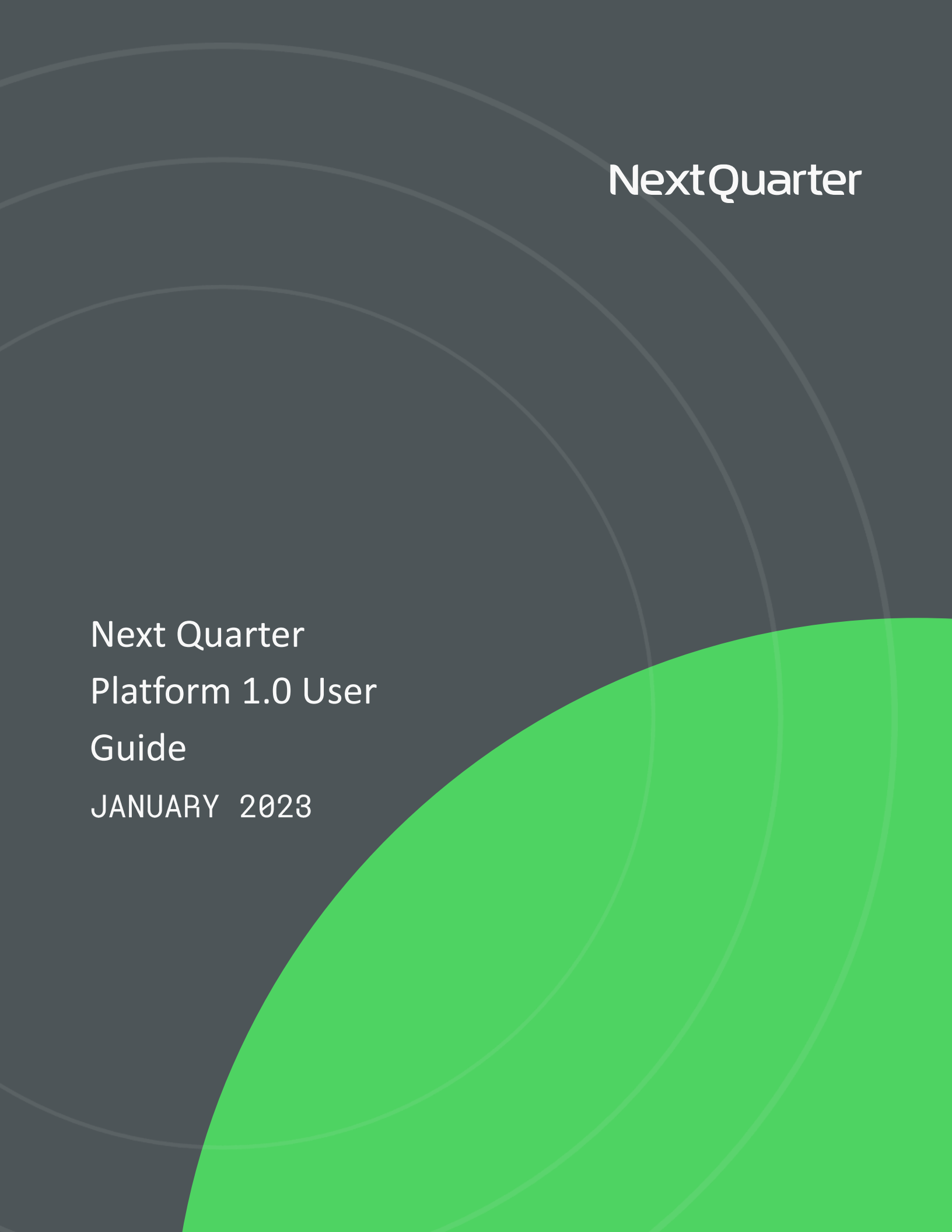


The background of the cover is a dark grey-blue. It features several concentric circles of varying radii, some of which are faint and others more prominent. A large, vibrant green shape, resembling a quarter-circle or a wedge, enters from the bottom right corner, creating a dynamic contrast with the dark background.

NextQuarter

Next Quarter
Platform 1.0 User
Guide
JANUARY 2023

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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 screenshot shows the NextQuarter app interface within Salesforce. The top navigation bar includes the NextQuarter logo (formerly ForecastEra), a search bar, and a list of tabs: NextQ, Accounts, Opportunities, Contacts, Opportunity Management, and FCST Configuration. The 'NextQ' tab is highlighted. Below the navigation bar, a search bar contains the text 'NextQ'. A dropdown menu shows the search results, with 'NextQ' listed under the 'Apps' section. The 'Accounts' tab is also highlighted in the top navigation bar. Below the 'Accounts' tab, a list of accounts is displayed, including 'Microsoft', 'Happy Drinks', 'Eduway Solutions', 'Test Account1', 'Test Business Unit Hierarchy', and 'Aetna'. The 'Happy Drinks' account is highlighted.

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

The screenshot shows the NextQuarter app interface within Salesforce, specifically the 'Accounts' tab. The top navigation bar includes the NextQuarter logo (formerly ForecastEra), a search bar, and a list of tabs: NextQ, Accounts, Opportunities, Contacts, Opportunity Management, and FCST Configuration. The 'Accounts' tab is highlighted. Below the navigation bar, a search bar contains the text 'Search this list...'. A list of accounts is displayed, including 'Microsoft', 'Happy Drinks', 'Eduway Solutions', 'Test Account1', 'Test Business Unit Hierarchy', and 'Aetna'. The 'Happy Drinks' account is highlighted.

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)

The screenshot shows the 'NextQuarter' (formerly ForecastEra) interface. The top navigation bar includes a search bar and tabs for 'NextQ', 'Accounts', 'Opportunities', 'Contacts', 'Opportunity Management', and 'FCST Configuration'. The 'Accounts' tab is selected, showing the 'Happy Drinks' account page. The account details section includes fields for Type (Customer - Direct), Phone, Website, Account Owner (Janella Struttman), Account Site, and Industry (Retail). Below this, a tabbed interface is shown with the 'Related' tab selected and highlighted by a red border. The 'Related' tab displays a list of contacts (6+) with a 'New' button. The contacts listed are:

Contact Name	Title	Email	Phone
Lynn Acland	Other CXO	lynn.acland@happydr...	+1(872) 674-5881
Aggy Brakespear	Senior Vice President	aggy.brakespear@ha...	+1(237) 400-0358
Patten Byre	Sales Director	patten.byre@happydr...	+1(538) 867-0754
Lidia Calladine	CEO	lidia.calladine@happy...	+1(769) 753-6311
Radcliffe Coraini	Vice President	radcliffe.coraini@hap...	+1(518) 433-5179
Hugues Cusworth	Vice President	hugues.cusworth@ha...	+1(853) 221-9396

3.1. Related Tab

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

Account
Happy Drinks

+ Fo

Type

Phone

Website

Account Owner

Account Site

Industry

Customer - Direct

 **Janella Struttman**

Retail

Related

Details

Account Planning

Ambitions

Relationship Map

More ▾

 **Contacts (6+)**

New

 **Lynn Acland**

▼

Title: Other CXO

Email: lynn.acland@happydr...

Phone: +1(872) 674-5881

 **Aggy Brakespear**

▼

Title: Senior Vice President

Email: aggy.brakespear@ha...

Phone: +1(237) 400-0358

 **Patten Byre**

▼

Title: Sales Director

Email: patten.byre@happydr...

Phone: +1(538) 867-0754

 **Lidia Calladine**

▼

Title: CEO

Email: lidia.calladine@happy...

Phone: +1(769) 753-6311

 **Radcliffe Coraini**

▼

Title: Vice President

Email: radcliffe.coraini@hap...

Phone: +1(518) 433-5179

 **Hugues Cusworth**

▼

Title: Vice President

Email: hugues.cusworth@ha...

Phone: +1(853) 221-9396

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).

Account
Happy Drinks

+ Fo

Related

Details

Account Planning

Ambitions

Relationship Map

More ▾

Account Owner

YearStarted

 **Janella Struttman**

Account Name

Employees

Happy Drinks

Parent Account

Account Plan Type

Industry

Retail

Annual Revenue

USD 1,000,000,000.00

President & CEO

Headquarters

Description

Engagement Level

Competitive Assessment

Risk Assessment

Scorecard

What If

Goals And Actions

Renewals

Market Insights

WhiteSpace

Idea Summary

Key Technology Engagement

Financial Grid

javascript:void(0)

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).

NextQuarter
formerly ForecastEra

Search...

NextQ Accounts Opportunities Contacts Opportunity Management FCST Configuration

Account **Happy Drinks**

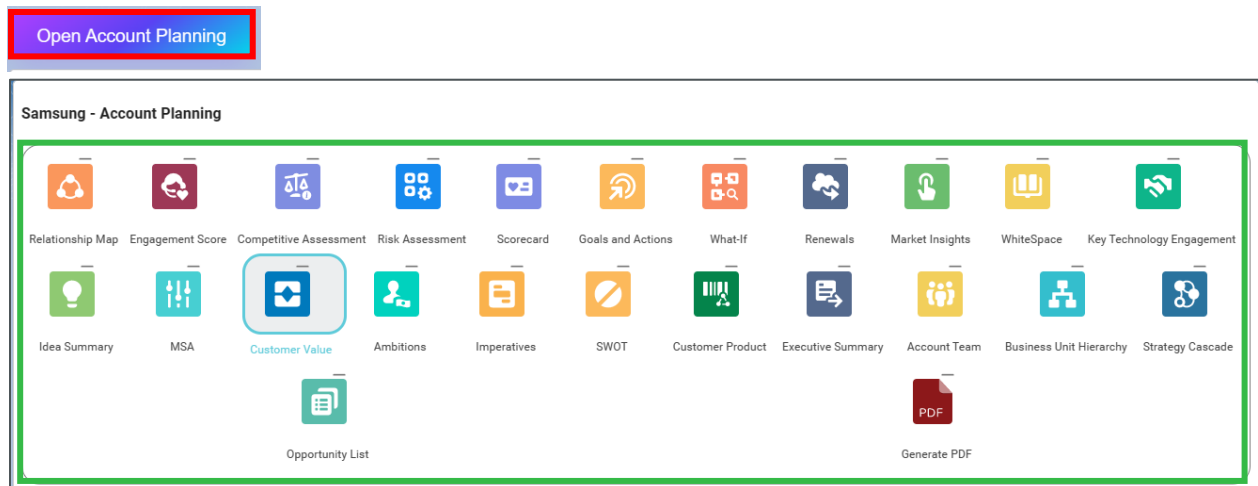
Type: Customer - Direct Phone Website Account Owner: Janella Struttman Account Site Industry: Retail

Related **Details** Account Planning Ambitions Relationship Map More

Account Owner	Janella Struttman	YearStarted
Account Name	Happy Drinks	Employees
Parent Account		Account Plan Type
Industry	Retail	
Annual Revenue	USD 1,000,000,000.00	
President & CEO		

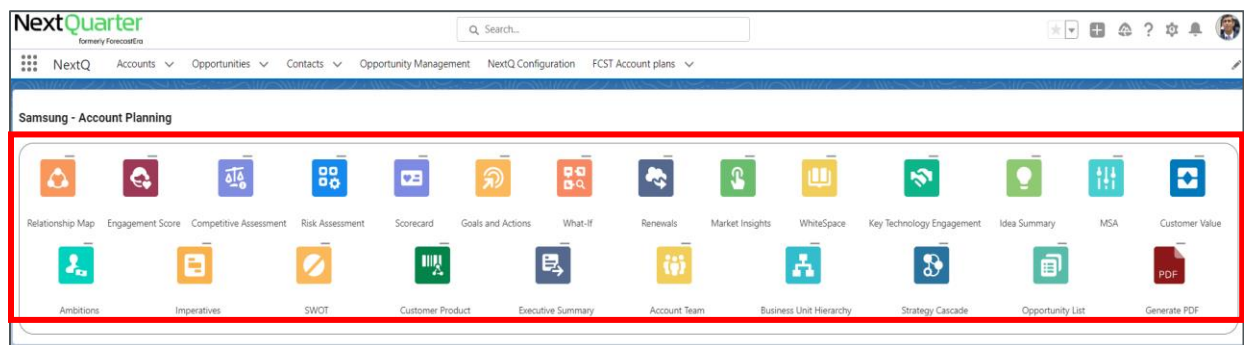
4. Open Account Planning

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).



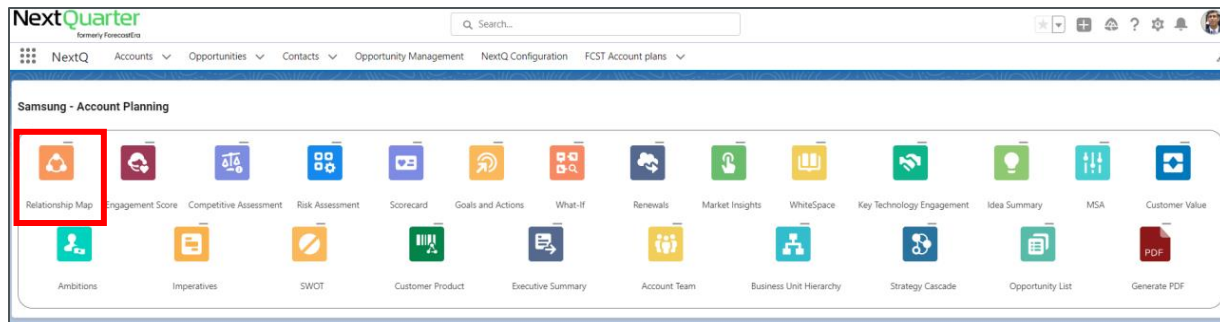
*Note – The component layout and order may change depending on business needs.

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

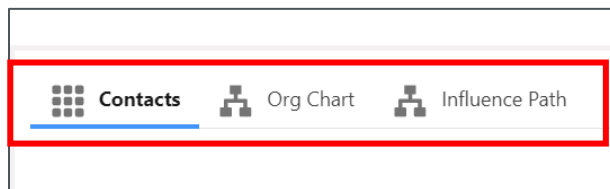


4.1. Relationship Map

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.

Client Contact	Exclude	Title	Reports To	Budget Ownership	Influence	Relationship	Score	Engagement Level	Activity	Face Off
Aggy Brakespear	☐	Senior Vice President	Lidia Calladine	\$	👍	😊	100	NA	0 Open Opportunities	ER
Cass Mallinar	☐	Vice President	Aggy Brakespear	\$	👍	😐	50	NA	0 Open Opportunities	KE

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).

Alex Kipman
AI Perception & Mixed Reality

Relationship Map Key Areas Of Interest

Face-Off Information

Face-Off	Owner Type	Intimacy
Gretchen Jacobi	Primary Owner	Positive

Add Face-Off

Task Information

Name	Due Date	Priority	Owner
------	----------	----------	-------

Add Task

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).

Alex Kipman
AI Perception & Mixed Reality

Relationship Map Key Areas Of Interest

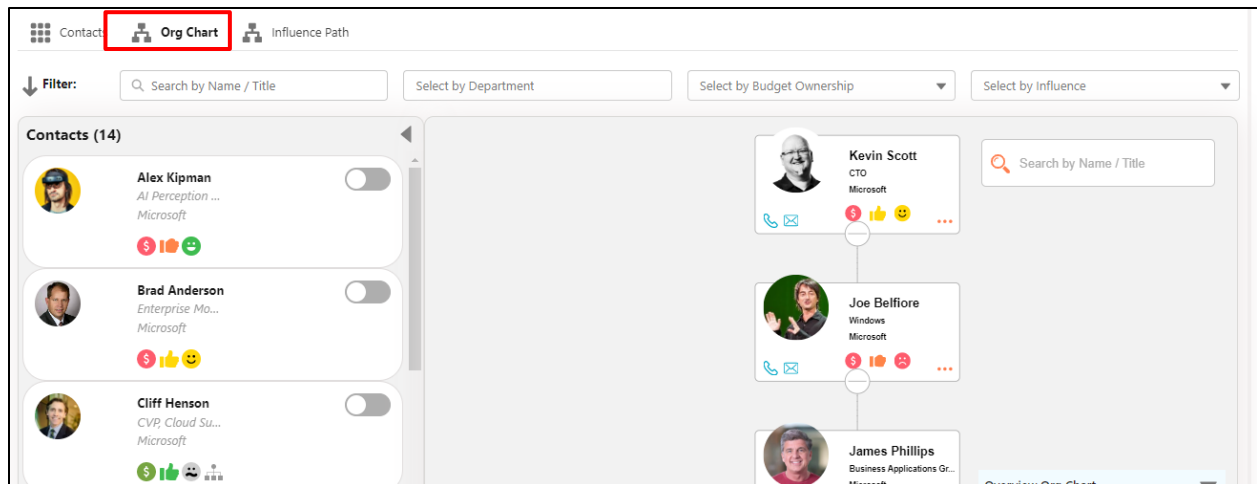
Key Areas Of Interest

▶ AI Gaming
▶ Golf

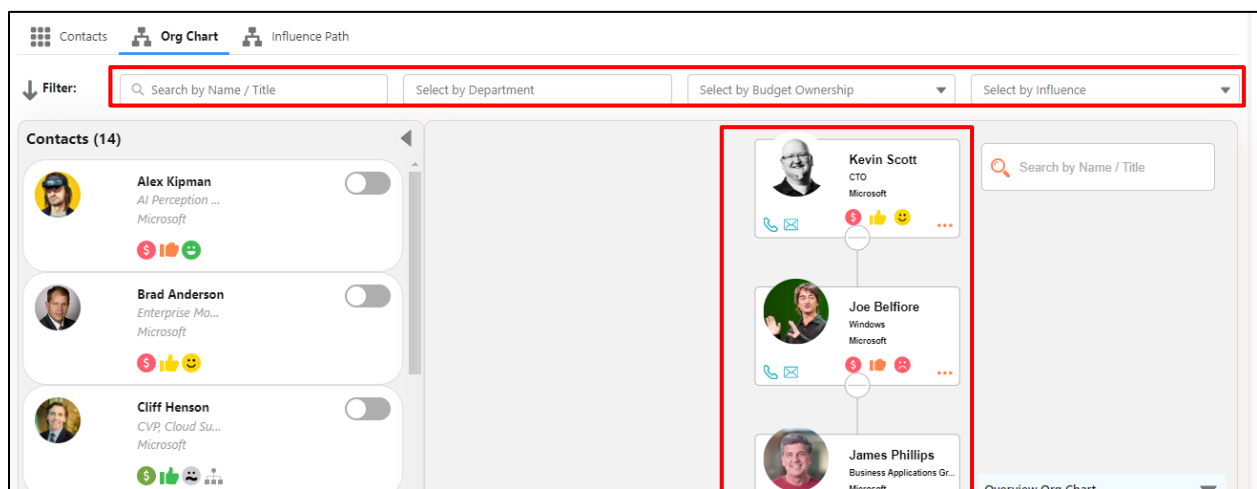
Add Key Areas

4.1.2. Org Chart

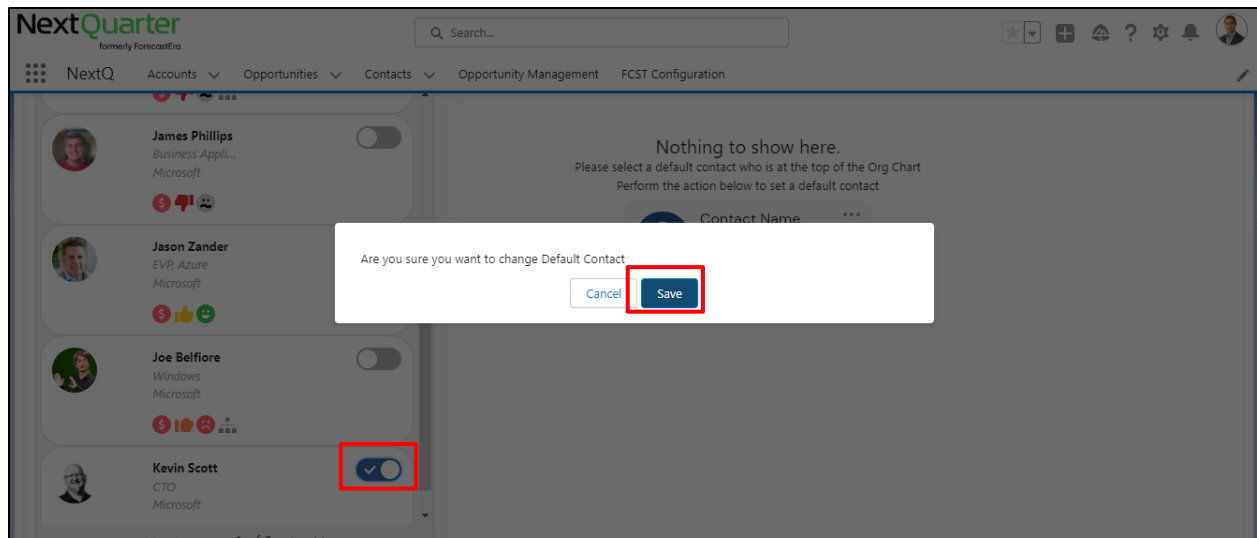
The second sub-section under Relationship Map is **Org Chart** (outlined in red).



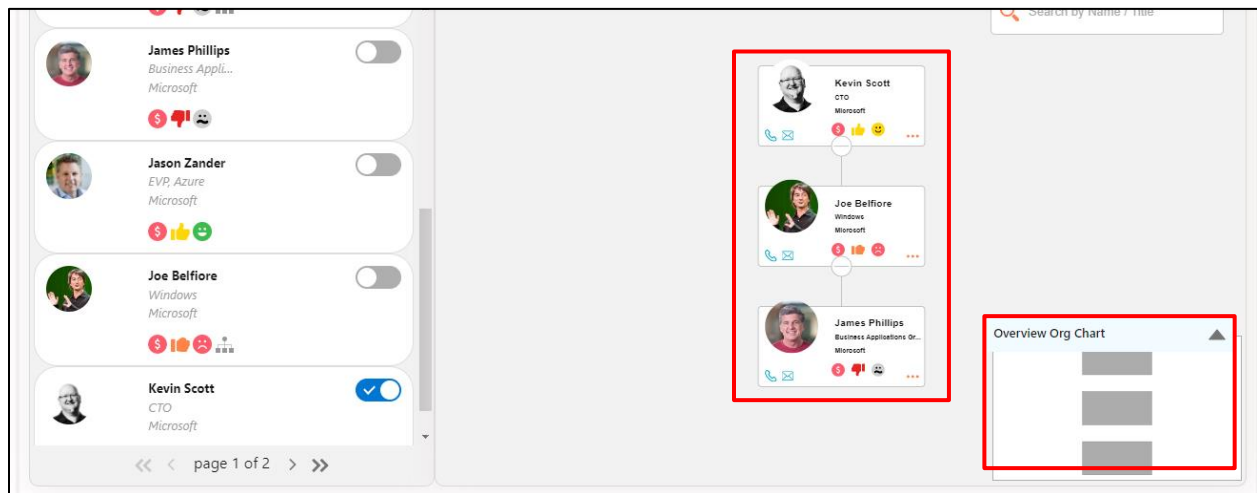
Here, Users can view the org chart, change the topmost contact or default contact, add more people to the org chart and even remove contacts that are no longer working at the organization. Users can also set filters to search for a specific set of contacts (all outlined in red).



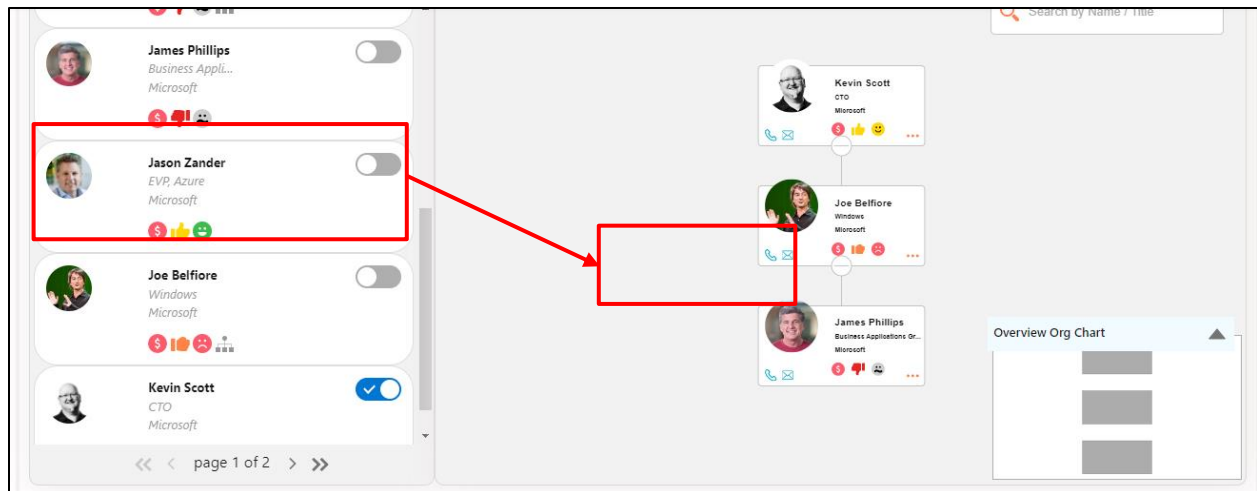
The topmost contact on the org chart, also known as default contact, can be selected by clicking on the **Toggle** button on their contact card and saving it as the default contact (both outlined in red).



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).

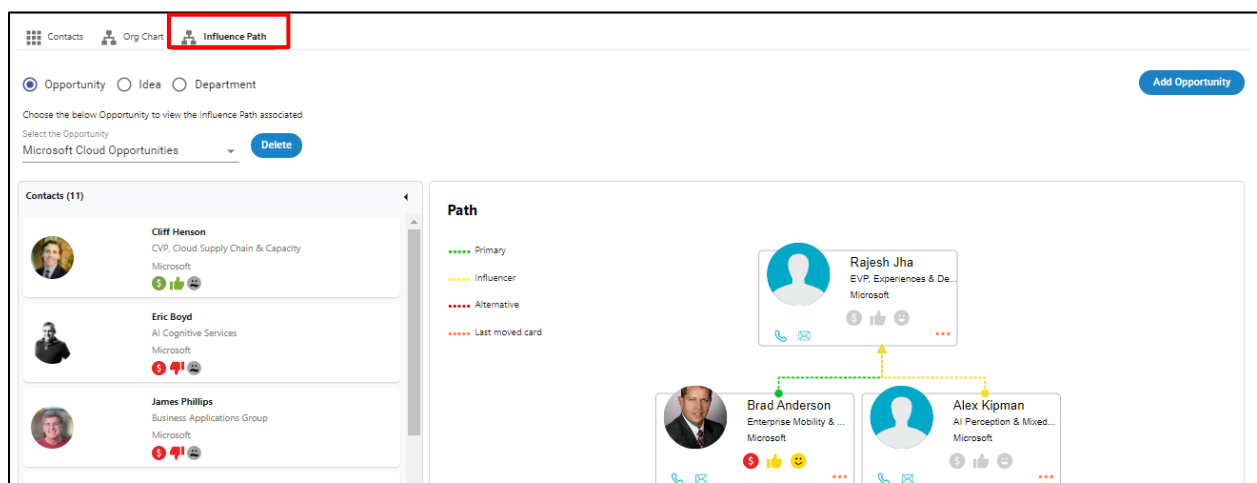


To add a new contact to the org chart, users can drag and drop the contact card onto any level (outlined in red).

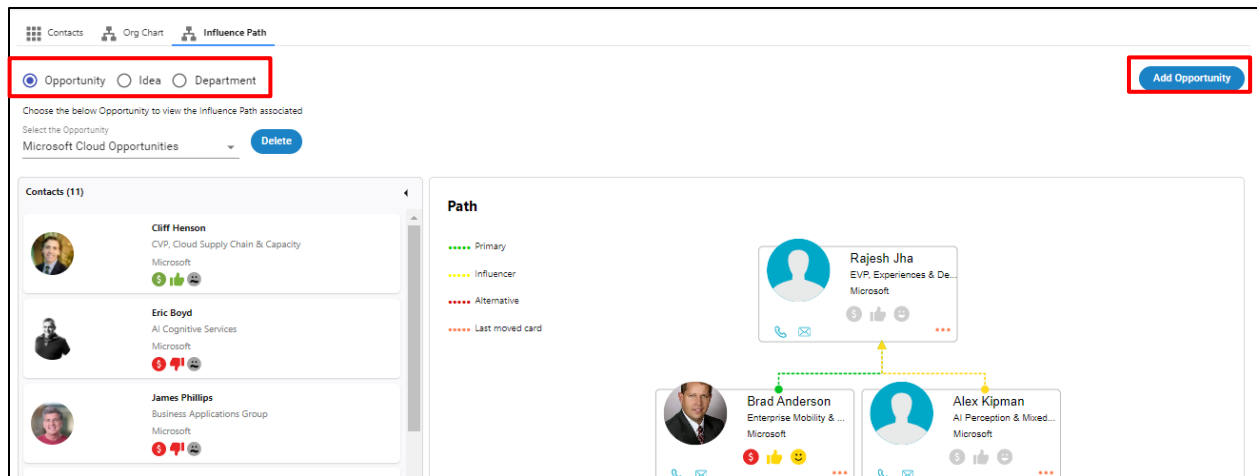


4.1.3. Influence Path

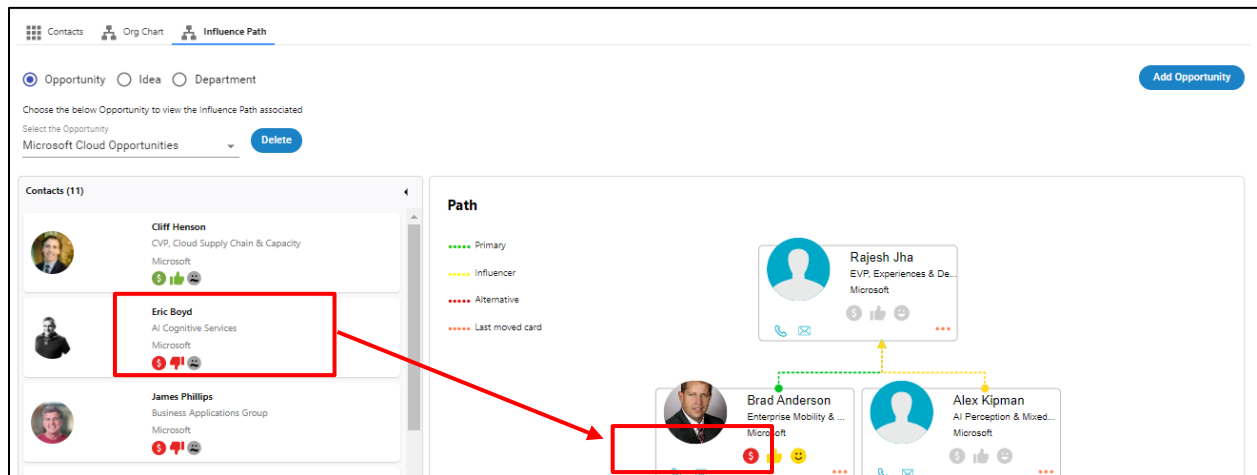
The third section under Relationship Map is **Influence Path** (outlined in red).



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**.

Path Selection

Please select Influence Path from the below

☒ Primary(Green)
 ☐ Influencer(Yellow)
 ☐ Alternative(Red)

CANCEL

REMOVE

UPDATE

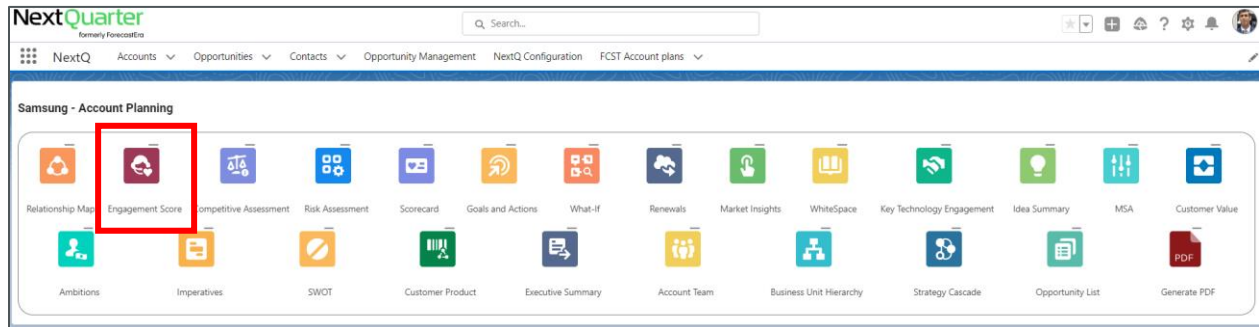
*Note – these steps will remain the same for the **Idea** sub-section.

3.3.1.3.1. Influence Path for Department

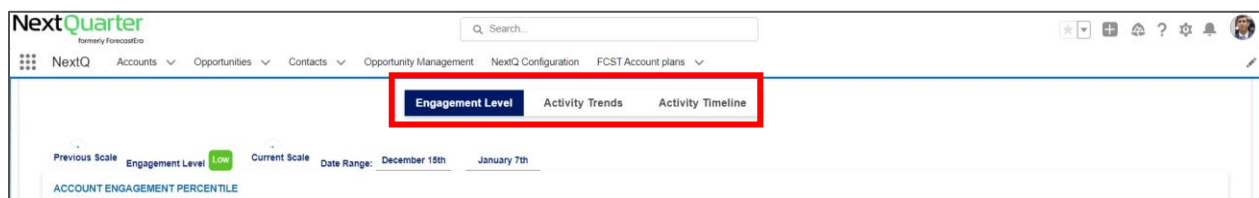
The Influence path for the department will not be automated. Users can drag and drop each contact card to create a department-level influence path.

4.2. Engagement Score

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

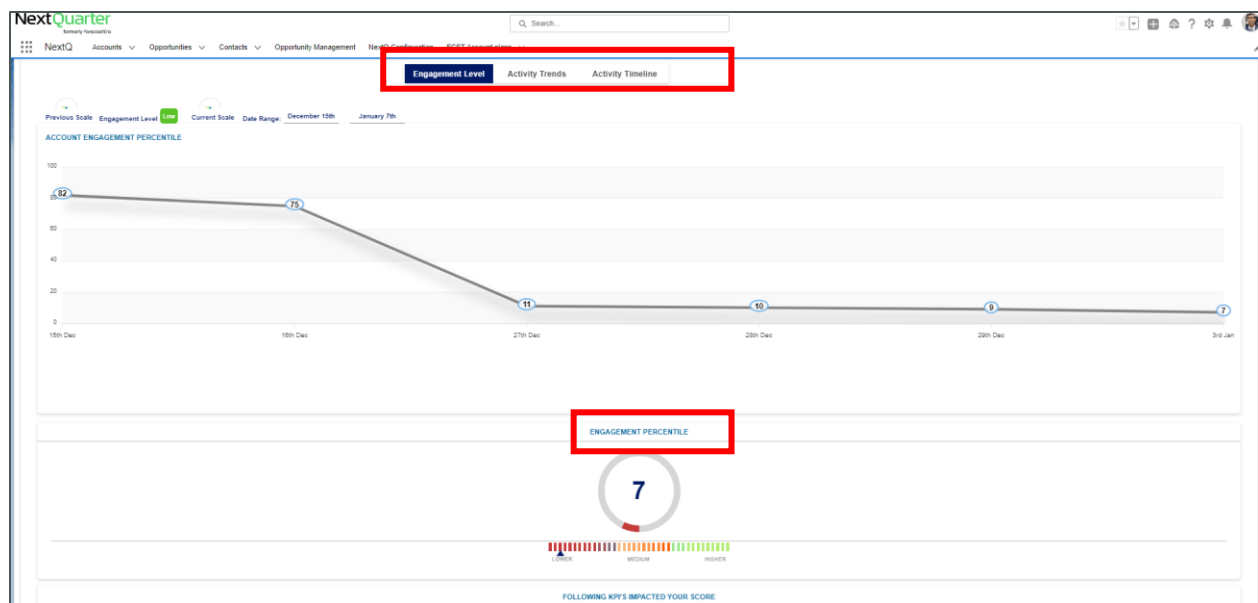


The Engagement Score has three sub-sections – **Engagement Level**, **Activity Trends**, and **Activity Timeline** (all outlined in red).



4.2. 1. Engagement Level

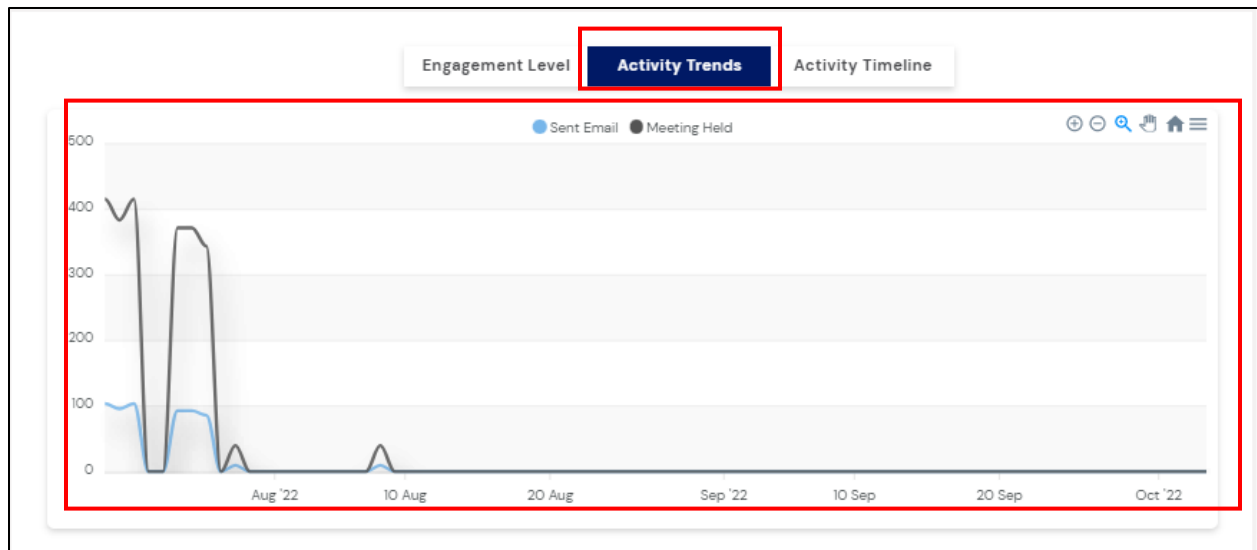
Under **Engagement Level**, users can select the date ranges to view the engagement percentile graph, range, and the KPIs that impact the score (all outlined in red).



FOLLOWING KPIS IMPACTED YOUR SCORE			
Activity		Count	Score
Open Email	○	0	0
Sent Email	○	596	596
Meeting Held	○	596	2384

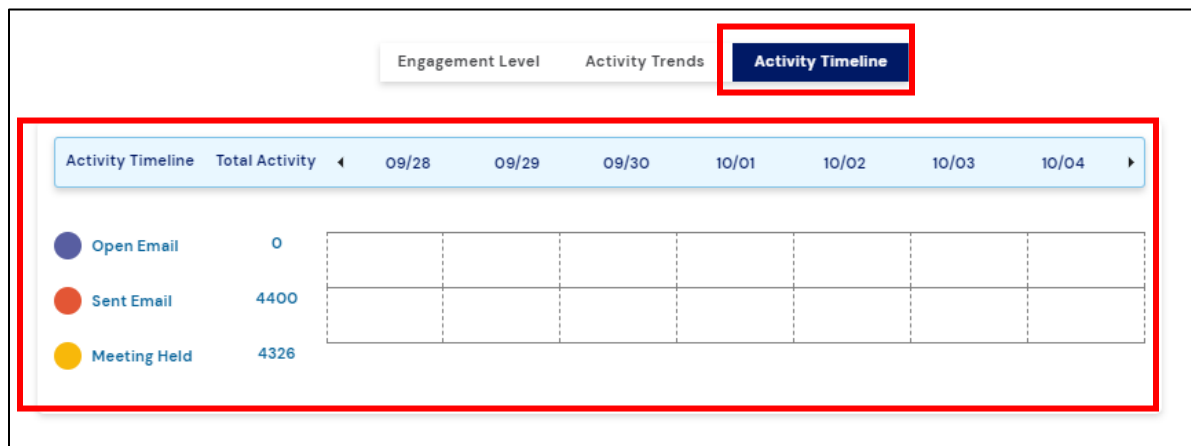
4.2.2. Activity Trends

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



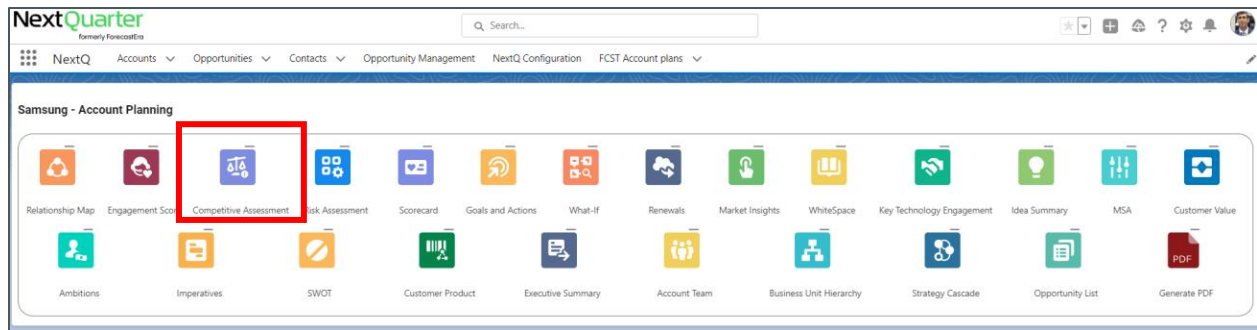
4.2.3. Activity Timeline

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).

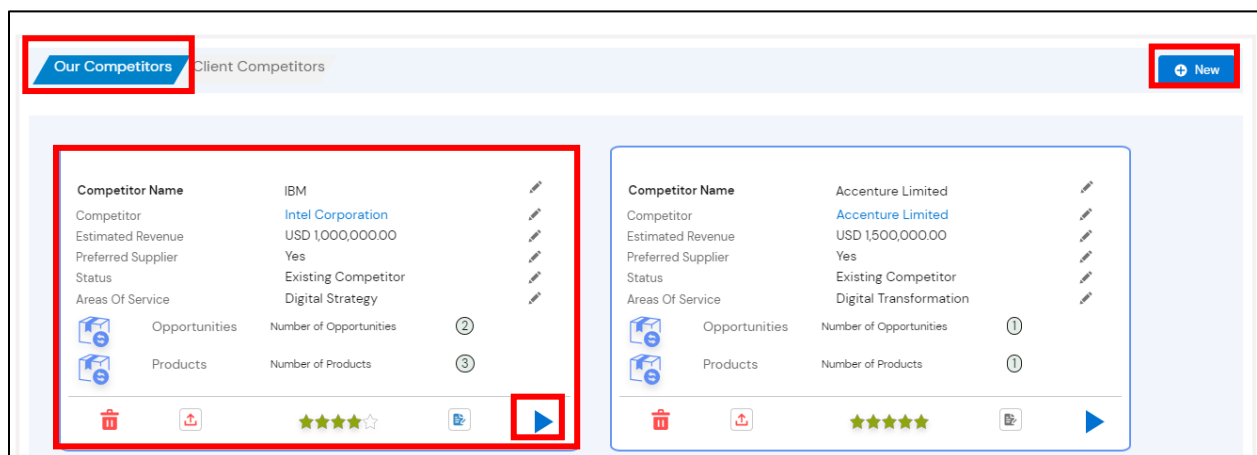


Under Competitive Assessment, users can see two sections – Our Competitors and Client Competitors (both outlined in red).



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).

Competitor Name	IBM	
Competitor	Intel Corporation	
Estimated Revenue	USD 1,000,000.00	
Preferred Supplier	Yes	
Status	Existing Competitor	
Areas Of Service	Digital Strategy	

Opportunity

DRAM for Surfaces

▼

Amount

USD 2,500,000

StageName

Negotiation

CloseDate

11/22/2022

▶

Opportunity

Idea for DRAM services

▼

Amount

USD 100

StageName

Id. Decision Makers

CloseDate

10/27/2022

▶

Estimated Wallet Share	10%	
Rating	4	
Competitor Strength	<u>Technology Leader:</u> <u>Brand Value</u> <u>Market Share</u>	
Competitor Weakness	<u>Not Diverse:</u> Intel is limited to the personal computing segment <u>Overproduction</u>	
Relationship Type	Our Competitors	
Relationship Type Control		

Tasks

0

0

0

0

+

★★★★☆

▶

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).

Our Competitors

Client Competitors

New

Competitor Name

AWS

Competitor

[AWS](#)

Estimated Revenue

EUR 1,100,000.00

Preferred Supplier

Yes

Status

Existing Competitor

Areas Of Service

Azure Compute, Azure Storage, Exchange, Bing

Opportunities

Number of Opportunities

2

Products

Number of Products

3

★★★★★

Competitor Name

Sony Playstation

Competitor

[Sony Playstation](#)

Estimated Revenue

EUR 600,000.00

Preferred Supplier

Status

Trending Down

Areas Of Service

Xbox Series XJS

Opportunities

Number of Opportunities

0

Products

Number of Products

0

★★★★☆

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).

Competitor Name	IBM	
Competitor	Intel Corporation	
Estimated Revenue	USD 1,000,000.00	
Preferred Supplier	Yes	
Status	Existing Competitor	
Areas Of Service	Digital Strategy	

Opportunity

DRAM for Surfaces

▼

Amount	USD 2,500,000
StageName	Negotiation
CloseDate	11/22/2022

▶

Opportunity

Idea for DRAM services

▼

Amount	USD 100
StageName	Id. Decision Makers
CloseDate	10/27/2022

▶

Estimated Wallet Share	10%	
Rating	4	
Competitor Strength	<u>Technology Leader:</u> <u>Brand Value</u> <u>Market Share</u>	
Competitor Weakness	<u>Not Diverse:</u> Intel is limited to the personal computing segment <u>Overproduction</u>	
Relationship Type	Our Competitors	
Relationship Type Control		

Tasks

0

0

0

0

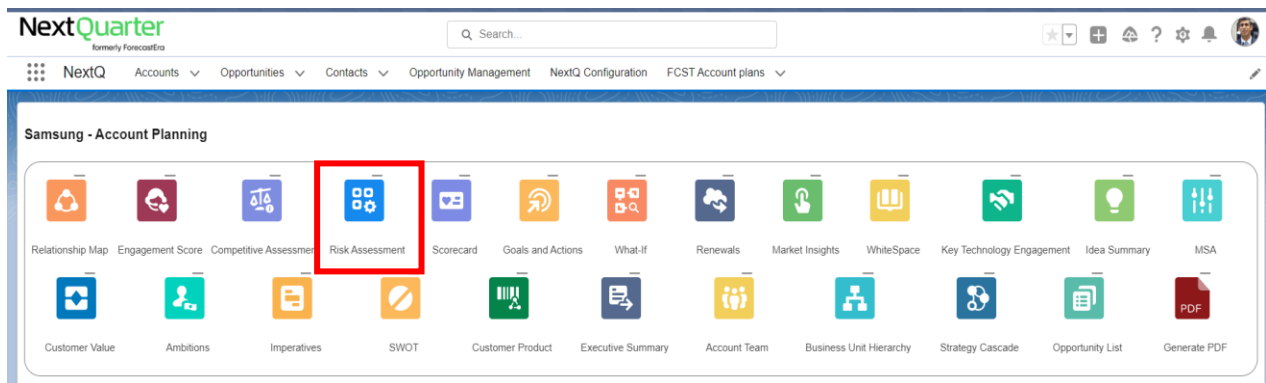
+

★★★★☆

▶

4.4. Risk Assessment

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

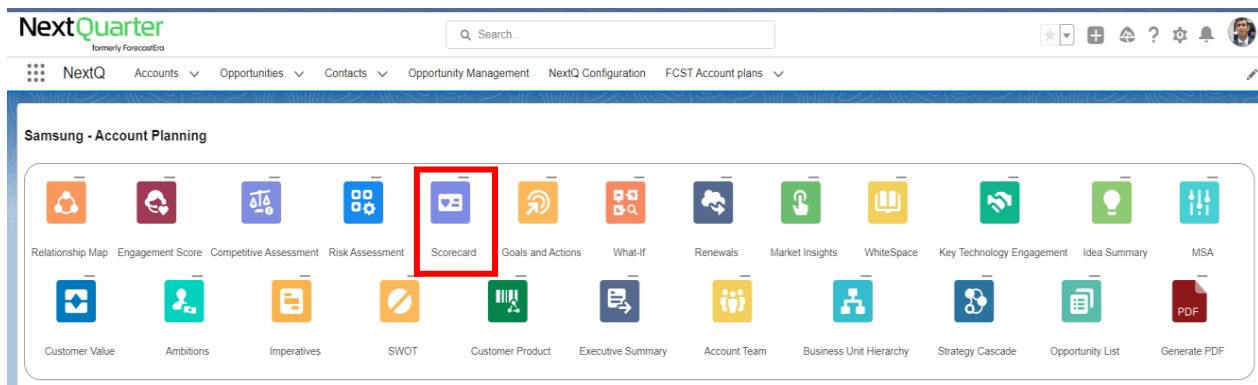


Here there are six cards (three of each for internal and external - **Operational, Commercial, Strategic**) with multiple-choice questions. Users can select and update the option to these questions (all outlined in **red**) that will add up to the section score, which is averaged out to create the total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

The image shows the 'RISK ASSESSMENT - Account Risks' form. At the top, there is a blue header bar with the title 'RISK ASSESSMENT - Account Risks' and a 'Submit' button. Below the header, there is a section titled 'INTERNAL STRATEGIC RISKS'. This section contains a list of questions, with the first question highlighted by a red rectangular box: '1. Is the Account Team reviewing the account plan with the client.' Below the question is a dropdown menu with the text 'Yes -(25pts)'. To the right of the question, there is a score indicator '25' and a dropdown arrow. In the top right corner, there is a green box containing two scores: 'Over All Score 58' and 'Section Score 75'.

4.5. Scorecard

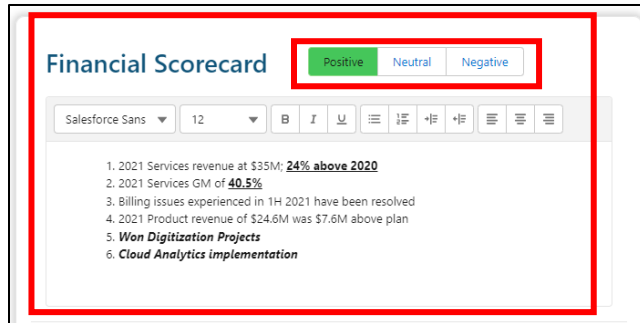
The fifth section under Account Planning is **Scorecard** (outlined in **red**).



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

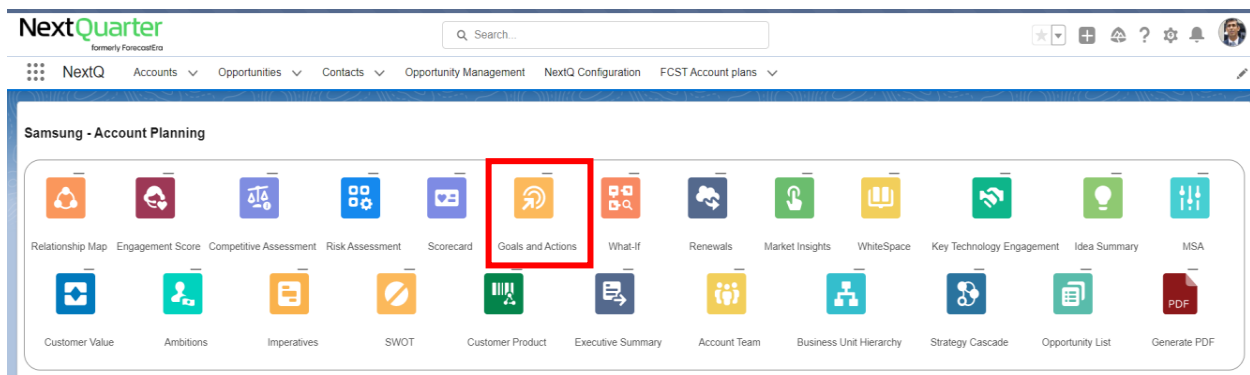
The screenshot displays the 'Account Scorecard' form. The form is divided into four main sections, each with a rating dropdown and a text area for comments. The sections are: **Financial Scorecard**, **Relationship Growth**, **Customer Satisfaction**, and **Feedback**. Each section has a rating dropdown with options: Positive, Neutral, and Negative. The text areas are free text fields where users can enter comments. The entire form is outlined with a red border. The right side of the form shows a list of comments for each section, with the first comment for each section being: '1. 2021 Services revenue at \$35M, 24% above 2020', '1. Consistently achieved overall Green Spotlight score', '1. Consistently achieved overall Green Spotlight score', and '1. Consistently achieved overall Green Spotlight score'.

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).

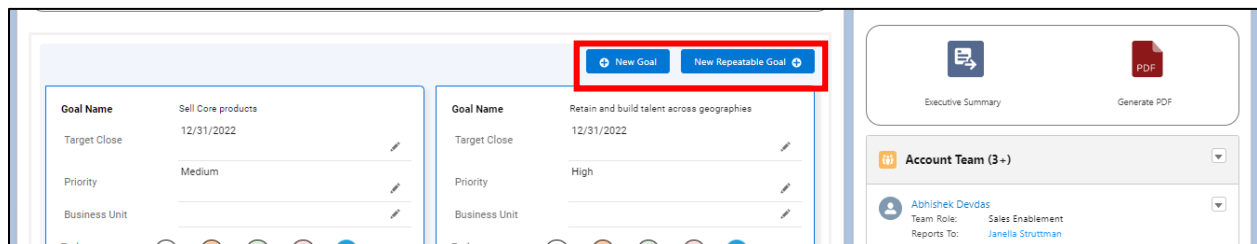


4.6. Goals and Actions

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.

Add Goal

Goal Name

Virtualize Desktops

Description

Sample description

Assessment Criteria

Target Close

Oct 6, 2022

Priority

High

Account

Happy Drinks

FCST Rating

None

Cancel

Save

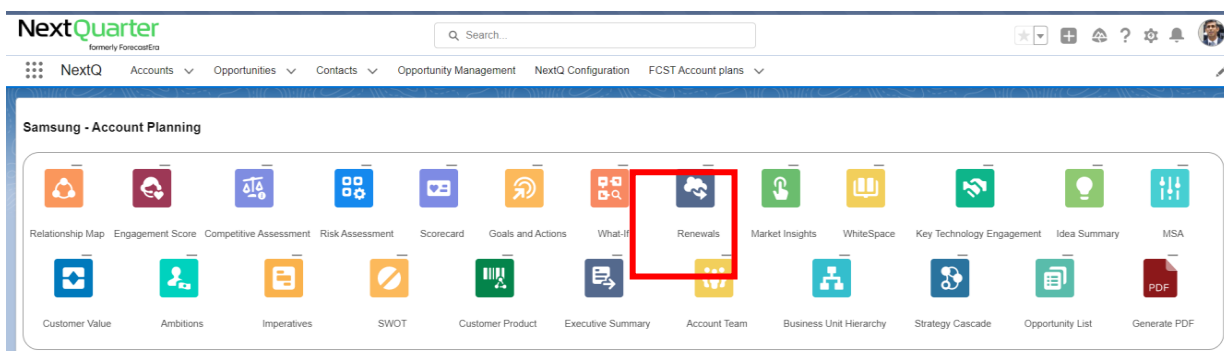
Users can also view the **Goals and Action** cards. The details for a specific goal can be seen (outlined in red). Users can click the + button to associate an opportunity, idea, or strategy record with the goal. Users can click on the circles next to **Tasks** to see whether they are classified as not 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).

The screenshot shows a goal management interface for the goal "Sell Core products" with a target close date of 12/31/2022 and a medium priority. The interface includes sections for Tasks, Ideas, Opportunities, and Strategy, each with a count and a plus icon to add new items. The Tasks section shows 0 tasks, Ideas shows 0 ideas, Opportunities shows 0 opportunities, and Strategy shows 4 strategies. The Strategy section lists two strategies: "Build or acquire Plant in Europe" and "Expand fresh food business until it represents half of the company revenue".

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

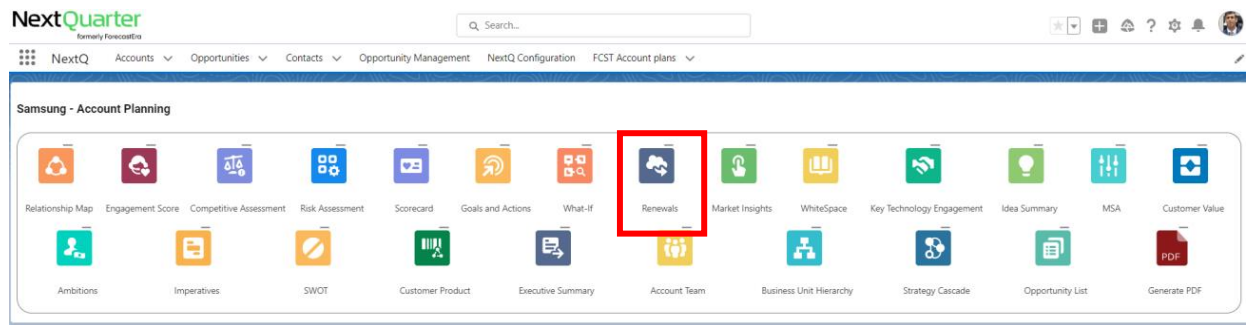
4.7. What-If

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.

* Opportunity Name
IT Problems

Account Name
Microsoft

Type
--None--

Lead Source
--None--

FCST Opportunity Insight
Search FCST Opportunity Insight...

FCST Renewal
☐

FCST Is Renewable
☒

FCST Days Before Renewal

FCST Previous Renewal
Search Opportunities...

Project Start Year

Amount

* Close Date
12/28/2022

Next Step

* Stage
Qualification

Probability (%)
10%

* Forecast Category
Pipeline

GridChkBox
☐

FCST RM Contact
Search Contacts...

Contract
Search Contracts...

FCST WS Ideas
Search FCST WS Ideas...

Project End Year

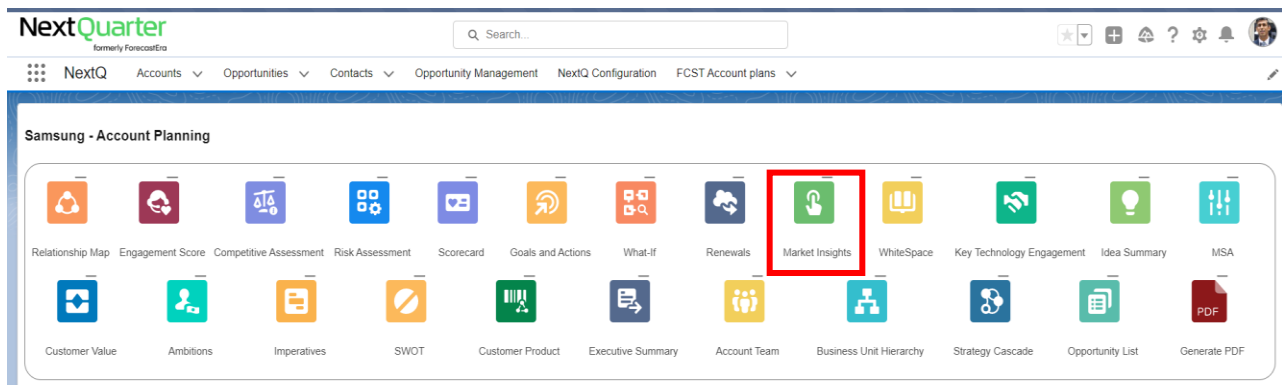
Cancel Save & New Save

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

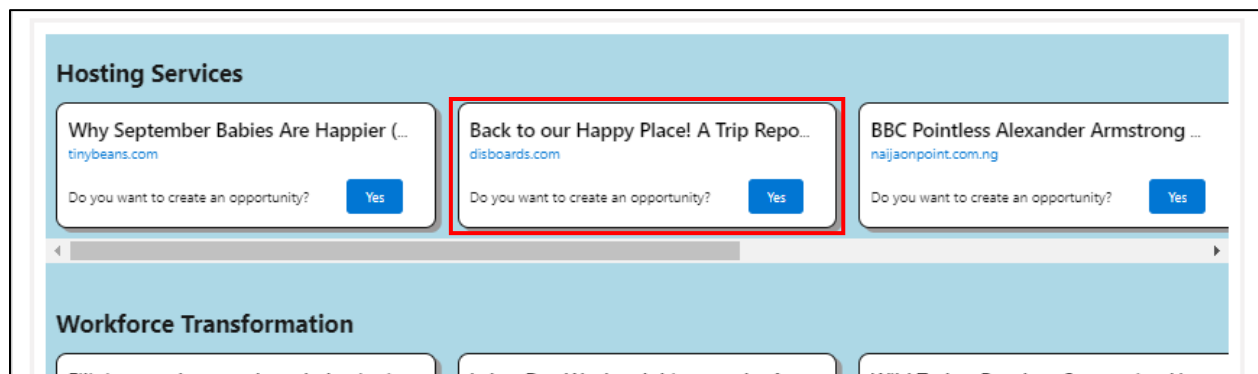
Note – the opportunity must be in the **Closed Won** stage to appear under the **Renewals** tab.

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).

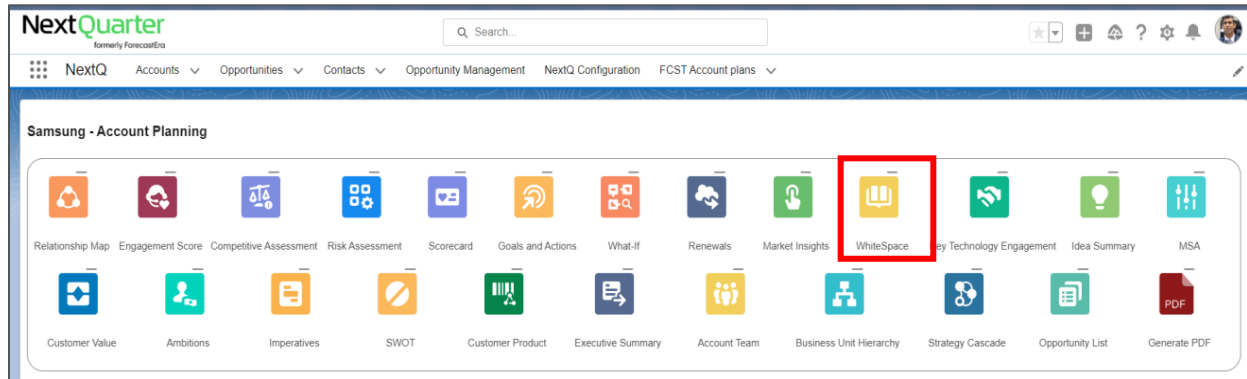


Clicking on **Yes** for any insight will open a new opportunity card.

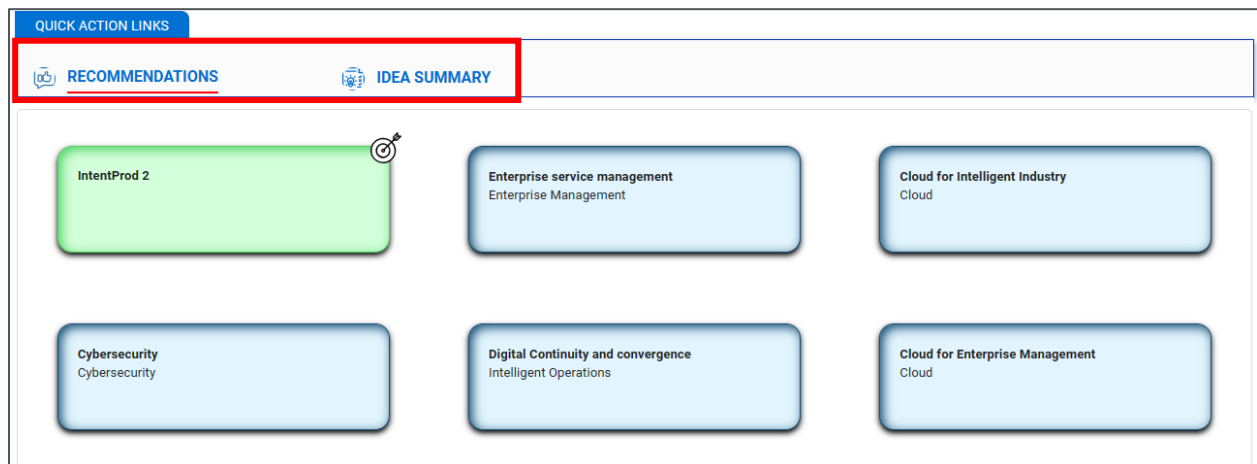
Once the mandatory details have been entered, users can save this opportunity to the account.

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.

QUICK ACTION LINKS

RECOMMENDATIONS

IDEA SUMMARY

IntentProd 2

Enterprise service management
Enterprise Management

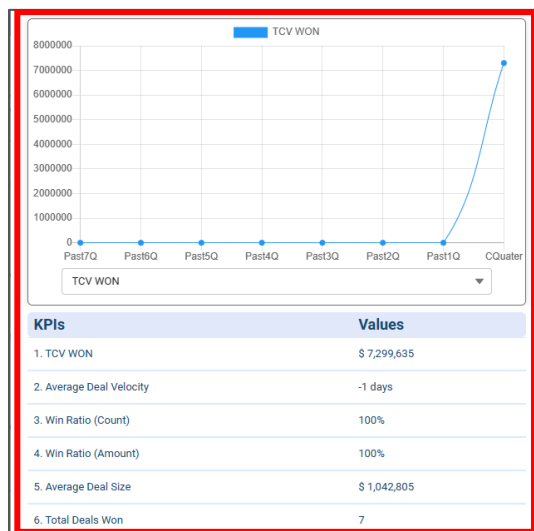
Cloud for Intelligent Industry
Cloud

Cybersecurity
Cybersecurity

Digital Continuity and convergence
Intelligent Operations

Cloud for Enterprise Management
Cloud

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).



Add Recommendations Idea

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).

FILTERS FOR DESIRABLE WHITE SPACES

Product Hierarchy

- Product
- CIS
 - CYB - Define
 - CYB - Defend
 - CYB - Define
 - CIS
 - CYB - Protect
 - CYB - Protect
 - CYB - Defend

Time Frame

- Current Quarter
- Past 1 Quarter
- Past 2 Quarter
- Past 3 Quarter
- Past 4 Quarter
- Past 5 Quarter
- Past 6 Quarter
- Past 7 Quarter

Stage

- Prospecting
- Qualification
- Needs Analysis
- Id. Decision Makers
- Engagement
- Shaping
- Solutioning
- End Game
- Negotiation
- Sales Proration
- Gap Closed
- Closed Won
- Closed Lost

KPI Selection

AI Services

Cloud for com management

\$0M

\$0M

NA

NA

\$0M

\$0M

NA

NA

Apply Apply Apply

SBU fx

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).

SELECT KPI TO DISPLAY TCV Won

Cluster Type	TCV Won	Average Deal Velocity	Win Ratio (Count)	Win Ratio (Amount)	Average Deal Size	Total Deals Won
Company Size	1	1	1	1	1	1
Region	1	1	1	1	1	1
Industry	1	1	1	1	1	1

Save

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).

CROSS SELL UP SELL

TCV Won on Cards

Cohorts Selection

- Company Size
- Region
- Industry

IntentProd 2

Enterprise service management

Digital Continuity and convergence

Cloud for Enterprise Management

Application ma

Company Size	fx	NA	\$3.5M	\$5M	NA	
Region	fx	NA	\$3.6M	\$0.5M	\$1M	
Industry	fx	NA	\$0.2M	\$5.6M	\$0.5M	

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).

TCV Won on Cards					
Cohorts Selection	IntentProd 2	Digital Continuity and convergence	Cloud for Enterprise Management	Enterprise service management	Tempo Pre
Company Size	NA	NA	NA	NA	
Region	NA	\$0.6M	\$0.5M	\$0.1M	
Industry	NA	\$5.6M	\$0.5M	\$0.2M	

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

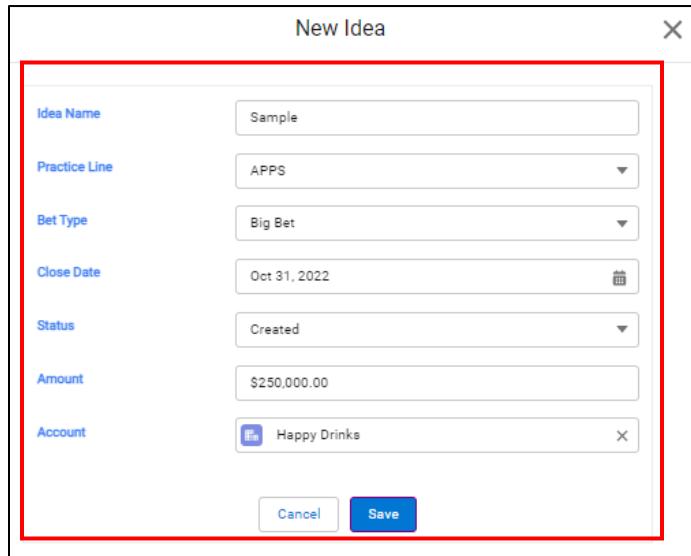
CROSS SELL			UP SELL	
TCV Won on Cards				
Cohorts Selection	Cloud for Intelligent Industry	Cybersecurity		
Company Size	\$15.5M	\$2.5M		
Region	\$0.5M	\$2.5M		
Industry	\$15.5M	\$2.5M		

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).

QUICK ACTION LINKS			
RECOMMENDATIONS		IDEA SUMMARY	
Open Ideas	Con. Opportunities	Closed Won Ideas	CREATE IDEAS +
Idea Name Digital Cloud Practice Line APPS Bet Type Big Bet Close Date 9/30/2022 Status Progressing		Idea Name Unified data platf... Practice Line APPS Bet Type Big Bet Close Date 12/14/2022 Status Created	

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).



The screenshot shows a 'New Idea' form with a red border. The form contains the following fields and values:

Field	Value
Idea Name	Sample
Practice Line	APPS
Bet Type	Big Bet
Close Date	Oct 31, 2022
Status	Created
Amount	\$250,000.00
Account	Happy Drinks

At the bottom of the form are two buttons: 'Cancel' and 'Save'.

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).

Open Ideas
Con. Opportunities
Closed Won Ideas

Idea Name

Digital Cloud

Practice Line

APPS

Bet Type

Big Bet

Close Date

9/30/2022

Status

Progressing

Amount

EUR 185,000.00

Products

0

+

Convert to Opportunity

Opportunity

Probability

80%

Contact

Danna Epp

Rating

5

Account

Happy Drinks

Tasks

0

0

0

0

+

Idea Name

Practice Line

Bet Type

Close Date

Status

Amount

Products

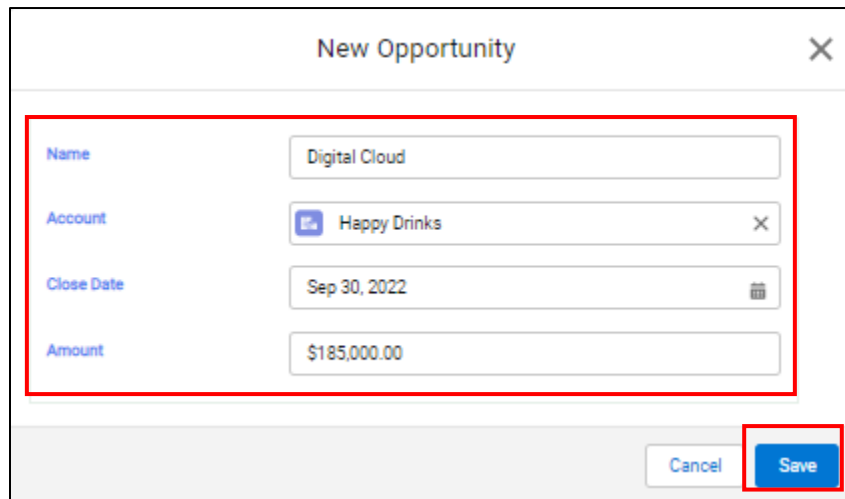
Click on the + button to see a popup to associate products with the open idea by selecting them and clicking on **Add Selected** (outlined in red).

Add Products

☐	Name	Family	Description
☐	Cloud Transformation Service...	Cloud Services	Cloud Transformation Servi
☐	Multi Tech Application Mana...	AMS	Multi Tech Application Man
☐	Service Desk Service	Smart Offices	Service Desk Service
☐	Application Packaging Service	Smart Offices	Application Packaging Serv
☐	Managed Data Centre Servic...	DC Infra & Services	Managed Data Centre Servi
☐	Modular Automation	Automation	
☐	IAM Services	Security Services	IAM Services
☐	Cloud Assessment (N2C)	Cloud Services	Cloud Assessment (N2C)
☐	Cloud Migration	Cloud Services	Cloud Migration

Cancel
Add Selected

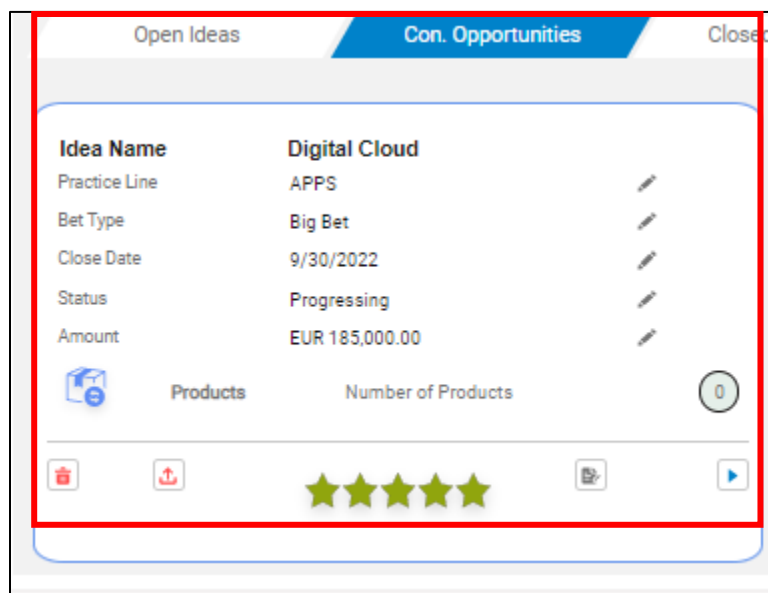
Click on the **Convert to Opportunity** button to see a new opportunity card. Add the opportunity name and opportunity, then click **Save** to create it (all outlined in red).



The screenshot shows a 'New Opportunity' form. The fields are: Name (Digital Cloud), Account (Happy Drinks), Close Date (Sep 30, 2022), and Amount (\$185,000.00). The Save button is highlighted in red.

Field	Value
Name	Digital Cloud
Account	Happy Drinks
Close Date	Sep 30, 2022
Amount	\$185,000.00

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



The screenshot shows the 'Con. Opportunities' section. The details for 'Digital Cloud' are: Practice Line (APPS), Bet Type (Big Bet), Close Date (9/30/2022), Status (Progressing), Amount (EUR 185,000.00). The Products section shows 0 products. The bottom bar has a red outline.

Field	Value
Idea Name	Digital Cloud
Practice Line	APPS
Bet Type	Big Bet
Close Date	9/30/2022
Status	Progressing
Amount	EUR 185,000.00

Products: 0

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).

Opportunities (6+)			New
Opportunity for Enterprise Management Services - HD20222 Stage: Negotiation Amount: USD 1,300,000.00 Close Date: 10/20/2022	Opportunity to Implement Digital Solution - HD2022Q4 Stage: Id. Decision Makers Amount: USD 900,000.00 Close Date: 10/11/2022	Opportunity for Implementation of Customer Experience Service... Stage: Qualification Amount: USD 1,500,000.00 Close Date: 10/5/2022	
Digital Cloud Stage: Prospecting Amount: USD 185,000.00 Close Date: 9/30/2022	Digital Workplace Automation - 2022Q3 Stage: Closed Won Amount: USD 500,000.00 Close Date: 9/11/2022	Opportunity for Digital Workplace - Q22022 Stage: Negotiation Amount: USD 500,000.00 Close Date: 9/8/2022	

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

Opportunity
Digital Cloud

Account Name
[Happy Drinks](#)

Close Date
 9/30/2022

Amount
 USD 185,000.00

Opportunity Owner
[Janella Struttman](#)

Prospecting

Qualification

Needs Analysis

Id. Decision Makers

Engagement

Shaping

Solutioning

End Game

Activity

Details

Chatter

Opportunity Owner	Janella Struttman	Opportunity Currency	USD - U.S. Dollar
Private	☐	Quantity	
Opportunity Name	Digital Cloud	Amount	USD 185,000.00
Account Name	Happy Drinks	Expected Revenue	USD 18,500.00
Type		Close Date	9/30/2022
Lead Source		Next Step	
FCST Opportunity Insight	A-71887	Stage	Prospecting

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

Opportunity Owner
Janelia Struttman

Private
☐

* Opportunity Name
Digital Cloud

Account Name
Happy Drinks

Type
--None--

Lead Source
--None--

FCST Opportunity Insight
A-71887

Opportunity Score
0.00
This field is calculated upon save

* Opportunity Currency
USD - U.S. Dollar

Quantity

Amount
185,000.00

Expected Revenue
USD 18,500.00

* Close Date
9/30/2022

Next Step

* Stage
Closed Won

Probability (%)
100%

Foot Days to Close
-3

Cancel Save

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

RECOMMENDATIONS IDEA SUMMARY

Open Ideas Con. Opportunities Closed Won Ideas CREATE IDEAS +

Idea Name Digital Cloud

Practice Line APPS

Bet Type Big Bet

Close Date 9/30/2022

Status Progressing

Amount EUR 185,000.00

Products Number of Products 0

★★★★★

Idea Name Digital Workplace ...

Practice Line APPS

Bet Type Normal Bet

Close Date 8/15/2022

Status Created

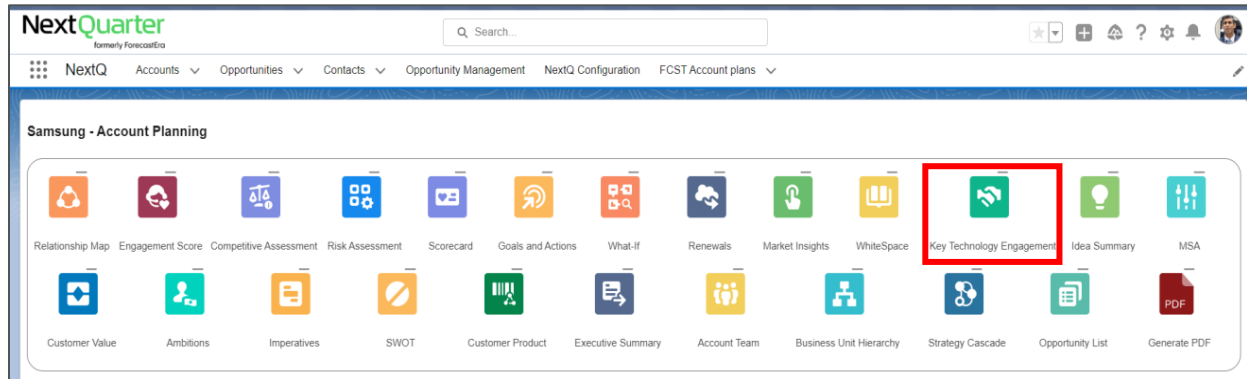
Amount USD 500,000.00

Products Number of Products 0

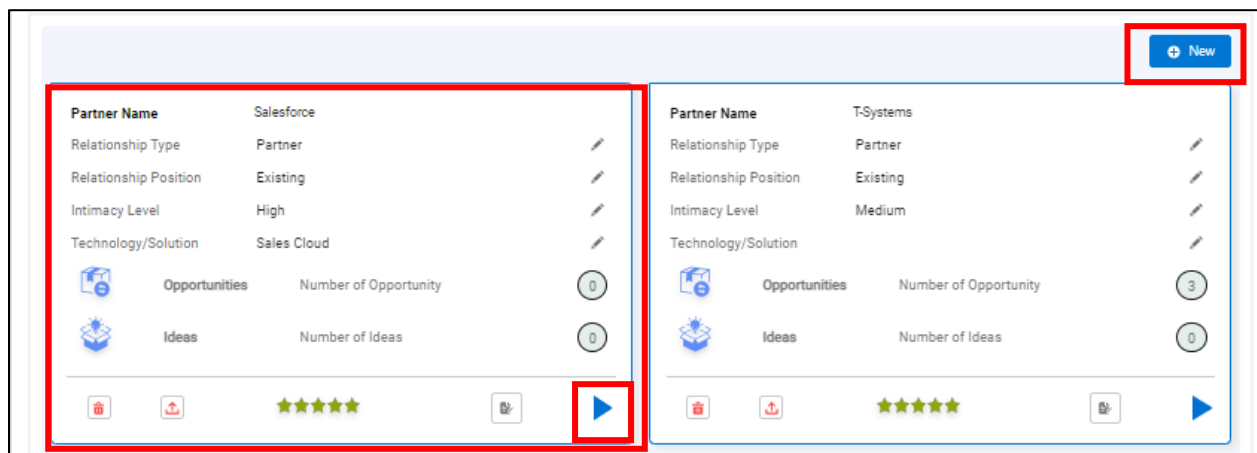
☆☆☆☆☆

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).

Partner Name	Salesforce
Relationship Type	Partner
Relationship Position	Existing
Intimacy Level	High
Technology/Solution	Sales Cloud

Opportunities
 0
+

Ideas
 0
+

Y+1 Bookings Ambition	USD 650,000.00
Main Upcoming Deal	
Competitors Involved With Partner	None
Main Deal (past involvement)	
Reassessment Date	9/8/2023
Primary Contact Name	Mike Smith
CY Bookings Ambition	USD 500,000.00
Type	
Executive Sponsor	
Actions	
Partner Rating	5

Tasks
 0
0
0
0
+

★★★★★
▶

4.12. Idea Summary

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

NextQuarter formerly ForecastErio

Search...

NextQ Accounts Opportunities Contacts Opportunity Management NextQ Configuration FCST Account plans

Samsung - Account Planning

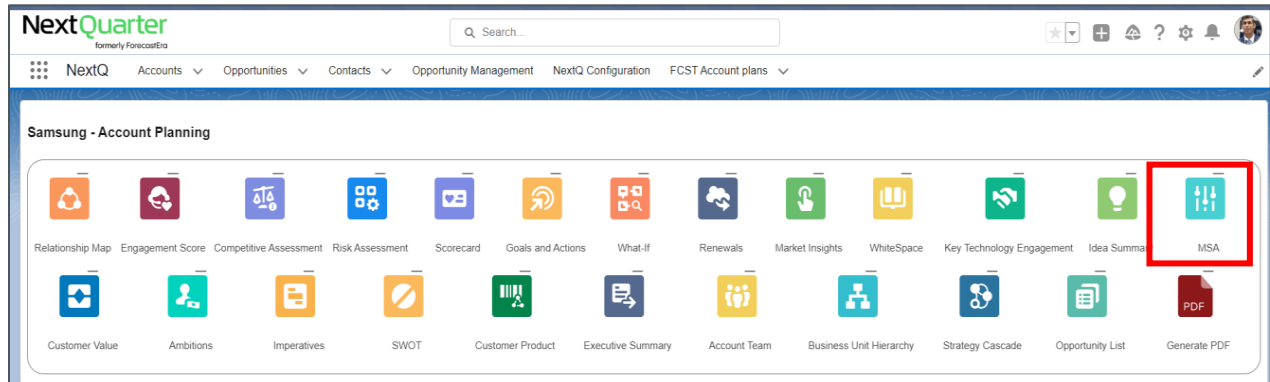
Relationship Map
 Engagement Score
 Competitive Assessment
 Risk Assessment
 Scorecard
 Goals and Actions
 What-If
 Renewals
 Market Insights
 WhiteSpace
 Key Technology Engagement
 Idea Summary
 MSA

Customer Value
 Ambitions
 Imperatives
 SWOT
 Customer Product
 Executive Summary
 Account Team
 Business Unit Hierarchy
 Strategy Cascade
 Opportunity List
 Generate PDF

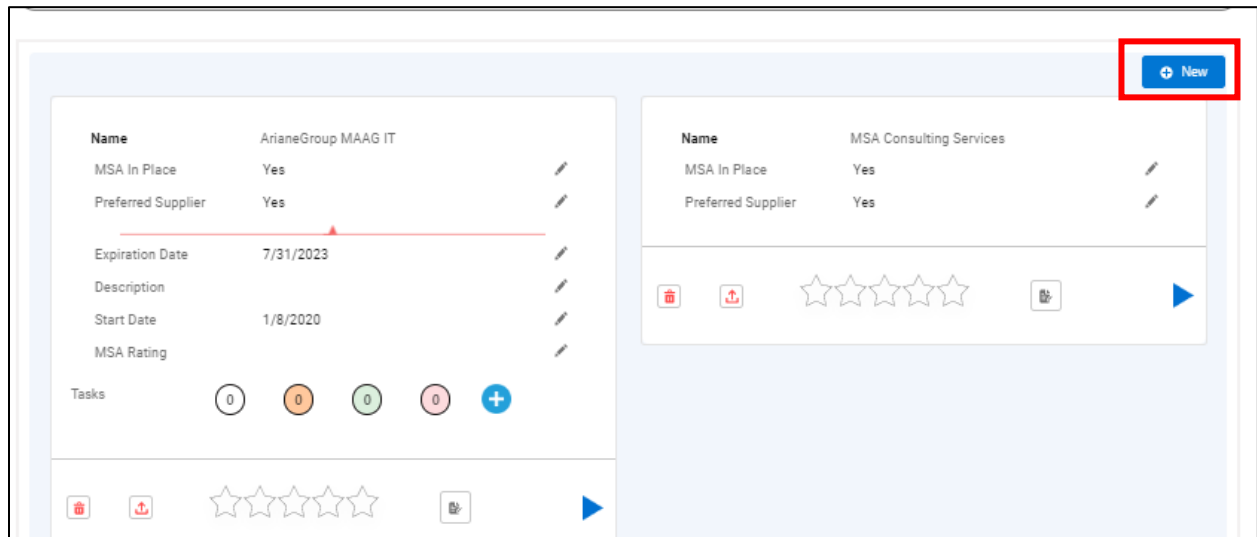
Clicking on this section will take users to the **Idea Summary** sub-section under **White Space**.

4.13. MSA

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

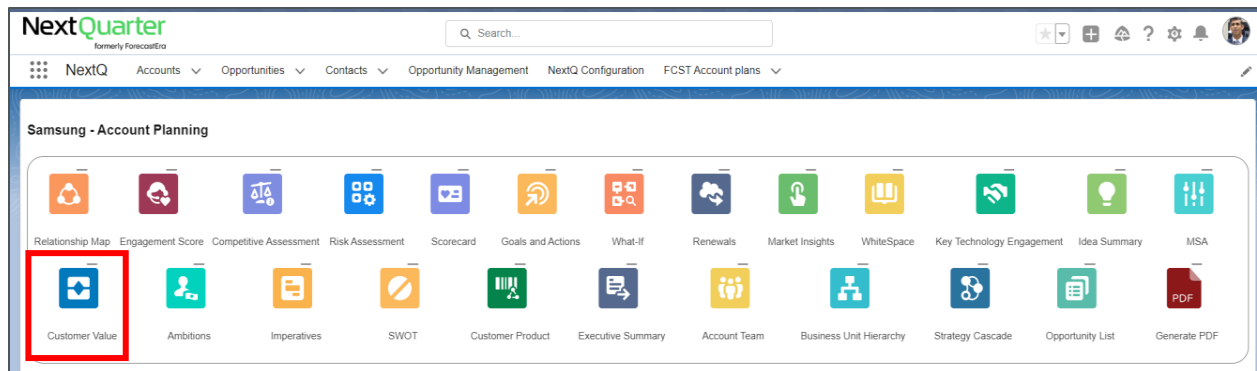


Users can view MSA cards and add a new card using the **+ New** button (all outlined in red).

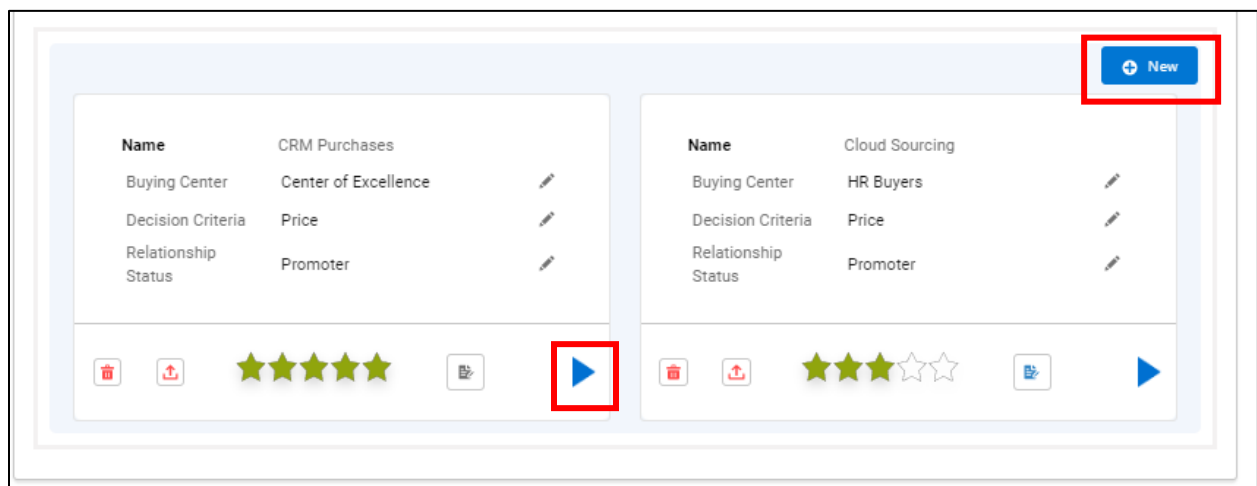


4.14. Customer Value

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



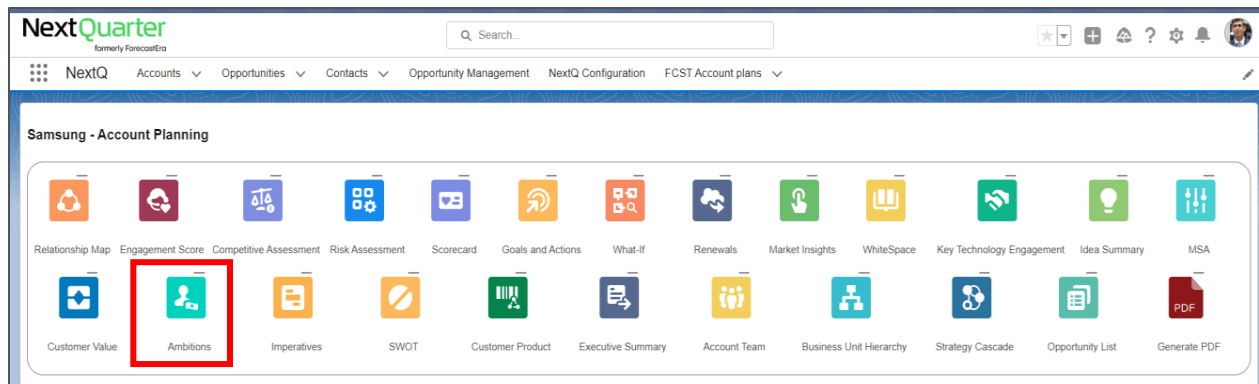
Users can view **Procurement Process** cards and add a new card using the **+ New** button. Users can expand the card using the triangle icon (all outlined in red).



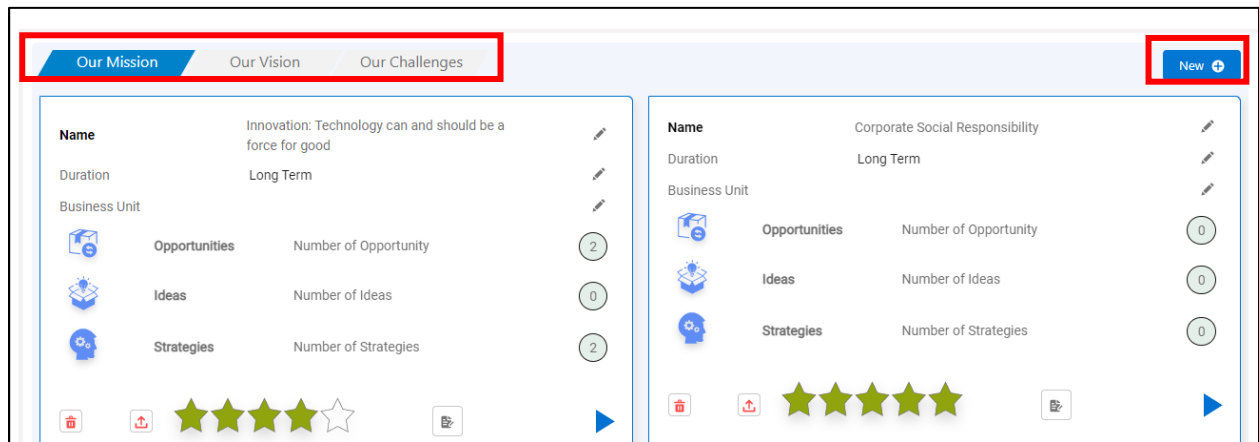
Once the card is expanded, users can view details like buying center, decision criteria, relationship status, customer org, key contact, what they value, approval in place, preferred supplier, expiration date, description, start date, and MSA rating (all outlined in red). They can also associate a task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

Name Test Ambition

Type Mission

Duration

Opportunities 0 + ▶

Ideas 0 + ▶

Short Description

Primary Contact

Account Happy Drinks

Ambition Rating

Strategies 1 + ▶

Imperative Name Test Imperatives

Tasks 0 1 0 0 +

Name To reach 30M€ revenues per year at the end of the 2022

Type Mission

Duration Short Term

Opportunities Number of Opportunity 1

Ideas Number of Ideas 1

Strategies Number of Strategies 3

★ ★ ★ ★ ★

Add Selected

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).

Add Opportunities

☐	Opportunity Na... ▼	Amount ▼	StageName ▼	CloseDate
☒	Proactive CRM Integ...	\$220,000	Prospecting	12/1/2022
☒	Opportunity for Impl...	\$1,500,000	Qualification	10/5/2022
☒	Opportunity for Ente...	\$1,300,000	Negotiation	10/20/2022
☐	Opportunity to Imple...	\$900,000	Id. Decision Makers	10/11/2022
☐	SAP CRM Maintena...	\$30,000	Closed Won	1/5/2015
☐	SAP SRM implemen...	\$20,000	Closed Won	4/5/2018
☐	SAP migration	\$40,000	Closed Lost	4/10/2019
☐	AM for Production s...	\$100,000	Closed Won	6/25/2013
☐	Opportunity for Digit...	\$500,000	Negotiation	9/8/2022

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).

Create Task

* Subject

Set up meeting

* Status

Not Started

* Due Date

10/5/2022

* Description

This is a sample description.

* Assigned To

Rahul Kamat

Contact

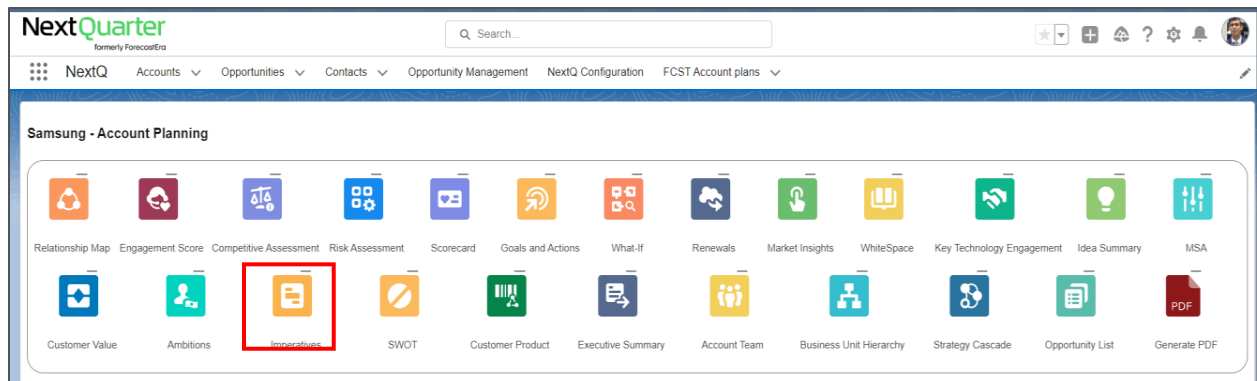
Search...

Cancel

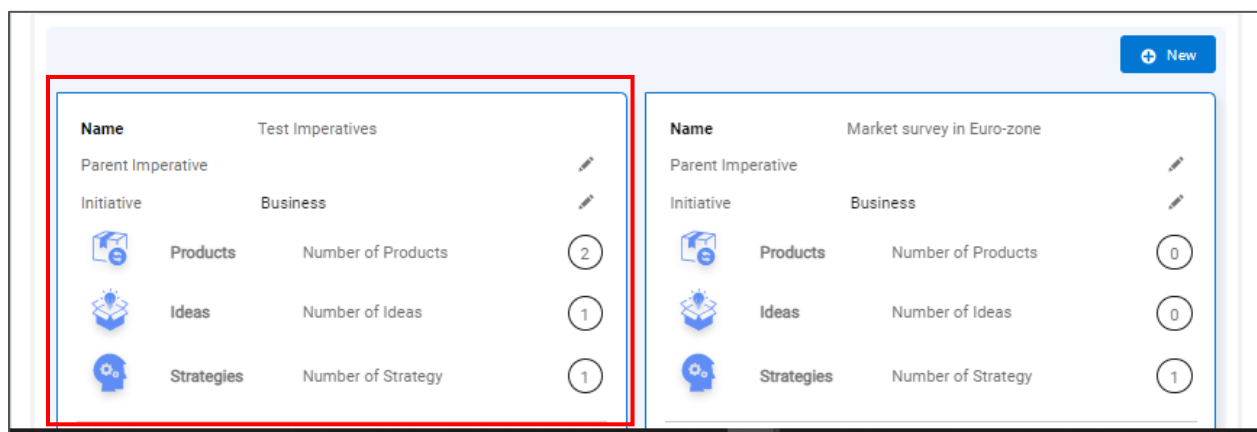
Save

4.16. Imperatives

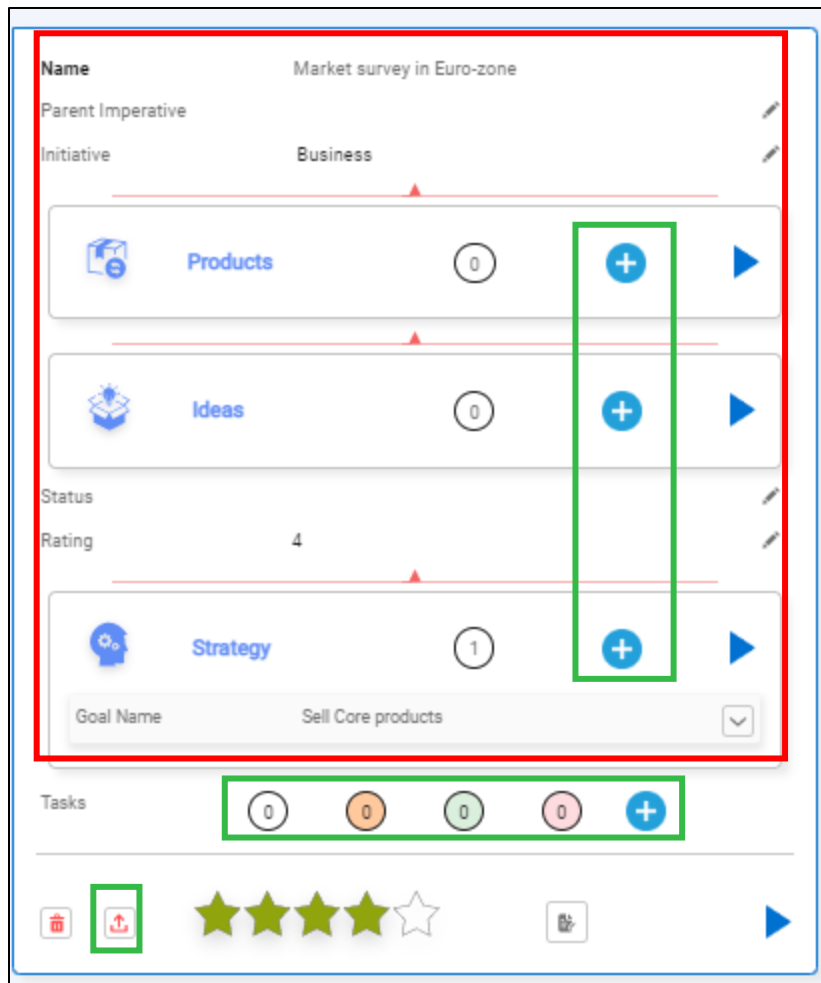
The following section under Account Planning is **Imperatives** (outlined in red).



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

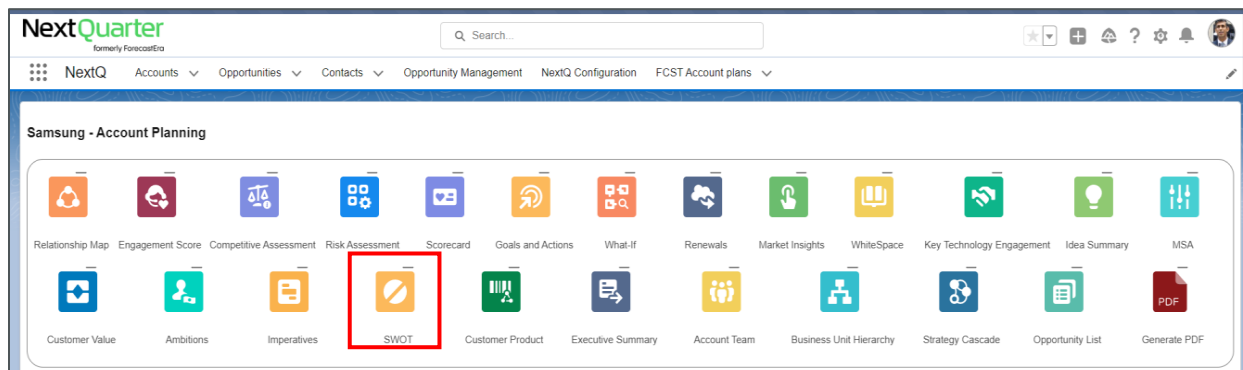


Expand any imperative card to view details about products, ideas, and strategies associated with the imperative. Click the + button to associate an opportunity, idea, or strategy. Click on the circles next to **Tasks** to see whether they are classified as **Not Started**, **Open**, **Completed**, or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

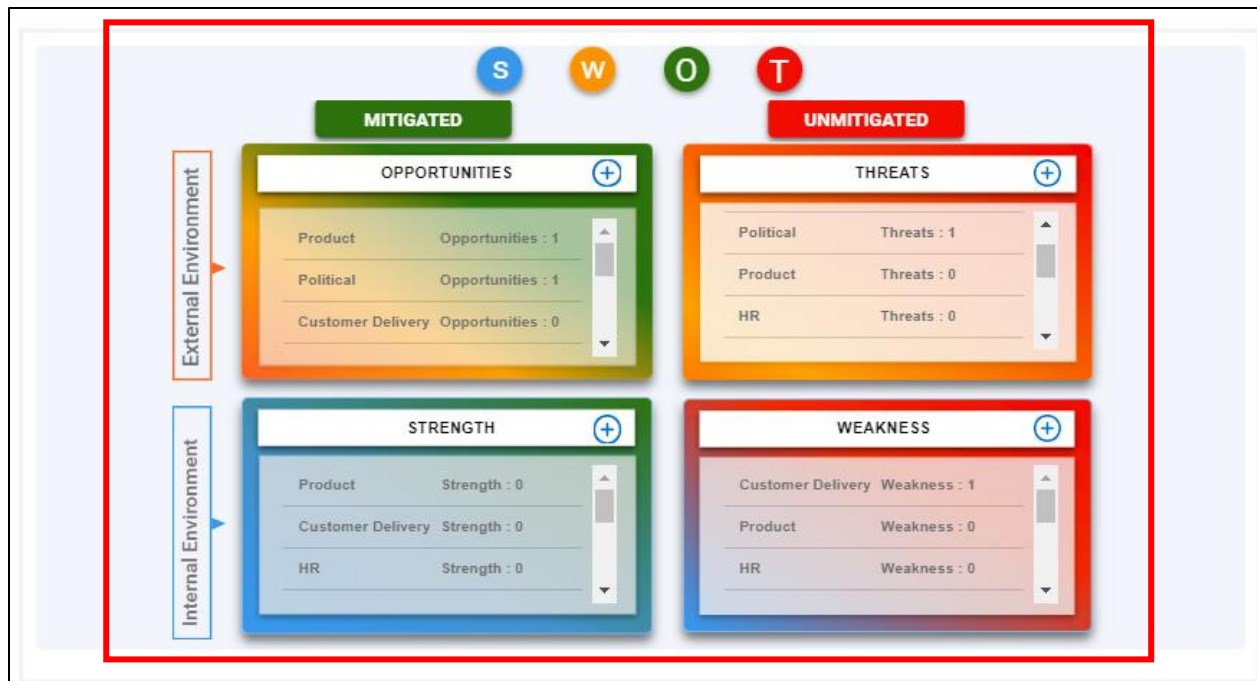


4.17. SWOT

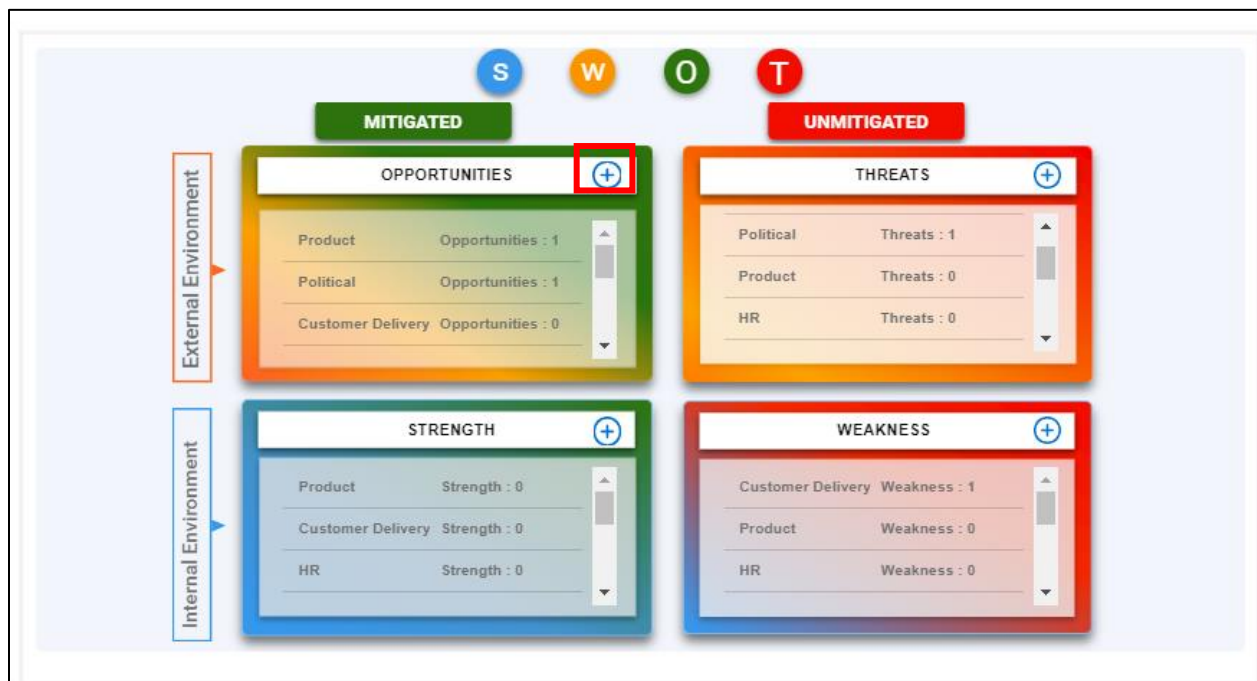
The following section under Account Planning is **SWOT** (outlined in red).



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.

The screenshot shows the 'Add New SWOT' form within the Forecastly application. The form is titled 'Add New SWOT' and is located in the center of the screen. It contains several input fields and dropdown menus, all of which are outlined in red. The fields are: 'SWOT Name' (text input), 'Account' (dropdown menu), 'Mitigation' (dropdown menu), 'SWOT Type' (dropdown menu), and 'Default Tag' (dropdown menu). The 'Save' button is located at the bottom left of the form. The background shows the application's navigation bar and a sidebar with 'External Environment' and 'Internal Environment' sections.

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).

The screenshot shows the SWOT analysis illustration in the Forecastly application. It features two main cards: 'STRENGTH' and 'WEAKNESS'. The 'STRENGTH' card is on the left and the 'WEAKNESS' card is on the right. Both cards are outlined in red. The 'STRENGTH' card lists 'Product', 'Customer Delivery', and 'HR' with a 'Strength : 0' value. The 'WEAKNESS' card lists 'Customer Delivery', 'Product', and 'HR' with a 'Weakness : 0' value. Below these cards, there is a detailed card for a specific SWOT item, also outlined in red. This card has a 'SWOT Name' field with the text 'Performance of delivery current scope' and a 'SWOT Description' field with the text 'Weekly dashboarding and monitoring, regular check up by group delivery'. At the bottom of this card, there is a blue 'Expand' button.

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

SWOT Name

Performance of delivery current scope

SWOT Description

Weekly dashboarding and monitoring, regular check up by group delivery

Comments

Rating

1

SWOT Opportunity

SWOT Goal

SWOT Idea

Tasks

0

0

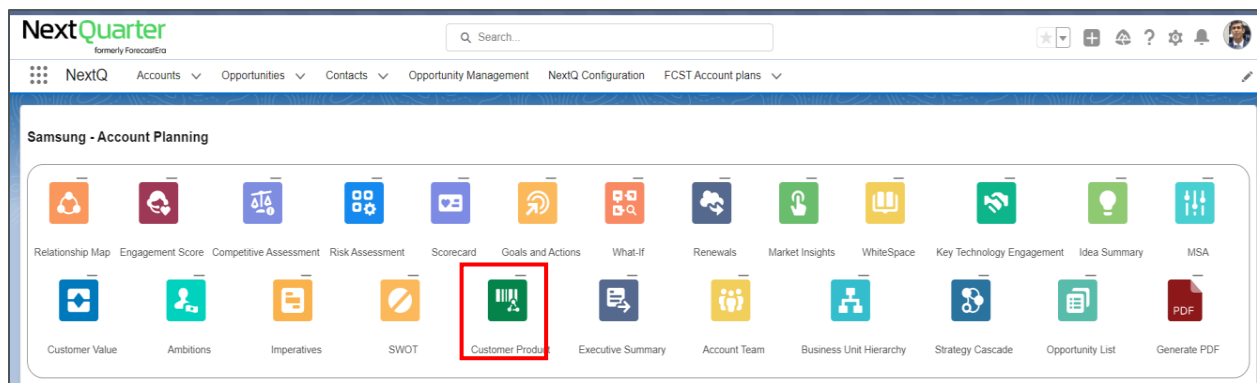
0

0

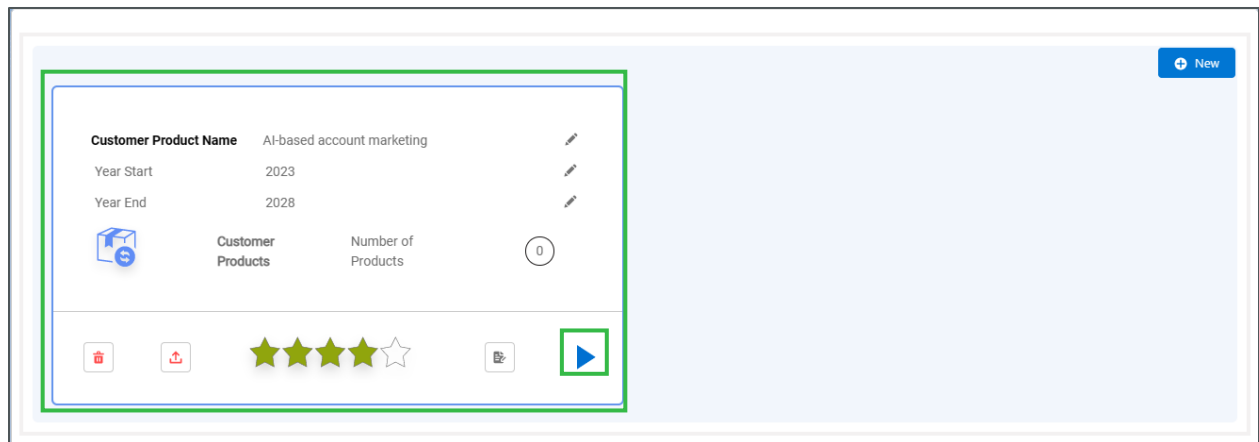
+

4.18. Customer Product

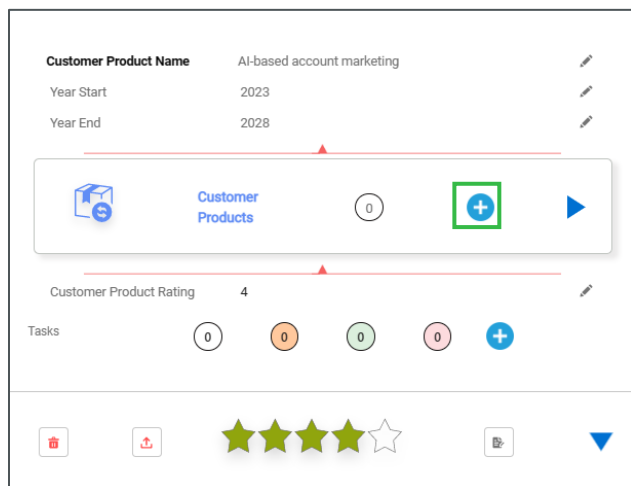
The following section under Account Planning is **Customer Product** (outlined in red).



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.

Add New Version

*Customer Product Name

Year start

Year End

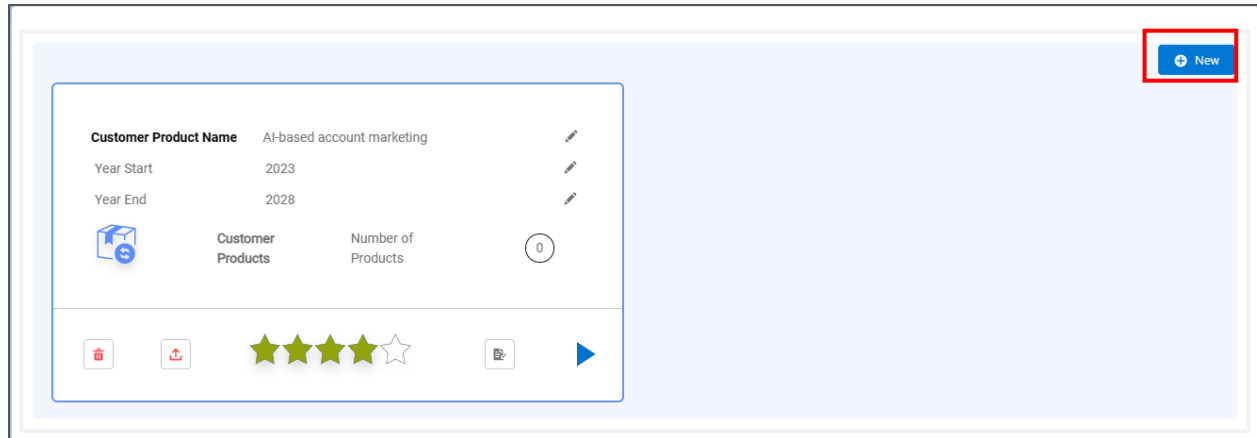
Customer Product Rating

--None--

Cancel

Save

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



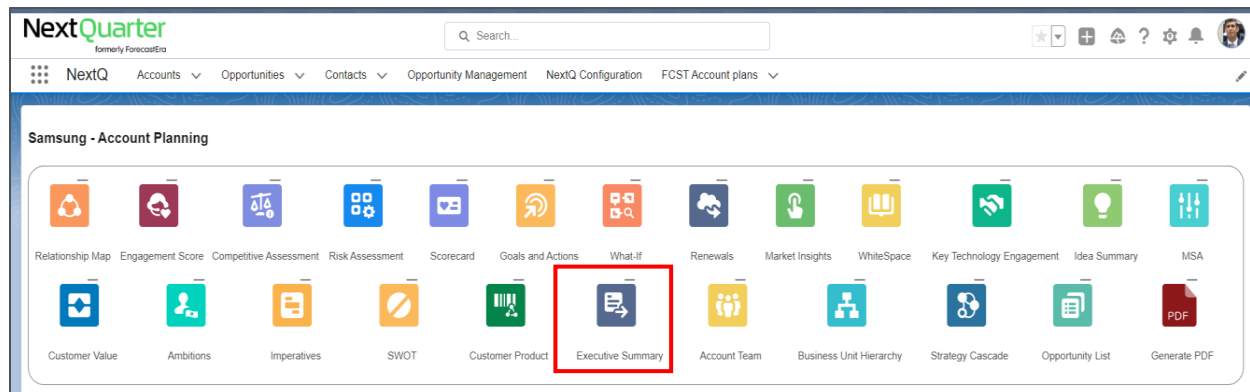
Users can define a new customer product as outlined below.

A form titled 'Add New Customer Product'. It contains four input fields: 'Customer Product Name' (with a red asterisk indicating it is required), 'Year start', 'Year End', and 'Customer Product Rating' (a dropdown menu currently showing '--None--'). At the bottom of the form, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red rectangular box.

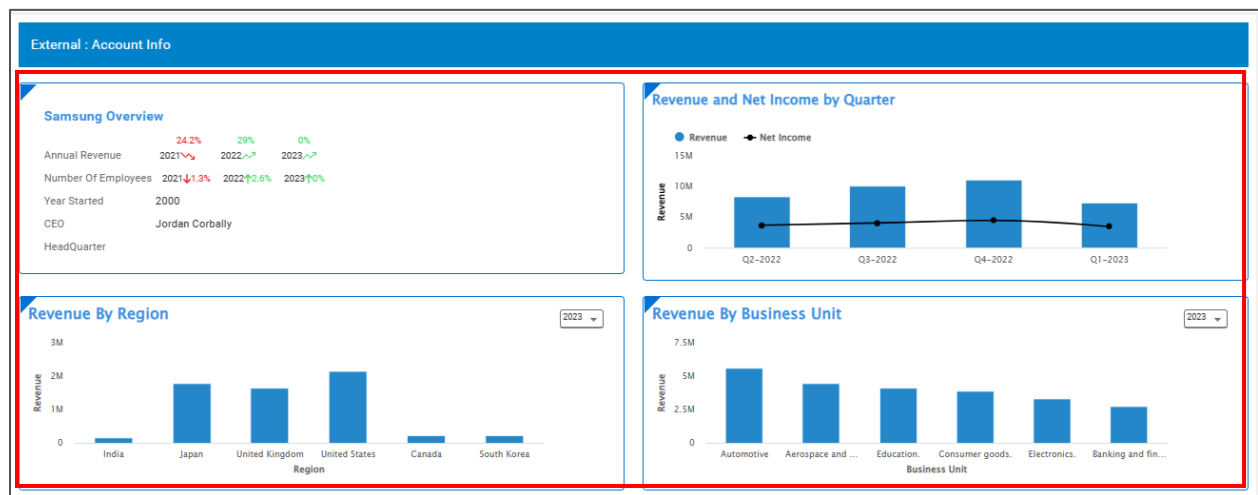
Users can enter the customer product name, year start, year-end, and customer product rating and click **Save** to add a new product.

4.19. Executive Summary

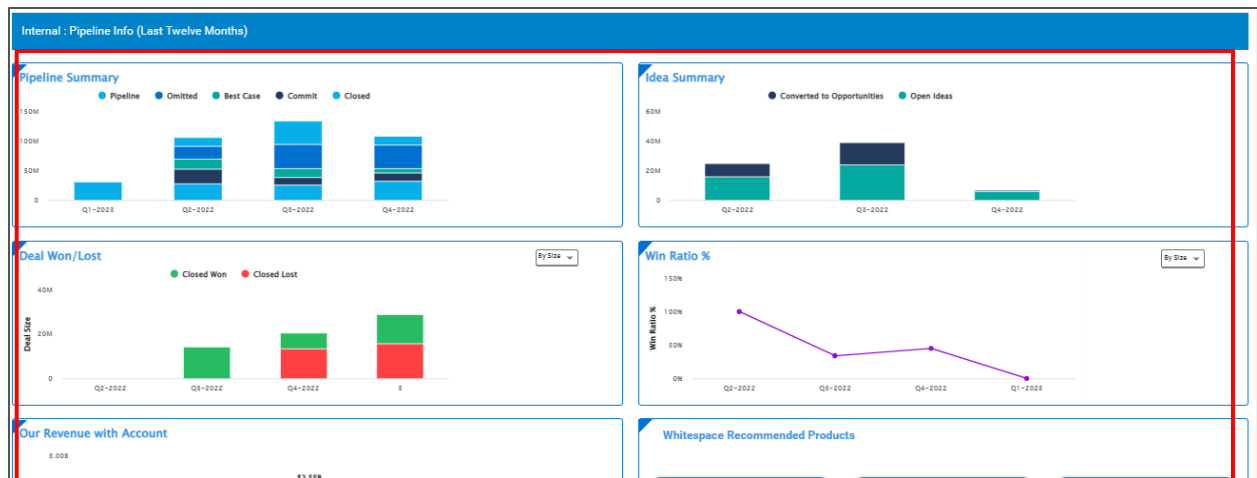
The following section under Account Planning Is **Executive Summary** (outlined in red).



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	EVR Azure	0	0	2		0	0	0		
Ainslee D	Windows	0	0	0		0	0	90		
Akrigg G	AI Perception & Mixed Reality	0	0	2		0	0	70		
Atchly K	AI Cognitive Services	0	0	0		0	0	70		
Chupin ER	EVR Experiences & Devices	0	0	2		0	0	0		
Chuter H	CEO	0	0	2		0	0	80		
Corbally E	CVR Cloud Supply Chain	0	0	36		0	0	100		
Delves Jed	CTO	0	0	0		0	0	90		
Lu Dawber	Director Sales	0	0	2		0	0	0		
Jordan Corbally	Enterprise Mobility & Mgmt	0	0	2		0	0	90		
Dederick Hubert	EVR Gaming	0	0	0		0	0	70		
Kelby Dincke	EVR Cloud & AI	0	0	0		0	0	80		
Jordan D	AI Cognitive Services	0	0	0		0	0	0		

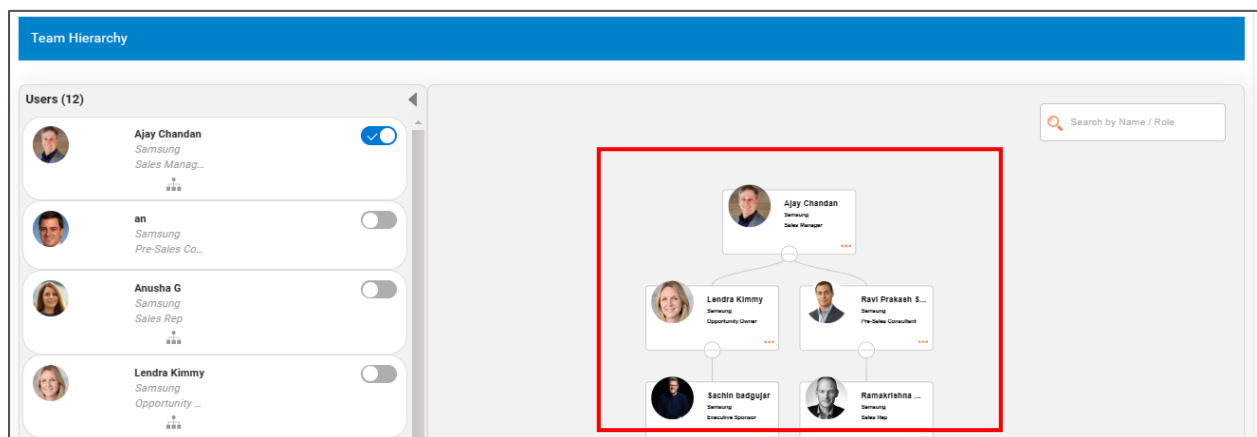
Users can view **Engagement and Relationship with Strategic Opportunities** (outlined in red).

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	2,727,744	0	0	36		0	0	100		1/1/2022
ARDEV9 Resiliency - Jeld-Wen Infra Assessment	2,086,442	0	0	36		0	0	100		5/28/2022
AR for Jubilant	5,671,803	0	0	43		0	0	30		9/9/2022
ABIAL - Windows 10 migration Pilot	3,759,023	0	0	71		0	0	45		2/12/2022
SOC60765 Service Desk & Enduser support	2,485,249	0	0	1		0	0	70		4/12/2022
KPMG-USA	8,648,589	0	0	1		0	0	100		8/12/2022
T&M Pratesh - OSDIV Opp	1,000,002	0	0	18		0	0	70		3/12/2022
Menzies Database Support Opp	8,000,003	0	0	20		0	0	0		1/15/2022
Windows Server Environment Managed Services RFPn Opp	1,000,004	0	0	1		0	0	60		2/10/2022
AWS migration project for Sony Mobile Opp	3,000,005	0	0	20		0	0	0		2/16/2022
Networks Infra Support LOT	7,000,006	0	0	1		0	0	90		1/25/2023
Network Managed Services - GE Renew opp	7,740,707	0	0	20		0	0	0		9/10/2022
onshore support opportunity	2,727,744	0	0	1		0	0	30		12/20/2022

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

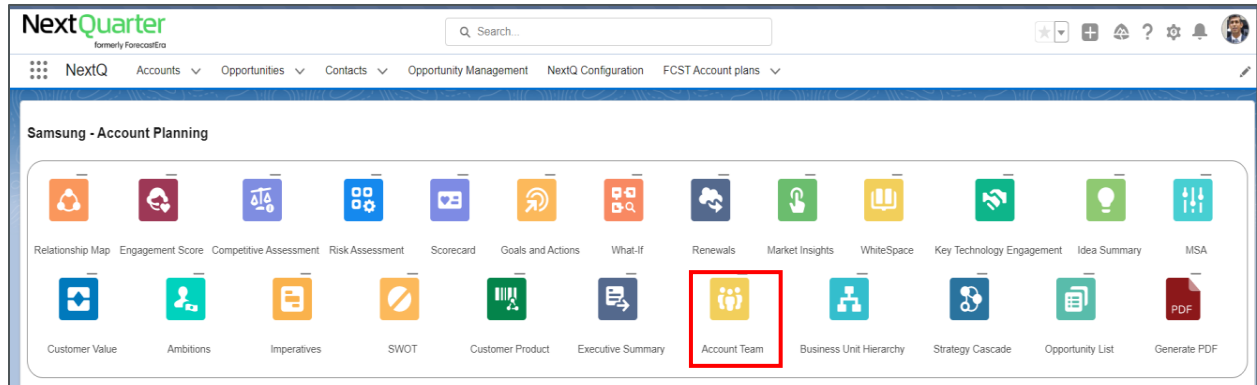


The last section of the Executive Summary Is the **Team Hierarchy**, where users can view the account team hierarchy (outlined in red).

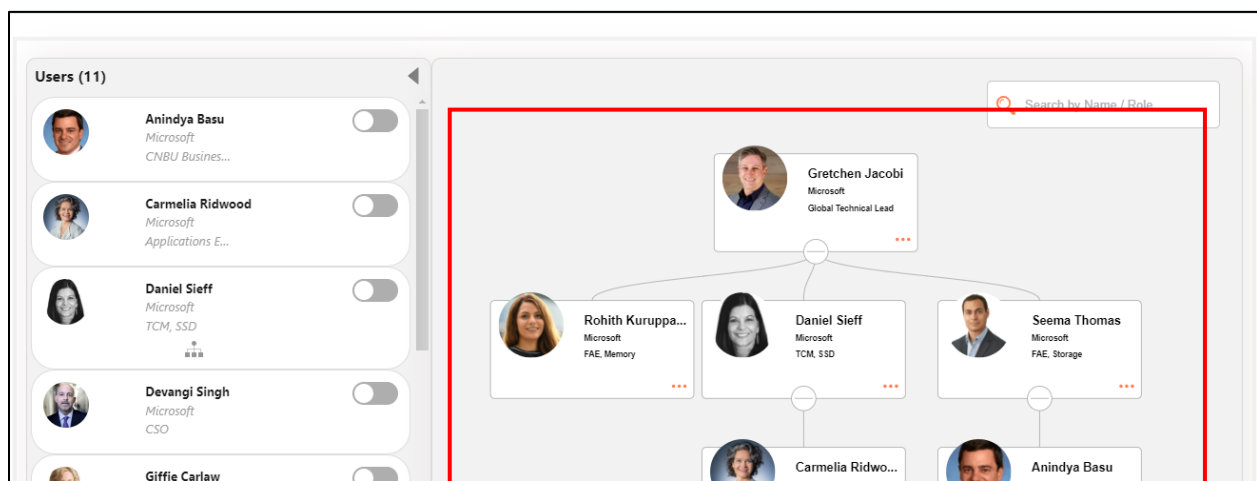


4.20. Account Team

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



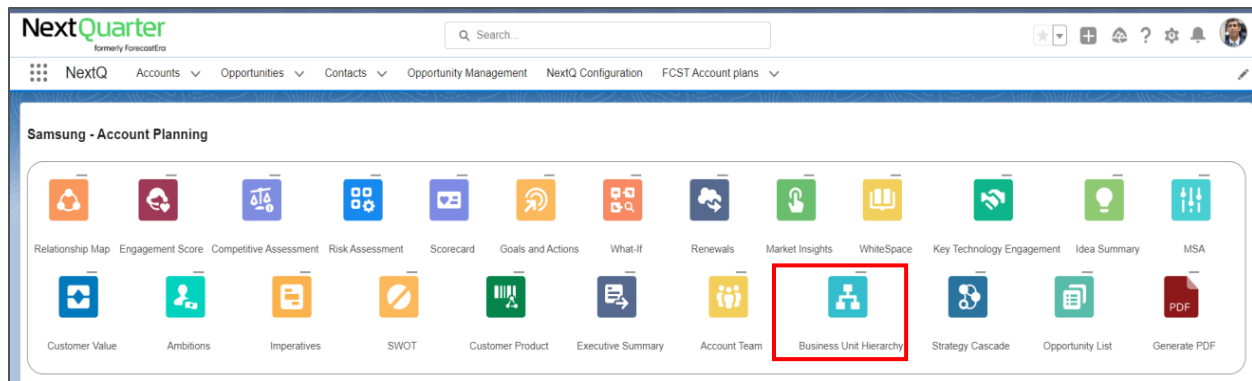
Users can view a hierarchy of users in the organization (outlined in red).



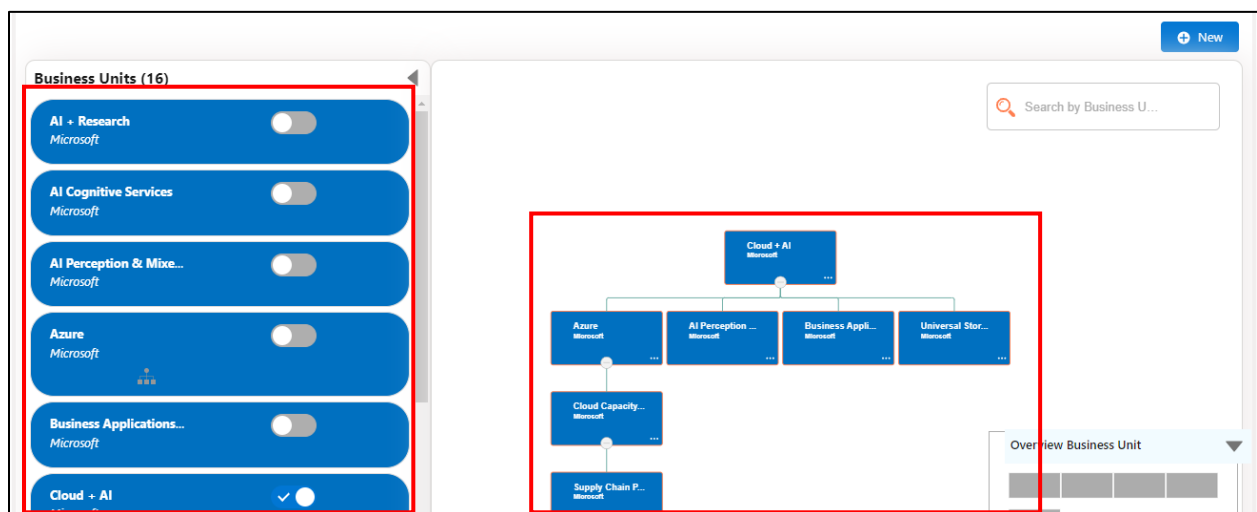
Like the org chart, users can select the topmost account team executive to view the partial hierarchy and drag and drop cards at any level to include them on the account team hierarchy.

4.21. Business Unit Hierarchy

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



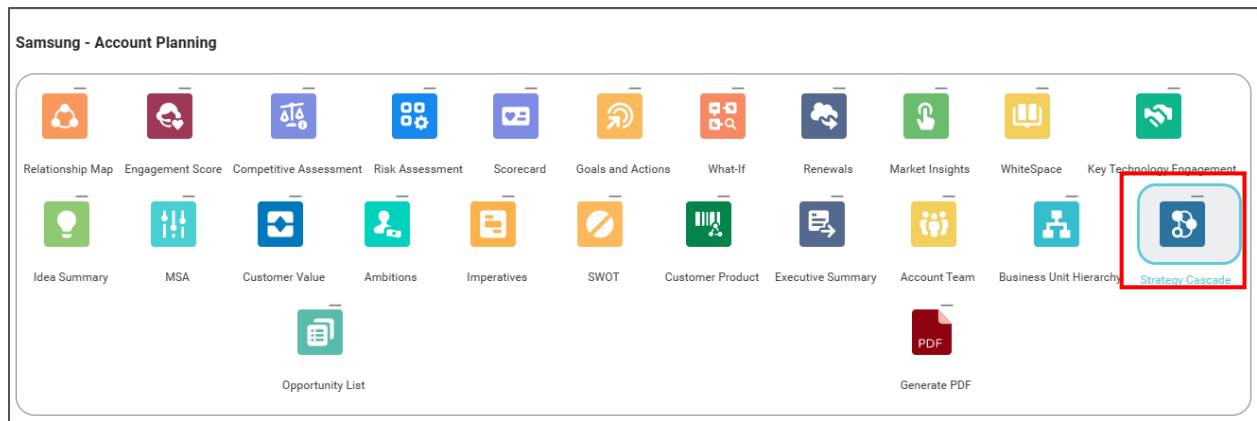
This section allows users to view **the Business Unit Hierarchy** in the account (outlined in red).



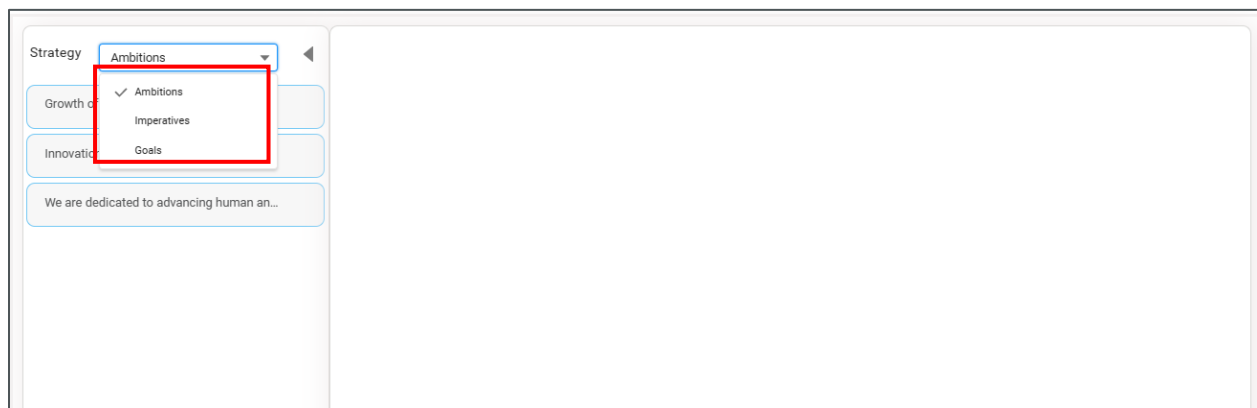
Like the org chart, users can select the topmost business unit to view the partial hierarchy and even drag and drop cards at any level to include them on the **Business Unit Hierarchy**.

4.22. Strategy Cascade

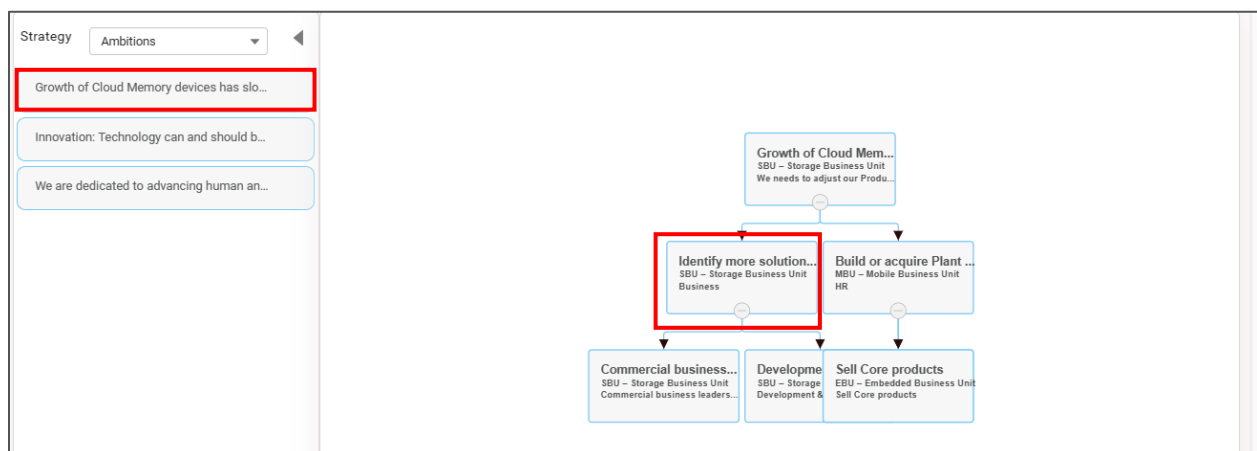
The following section under Account Planning is **Strategy Cascade** (outlined in red).



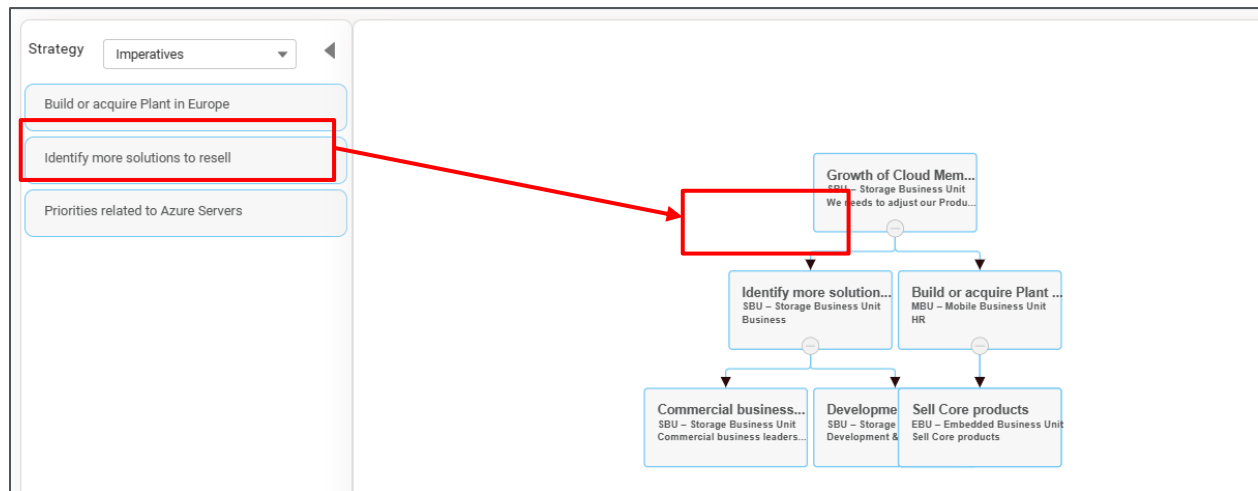
Users can see the **Strategy Cascade of Ambitions, Imperatives, and Goals and Actions**, depending on the selection (outlined in red).



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).

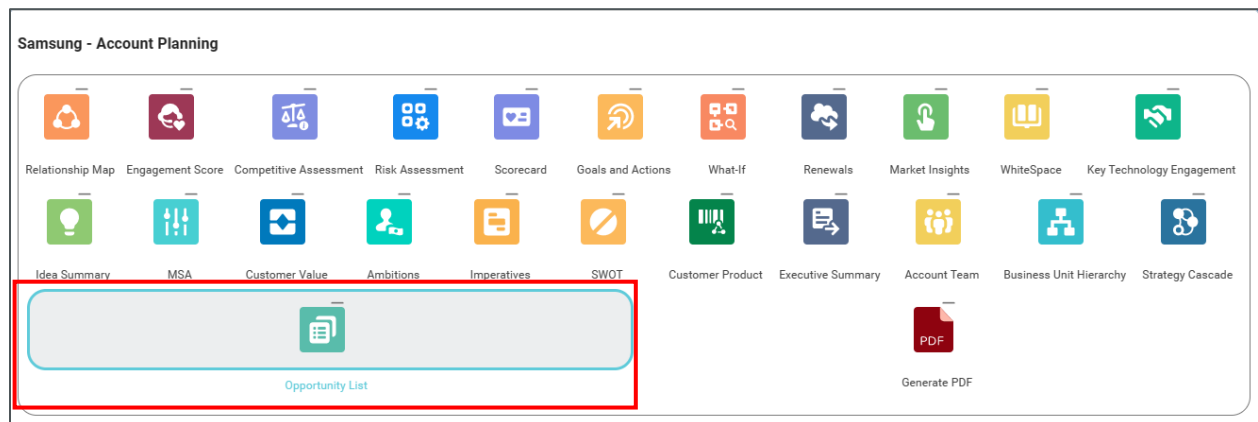


Users can also add an imperative to an ambition by dragging and dropping a card onto any level, just like with the org chart (outlined in red).



4.23. Opportunity List

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

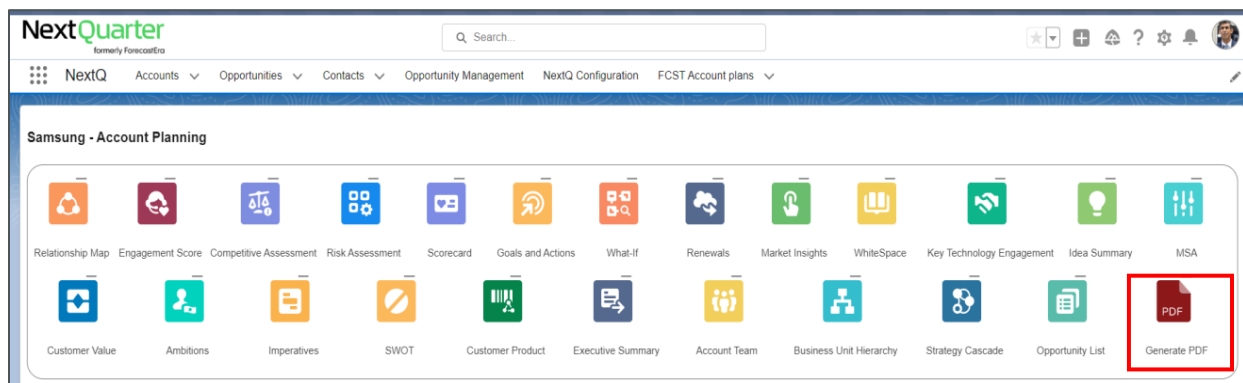


Users have a list of opportunities, which allows for a single view of **Deal Name**, **Days to Close**, **Amount**, **Close Date**, **Forecast Category**, **Opportunity Score**, **Stage Progress**, **Engagement Score**, and **Sales Methodology** qualifiers (outlined in red).

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
AMD0976 Menzies Database	5	\$8,000,003.00	1/15/2023	Pipeline		56 High	
Anaplan- 24/7 & L1 offshore support opportunity	-374	\$3,727,744.00	1/1/2022	Pipeline		31 Medium	
AOEDIV9087	14	\$1,000,002.00	1/24/2023	Pipeline		42 Medium	
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
AR for Jubilant	-123	\$5,671,803.00	9/9/2022	Pipeline		39 Medium	
ARDE90 Rezilyens - Jeld-Wen Infra Assessment	-227	\$2,086,442.00	5/28/2022	Pipeline		20 Low	
ASDO908 Sydney	256	\$7,331,545.00	9/23/2023	Pipeline		34 Medium	
ASG Group-Fed Cloud Mgmt.	-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).

Select Feature for PDF Generation

- ☒ Executive Summary
- ☒ Scorecard
- ☐ MSA
- ☐ Partners
- ☒ Procurement Process
- ☐ Imperative
- ☒ Idea Summary
- ☒ Financial Grid

Generate PDF

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

