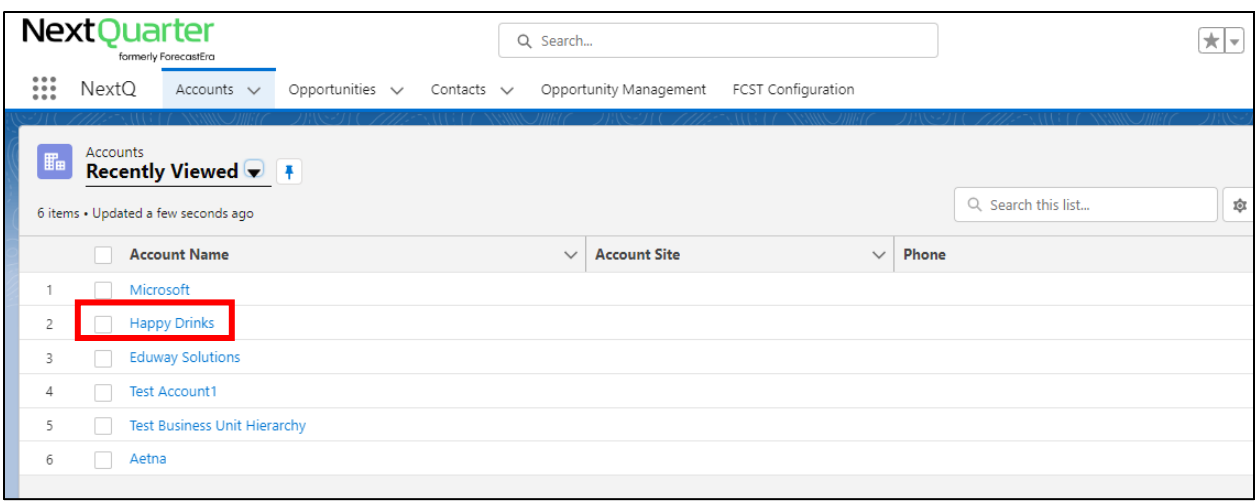
This document will help users operate the Next Quarter Platform 1.0 effectively and efficiently.

# 2. Access the Application

Once logged into Salesforce, users should see “NextQ” on the screen. If it’s not visible, click on the app launcher icon, and search for “NextQ” (all outlined in red).



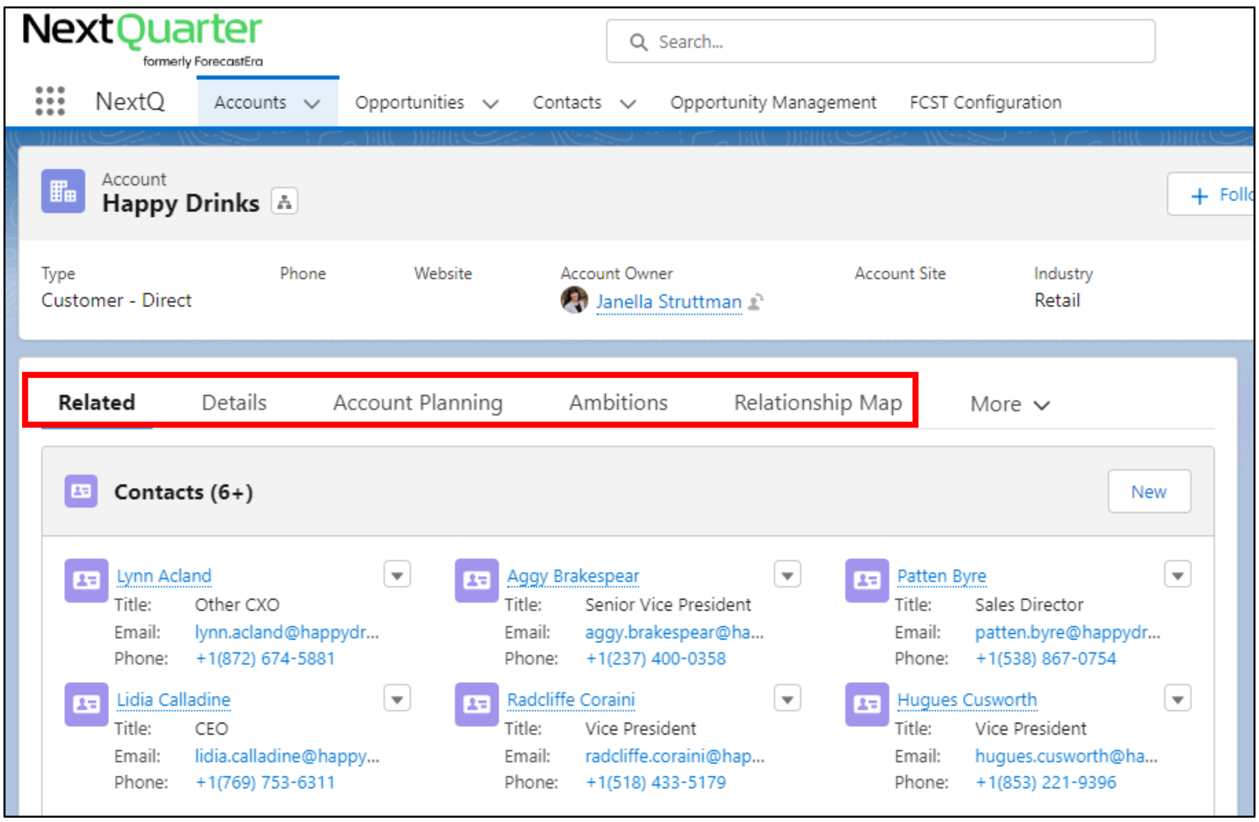
The next step is to select an account from the **Accounts** tab (outlined in red).



# 3. Account Page Tabs

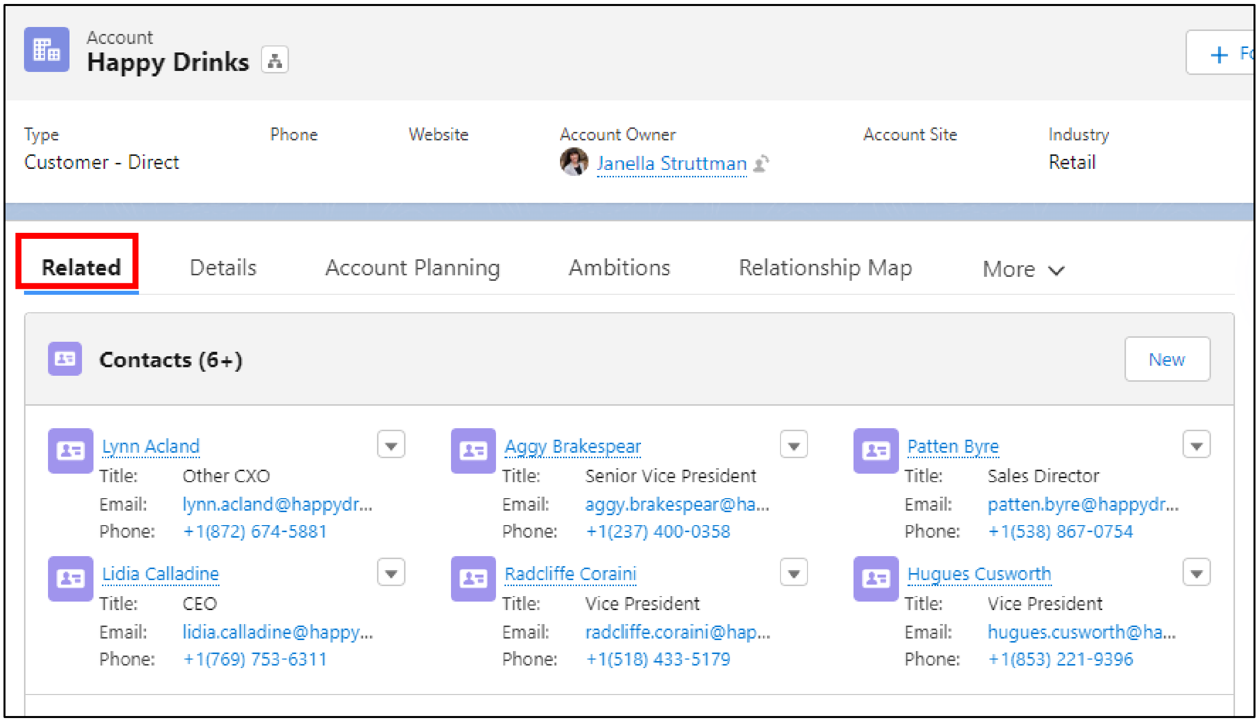
There are five tabs visible (outlined in red) on the **Account** page, including –

- Related
- Details
- Account Planning
- Ambitions
- Relationship Map
- More (dropdown with all the other tabs)



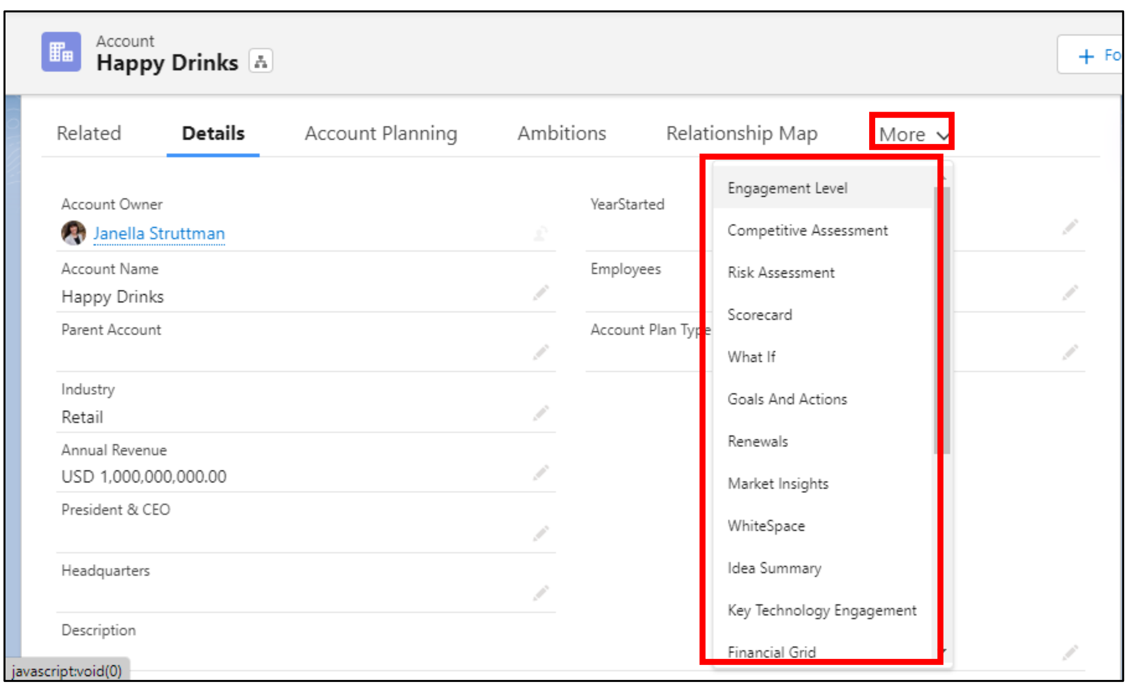

## 3.1. Related Tab

Users can view the details on the **Account** page by clicking on the **Details** tab (outlined in red).



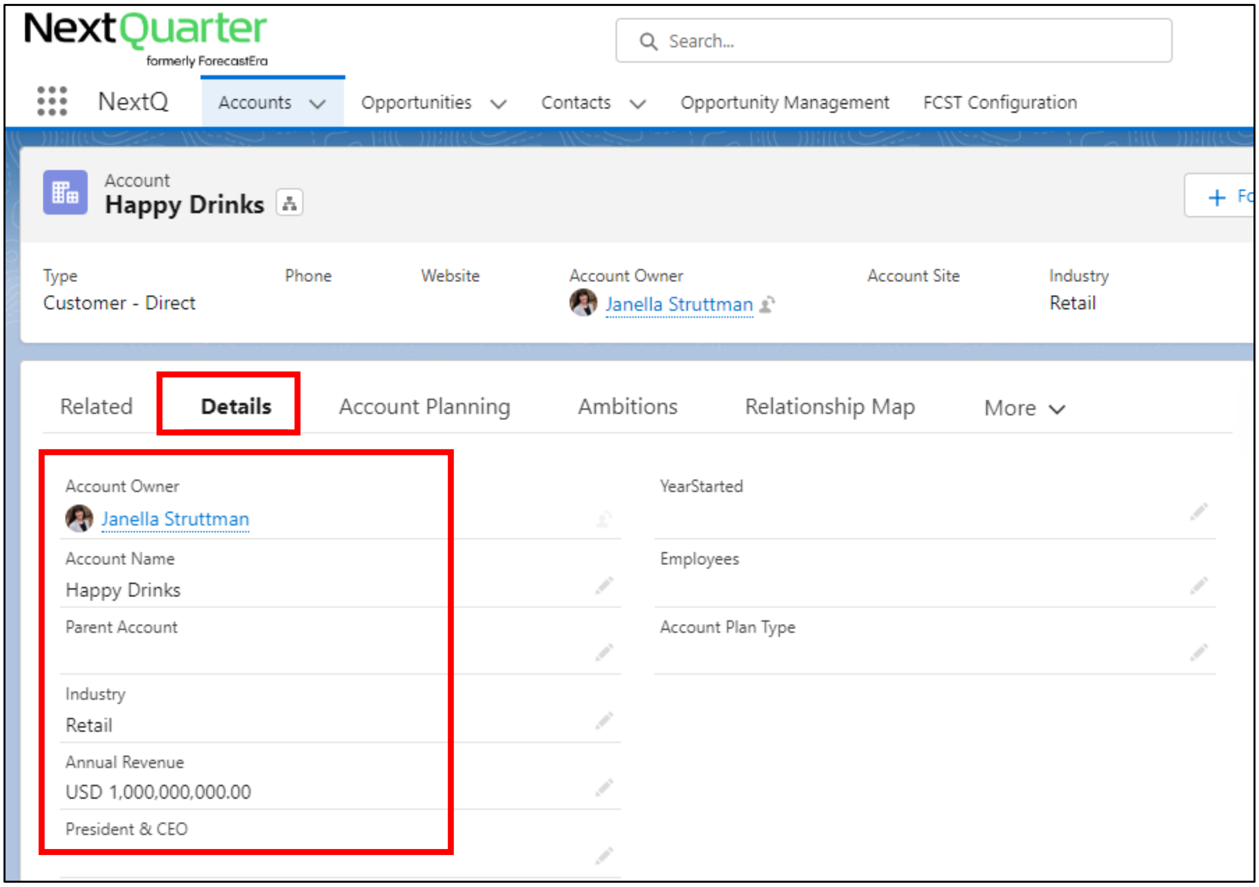

Users can view details like contacts, object junctions, opportunities associated with the account, and other information.

The other tabs are listed under the **More** drop-down menu (all outlined in red).



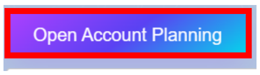
## 3.2. Details Tab

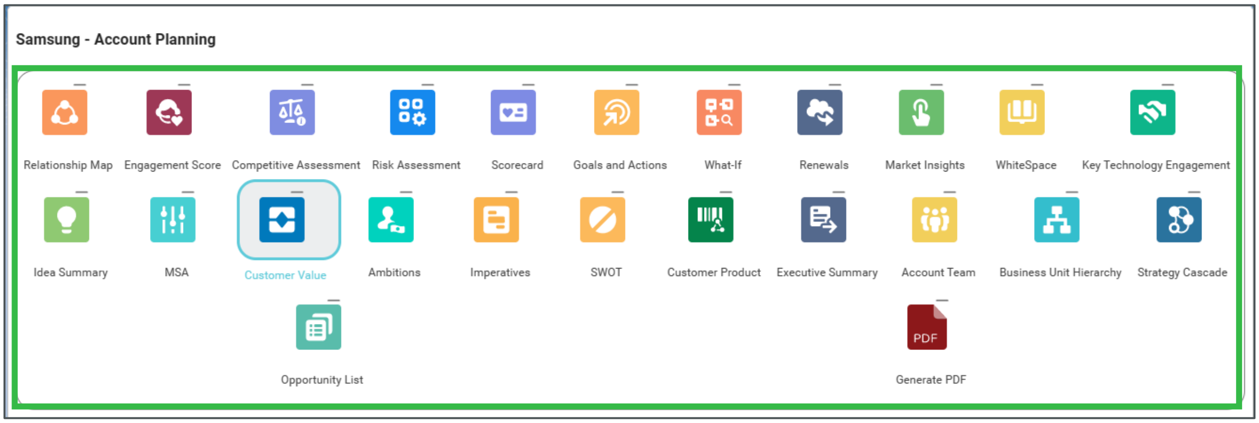
Users can see details like Account Owner and Region (all outlined in red). Further below are details like Industry Type and Annual Revenue (all outlined in red).



# 4. Open Account Planning

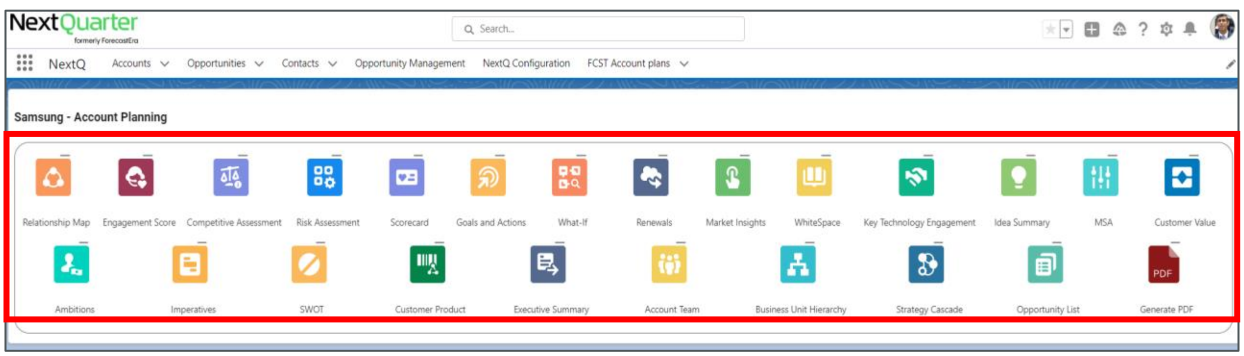
The **Open Account Planning** button opens a tab with shortcuts to other application sections (outlined in red), including **Dashboards, Generate PDF**, **Relationship Map, Engagement Score**, and more (all outlined in green).



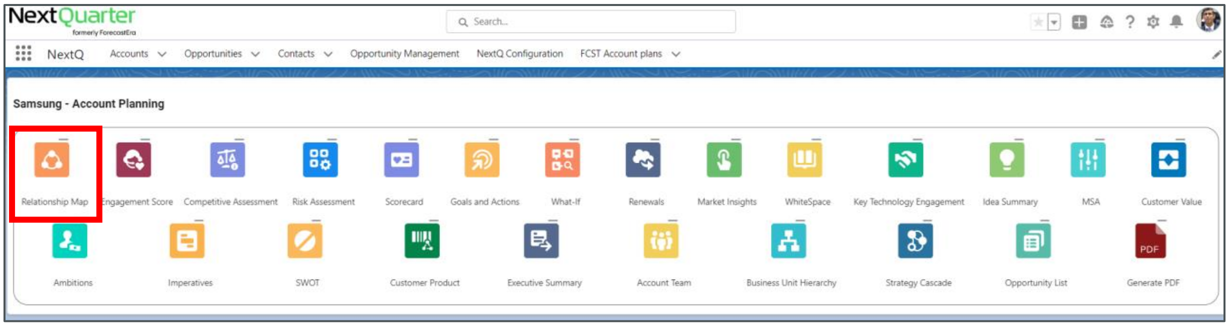

*Note – The component layout and order may change depending on business needs.

Clicking on **Open Account Planning** will lead to another screen with all the sections outlined (outlined in red).

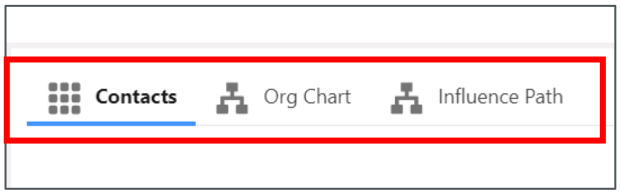



## 4.1. Relationship Map

The first section under Account Planning is **Relationship Map** (outlined in red).

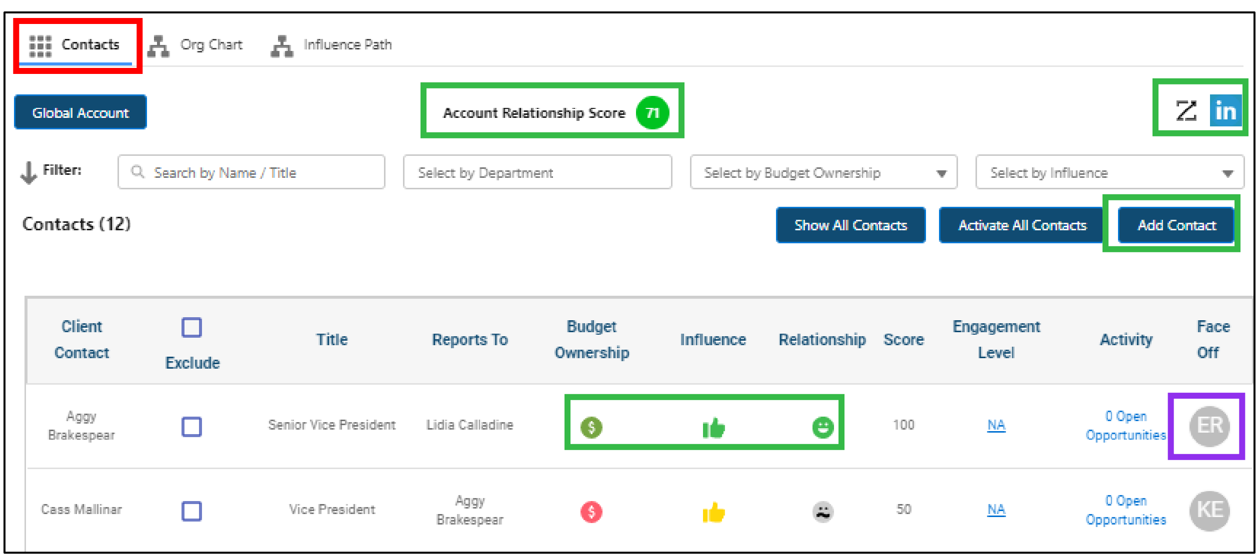



The Relationship Map has three sections – **Contacts**, **Org Chart**, and **Influence Path** (all outlined in red).

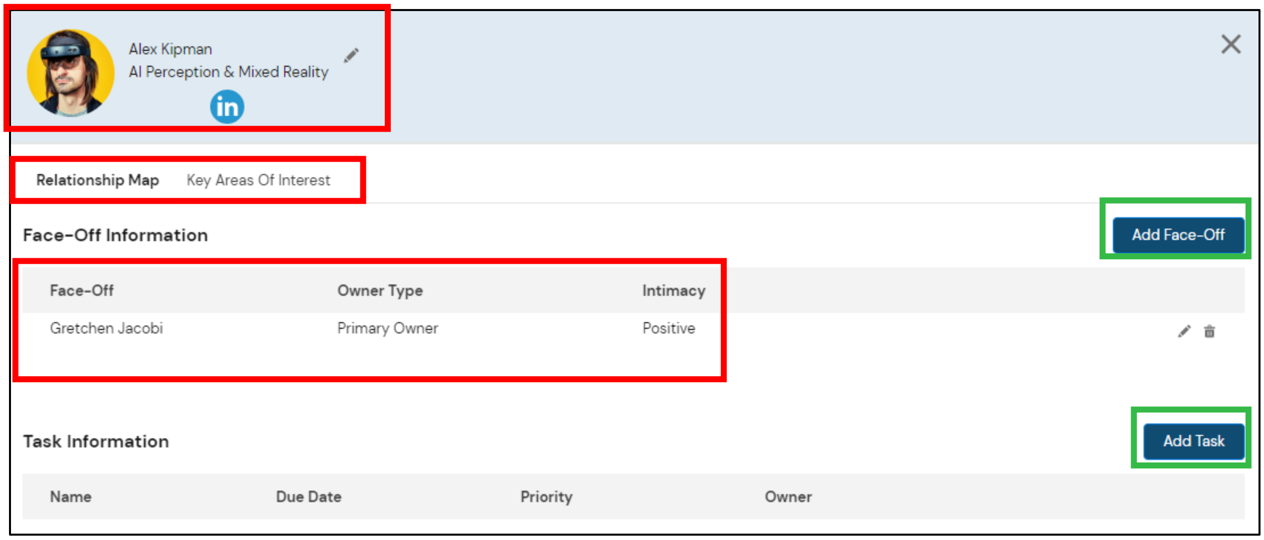



### 4.1.1. Contacts

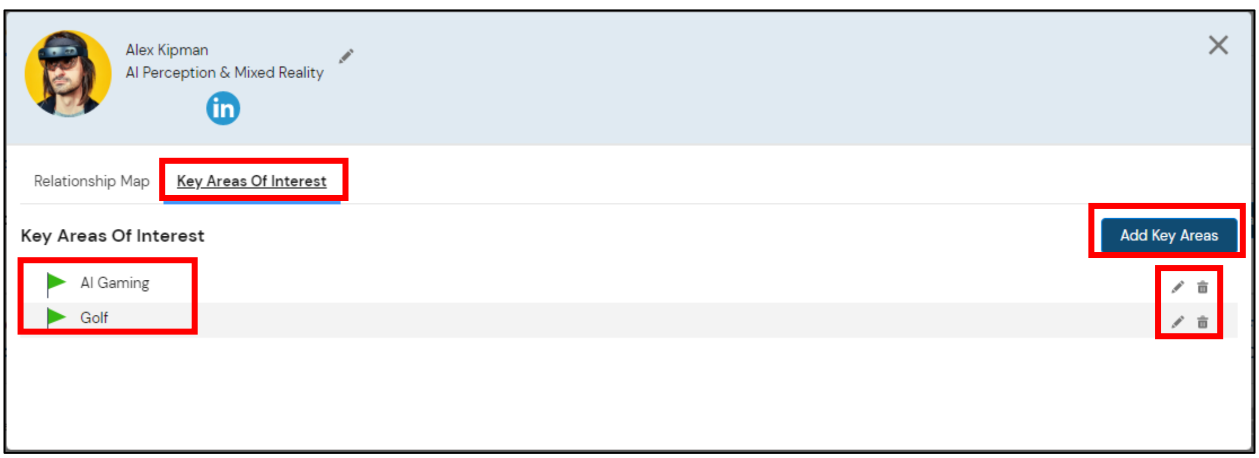
The first sub-section under Relationship Map is **Contacts** (outlined in red). Users can add contacts with the **Add Contact** button, import contacts from ZoomInfo or LinkedIn, and view the account score. Users can also view contact attributes for each contact card (all outlined in green). The **Face-Off** card (outlined in purple) will allow users to view the contact's key areas of interest and their relationship with a potential promoter or champion contact.




Clicking on the **Face-Off** field on any contact card will open the face-off card. Here, users see the name, role, and two sections – Relationship Map and Key Areas of Interest (all outlined in red). Under **Relationship Map**, there are details for the current face-off, their role, and the client's intimacy with the face-off. Users can add another face-off or associate a task with the face-off using the Add **Face-Off** and **Add Task** buttons (all outlined in green).

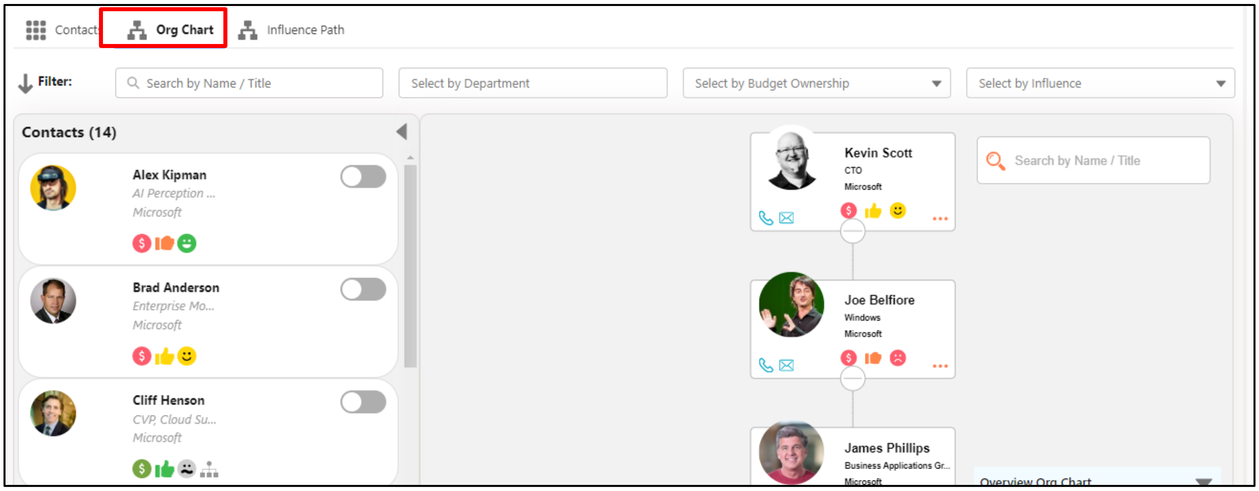



Under **Key Areas of Interest**, Users can view the interests of the Face-Off, edit the Key Areas of Interest, or even add a new one by clicking on the **Add Key Areas** button (all outlined in red).

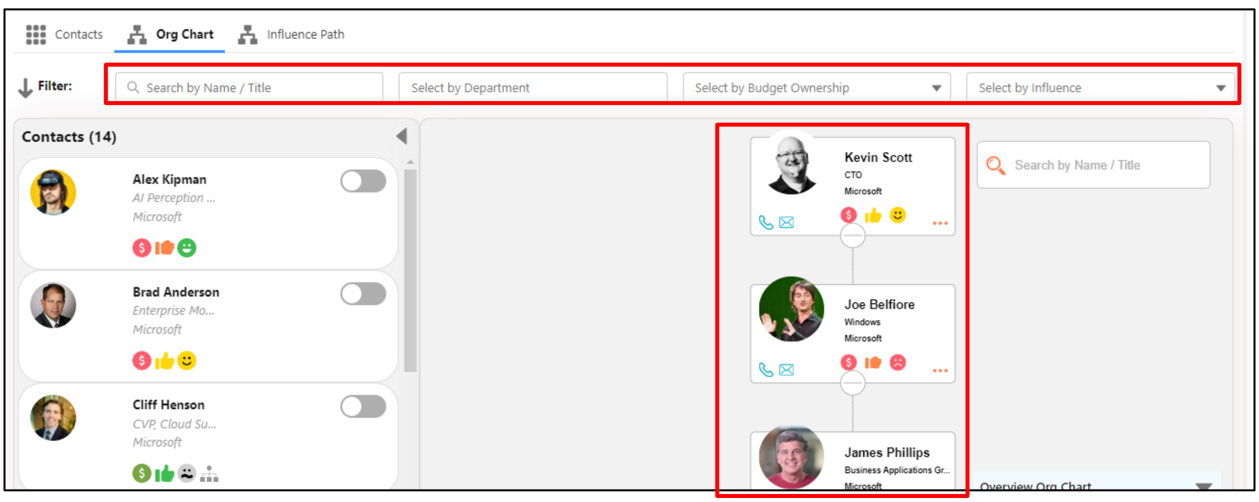



### 4.1.2. Org Chart

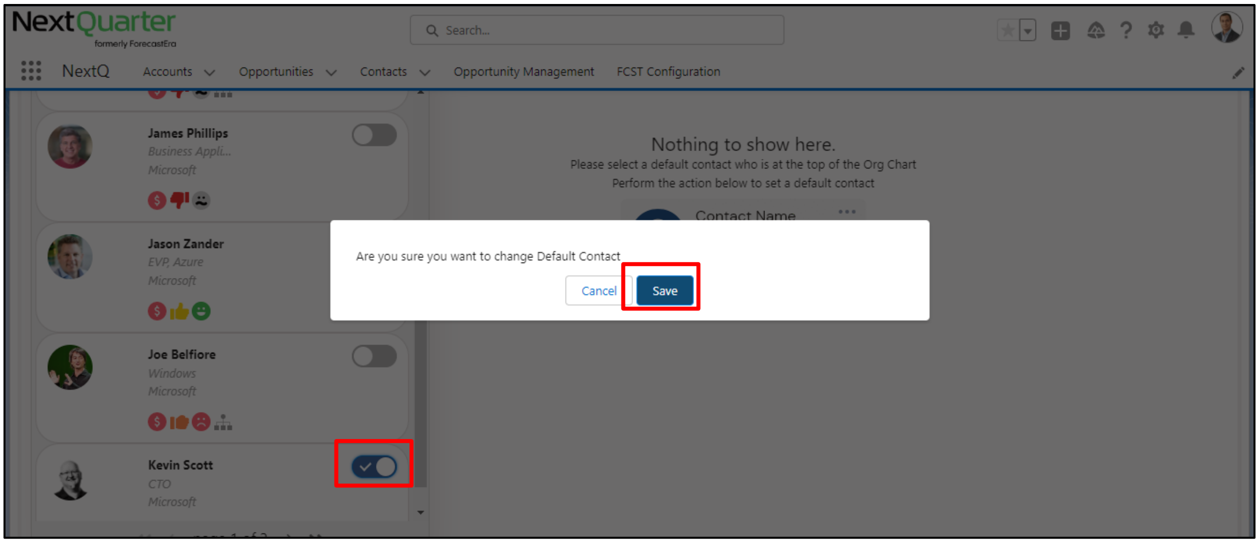
The second sub-section under Relationship Map is **Org Chart** (outlined in red).



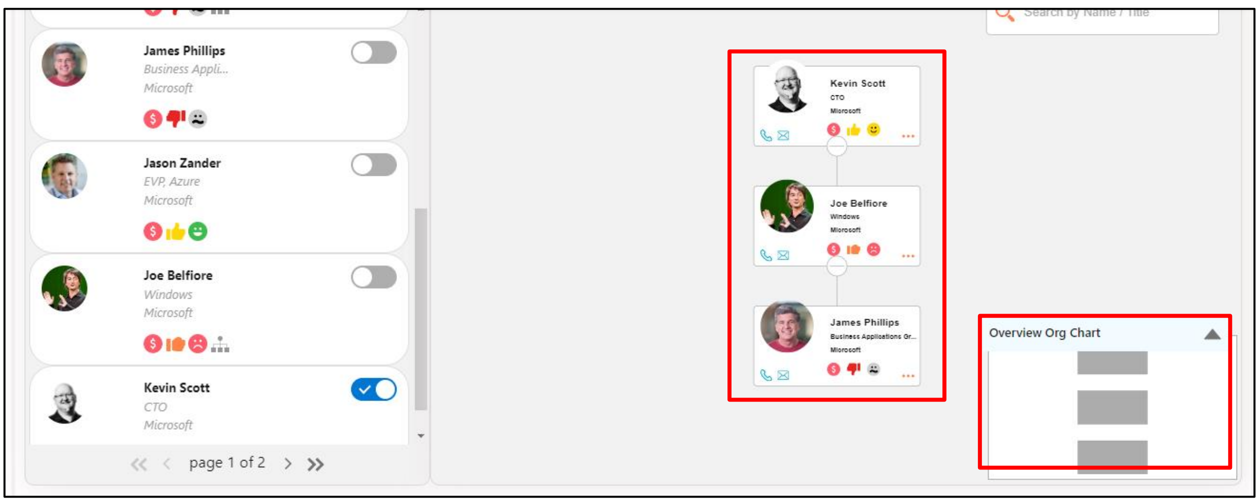

Here, Users can view the org chart, change the topmost contact or default contact, add more people to the org chart and even remove contacts that are no longer working at the organization. Users can also set filters to search for a specific set of contacts (all outlined in red).



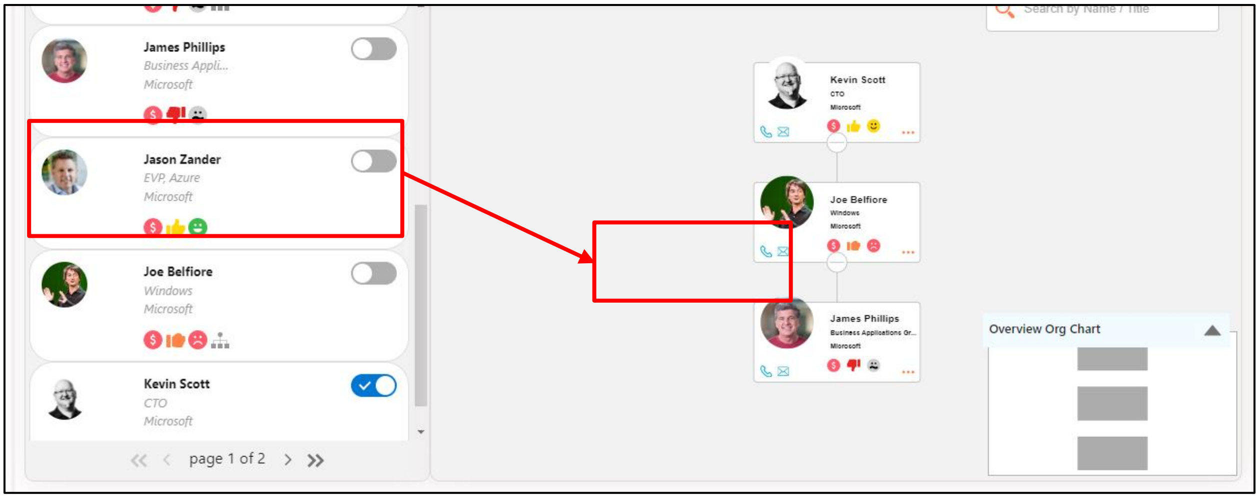

The topmost contact on the org chart, also known as default contact, can be selected by clicking on the **Toggle** button on their contact card and saving it as the default contact (both outlined in red).




Clicking on the **Save** button will populate the org chart with the selected contact as the topmost contact, and all the other contacts that report to the top contact will appear below. Users can also view the overview org chart and quickly scan org charts with 100-1,000 members (outlined in red).

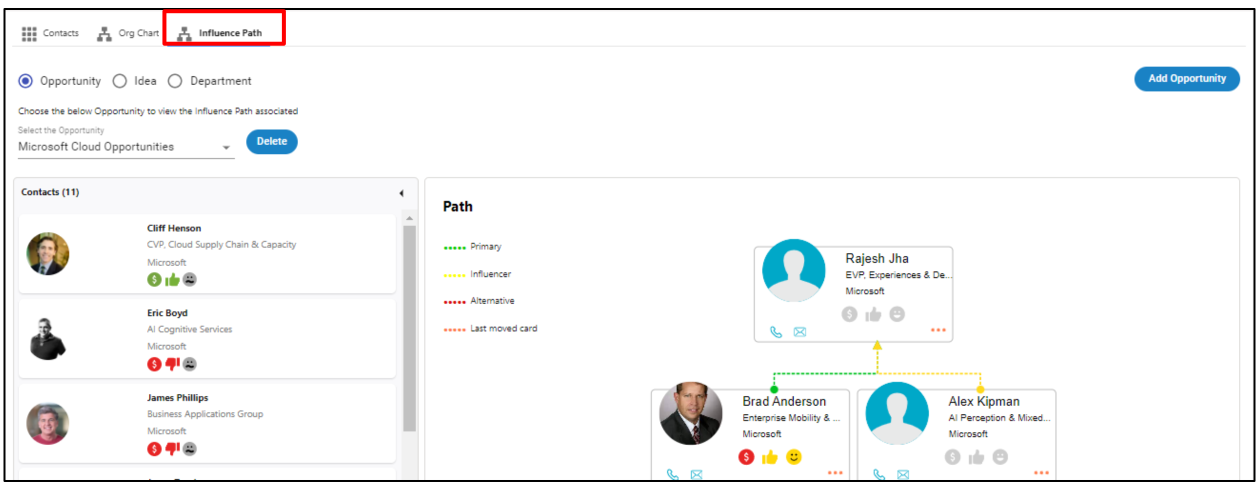



To add a new contact to the org chart, users can drag and drop the contact card onto any level (outlined in red).

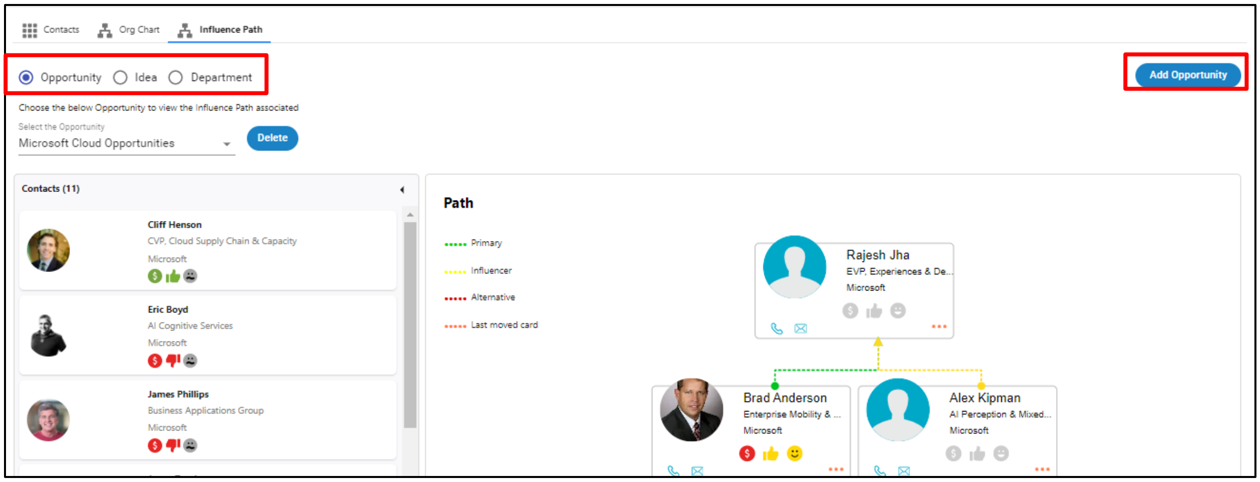



### 4.1.3. Influence Path

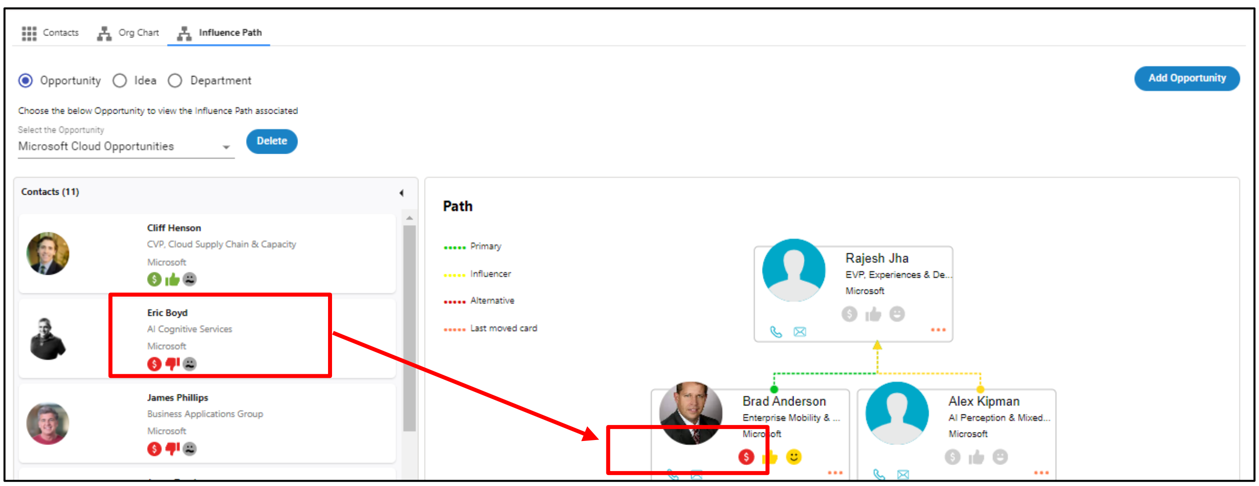
The third section under Relationship Map is **Influence Path** (outlined in red).



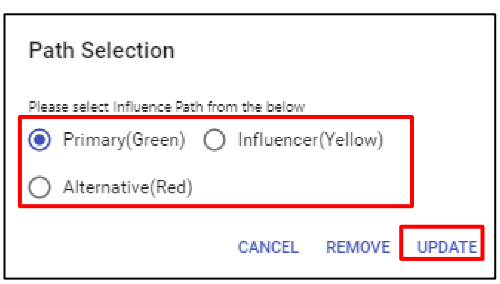

There are three sub-sections under the **Influence Path** – **Opportunity**, **Idea**, and **Department** (all outlined in red). Under any of the three sections, Users can add a new opportunity/idea/department, select the decision maker, and generate an automated influence path to reach the respective decision-maker.




Users can add more people to the influence path by dragging and dropping their contact cards onto the **Influence Path** and updating the path type (outlined in red).




Once users have dragged and dropped the contact card under the desired contact on the **Influence Path**, they will be asked to confirm the influence path type, whether primary, influencer, or alternative (outlined in red), and click **Update**.



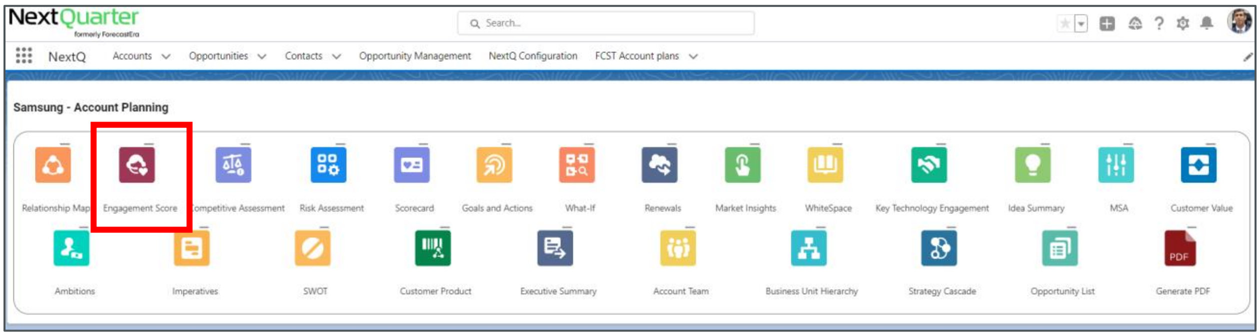

*Note – these steps will remain the same for the **Idea** sub-section.

3.3.1.3.1. Influence Path for Department

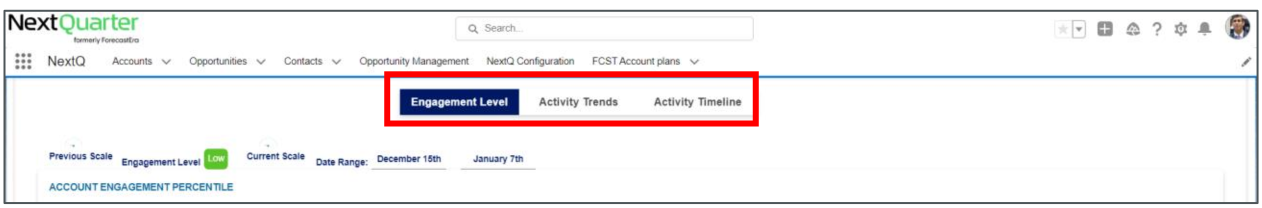
The Influence path for the department will not be automated. Users can drag and drop each contact card to create a department-level influence path.

## 4.2. Engagement Score

The second section under Account Planning is **Engagement Score** (outlined in red).

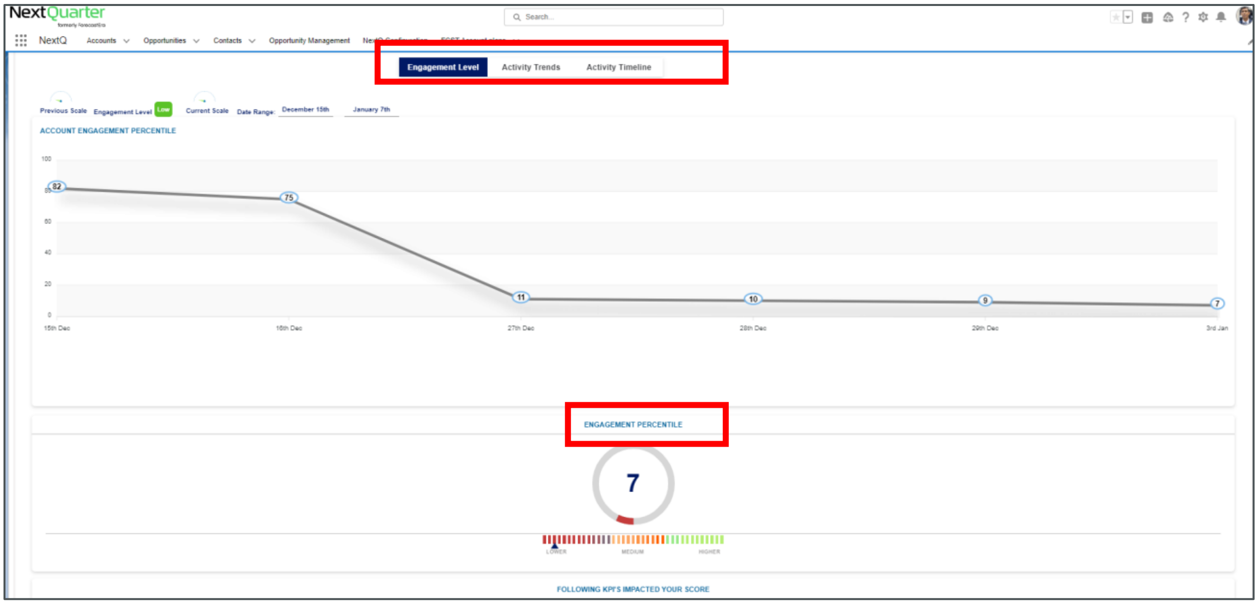


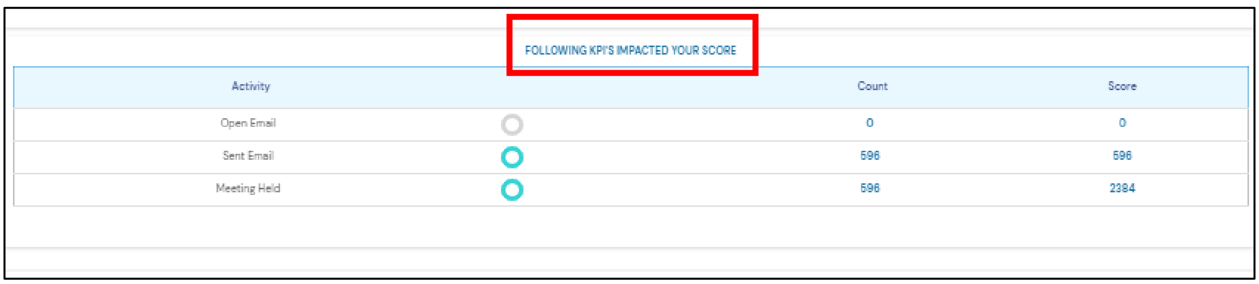

The Engagement Score has three sub-sections – **Engagement Level**, **Activity Trends**, and **Activity Timeline** (all outlined in red).




### 4.2. 1. Engagement Level

Under **Engagement Level**, users can select the date ranges to view the engagement percentile graph, range, and the KPIs that impact the score (all outlined in red).



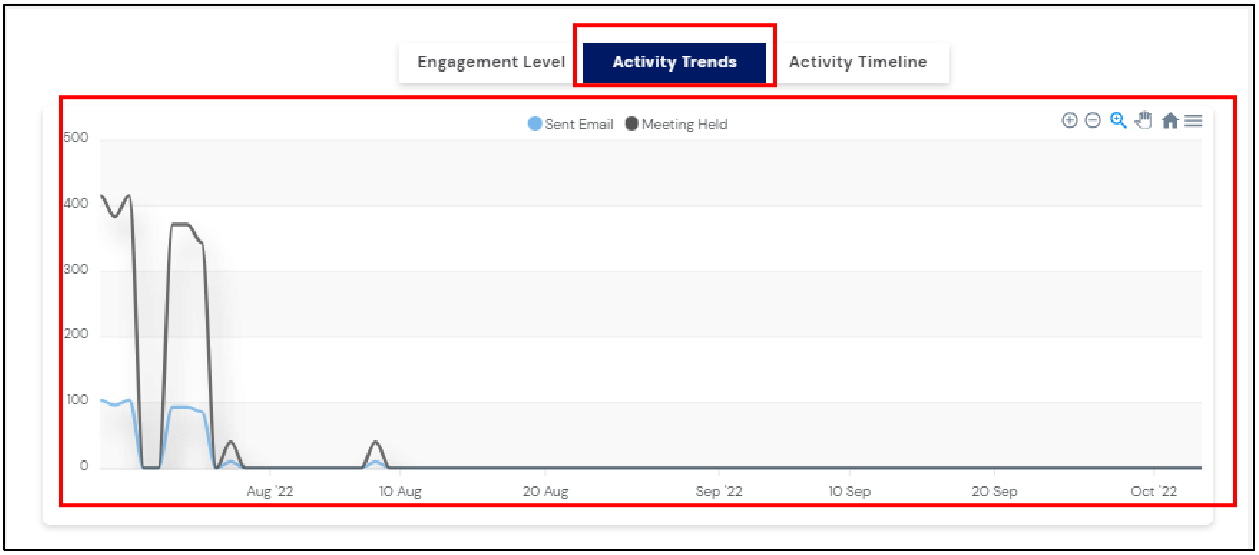



FOLLOWING KPI'S IMPACTED YOUR SCORE

| Activity | | Count | Score |
|---|---|---|---|
| Open Email | | 0 | 0 |
| Sent Email | | 596 | 596 |
| Meeting Held | | 596 | 2384 |

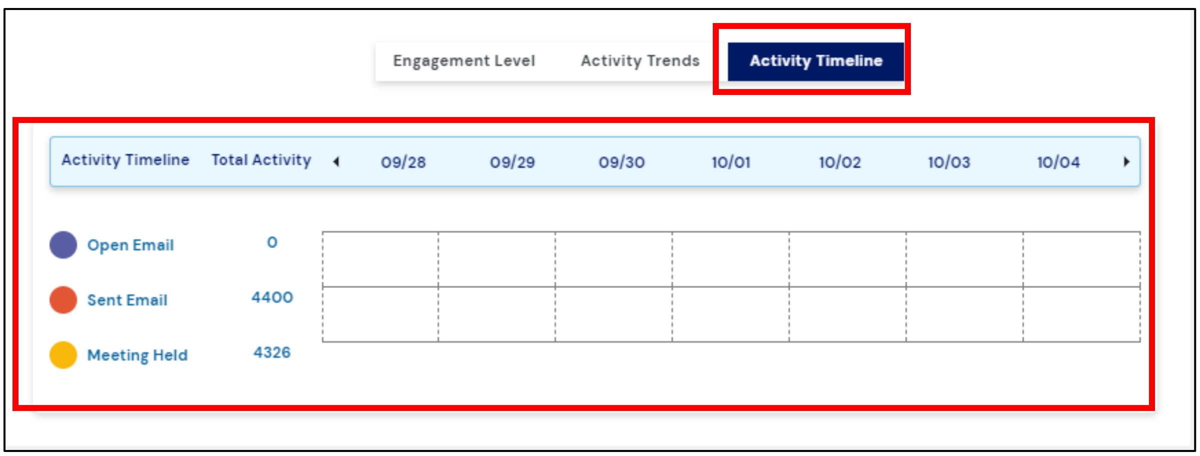
### 4.2.2. Activity Trends

The second section is **Activity Trends**, based on the date ranges selected. Users can see a graph of activity trends (all outlined in red).



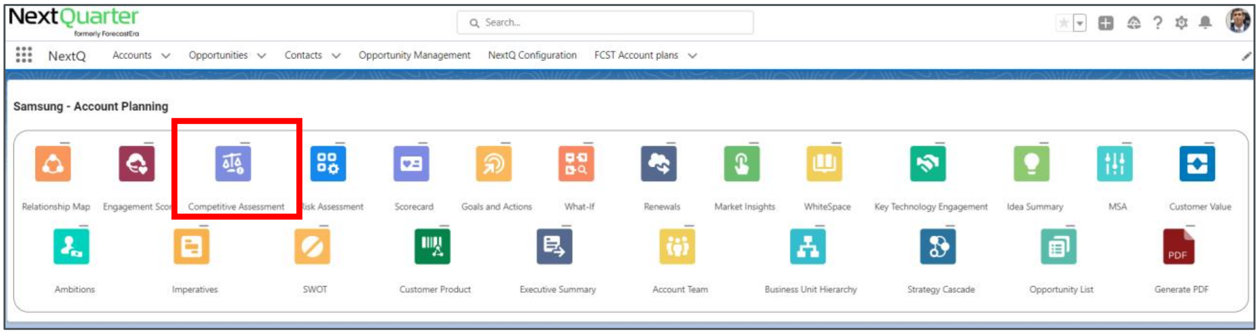

### 4.2.3. Activity Timeline

The third section is the **Activity Timeline**, where users can see a bubble chart on the activity timeline based on the date ranges selected (all outlined in red).




## 4.3. Competitive Assessment

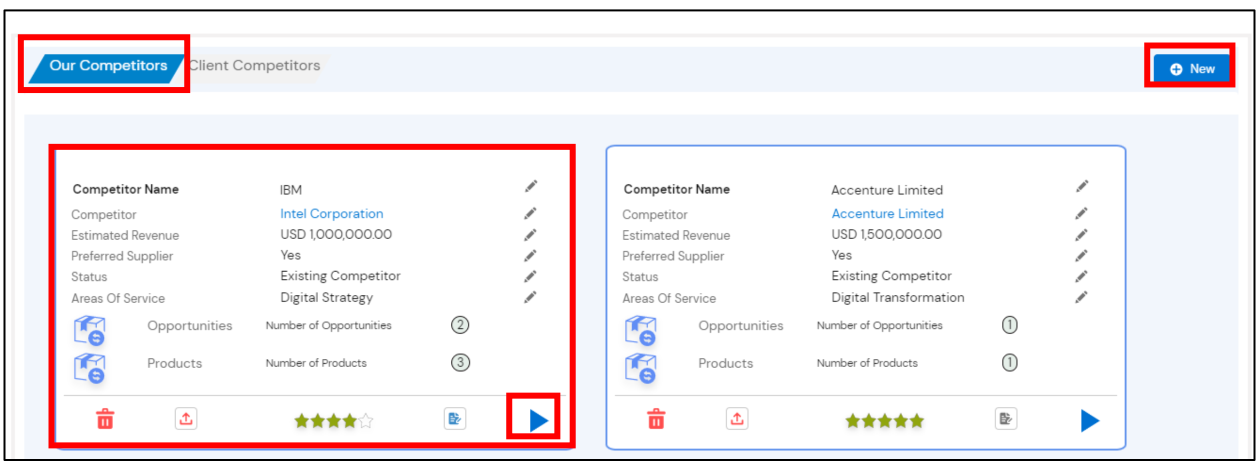
The third section under Account Planning is **Competitive Assessment** (outlined in red).



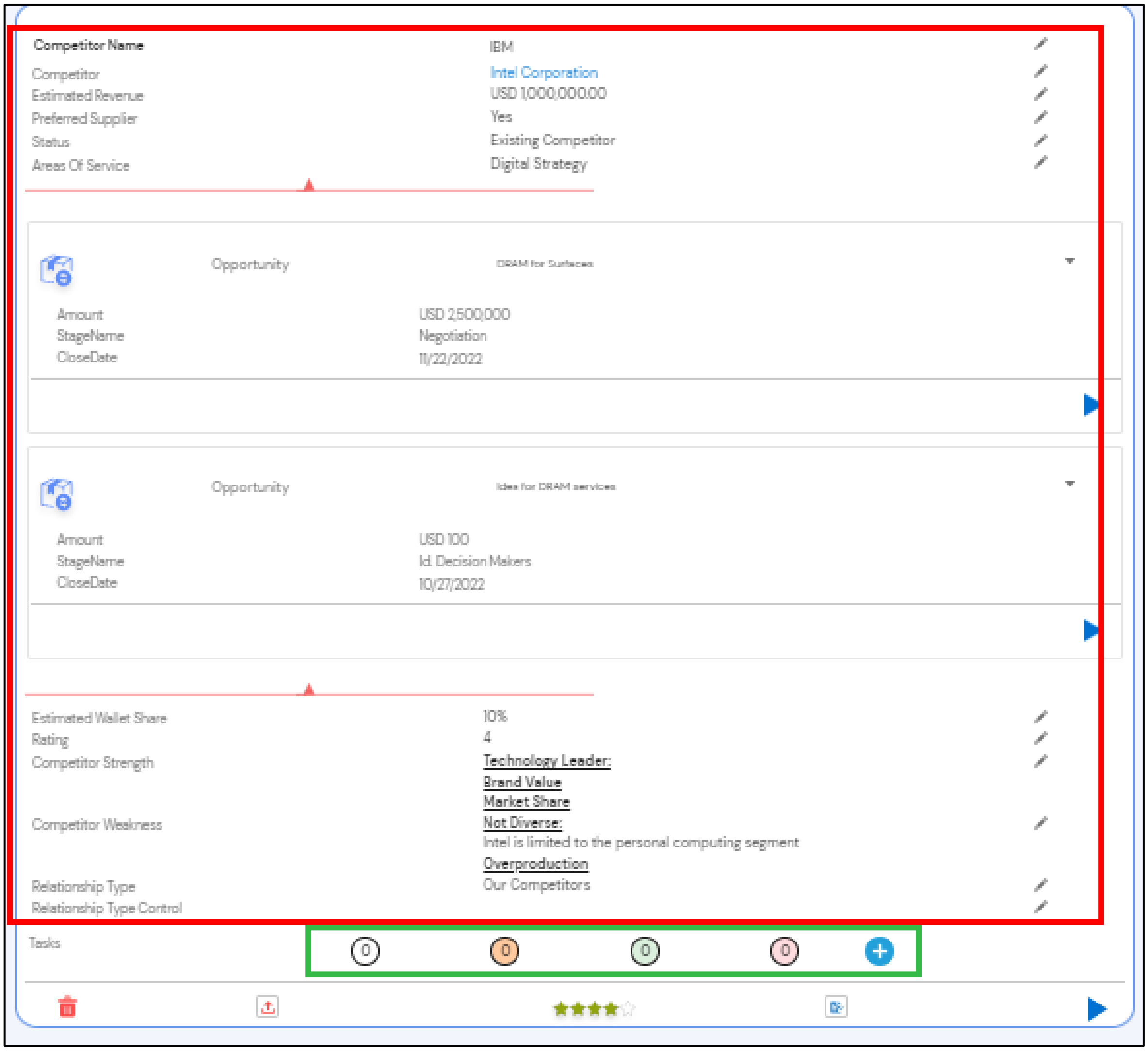

Under Competitive Assessment, users can see two sections – Our Competitors and Client Competitors (both outlined in red).


### 4.3.1. Our Competitors

The first sub-section under Competitive Assessment is **Our Competitors**. Under **Our Competitors**, users can view competitor cards and add a new card using the **+ New** button. Users can also expand the card using the triangle icon (all outlined in red).

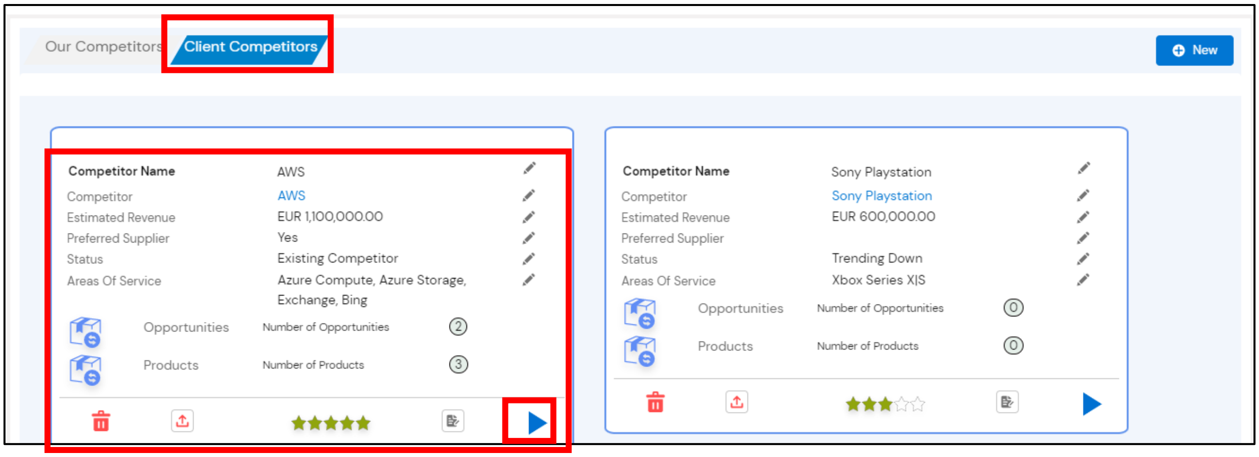



Clicking on the **Expand Card** button will take users to a popup where they can see competitor card details, including competitor name, estimated revenue, status, areas of service, and any opportunities associated with it, along with estimated wallet share, competitor rating, strength, weakness, relationship type, relationship type control (all outlined in red) and the option to associate a task with it (outlined in green).

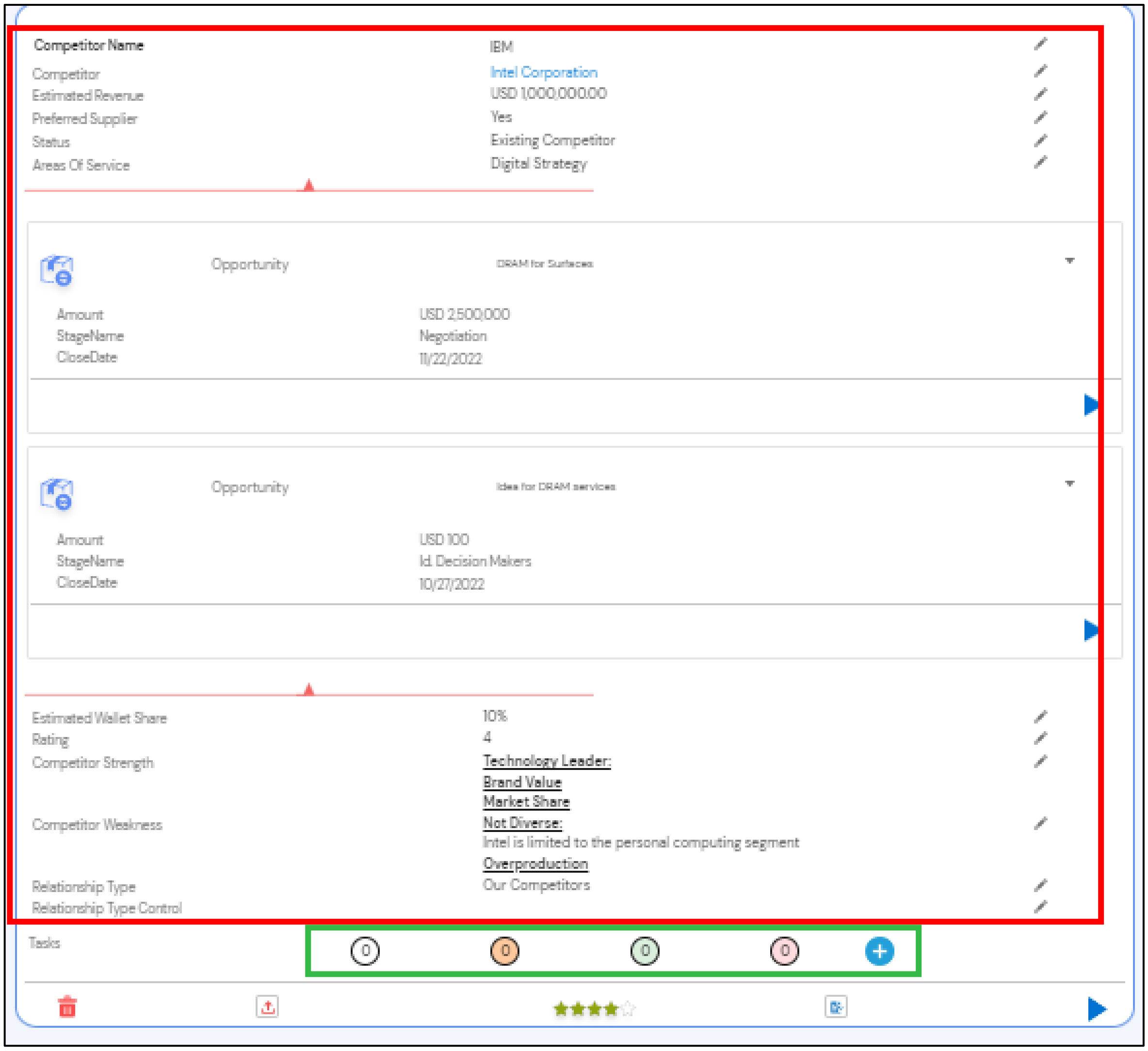



### 4.3.2. Client Competitors

The second sub-section under Competitive Assessment is **Client Competitors**. Under **Our Competitors**, users can view competitor cards and add a new card using the **+ New** button. The card can be expanded by clicking the triangle icon (all outlined in red).

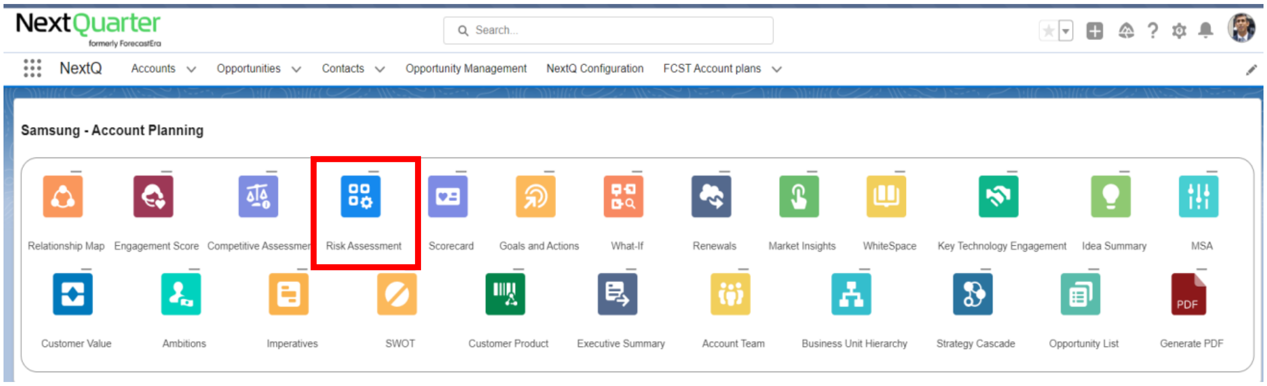



Clicking on the **Expand Card** button will take users to a popup where competitor card details are viewed, including competitor name, estimated revenue, status, areas of service, and any opportunities associated with it, along with estimated wallet share, competitor rating, strength, weakness, relationship type, relationship type control (all outlined in red) and the option to associate a task with it (outlined in green).

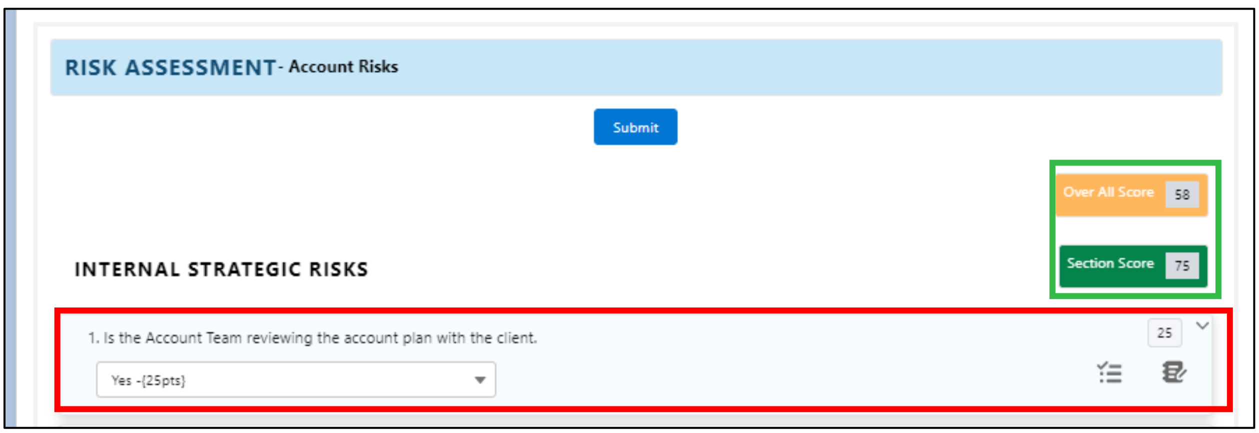



## 4.4. Risk Assessment

The fourth section under Account Planning is **Risk Assessment**.

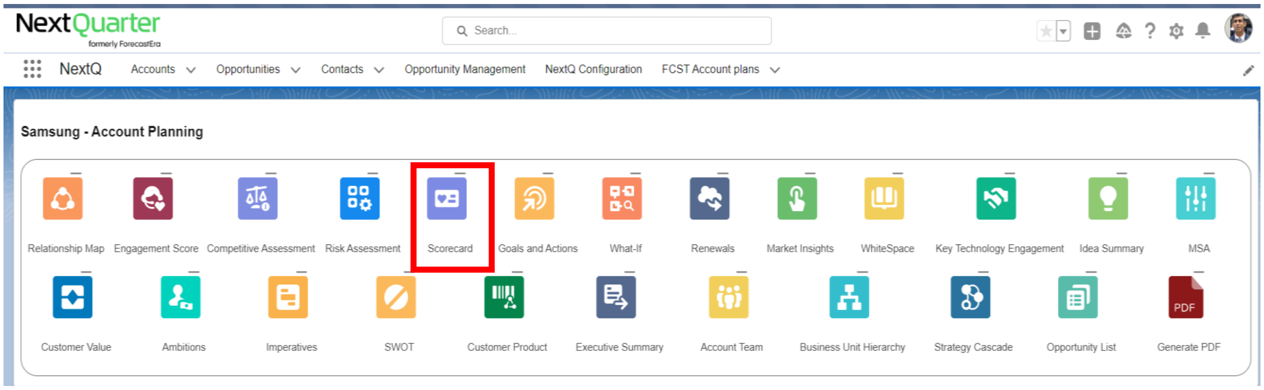



Here there are six cards (three of each for internal and external - **Operational**, **Commercial**, **Strategic**) with multiple-choice questions. Users can select and update the option to these questions (all outlined in red) that will add up to the section score, which is averaged out to create the total risk score (outlined in green).

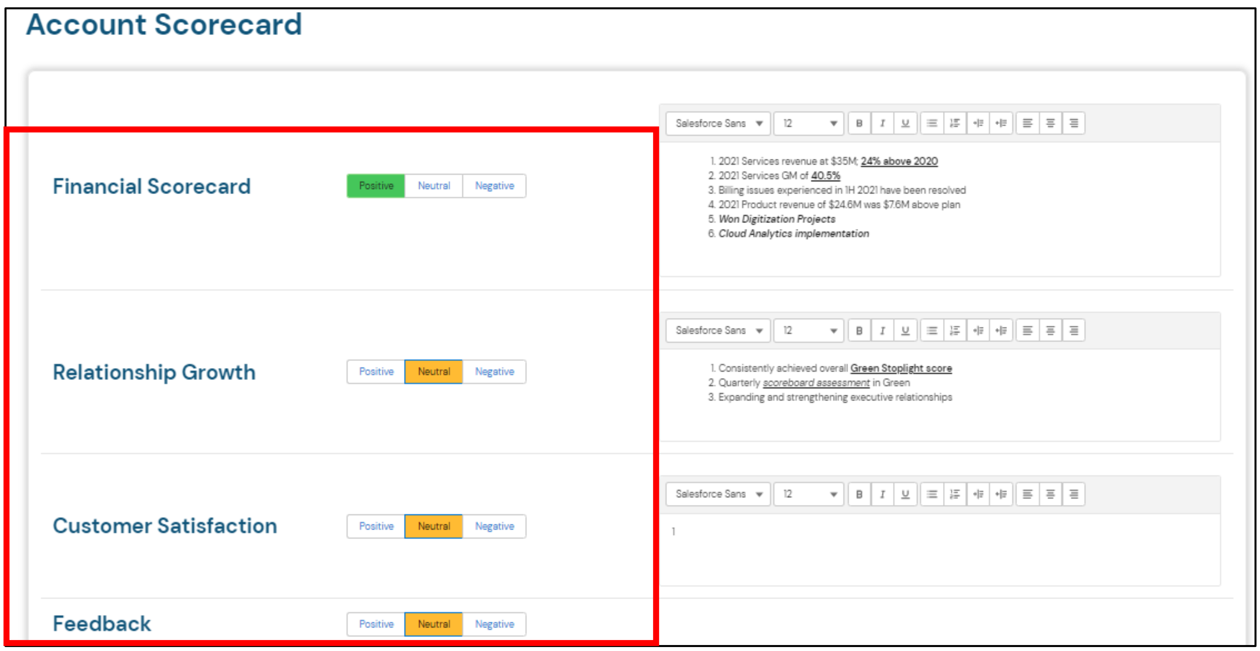



## 4.5. Scorecard

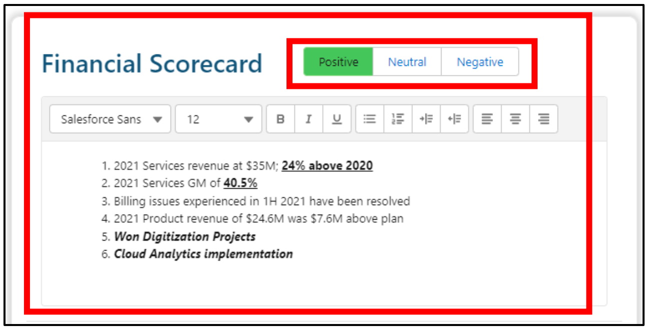
The fifth section under Account Planning is **Scorecard** (outlined in red).



The **Account Scorecard** is divided into four parts – **Financial Scorecard**, **Relationship Growth**, **Customer Satisfaction**, and **Feedback** (outlined in red).

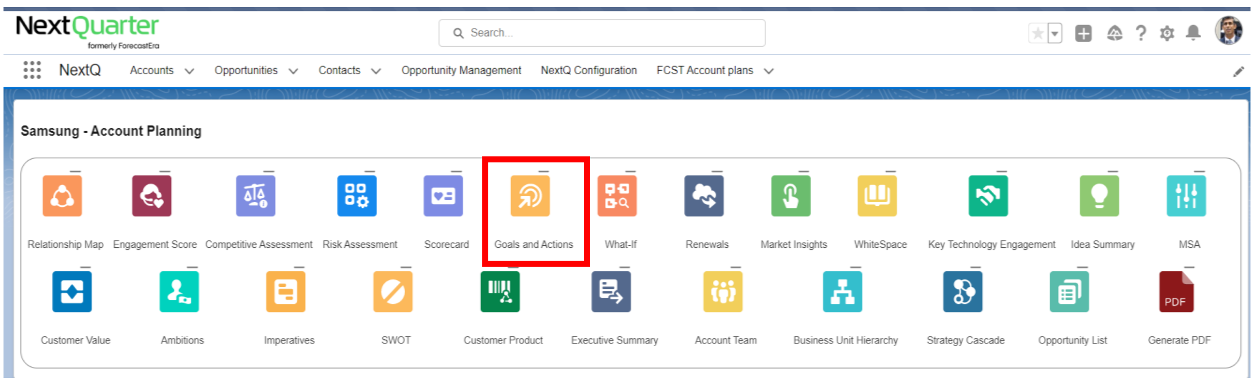


The total rating for any section can be updated by clicking on the **Positive**, **Negative** or **Neutral** to correct it. The cards are free text fields, where formats like bold or italics can be used to impress upon specific parts of the description (all outlined in red).

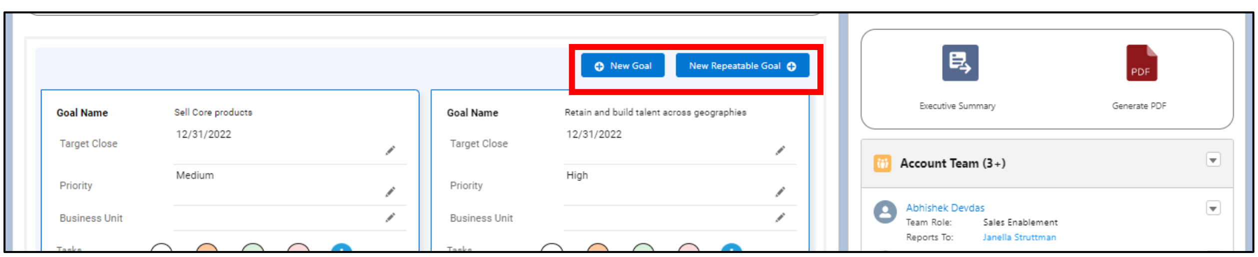



## 4.6. Goals and Actions

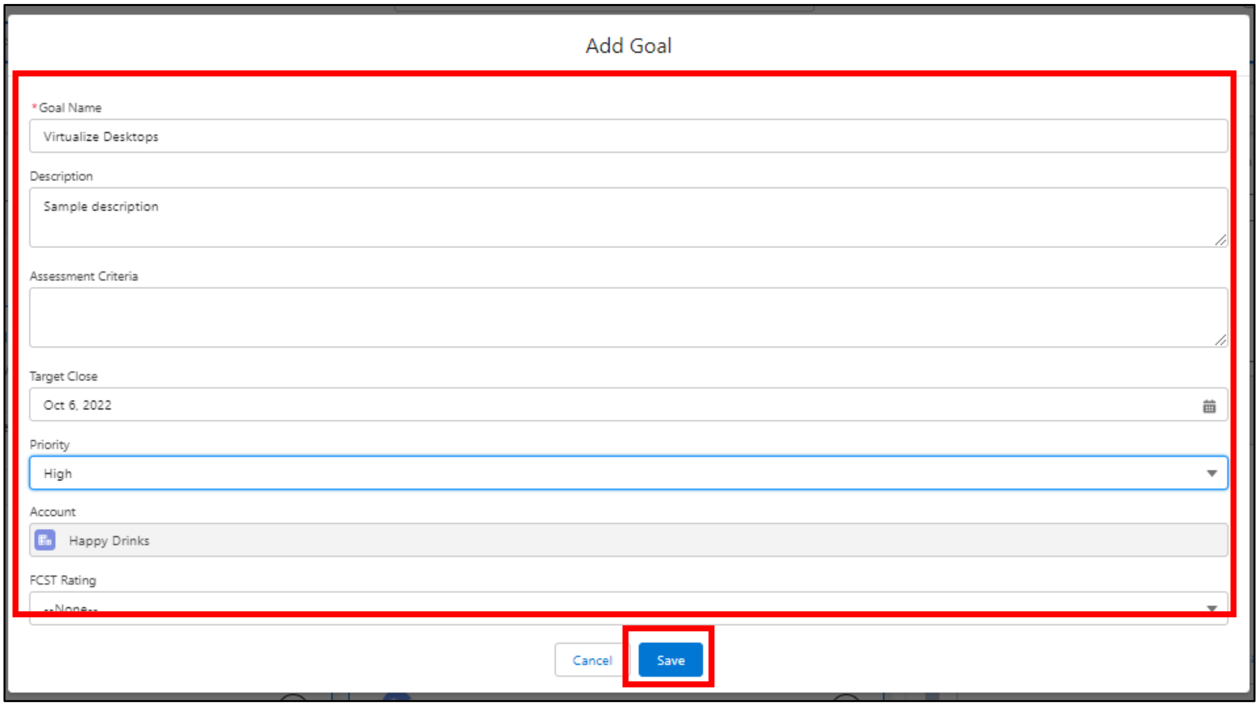
The sixth section under Account Planning is **Goals and Actions** (outlined in red).



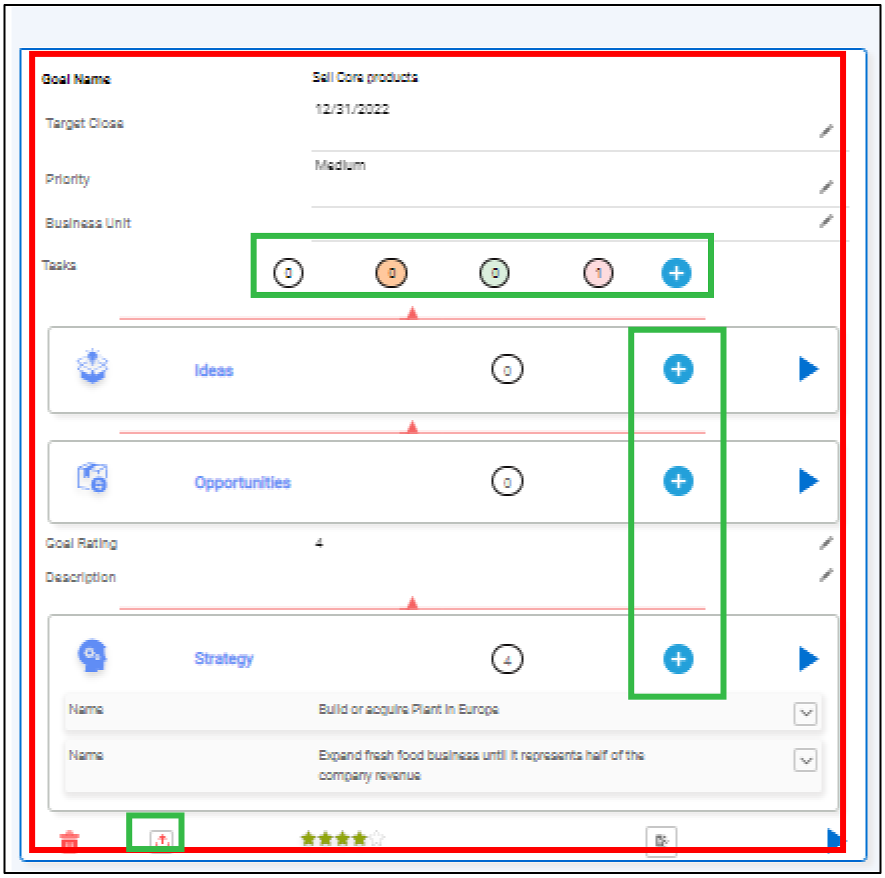

Users can click on the **New Goal** button or create a new repeatable goal using the **New Repeatable Goal** button (all outlined in red).




On clicking either button, in this case, the **New Goal** button, users can enter details about the goal, like name, description, close date, priority, and rating, and click **Save** to create the new goal.



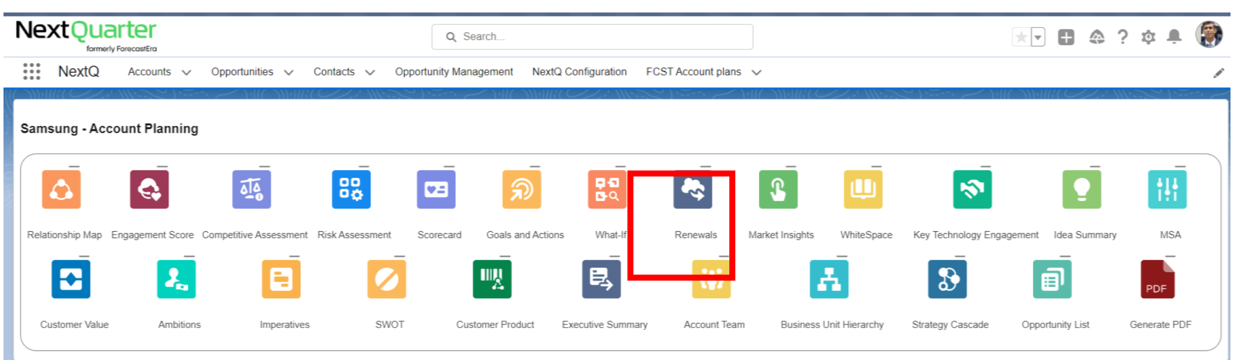

Users can also view the **Goals and Action** cards. The details for a specific goal can be seen (outlined in red). Users can click the **+** button to associate an opportunity, idea, or strategy record with the goal. Users can click on the circles next to **Tasks** to see whether they are classified as not started, open, completed, or overdue. Users can also click the **+** button to add a new task. Files associated with a goal can be uploaded using the **Upload** button (all outlined in green).




*Note – The steps remain the same for all cards to associate an idea, opportunity, strategy, or create a task.

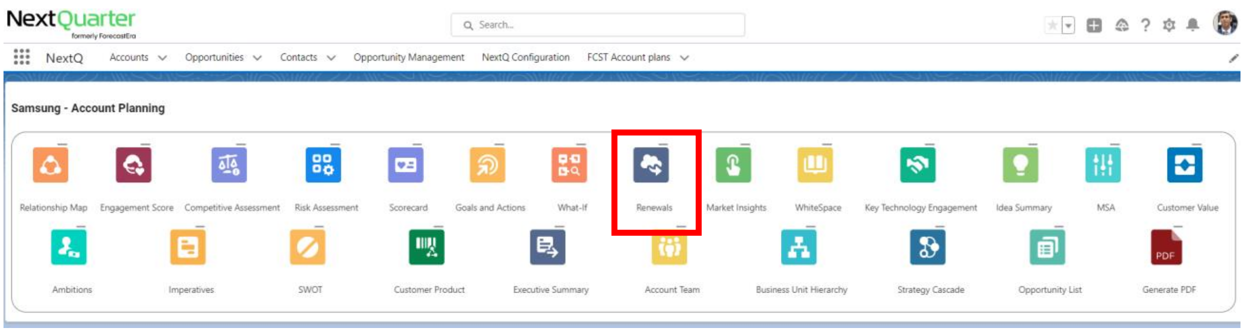
## 4.7. What-If

The sixth section under Account Planning is **What-If** (outlined in red).

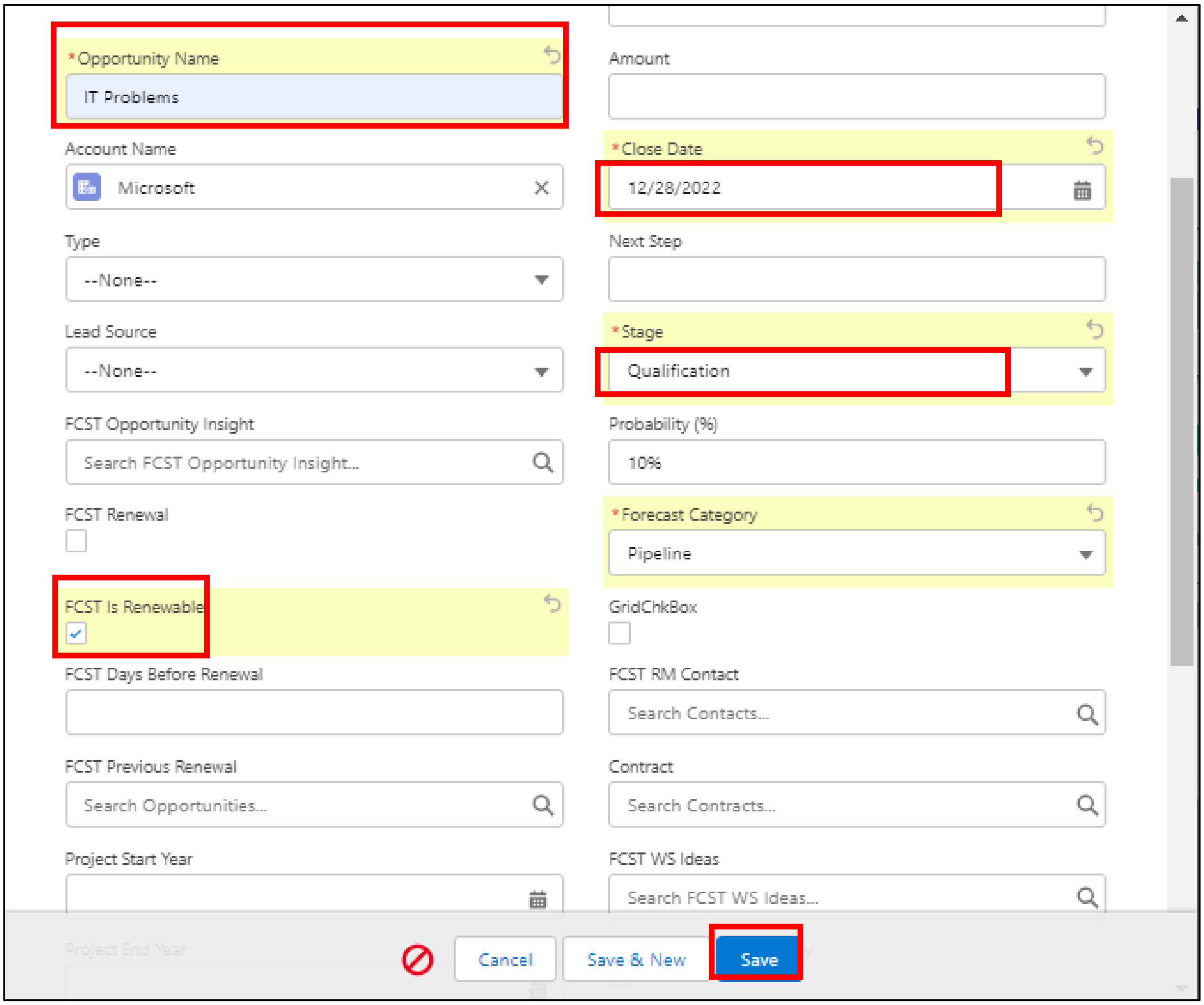


## 4.8. Renewals

The following section under Account Planning is **Renewals** (outlined in red).




Users must enter the opportunity name, close date, stage, and check the box, FCST is renewable, and click **Save** (all outlined in red) to create a new renewal opportunity.

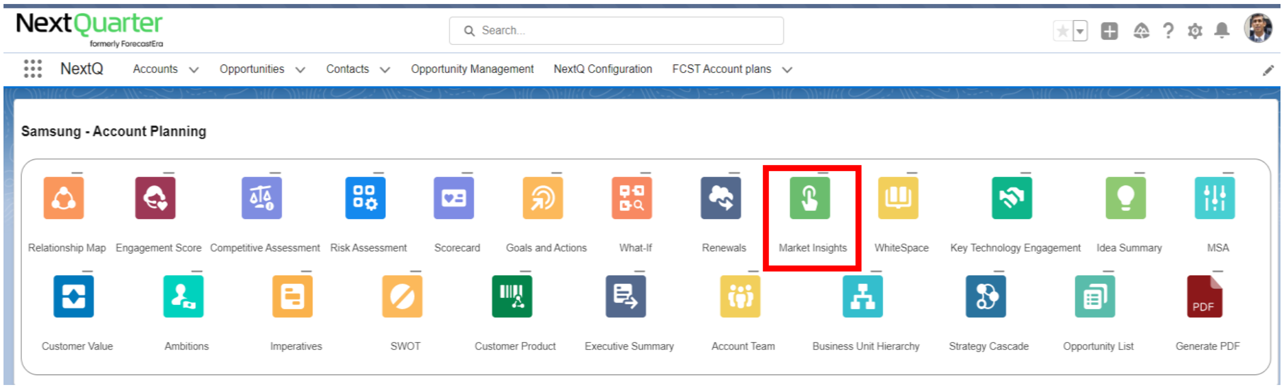



Once the opportunity has been created, users can view it under **Renewals**.

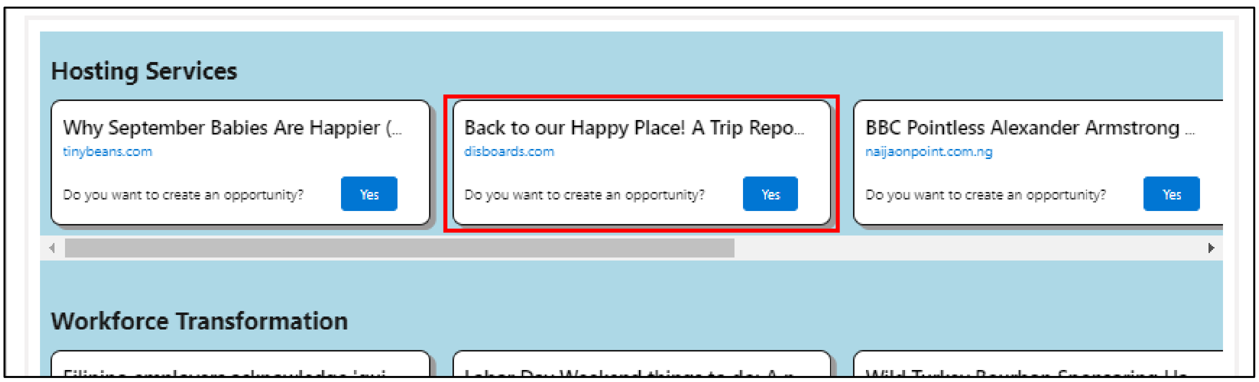
Note – the opportunity must be in the **Closed Won** stage to appear under the **Renewals** tab.

## 4.9. Market Insights

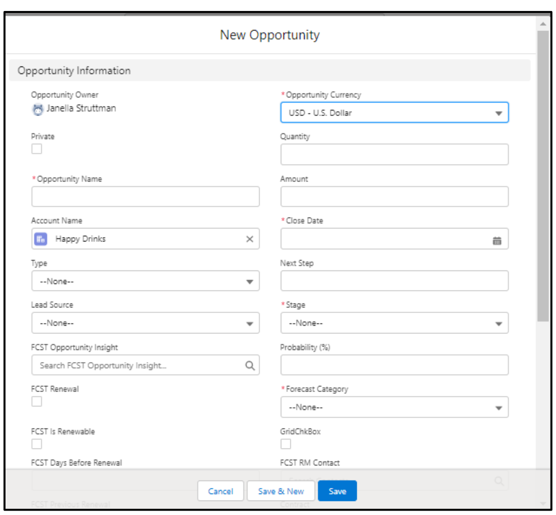
The following section, under Account Planning, is **Market Insights** (outlined in red).




Users can add relevant tags associated with the account and collect insights from over 100 million web sources (outlined in red).



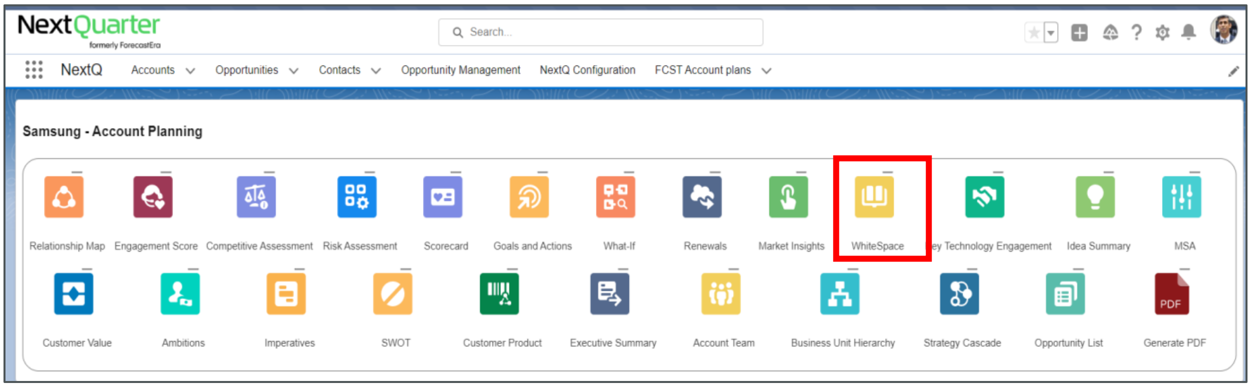

Clicking on **Yes** for any insight will open a new opportunity card.




Once the mandatory details have been entered, users can save this opportunity to the account.

## 4.10. White Space

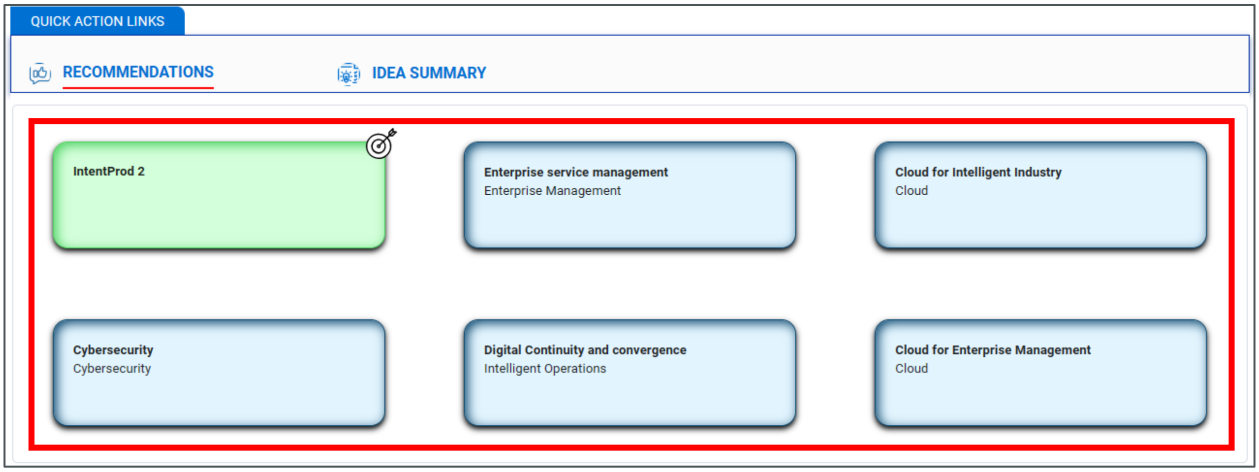
The following section, under Account Planning, is **White Space** (outlined in red).



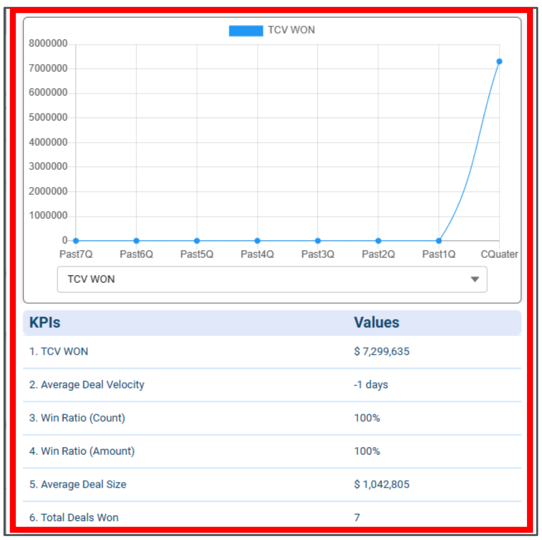

The first section contains quick links to recommendations and the idea summary (all outlined in red).

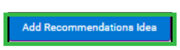

### 4.10.1. Recommendations

The **Recommendations** section lists the top six products (outlined in red) with the best chance of being sold based on the organization's earlier sales and the industries catered to.



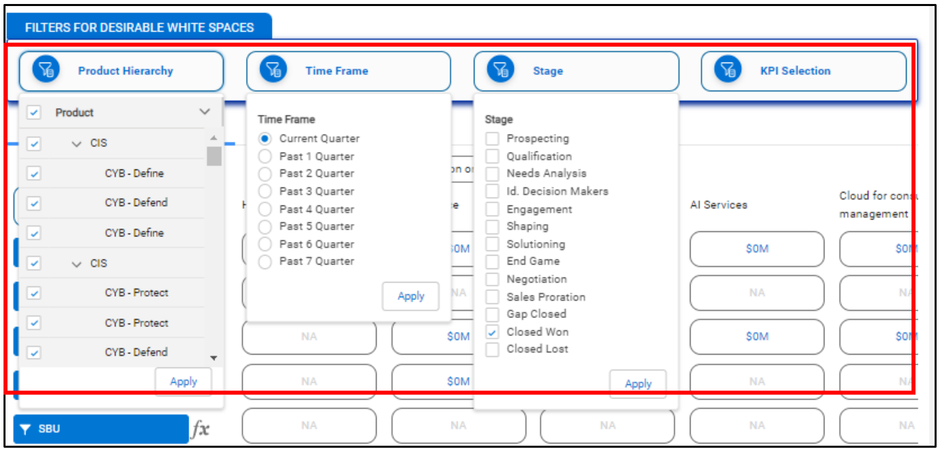

Clicking on any product will bring up a card with a summary of the product, including a graph on **TCV Won**, **Average Deal Velocity**, **Win Ratio**, **Average Deal Size**, and **Total Deals Won** (all outlined in red).



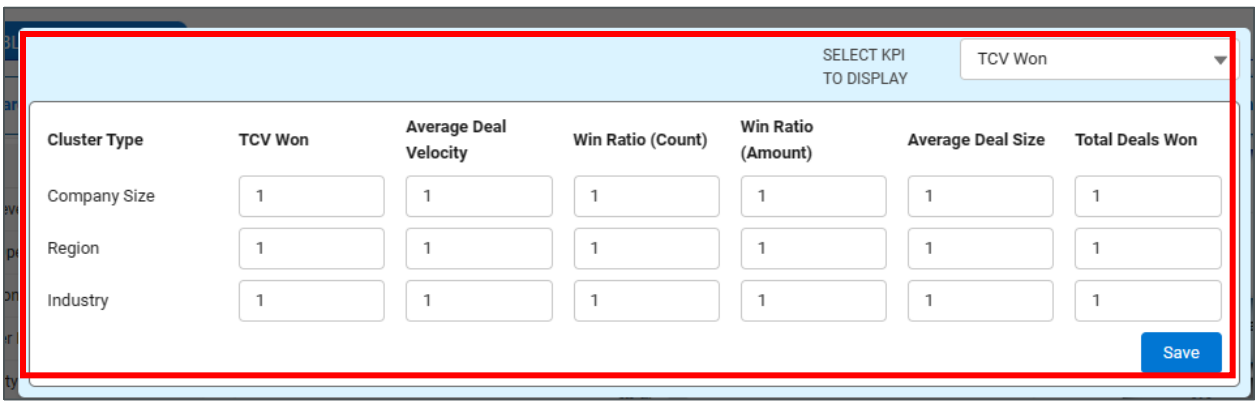




Users can click the **Add Recommendation Idea** button (outlined in green) to create a new idea.

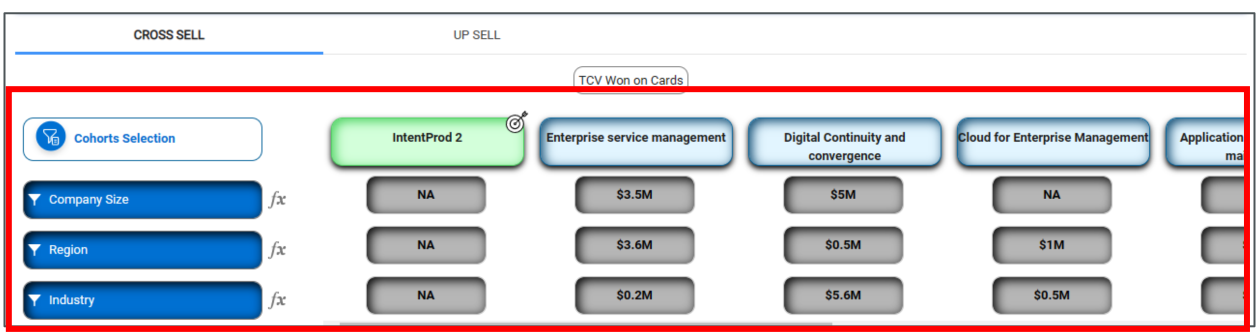
Further below is a section on filters for desirable white spaces, where the four options will be displayed based on configurations. Multiple selections can be added to each of the four options (all outlined in red).



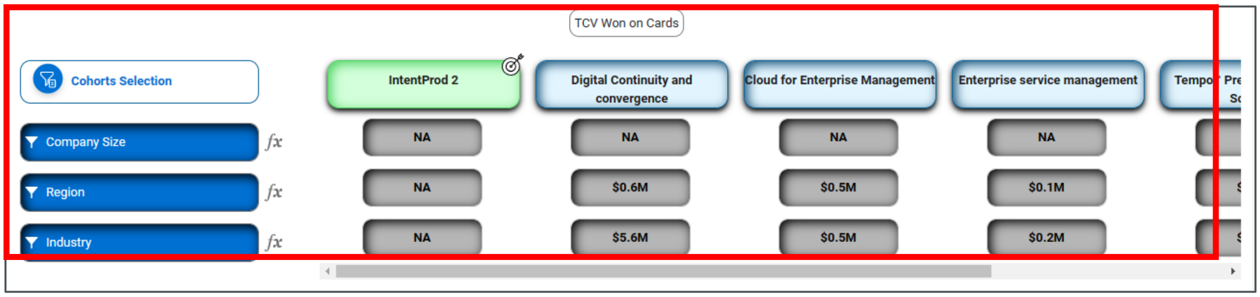

Clicking on **KPIs Selection** will open another card where the KPIs can be selected to display based on the cluster types configured (all outlined in red).



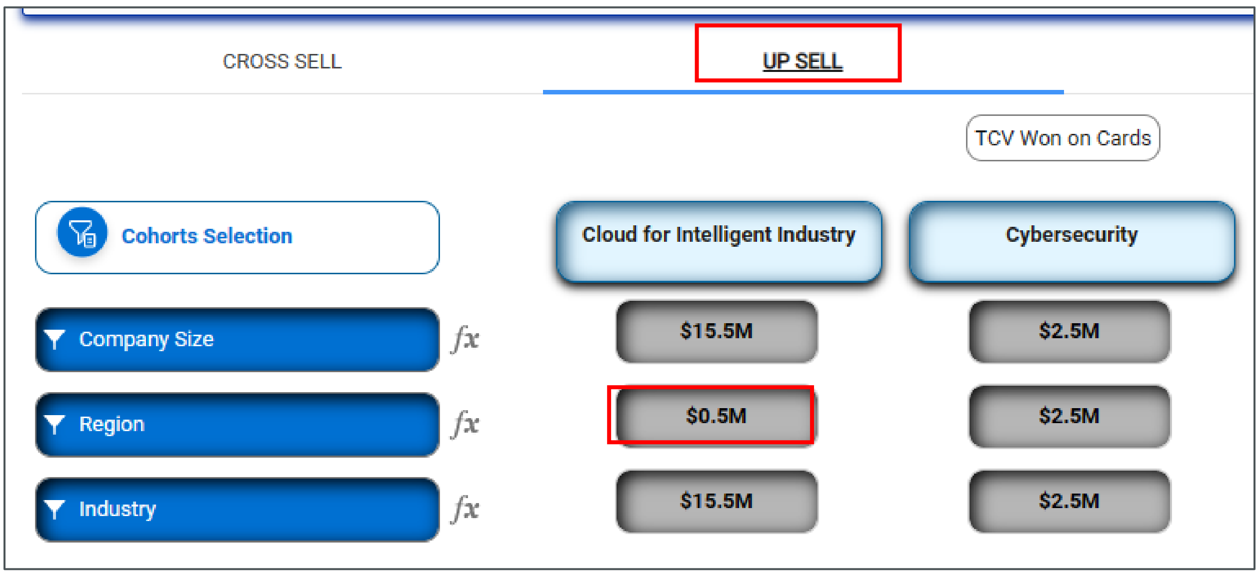

The following section is the **Cross-Sell** suggestions, where users can select cohorts to get recommendations on which products to sell (all outlined in red).




Select any company size, region, or industry, and the recommendations will reflect the changes in cohorts. For example, APAC is selected as the region, and users can see the changes to the recommendations (outlined in red).

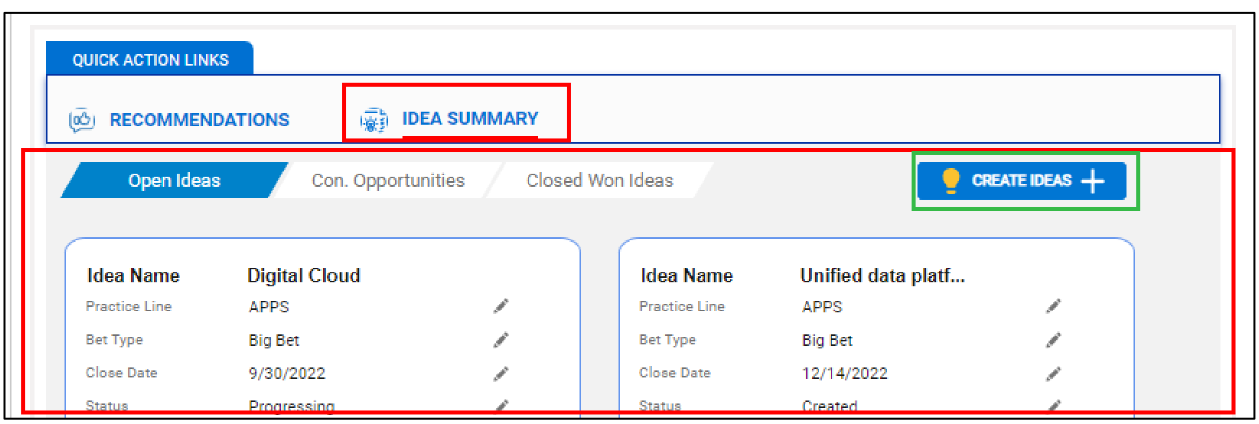



As with **Cross-Sell** recommendations, click the **Upsell** section and select **Cohorts** to view upsell recommendations (all outlined in red).

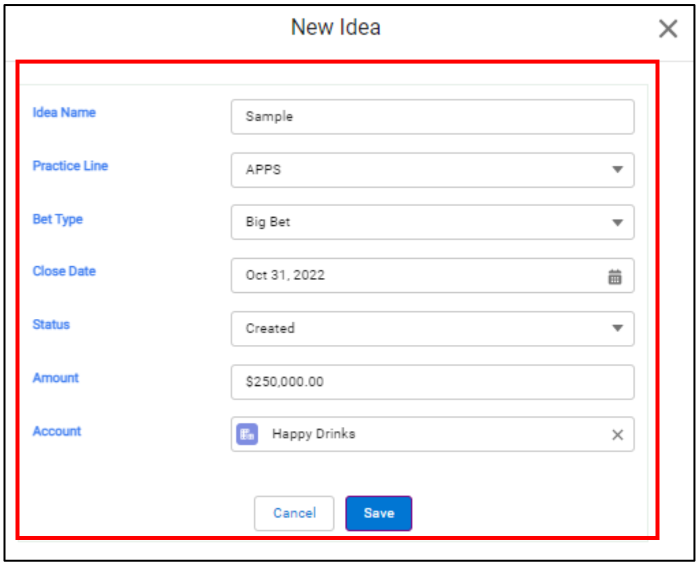



4.10.2. Idea Summary

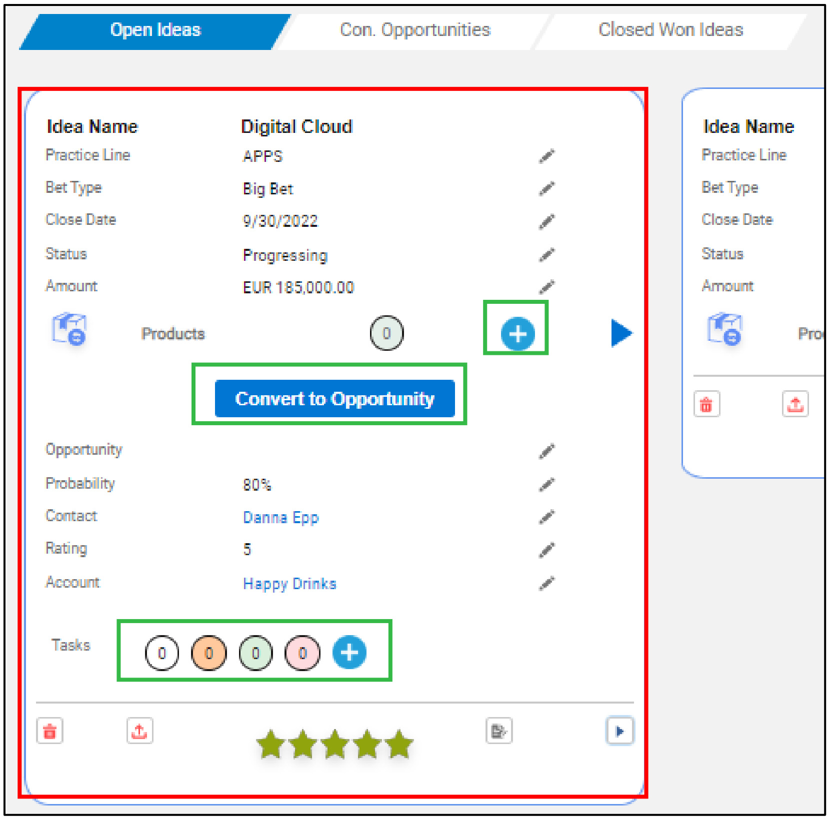
The second sub-section under White Space is **Idea Summary**. Users can create ideas, view idea cards, add products to ideas, convert ideas into opportunities, and develop tasks for ideas (all outlined in red).



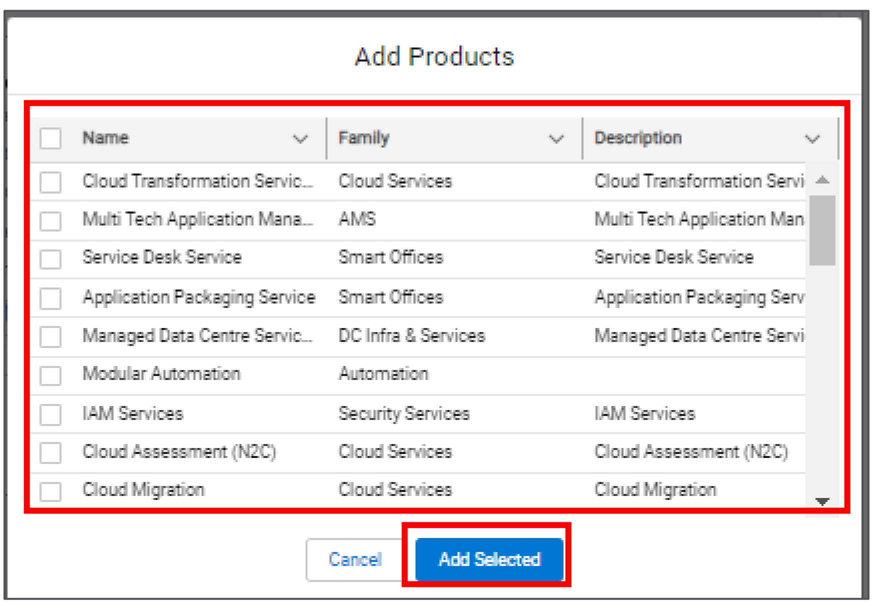
Click on the **Create Idea** button on the screen above (outlined in green) to go to the screen below, view all the details, and save it to create a new idea associated with the selected product (all outlined in red).



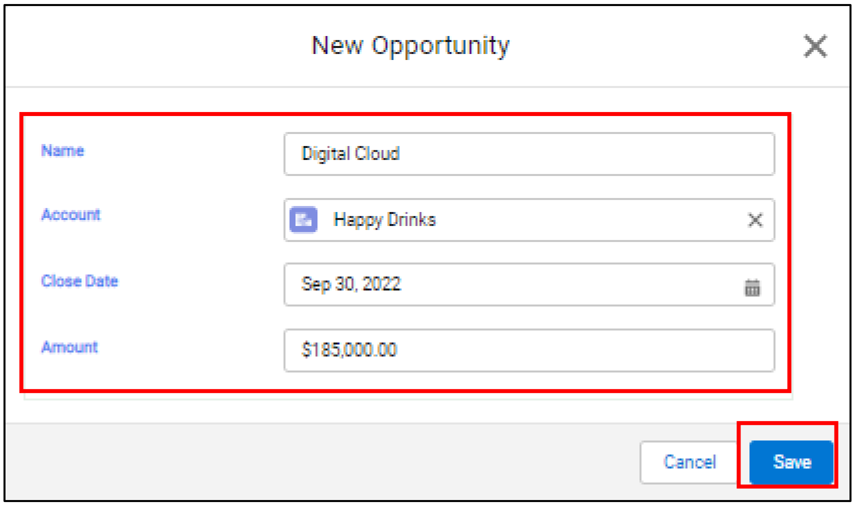

Once an idea has been created, users can view the idea card under **Open Ideas** (outlined in red). Next, click the **+** button to associate products with the idea or convert the idea into an opportunity by clicking the **Convert to Opportunity** button. Finally, users can click on the **+** button to add a new task (all outlined in green).



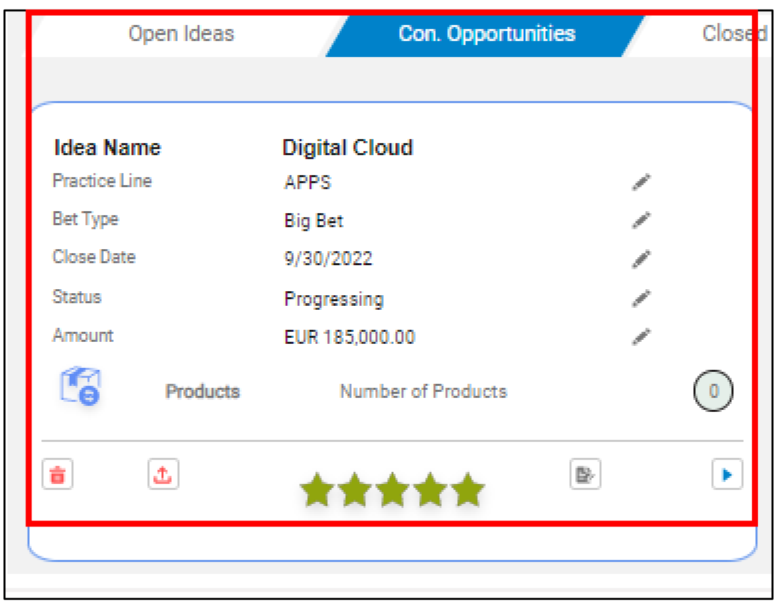

Click on the **+** button to see a popup to associate products with the open idea by selecting them and clicking on **Add Selected** (outlined in red).



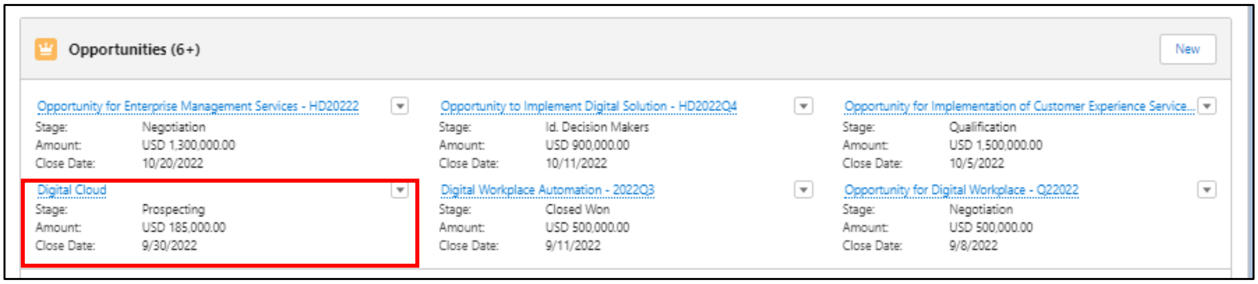
Click on the **Convert to Opportunity** button to see a new opportunity card. Add the opportunity name and opportunity, then click **Save** to create it (all outlined in red).



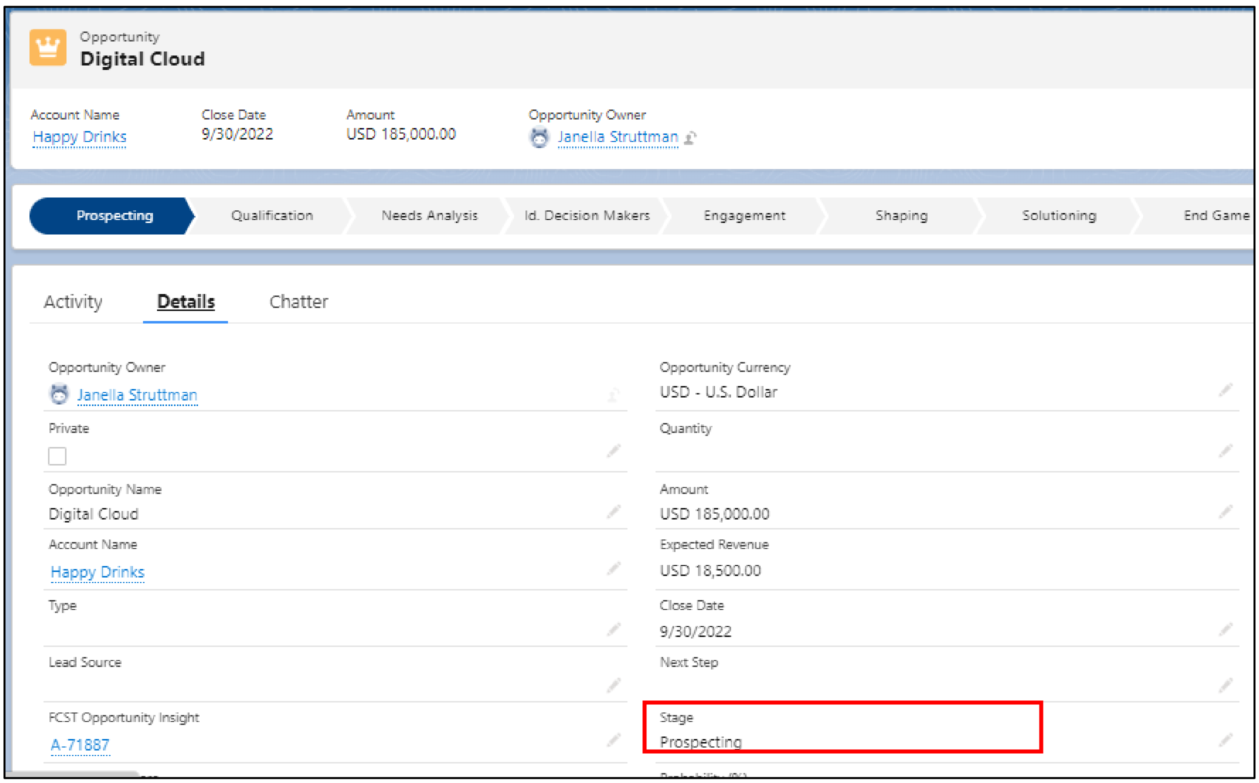

Once the idea has been converted into an opportunity, it can be seen under the **Con. Opportunities** section (all outlined in red).



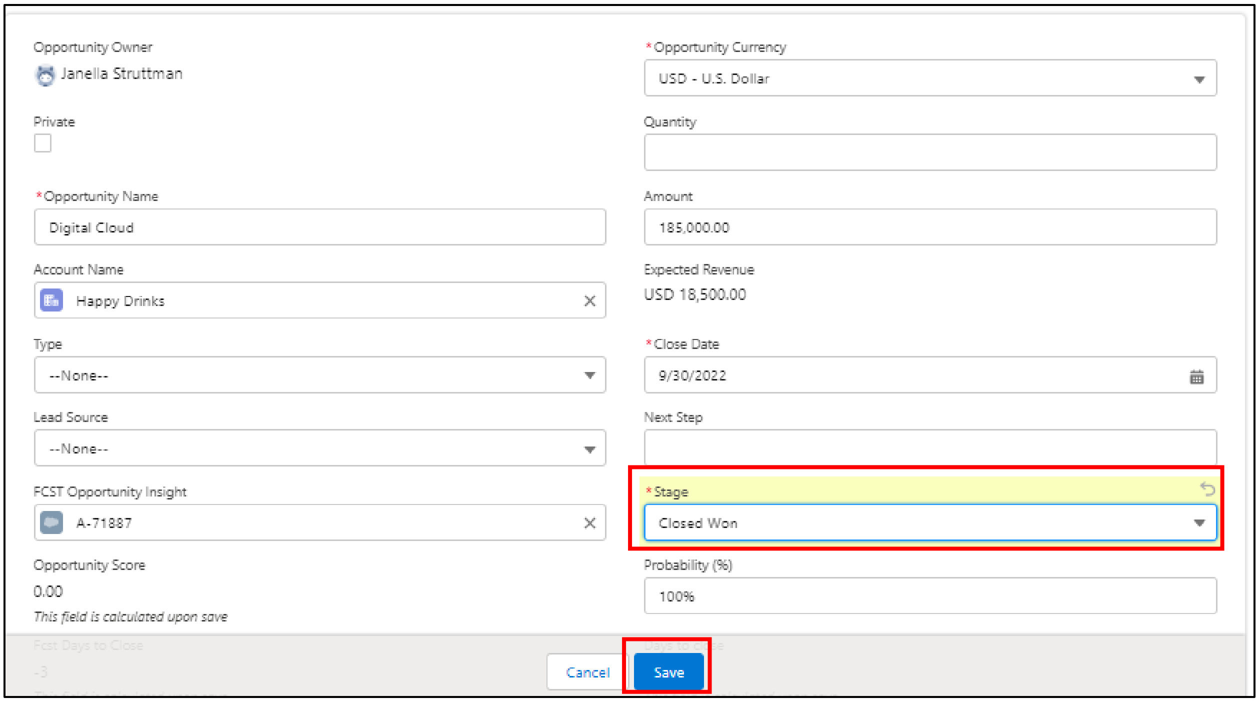

Users can go to the **Related** tab on the account page to verify whether the opportunity has been created under the **Opportunities** section (outlined in red).



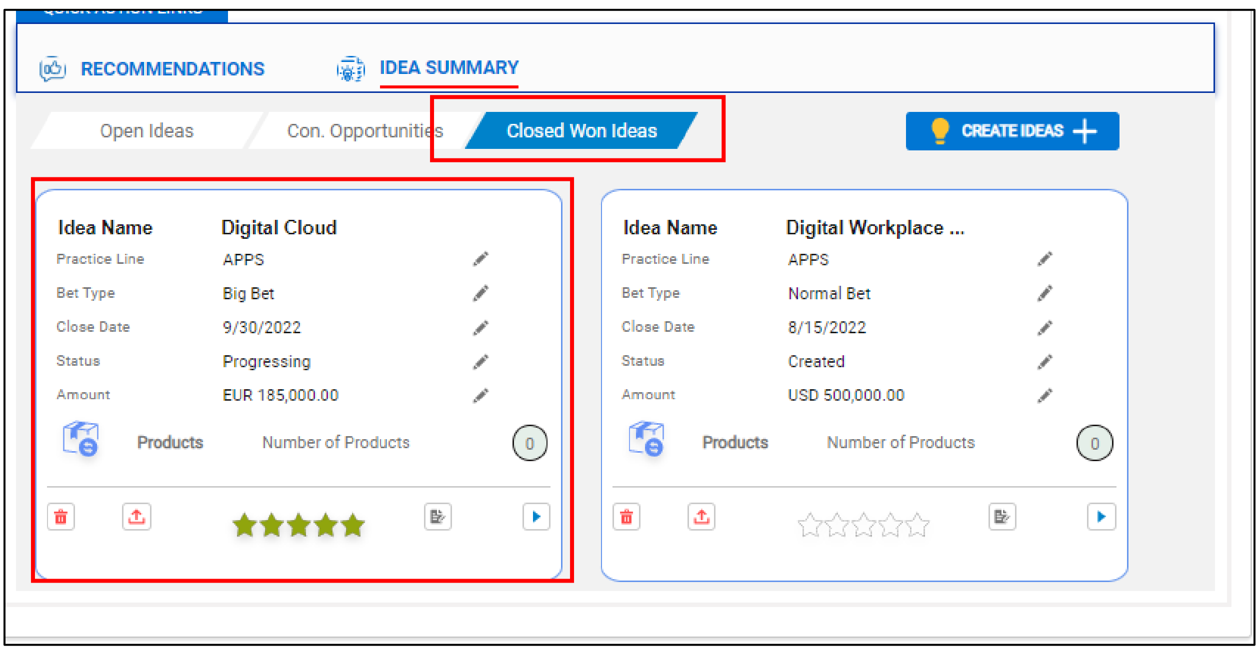

Since the idea has been won, the opportunity stage must be changed from **Prospecting** (outlined in red) to **Closed Won**.




Users must update the opportunity stage to **Closed Won** and save it (all outlined in red).

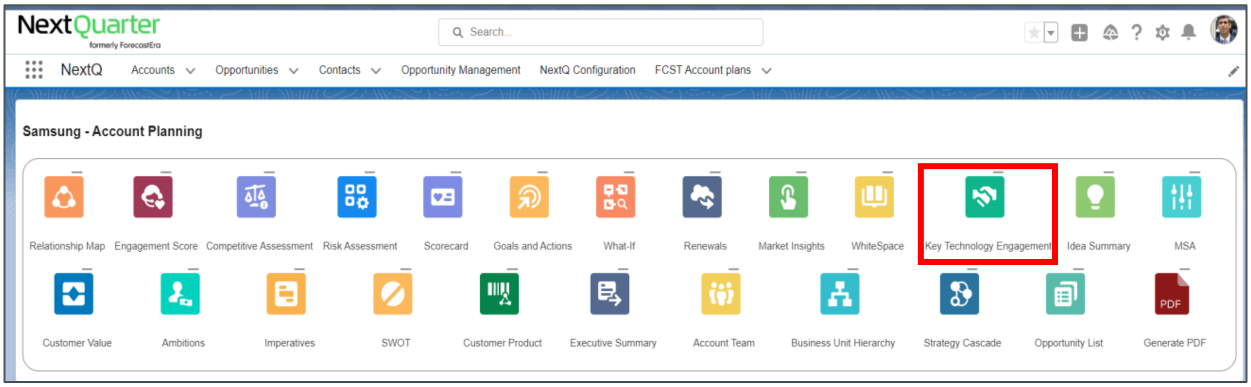



Users can now view the closed opportunity in the **Idea Summary** section under the **Closed Won** section (outlined in red).

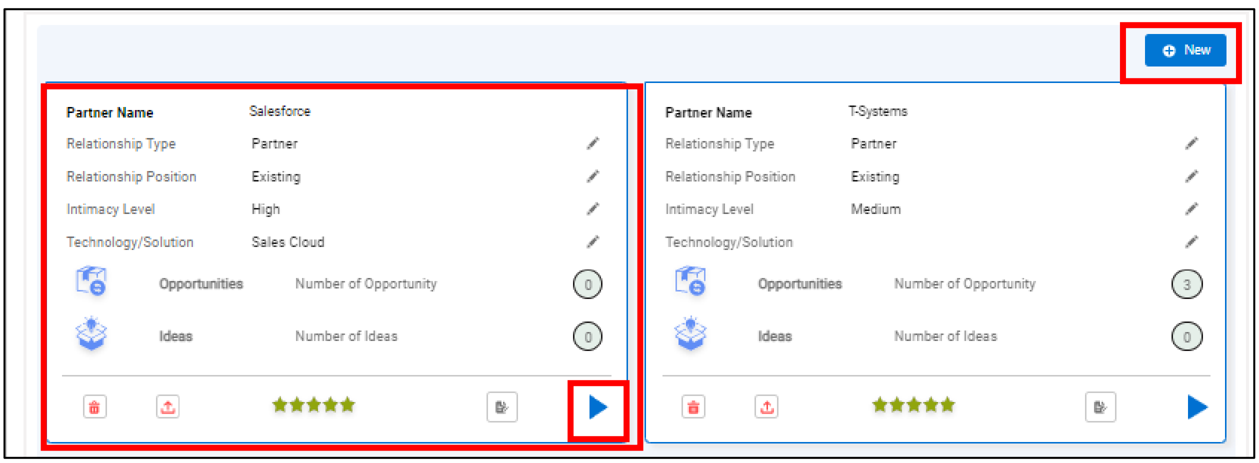


## 4.11. Key Technology Engagement

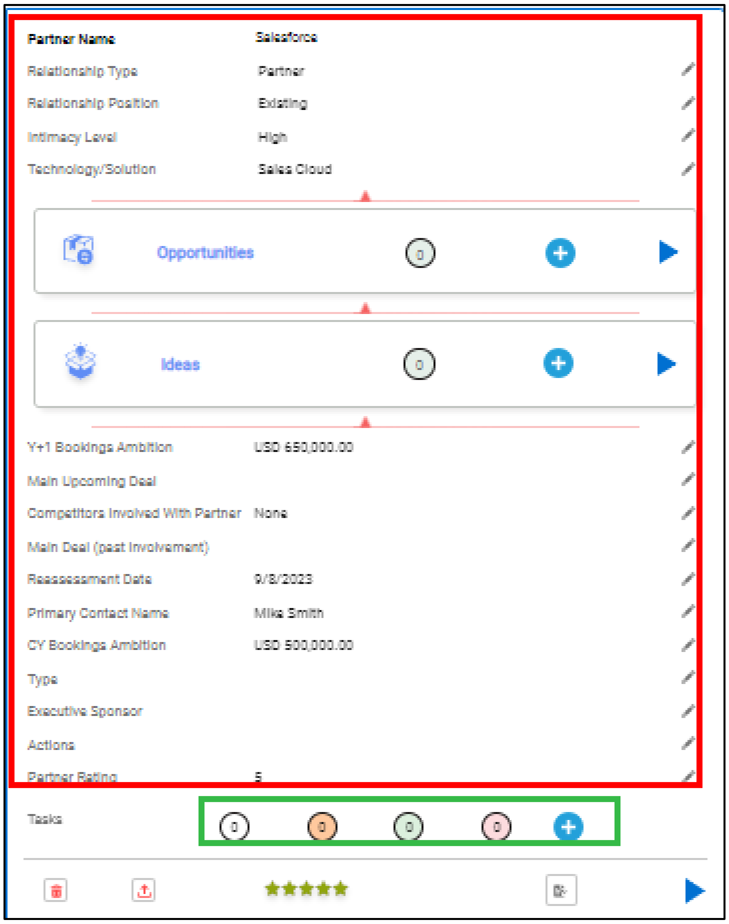
The following section under Account Planning is **Key Technology Engagement** (outlined in red).




Users can view partner cards and add a new card using the **+ New** button. Users can also expand the card using the triangle icon (all outlined in red).

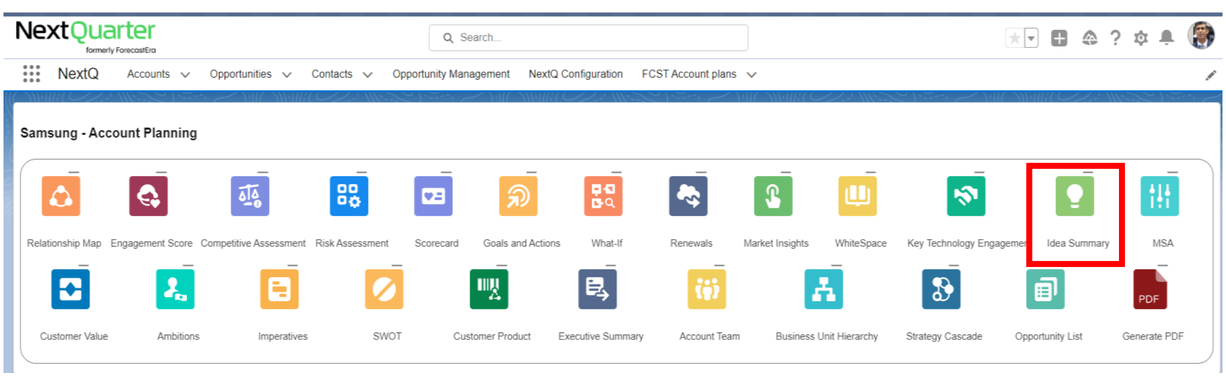



Once the card is expanded, users can view details like partner name, relationship type, relationship position, intimacy, technology solution, opportunities associated, ideas, and other information (all outlined in red) and even associate a task with it (all outlined in green).




## 4.12. Idea Summary

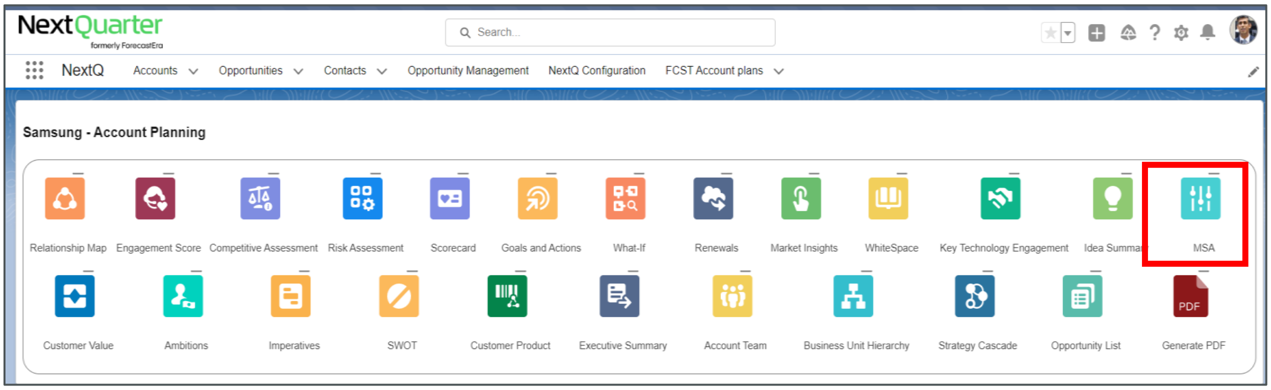
The following section under Account Planning is **Idea Summary** (outlined in red).



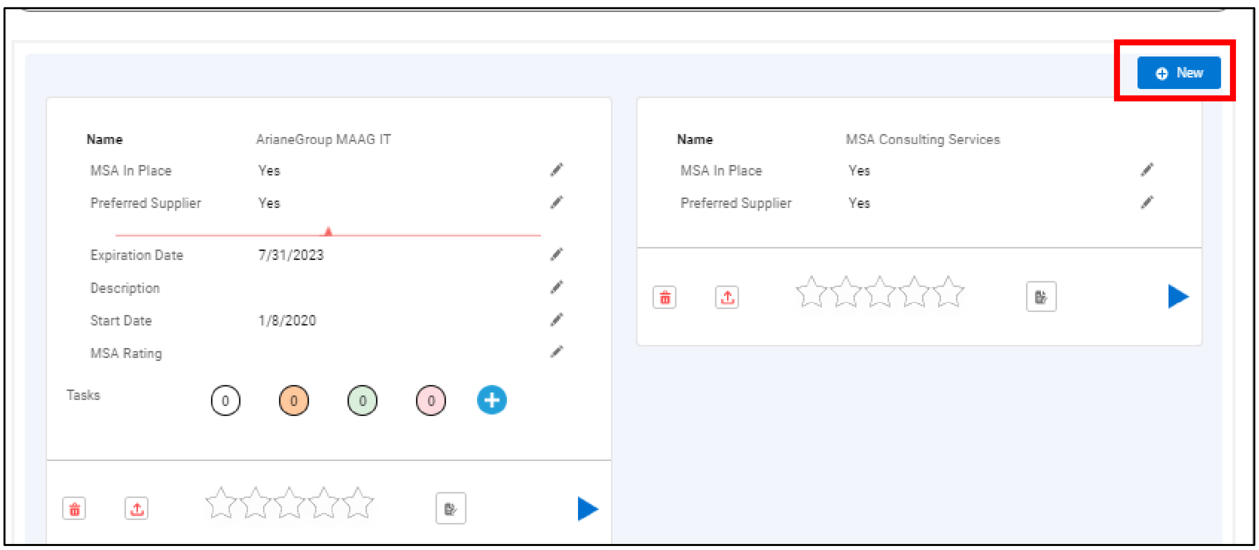

Clicking on this section will take users to the **Idea Summary** sub-section under **White Space**.

## 4.13. MSA

The following section under Account Planning is **MSA** (outlined in red).

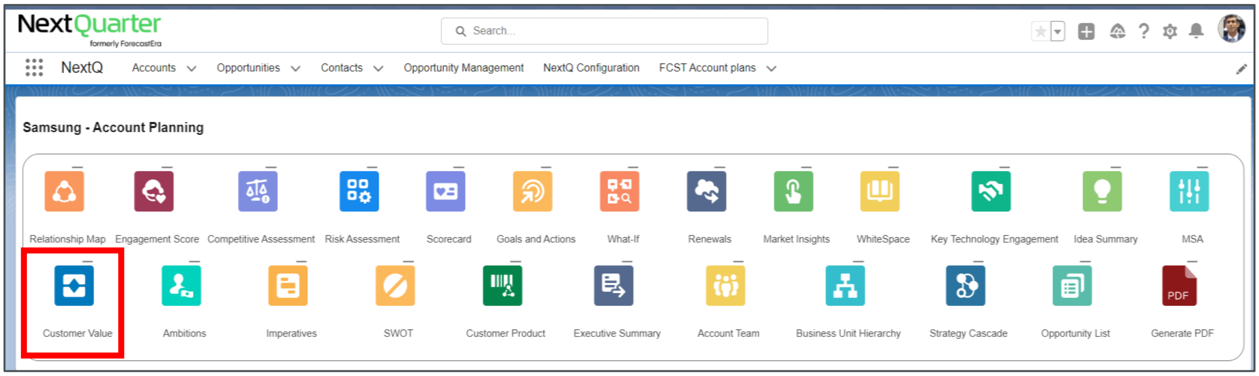



Users can view MSA cards and add a new card using the **+ New** button (all outlined in red).

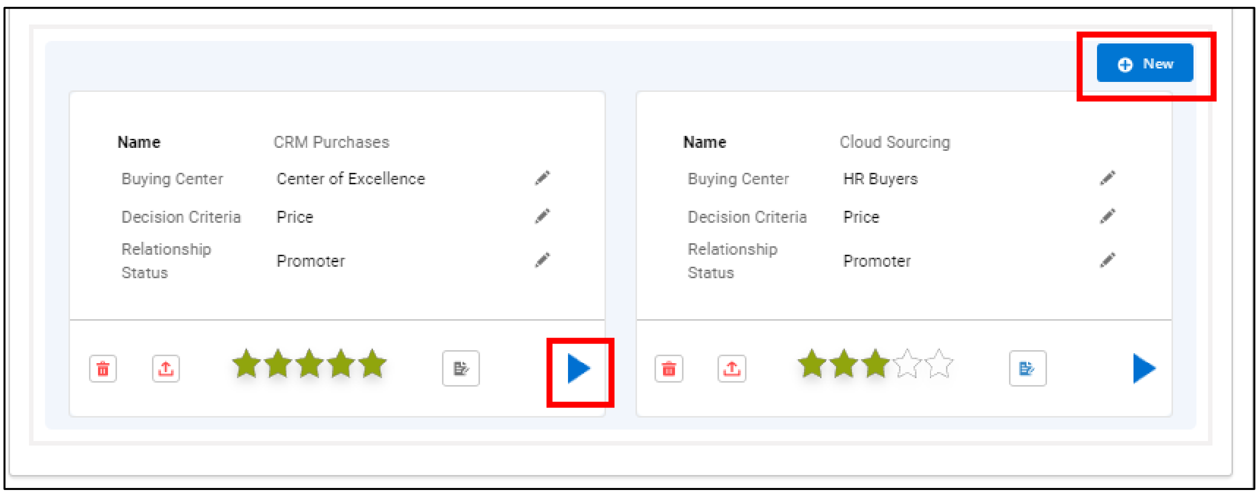



## 4.14. Customer Value

The following section under Account Planning is **Customer Value** (outlined in red).



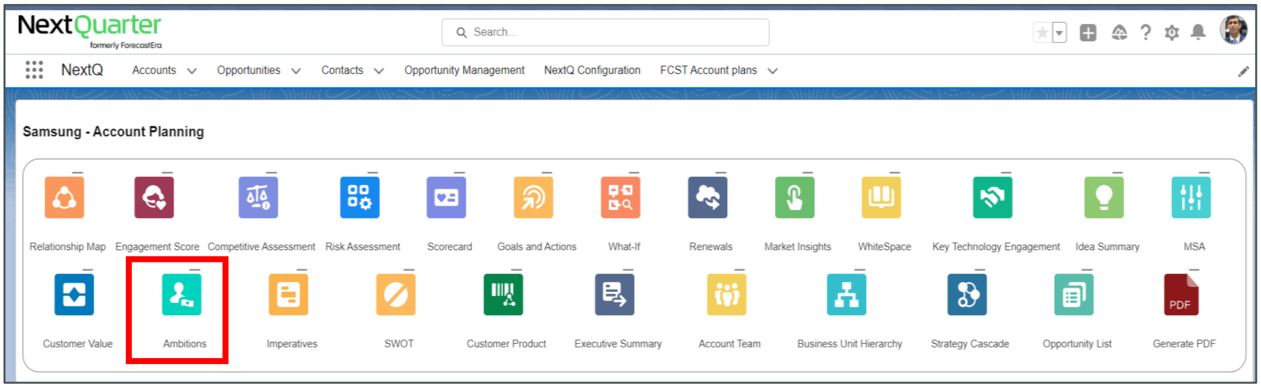

Users can view **Procurement Process** cards and add a new card using the **+ New** button. Users can expand the card using the triangle icon (all outlined in red).



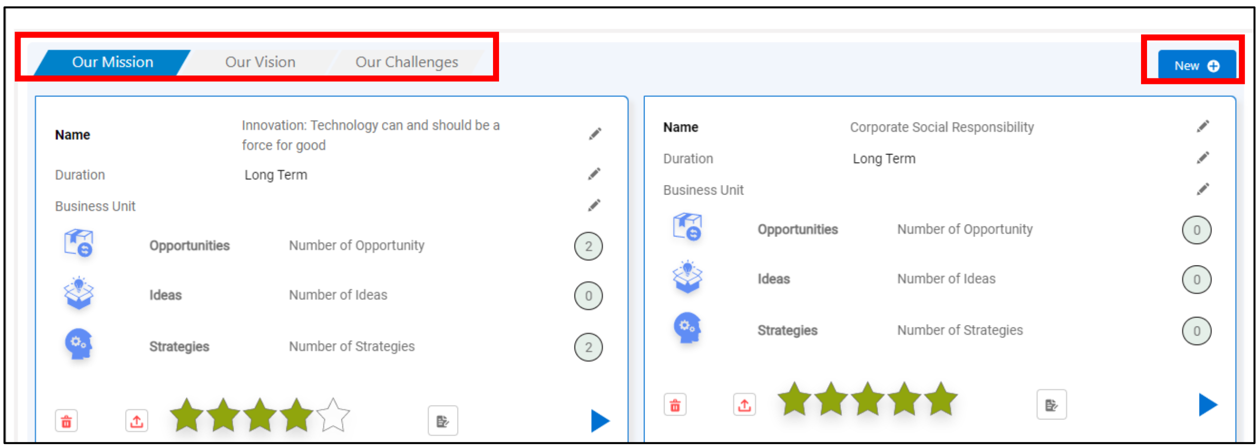

Once the card is expanded, users can view details like buying center, decision criteria, relationship status, customer org, key contact, what they value, approval in place, preferred supplier, expiration date, description, start date, and MSA rating (all outlined in red). They can also associate a task with it (all outlined in green).

## 4.15. Ambitions

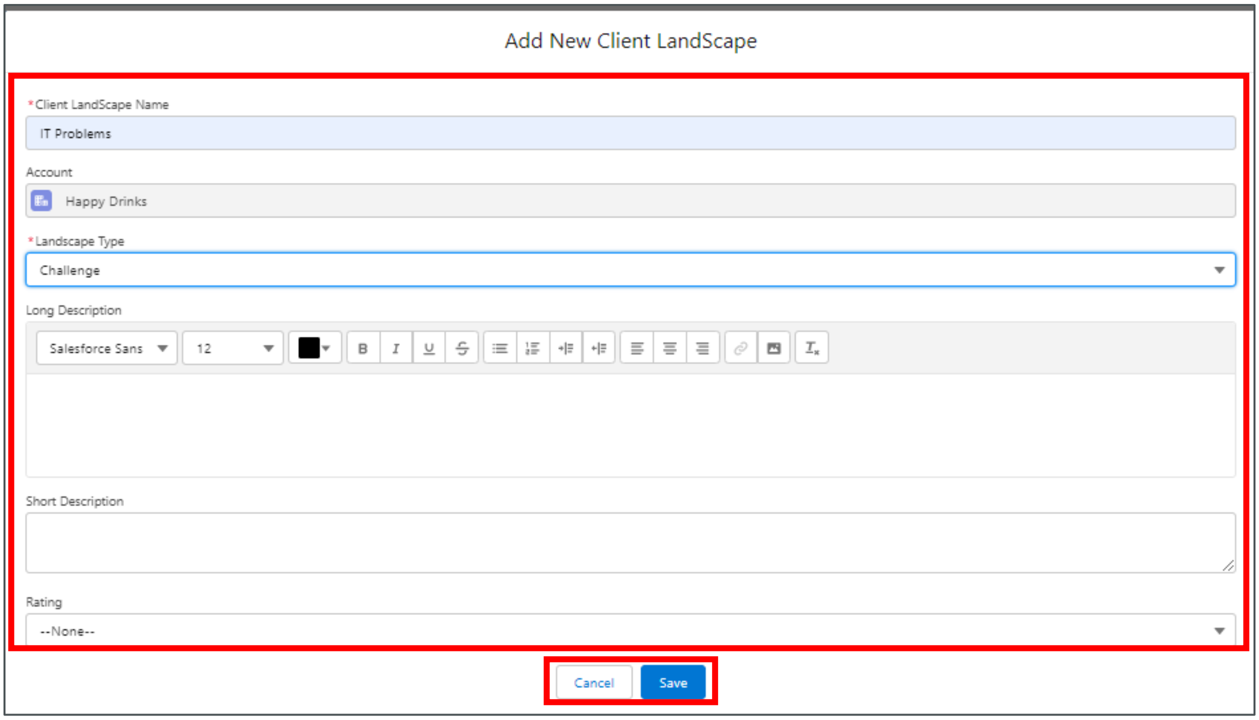
The following section under Account Planning is **Ambitions** (outlined in red).



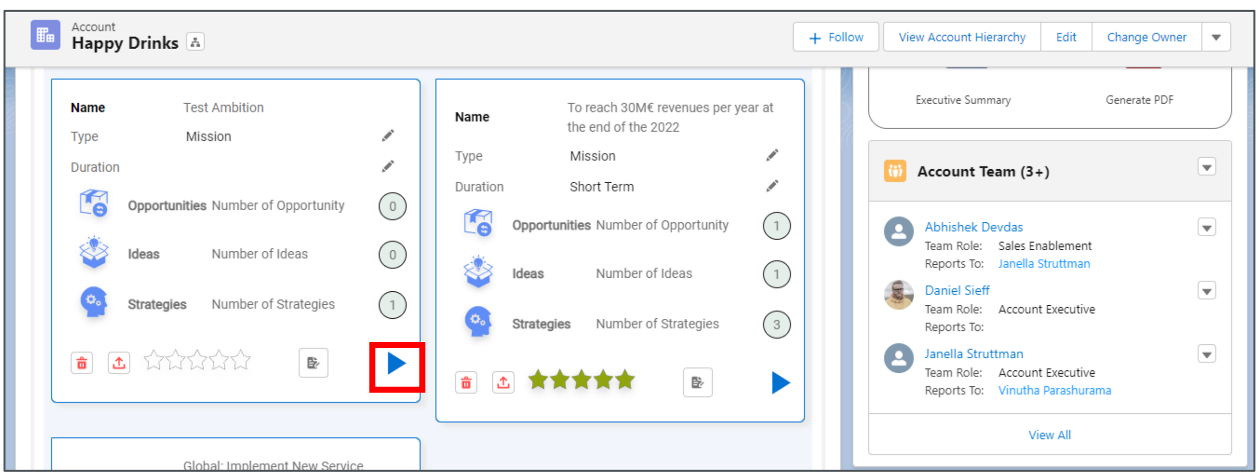

The ambitions section allows users to create a mission, vision, and challenges under **Our Mission**, **Our Vision**, **or Our Challenges**, respectively, by clicking the **New +** button (all outlined in red).



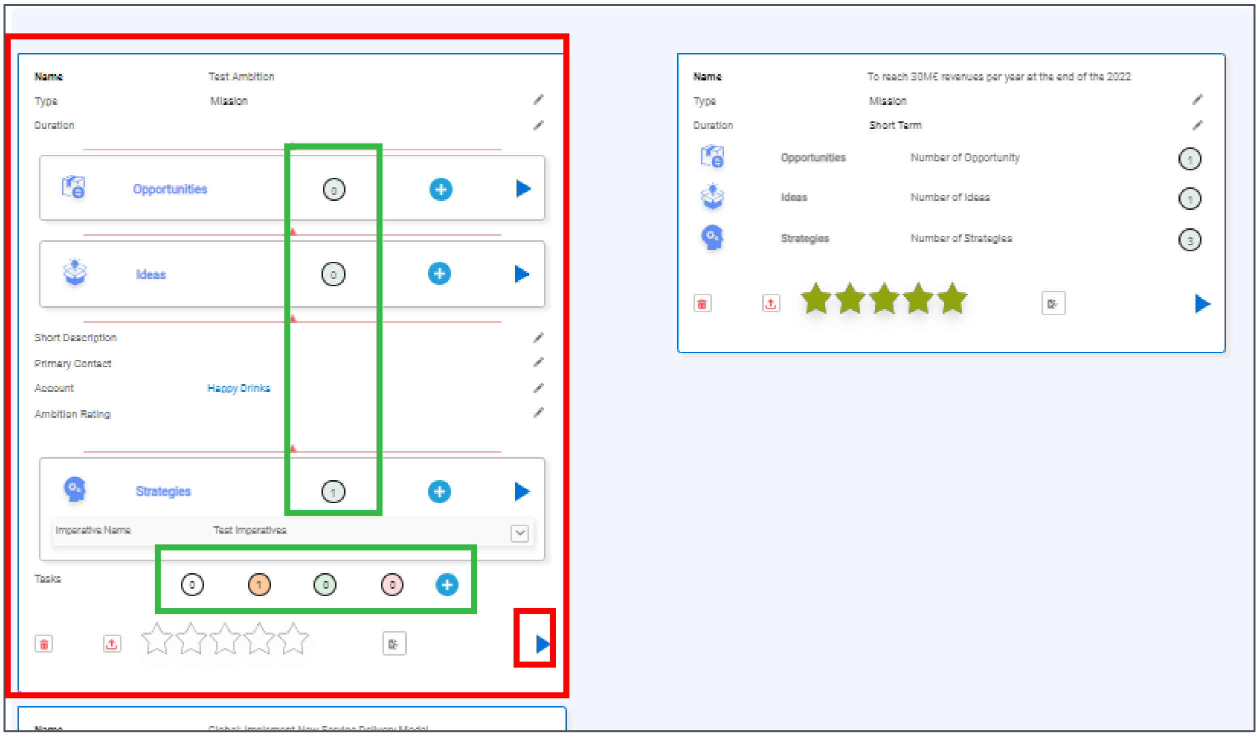

Once the details have been entered, users can save them (all outlined in red), which will appear under the same section.



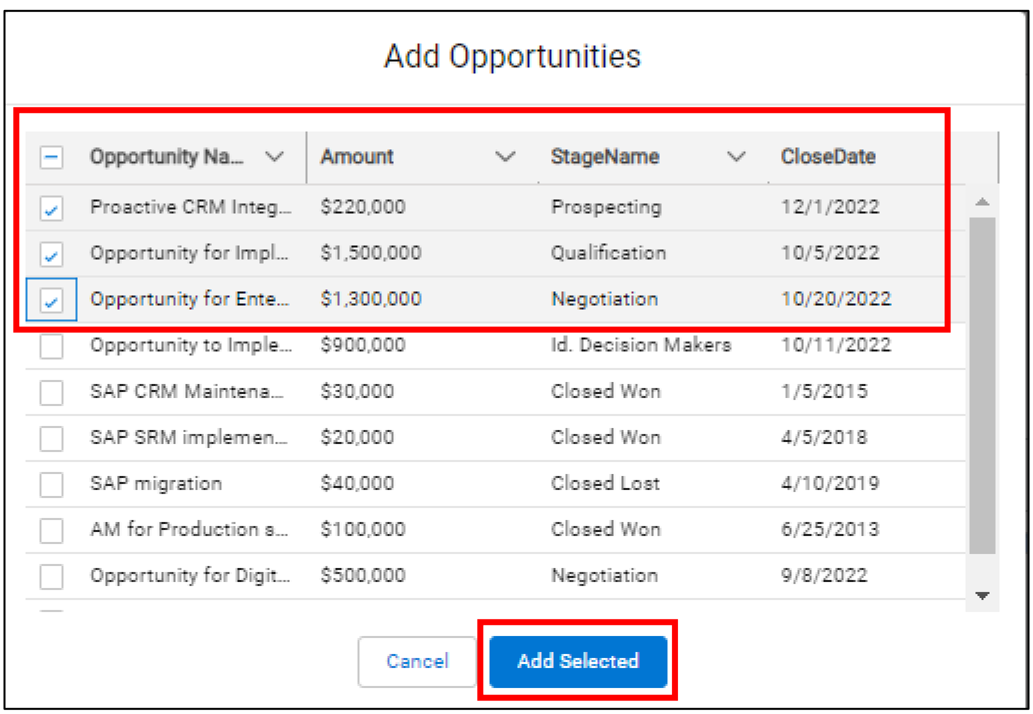

Users can also click the expand button to view details about a specific ambition (outlined in red).




Now, the details for a specific ambition can be seen (outlined in red). Users can click the **+** button to associate an opportunity, idea, or strategy. Users can click on the circles next to **Tasks** to see whether they are classified as not started, open, completed, or overdue. Users can also click on the **+** button to add a new task (all outlined in green).



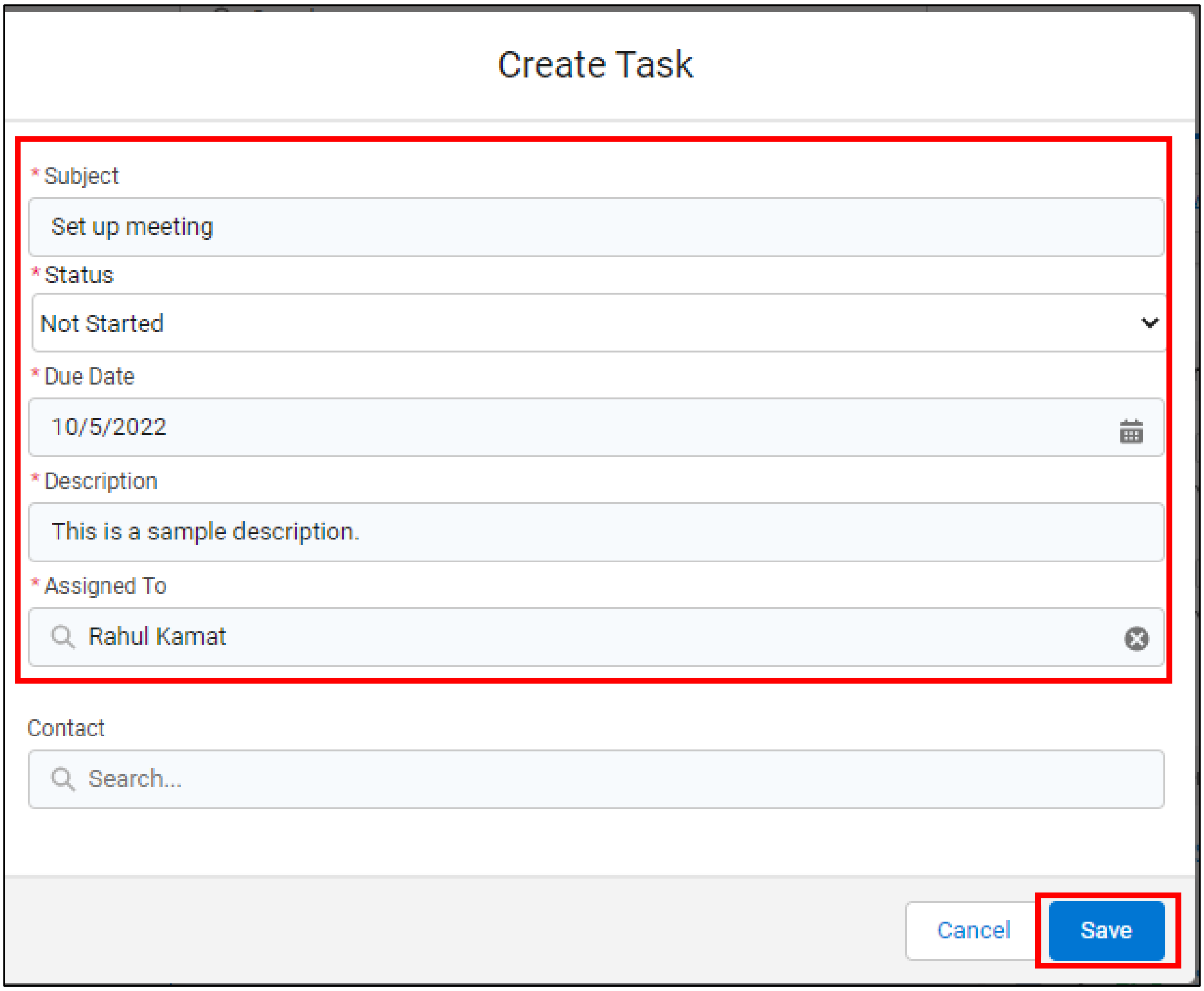

When a user clicks the **+** button next to opportunities, a list of opportunity records associated with the ambition will appear. Users can select the opportunities to associate with the ambition and click the **Add Selected** button (all outlined in red).



In this example, the opportunities associated with ambition will increase from 0 to 3.

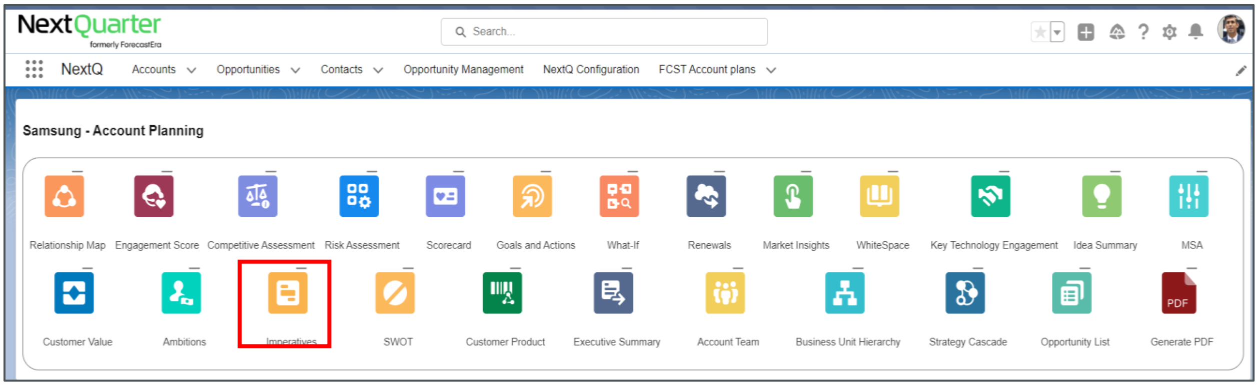
*Note - If users click the **+** button next to ideas or strategies, a list of records associated with ideas or strategies will appear, the same as opportunities.

When users click the **+** button next to the tasks, they can enter the details and click **Save** to create a new task (all outlined in red).

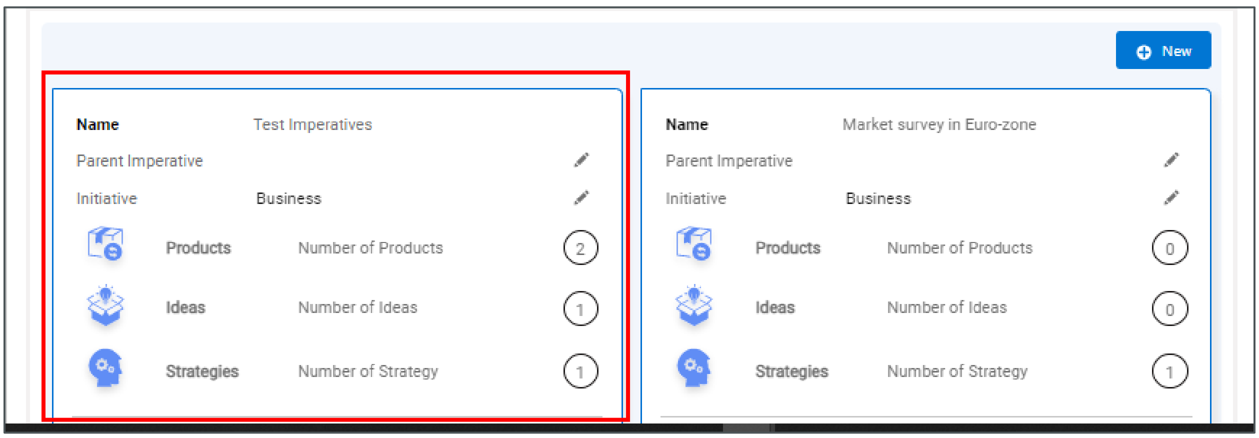



## 4.16. Imperatives

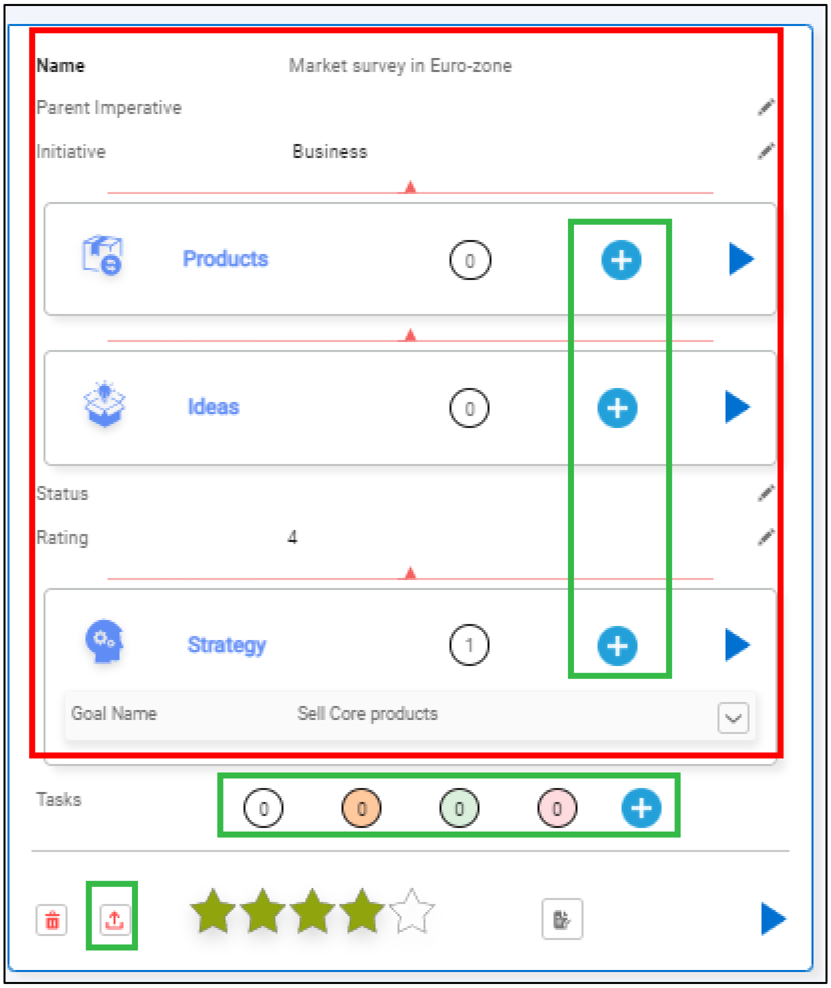
The following section under Account Planning is **Imperatives** (outlined in red).




The cards for all the client imperatives associated with the account are here (all outlined in red).

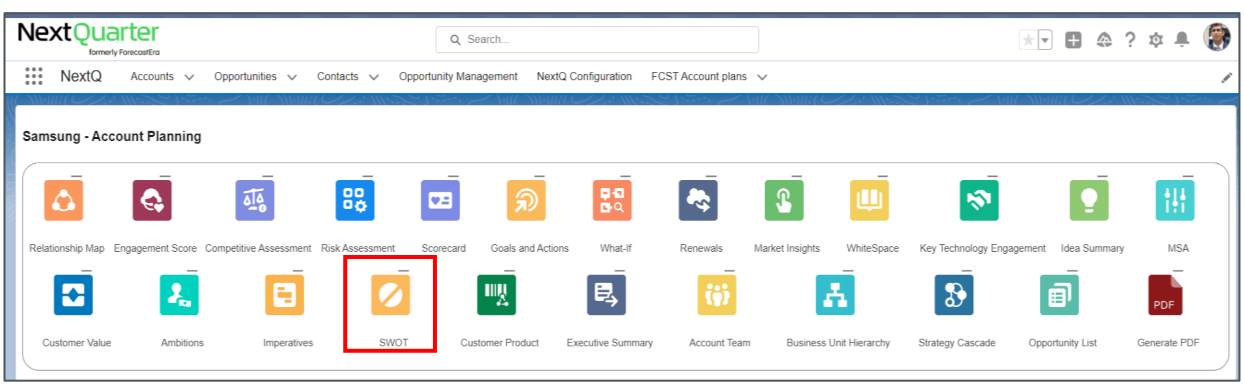



Expand any imperative card to view details about products, ideas, and strategies associated with the imperative. Click the **+** button to associate an opportunity, idea, or strategy. Click on the circles next to **Tasks** to see whether they are classified as **Not Started**, **Open**, **Completed**, or **Overdue**. Users can also click on the **+** button to add a new task (all outlined in green).

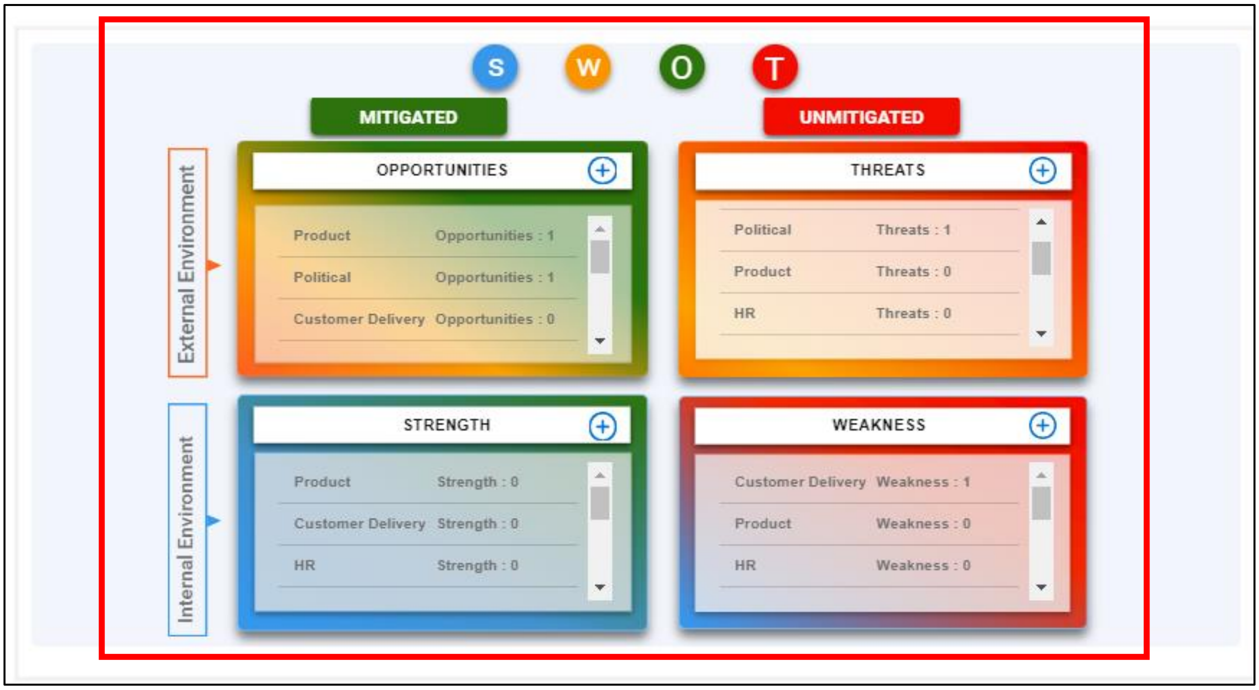



## 4.17. SWOT

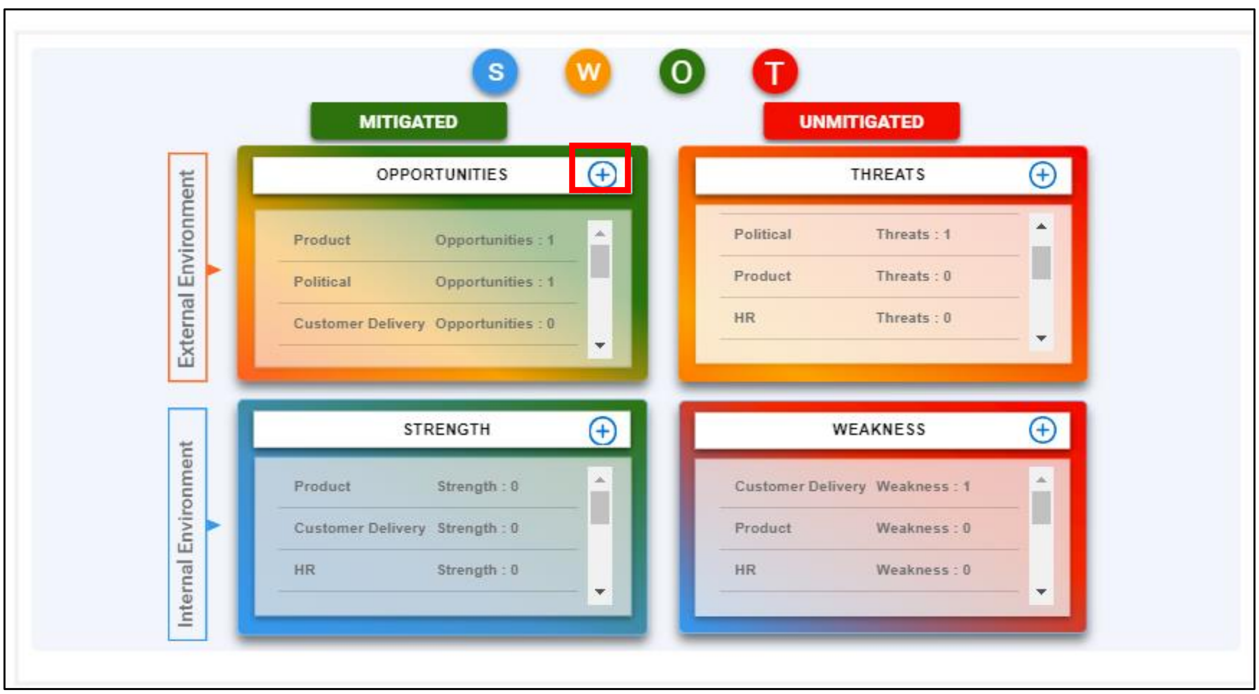
The following section under Account Planning is **SWOT** (outlined in red).




Users can view the SWOT details (outlined in red).

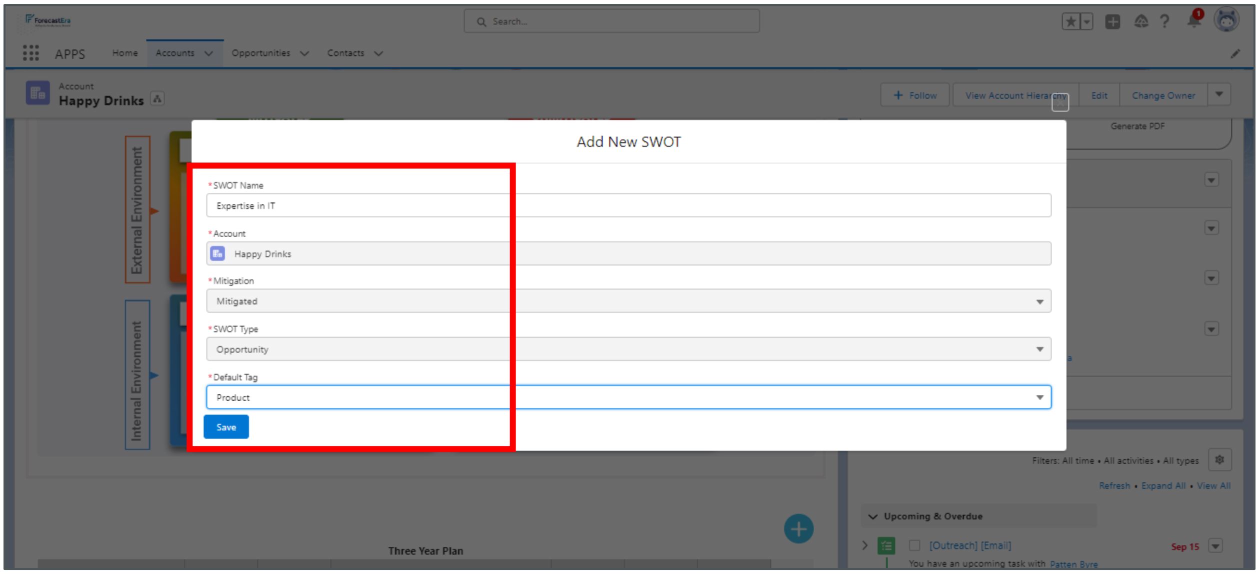



Users can add a new SWOT by clicking on the **+** button (outlined in red).

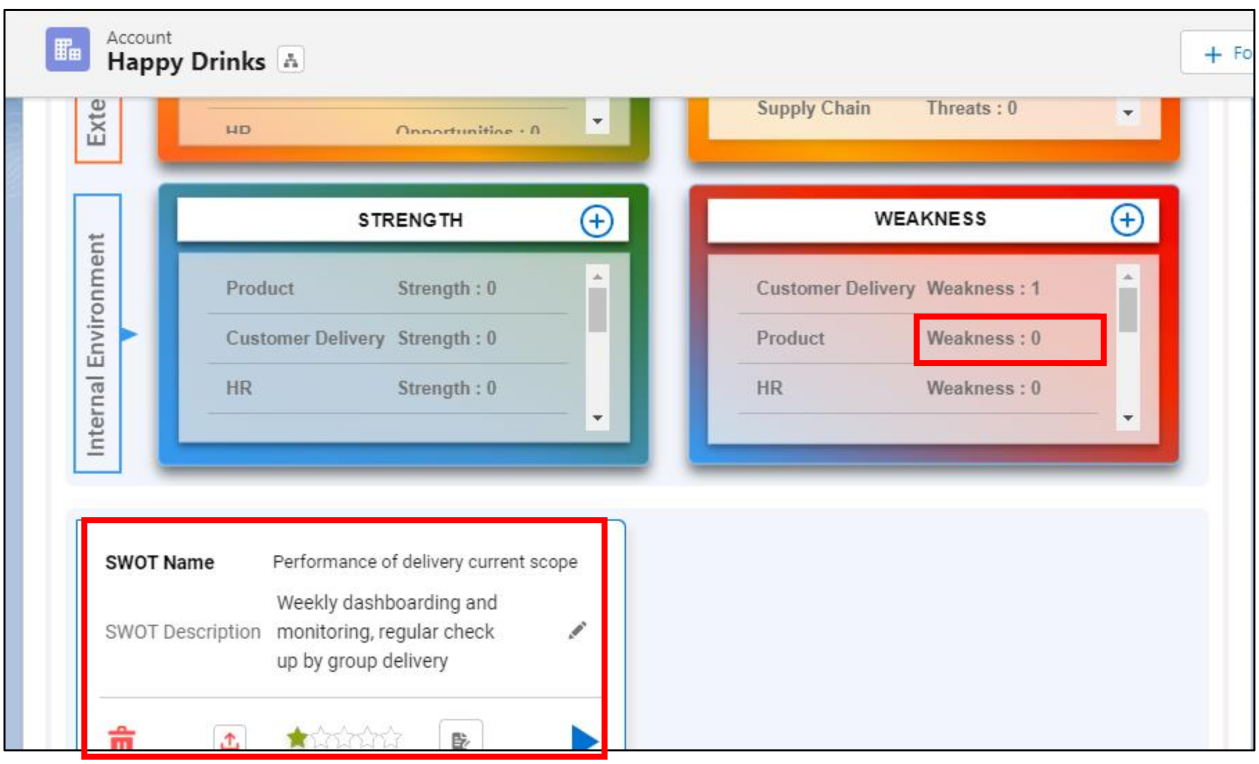



Clicking on the **+** button allows details to be entered for the specific SWOT, and users can save it by clicking the **Save** button (all outlined in red).

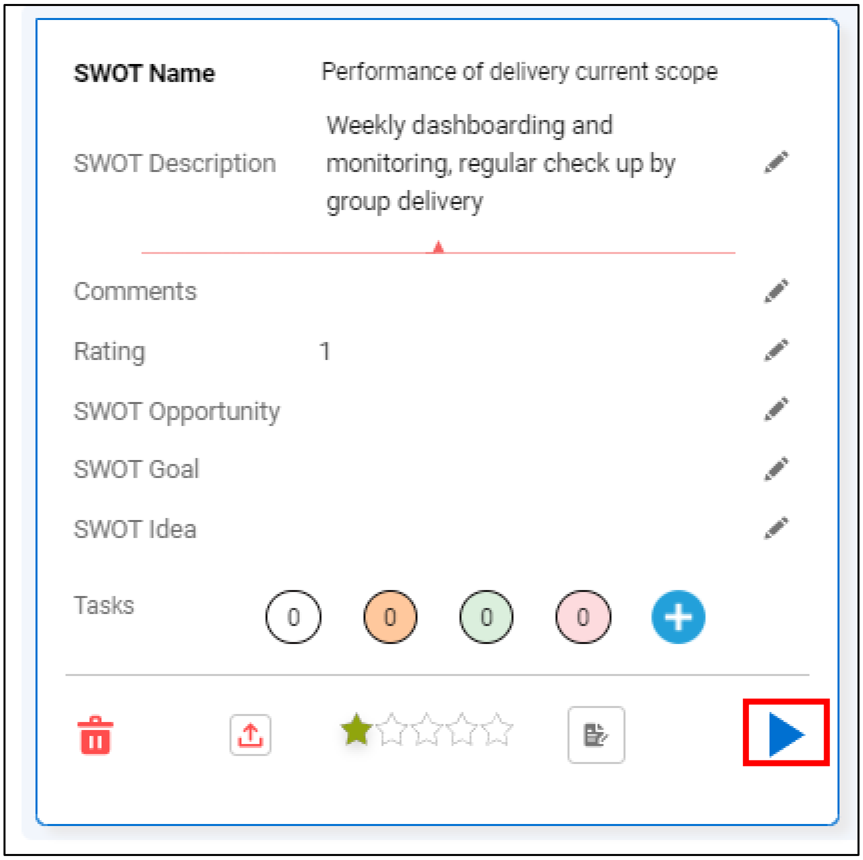
*Note – This applies to all four SWOT components.




Click on the **SWOT** name (e.g., Weakness 1), which will display a card of the weakness with specific details at the bottom of the SWOT analysis illustration (all outlined in red).

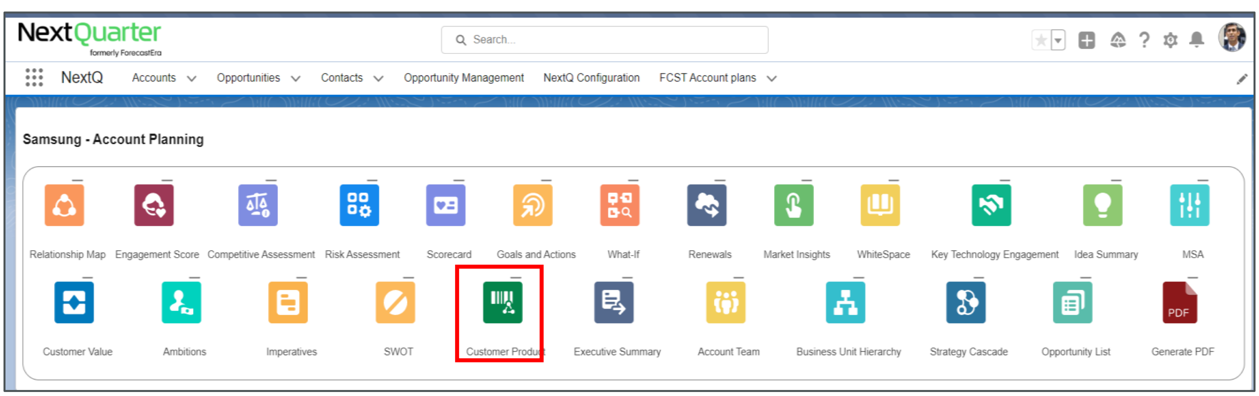



Users can click on the blue **Expand** button to view more details about the SWOT (outlined in red).

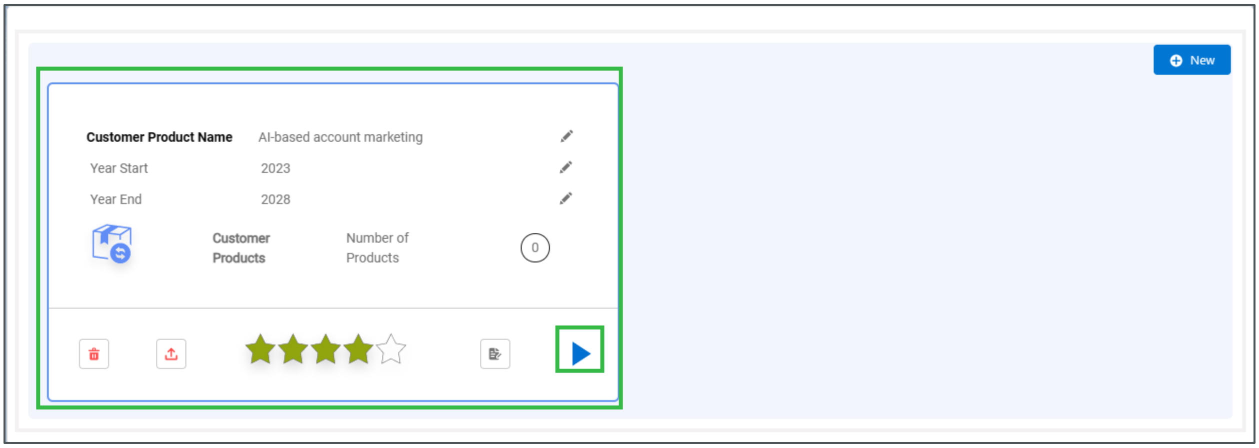



## 4.18. Customer Product

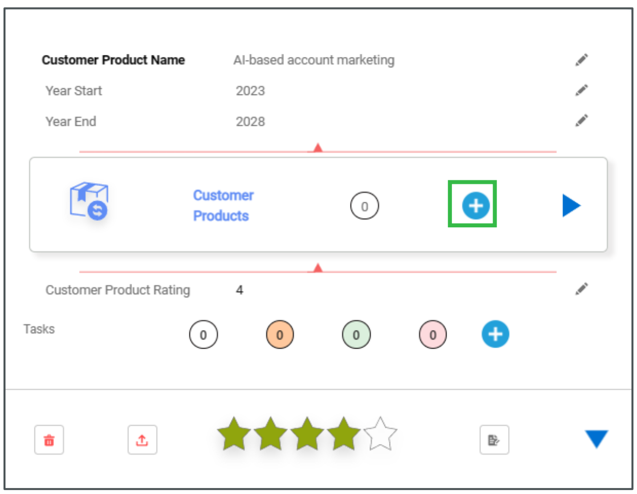
The following section under Account Planning is **Customer Product** (outlined in red).



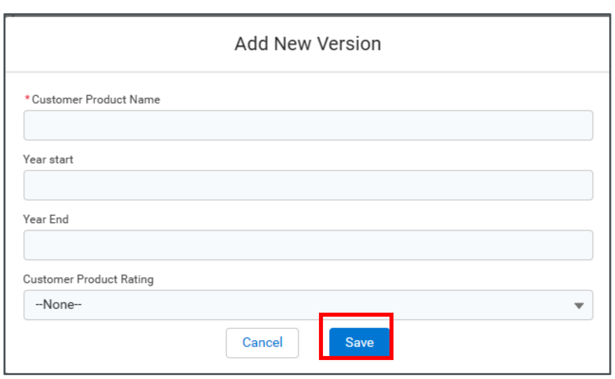

Clicking this section will take users to a screen to view existing customer product cards. The card can be expanded to view more details about the product (all outlined in green).



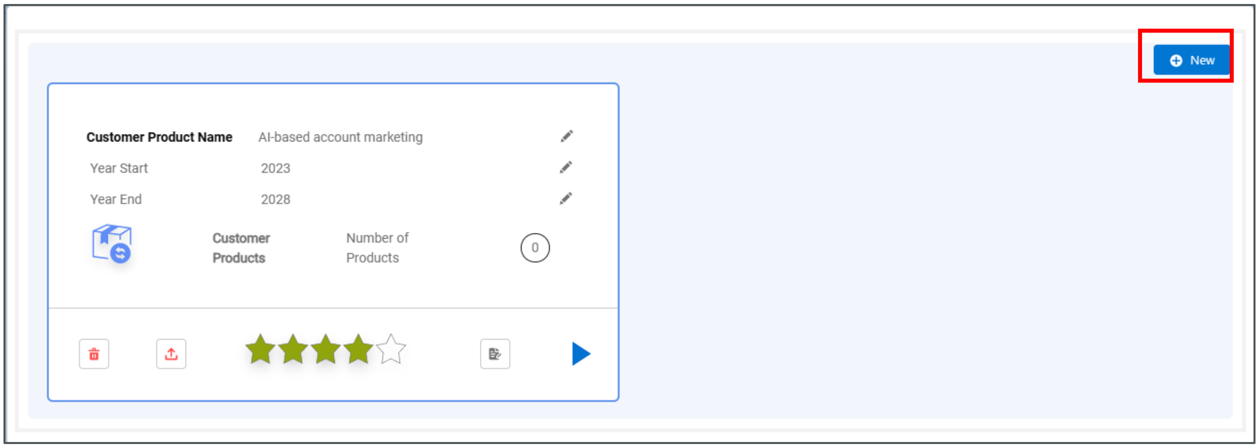

The customer product card details can be viewed by clicking the **Expand** (+ icon) button, as outlined below.



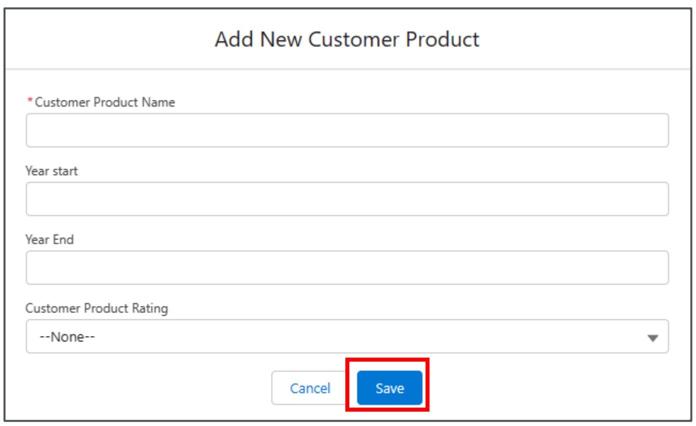

Clicking on the **Expand** (+ icon) button will take users to the **Add New Version** card, where they can add a new customer product name, year start, year-end, and customer product rating, and click **Save** (outlined in red) to add a new product version.



Users can add a new customer product by clicking on the **+ New** button (outlined in red).



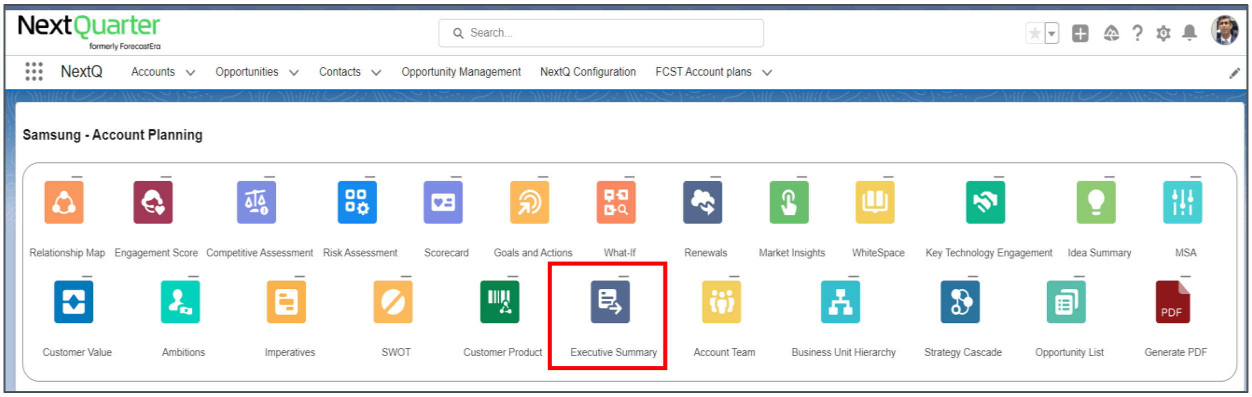

Users can define a new customer product as outlined below.



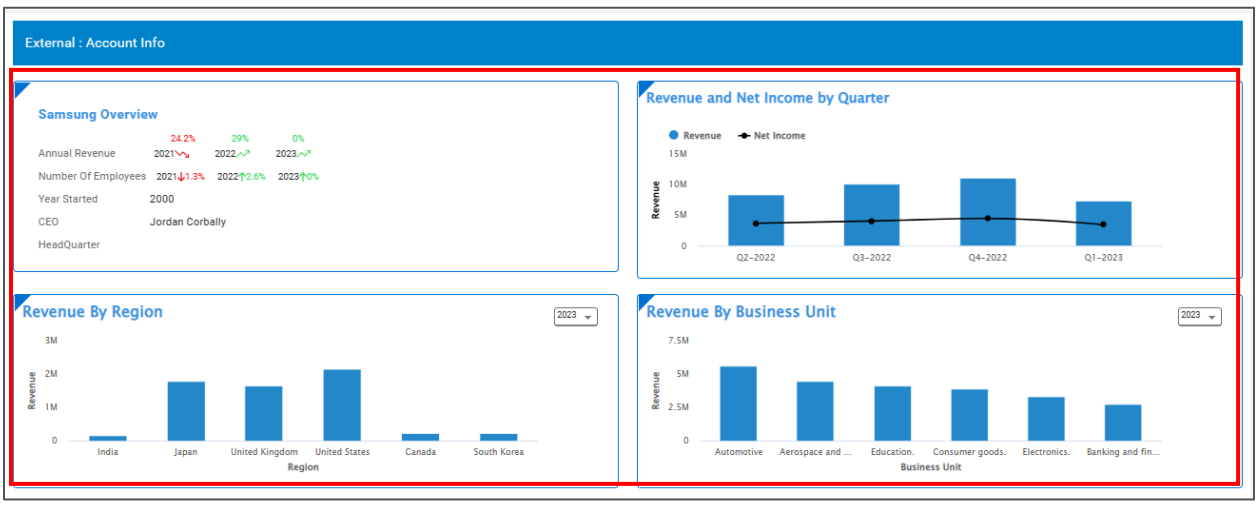

Users can enter the customer product name, year start, year-end, and customer product rating and click **Save** to add a new product.

## 4.19. Executive Summary

The following section under Account Planning Is **Executive Summary** (outlined in red).




Users can view external account information, which includes **Account Overview**, **Revenue and Net income by Quarter, Revenue by Region**, and **Revenue by Business Unit** (outlined in red).




Further below, users can view internal account information, which includes **Pipeline Summary**, **Idea Summary**, **Deal Won/Lost**, **Win Ratio %**, **Our Revenue with Account**, and **White Space Recommended Products** (outlined in red).


Further below, users can view engagement and relationship details, which include **Contacts and Engagement**, **Opportunity Size**, **Engagement Score trends**, and **Relationship Map** trends (outlined in red).


Users can view the engagement and relationship with strategic contacts over a selected quarter (outlined in red).

## Engagement and Relationship with Strategic Contacts

| Name | Title | Engagement Score Trends (Week Start) | | | | Relationship Score Trends (Week Start) | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | Oct | Nov | Dec | Jan | Oct | Nov | Dec | Jan |
| Cope Johan | EVP, Azure | 0 | 0 | 2 | 1 | 0 | 0 | 0 | 100 |
| Ainslee D | Windows | 0 | 0 | 0 | 0 | 0 | 0 | 90 | 90 |
| Akrigg G | AI Perception & Mixed Reality | 0 | 0 | 2 | 1 | 0 | 0 | 70 | 70 |
| Atchly K | AI Cognitive Services | 0 | 0 | 0 | 0 | 0 | 0 | 70 | 70 |
| Chupin ER | EVP, Experiences & Devices | 0 | 0 | 2 | 1 | 0 | 0 | 0 | 20 |
| Chuter H | CEO | 0 | 0 | 2 | 1 | 0 | 0 | 80 | 80 |
| Corbally E | CVP, Cloud Supply Chain | 0 | 0 | 36 | 25 | 0 | 0 | 100 | 100 |
| Delves Jed | CTO | 0 | 0 | 0 | 0 | 0 | 0 | 90 | 90 |
| Lu Dawber | Director Sales | 0 | 0 | 2 | 1 | 0 | 0 | 0 | 90 |
| Jordan Corbally | Enterprise Mobility & Mgmt | 0 | 0 | 2 | 1 | 0 | 0 | 90 | 90 |
| Dederick Hubert | EVP, Gaming | 0 | 0 | 0 | 0 | 0 | 0 | 70 | 70 |
| Kelby Dincke | EVP, Cloud & AI | 0 | 0 | 0 | 0 | 0 | 0 | 80 | 80 |
| Jordan D | AI Cognitive Services | 0 | 0 | 0 | [illegible] | 0 | 0 | 0 | [illegible] |

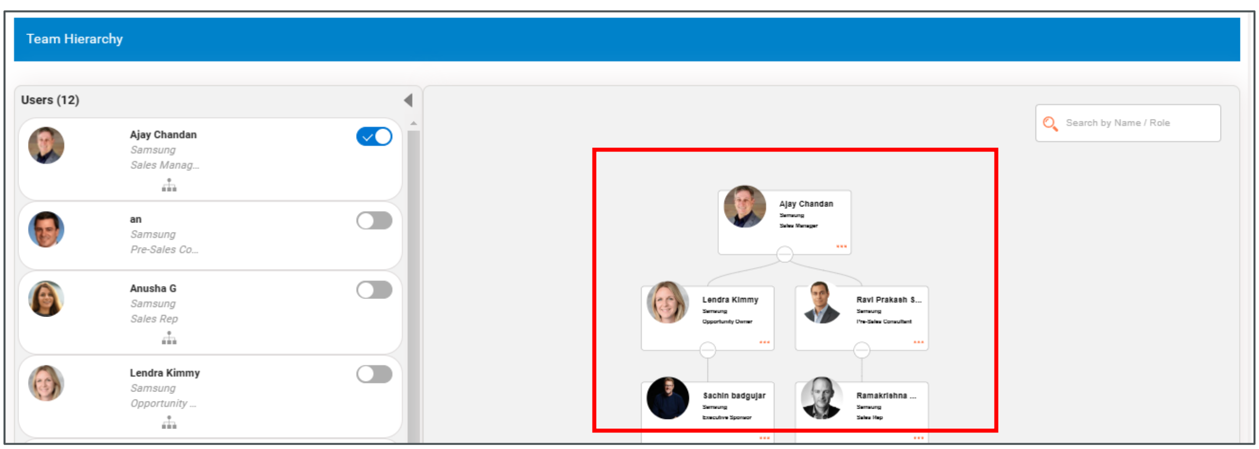
Users can view **Engagement and Relationship with Strategic Opportunities** (outlined in red).

## Engagement and Relationship with Strategic Opportunities

| Name | Size | Engagement Score Trends (Week Start) | | | | Relationship Score Trends (Week Start) | | | | Close Date |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Dec 19 | Dec 26 | Jan 2 | Jan 9 | Dec 19 | Dec 26 | Jan 2 | Jan 9 | |
| Anaplan- 24/7 & L1 offshore support opportunity | 3,727,744 | 0 | 0 | 36 | 36 | 0 | 0 | 100 | 100 | 1/1/2022 |
| ARDE90 Rezilyens - Jeld-Wen Infra Assessment | 2,086,442 | 0 | 0 | 36 | 36 | 0 | 0 | 100 | 100 | 5/28/2022 |
| AR for Jubilant | 5,671,803 | 0 | 0 | 43 | 43 | 0 | 0 | 30 | 30 | 9/9/2022 |
| ABIAL – Windows 10 migration Pilot | 3,759,023 | 0 | 0 | 71 | 71 | 0 | 0 | 45 | 45 | 2/12/2022 |
| SDES0765 Service Desk & Enduser support | 3,485,349 | 0 | 0 | 1 | 1 | 0 | 0 | 70 | 70 | 4/13/2022 |
| KPMG-USA | 8,648,589 | 0 | 0 | 1 | 1 | 0 | 0 | 100 | 100 | 8/13/2022 |
| T&M Pranesh - OEDIV Opp | 1,000,002 | 0 | 0 | 18 | 18 | 0 | 0 | 70 | 70 | 3/12/2022 |
| Menzies Database Support Opp | 8,000,003 | 0 | 0 | 20 | 20 | 0 | 0 | 0 | 0 | 1/15/2022 |
| Windows Server Environment Managed Services RFPn Opp | 1,000,004 | 0 | 0 | 1 | 1 | 0 | 0 | 60 | 60 | 2/10/2022 |
| AWS migration project for Sony Mobile Opp | 3,000,005 | 0 | 0 | 20 | 20 | 0 | 0 | 0 | 0 | 3/16/2022 |
| Networks Infra Support LOT | 7,000,006 | 0 | 0 | 1 | 1 | 0 | 0 | 90 | 90 | 1/25/2023 |
| Network Managed Services - GE Renw opp | 7,740,707 | 0 | 0 | 20 | 20 | 0 | 0 | 0 | 0 | 9/10/2022 |
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | 1 | [illegible] | [illegible] | [illegible] | 30 | [illegible] |

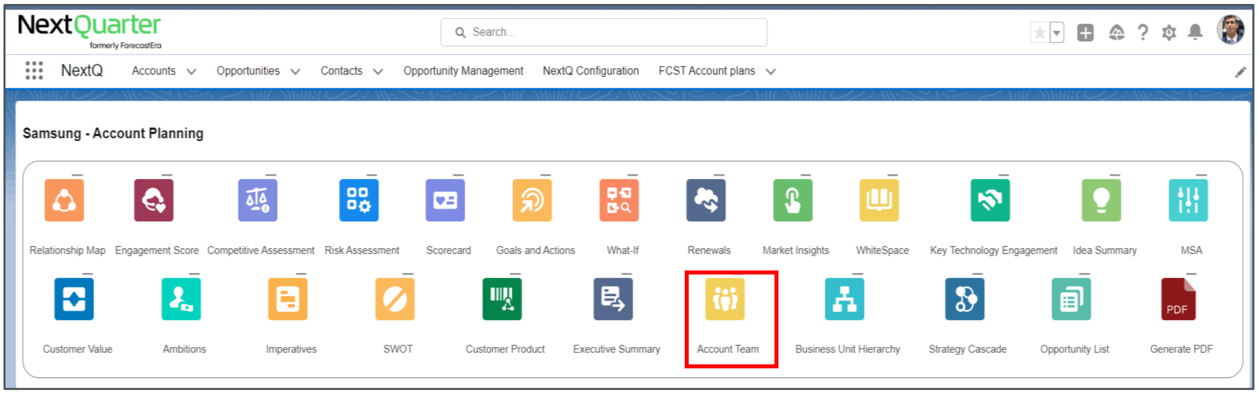
The second to last section on this page is the **SWOT Analysis** (outlined in red)


The last section of the Executive Summary Is the **Team Hierarchy**, where users can view the account team hierarchy (outlined In red).

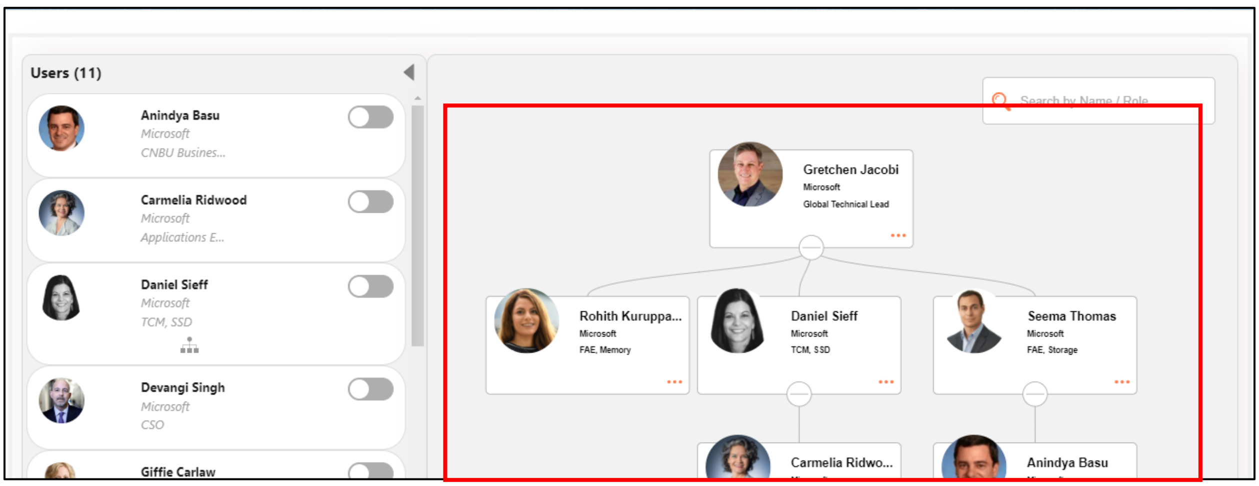



## 4.20. Account Team

The following section under Account Planning is **Account Team** (outlined in red).



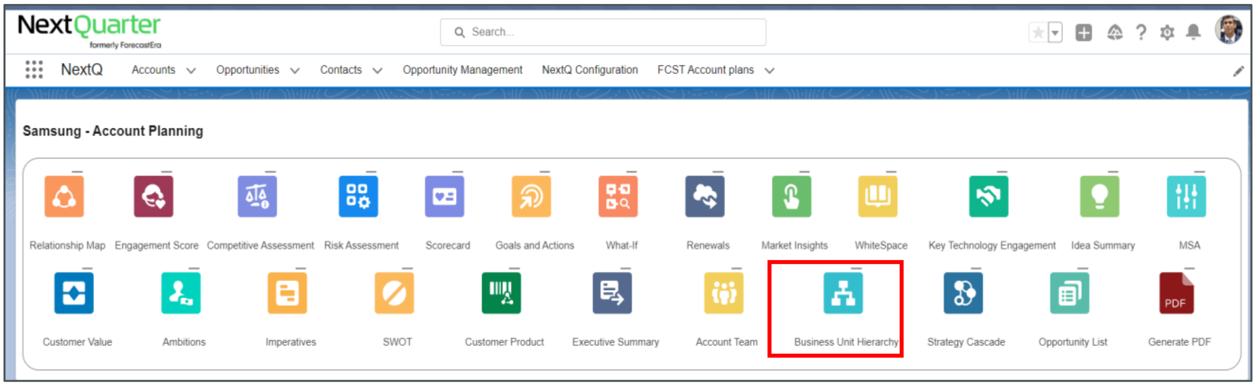

Users can view a hierarchy of users in the organization (outlined in red).



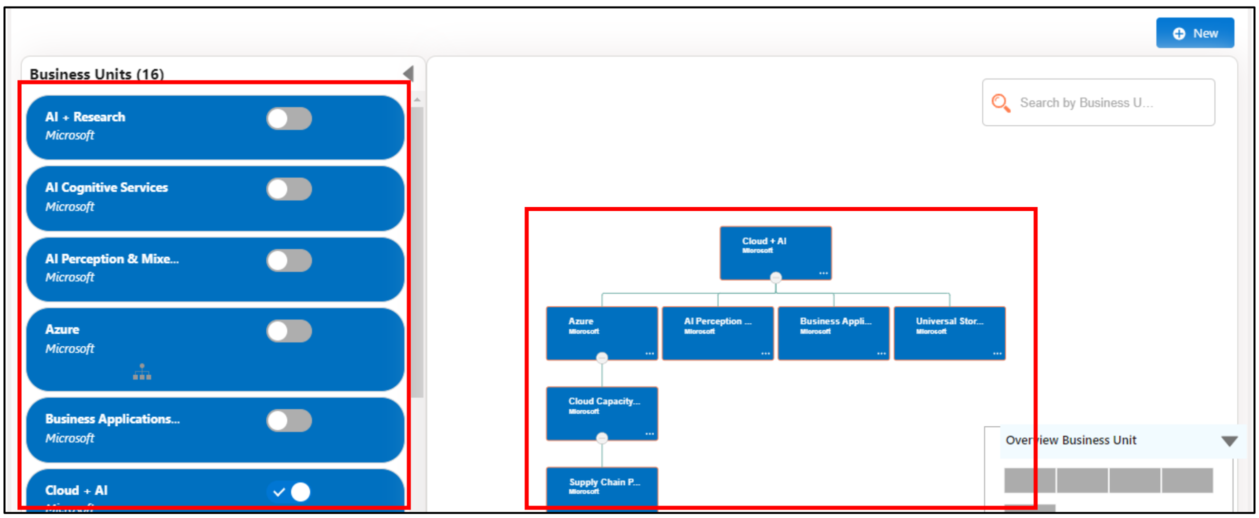

Like the org chart, users can select the topmost account team executive to view the partial hierarchy and drag and drop cards at any level to include them on the account team hierarchy.

## 4.21. Business Unit Hierarchy

The following section under Account Planning is **Business Unit Hierarchy** (outlined in red).



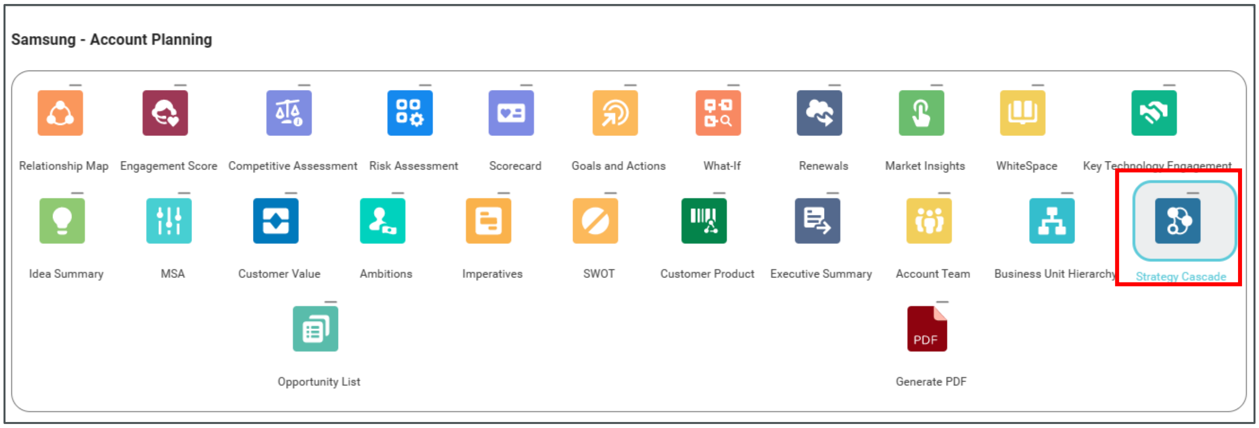

This section allows users to view **the Business Unit Hierarchy** in the account (outlined in red).



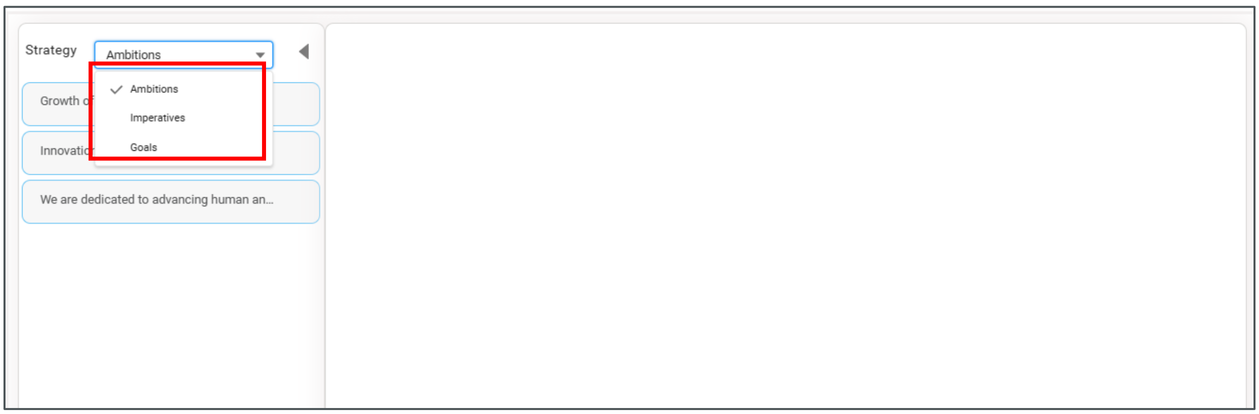

Like the org chart, users can select the topmost business unit to view the partial hierarchy and even drag and drop cards at any level to include them on the **Business Unit Hierarchy**.

## 4.22. Strategy Cascade

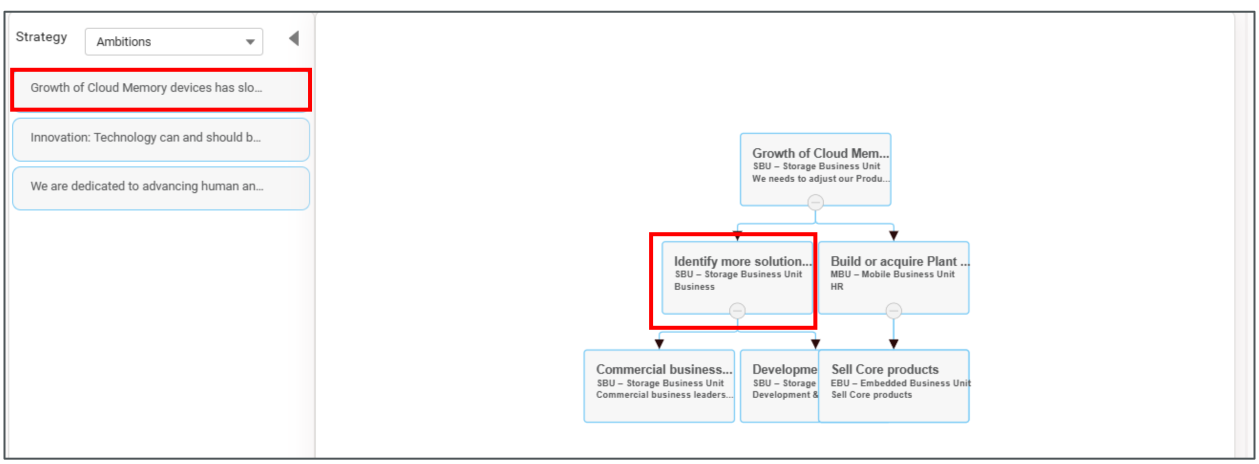
The following section under Account Planning Is **Strategy Cascade** (outlined in red).



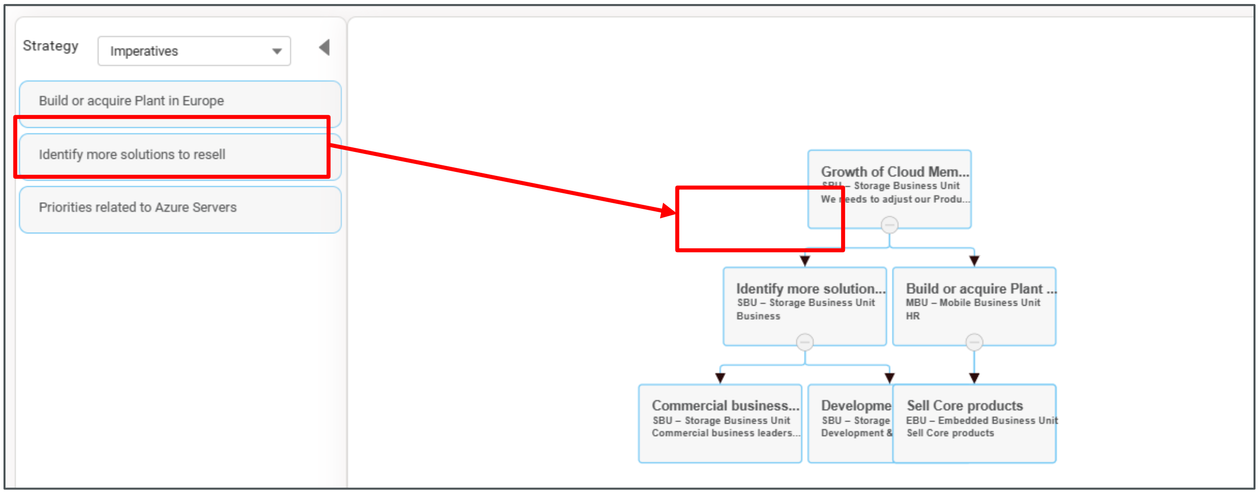

Users can see the **Strategy Cascade of Ambitions**, **Imperatives**, and **Goals and Actions**, depending on the selection (outlined in red).




Selecting an ambition will show users a cascade or hierarchy of which imperatives roll up to the chosen ambition. Users can view how the imperative rolls up to the ambition (all outlined in red).

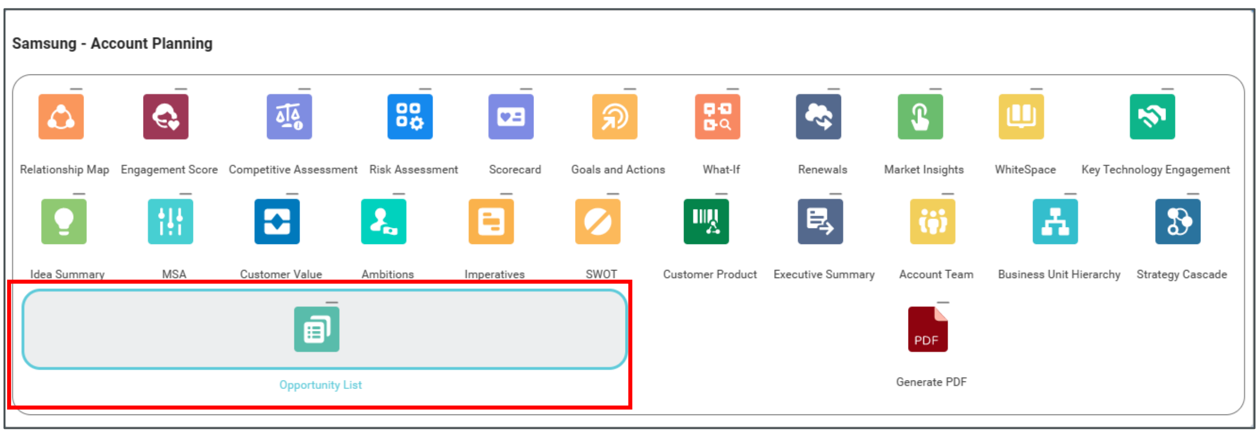


Users can also add an imperative to an ambition by dragging and dropping a card onto any level, just like with the org chart (outlined in red).

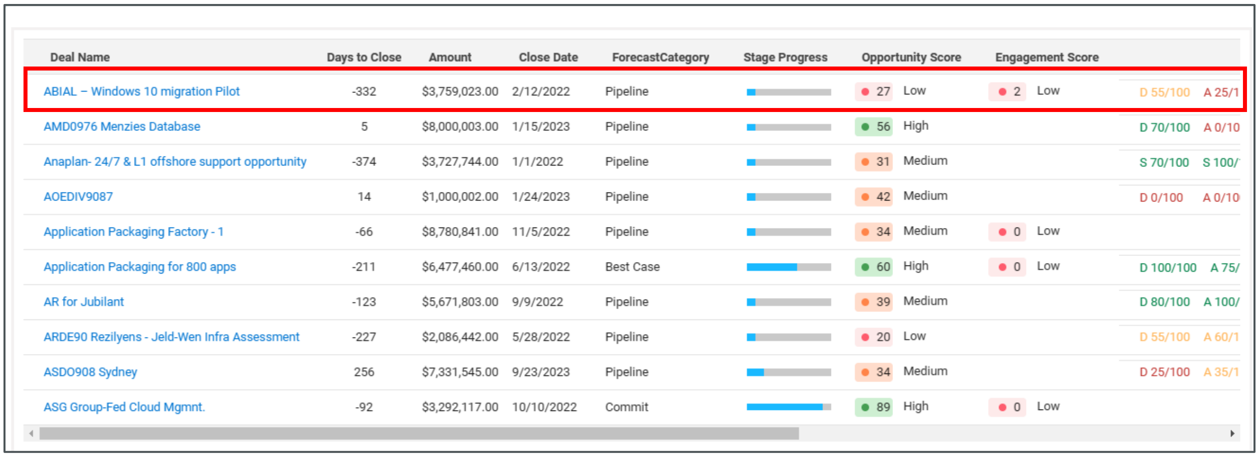



## 4.23. Opportunity List

The second to last section under Account Planning Is **Opportunity List** (outlined in red).



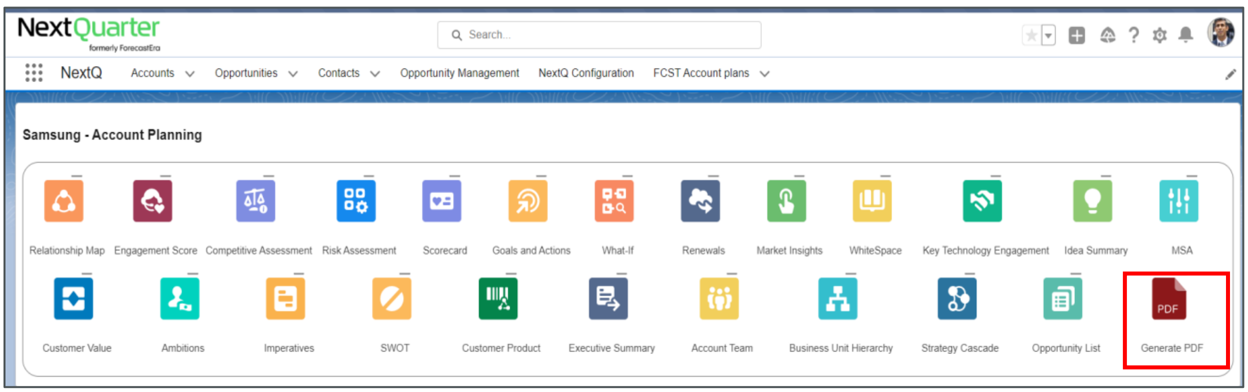

Users have a list of opportunities, which allows for a single view of **Deal Name**, **Days to Close**, **Amount**, **Close Date**, **Forecast Category**, **Opportunity Score**, **Stage Progress**, **Engagement Score**, and **Sales Methodology** qualifiers (outlined in red).



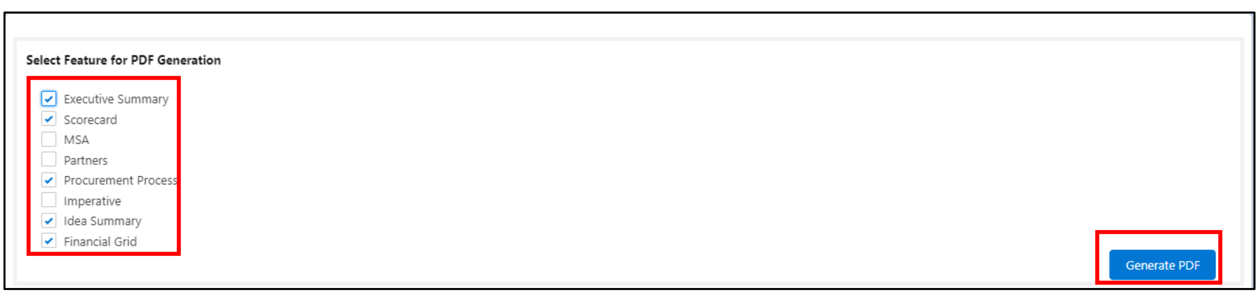
| Deal Name | Days to Close | Amount | Close Date | ForecastCategory | Stage Progress | Opportunity Score | Engagement Score | |
|---|---|---|---|---|---|---|---|---|
| ABIAL – Windows 10 migration Pilot | -332 | $3,759,023.00 | 2/12/2022 | Pipeline | | 27 Low | 2 Low | D 55/100 A 25/1 |
| AMD0976 Menzies Database | 5 | $8,000,003.00 | 1/15/2023 | Pipeline | | 56 High | | D 70/100 A 0/10 |
| Anaplan- 24/7 & L1 offshore support opportunity | -374 | $3,727,744.00 | 1/1/2022 | Pipeline | | 31 Medium | | S 70/100 S 100/ |
| AOEDIV9087 | 14 | $1,000,002.00 | 1/24/2023 | Pipeline | | 42 Medium | | D 0/100 A 0/10 |
| Application Packaging Factory - 1 | -66 | $8,780,841.00 | 11/5/2022 | Pipeline | | 34 Medium | 0 Low | |
| Application Packaging for 800 apps | -211 | $6,477,460.00 | 6/13/2022 | Best Case | | 60 High | 0 Low | D 100/100 A 75/ |
| AR for Jubilant | -123 | $5,671,803.00 | 9/9/2022 | Pipeline | | 39 Medium | | D 80/100 A 100/ |
| ARDE90 Rezilyens - Jeld-Wen Infra Assessment | -227 | $2,086,442.00 | 5/28/2022 | Pipeline | | 20 Low | | D 55/100 A 60/1 |
| ASDO908 Sydney | 256 | $7,331,545.00 | 9/23/2023 | Pipeline | | 34 Medium | | D 25/100 A 35/1 |
| ASG Group-Fed Cloud Mgmnt. | -92 | $3,292,117.00 | 10/10/2022 | Commit | | 89 High | 0 Low | |

## 4.24. Generate PDF

The last section under Account Planning is **Generate PDF** (outlined in red).




Users can select sections they wish to export onto a PDF for presentations or to share within their organizations and click **Generate** to create the PDF (all outlined in red).




For further questions on Users guide, please email us at *info@nextq.ai.*