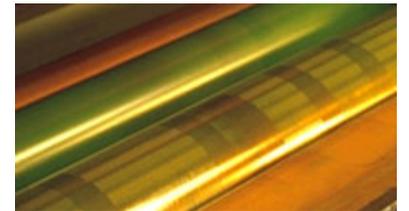


JOBZ!

Sales Management Through Self Management

Part 2; People

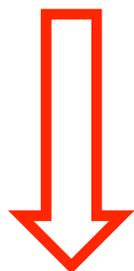


Seize the Data

- Sales reps create contact data in JOBZ!
 - Customers, Prospects, Delivery Destinations etc.
- Contact data supports workflow.
 - RFE > Proposal > SOP > Invoice
- JOBZ! also organizes the contact data into Sorts and Reports.
 - Contact history, reminders, marketing groups, etc.
- Sales reps use these Sorts and Reports to manage themselves.
- Management uses the same Sorts and Reports to manage sales.

The Data Set

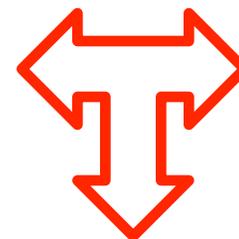
Sales Rep



Rep Data

Manager

Rep Data

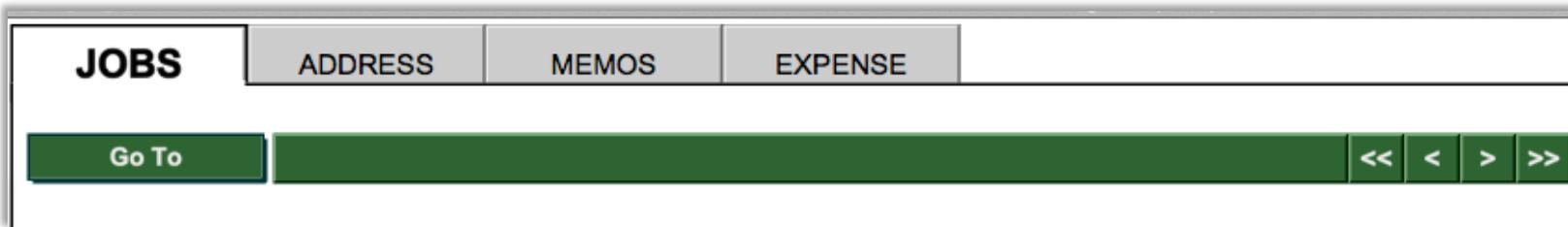


Rep Data

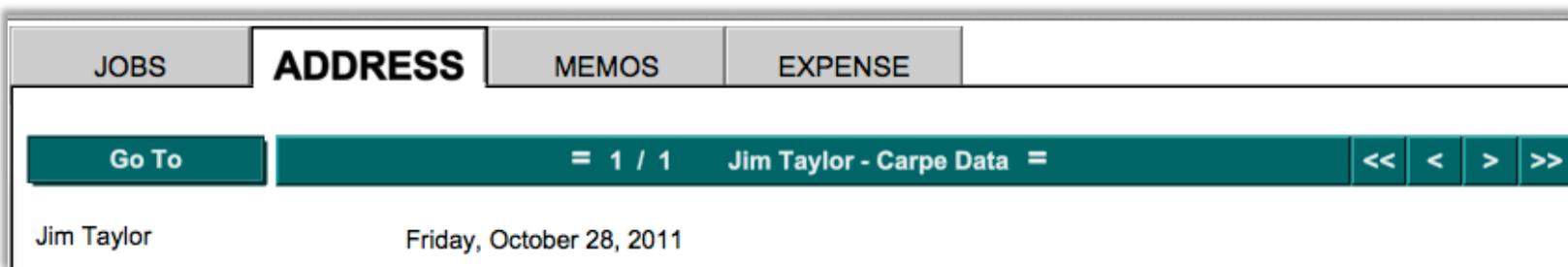
Rep Data

Objective- CRM (Customer Relationship Management)

- Paperwork Flow & Communications
 - Request for Estimate, Proposal, Order Entry, Confirmations, etc.
- The JOBS tab:



- Contact (People) Management:
 - Prospecting
 - Marketing
 - Territory & Account Assignments
- The ADDRESS tab:



ADDRESS Contact Management: Sales Automation

Click to record a contact made today. Add last contact to History and set a next contact.

The screenshot shows the ADDRESS software interface for contact management. The main window displays contact details for 'Mr. Rich Text', a Designer at 'Database Testing, Inc.' in Campbell, CA. The interface includes a 'Today' tab for recording contacts, a 'Next Contact' section for planning future interactions, and a 'Contact History' section for tracking past contacts. A list of 'Rich Text's Coworkers' is visible on the right side.

Annotations:

- Google Map:** Points to the address field.
- Record a last contact with a group of people:** Points to the 'Last Contact' section.
- Plan a next contact with a group of people:** Points to the 'Next Contact' section.
- List of all the people in the company. Click on them to navigate, and isolate the company as a found set.** Points to the 'Rich Text's Coworkers' list.
- Contact History is kept by clicking the Today button and using the fields below it, then clicking the Next Contact buttons.** Points to the 'Contact History' section.

Text on the left side:

Tab panel: View of Jobs for this person, by title, or by date. Memos is correspondence to the person. Delivery is where you enter notes that will appear on Delivery Instructions. Budget sets a sales target for the person, that can roll up to a company-wide sales budget.

Knowledgeable use of this screen benefits the Sales Rep, and by extension, Management



ADDRESS Categories

Multiple ways to categorize a person.

Company-wide Segments on this tab.

Regional-specific Segments are behind this tab.

The screenshot displays the 'Segments' tab for a contact named Mr. Rich Text. The contact information includes: Title: Designer, Company: Database Testing, Inc., Co. Type: Computer Software, Address: 1999 S. Bascom Ave., Suite 700, Campbell, CA 95008, Email: pressok@yahoo.com, Direct: 408 395-8183, Cell: 408 666-7356, Payer: 408-666-7356, Cust. #: 36779, Category: Account, Temp: Target.

The 'Segments' section contains a list of checkboxes for various marketing channels, such as Plastic, Political, P-O-P, Post Cards, Posters, Rack Cards, Self Mailers, Shells, and Specialty. A red box highlights the 'Check' and 'Uncheck' buttons, with a callout stating: 'Check or un-check a found set of people.' Another callout says: 'Check all boxes that apply. Management defines available selections.'

The 'Campaigns' section includes checkboxes for JOBZ News, Management Newsletter, Newsletter, Support Newsletter, Test, and User Newsletter. A callout states: 'Build a marketing campaign around these segments, in combination with any of the other categories.'

At the bottom right, a sidebar lists 'Rich Text's Coworkers' including Steve Austin, Lois Bidder, Lance Boyle, Max Clearance, Noah Dia, Ha, Ric, An, Ru, Di, Ro, Aa, Ph, Ne, Ac, Al, Je, Se, Su, Receiving, Central Receiving, Rich Text, and Phil Thepresses. A callout says: 'Export selected contact data to Excel to upload to an email campaign service.' and 'Or use the data to drive a digital variable data press. You are a printing company, right?'.

The 'JOBS' table at the bottom left shows a summary of printing jobs:

Month	Year	Plant	Type	Amount
January	2012	CD	Litho	\$125,000
February	2012	CD	Litho	\$250,000
March	2012	SF	WF	\$12,500
March	2012	CD	Litho	\$10,000
May	2012	CD	Litho	\$10,000

Summary: 12 Mo \$102,529 2010 \$28,412 Budget \$407,500 YTD \$102,529



ADDRESS: Merge Mail Capabilities



Build a found set of contacts by category, then send each of them a letter, or post card, or email.

February 25, 2007

Hugh Saturation
File Edit View, Inc
18338 Las Cumbres
Los Gatos CA 95033

Hello Hugh,

This is an example of a Merge letter sent directly from JOBZ!

First, I selected a group of people that I wanted to send a message to, including you. The criteria for defining this group can be extremely flexible. For example, I might want to send a printing sample to all my Designers. Then I can narrow this list down, or expand it to include Prospects in the Banking segment.

Then I typed this text, a salutation and signoff, and clicked Print. You (and all the others) are viewing the result. Personalized for you, with my company's letterhead graphics and even my signature. I can also print envelopes or address labels.

Or, using the JOBZ! / Email integration capability, I could eliminate the paper and send an individual email to each recipient.

Finally, the contact history field of each recipient is updated with the date and subject of this memo, so I can later be reminded of what I sent to whom, and when. I can even schedule follow-up phone calls to remind me later to have a conversation about it with each recipient.

Thanks,

Eric Clapton
Carpe Data

February 25, 2007

Amber Lith
Database Testing, Inc
18338 Las Cumbres
Los Gatos CA 95033

Hello Amber,

This is an example of a Merge letter sent directly from JOBZ!

First, I selected a group of people that I wanted to send a message to, including you. The criteria for defining this group can be extremely flexible. For example, I might want to send a printing sample to all my Designers. Then I can narrow this list down, or expand it to include Prospects in the Banking segment.

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Or, using the JOBZ! / Email integration capability, I could eliminate the paper and send an individual email to each recipient.

Finally, the contact history field of each recipient is updated with the date and subject of this memo, so I can later be reminded of what I sent to whom, and when. I can even schedule follow-up phone calls to remind me later to have a conversation about it with each recipient.

Thanks,

Jim Taylor
Carpe Data

February 25, 2007

Richard Head
Database Testing, Inc
7525 SE Lake Road
Milwaukie OR 97132

Hello Richard,

This is an example of a Merge letter sent directly from JOBZ!

First, I selected a group of people that I wanted to send a message to, including you. The criteria for defining this group can be extremely flexible. For example, I might want to send a printing sample to all my Designers. Then I can narrow this list down, or expand it to include Prospects in the Banking segment.

Then I typed this text, a salutation and signoff, and clicked Print. You (and all the others) are viewing the result. Personalized for you, with my company's letterhead graphics and even my signature. I can also print envelopes or address labels.

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Finally, the contact history field of each recipient is updated with the date and subject of this memo, so I can later be reminded of what I sent to whom, and when. I can even schedule follow-up phone calls to remind me later to have a conversation about it with each recipient.

Thanks,

Jim Taylor
Carpe Data

February 25, 2007

Ben Around
The Block Design
665 Third Street
San Francisco CA 94103

Hello Ben,

This is an example of a Merge letter sent directly from JOBZ!

First, I selected a group of people that I wanted to send a message to, including you. The criteria for defining this group can be extremely flexible. For example, I might want to send a printing sample to all my Designers. Then I can narrow this list down, or expand it to include Prospects in the Banking segment.

Then I typed this text, a salutation and signoff, and clicked Print. You (and all the others) are viewing the result. Personalized for you, with my company's letterhead graphics and even my signature. I can also print envelopes or address labels.

Or, using the JOBZ! / Email integration capability, I could eliminate the paper and send an individual email to each recipient.

Finally, the contact history field of each recipient is updated with the date and subject of this memo, so I can later be reminded of what I sent to whom, and when. I can even schedule follow-up phone calls to remind me later to have a conversation about it with each recipient.

Thanks,

Jimmy Buffett
Carpe Data

February 25, 2007

Seymour Hickies
One.com
665 Third Street
San Francisco CA 94103

Hello Seymour,

This is an example of a Merge letter sent directly from JOBZ!

First, I selected a group of people that I wanted to send a message to, including you. The criteria for defining this group can be extremely flexible. For example, I might want to send a printing sample to all my Designers. Then I can narrow this list down, or expand it to include Prospects in the Banking segment.

Then I typed this text, a salutation and signoff, and clicked Print. You (and all the others) are viewing the result. Personalized for you, with my company's letterhead graphics and even my signature. I can also print envelopes or address labels.

Or, using the JOBZ! / Email integration capability, I could eliminate the paper and send an individual email to each recipient.

Finally, the contact history field of each recipient is updated with the date and subject of this memo, so I can later be reminded of what I sent to whom, and when. I can even schedule follow-up phone calls to remind me later to have a conversation about it with each recipient.

Thanks,

Jimi Hendrix
Carpe Data

February 25, 2007

JOBZ! Printing Sales Software

18338 Las Cumbres Road
Los Gatos, CA 95033
408-390-8183
jim@carpedata.com
www.carpedata.com

February 25, 2007

Serge Protector
Database Testing, Inc.
1740 Technology Dr. Suite 100
San Francisco CA 94080

Hello Serge,

This is an example of a Merge letter sent directly from JOBZ!

First, I selected a group of people that I wanted to send a message to, including you. The criteria for defining this group can be extremely flexible. For example, I might want to send a printing sample to all my Designers. Then I can narrow this list down, or expand it to include Prospects in the Banking segment.

Then I typed this text, a salutation and signoff, and clicked Print. You (and all the others) are viewing the result. Personalized for you, with my company's letterhead graphics and even my signature. I can also print envelopes or address labels.

Or, using the JOBZ! / Email integration capability, I could eliminate the paper and send an individual email to each recipient.

Finally, the contact history field of each recipient is updated with the date and subject of this memo, so I can later be reminded of what I sent to whom, and when. I can even schedule follow-up phone calls to remind me later to have a conversation about it with each recipient.

Thanks,

Jim Taylor
Carpe Data

Each letter is signed by the assigned Sales Rep. Or, if you like, by the Sales Rep's manager.



ADDRESS Sales Management

Go To Organize **New...** Actions = 5 / 23 = << < > >> Find... HELP

Address Manager Screen

Company: Database Test
Name: Rich Text
Designer: 408 395-8183 x12, 1999 S. Bascom Ave., Suite 700, Campbell CA 95008, pressok@yahoo.com

Assigned Sales Rep: Jim Taylor
Region: Northern California
CSR: [Empty]
Category: Account
Temperature: Target
Manager Temperature: Red

Rich Text's Coworkers and Assigned Reps

Steve Austin	Jim Taylor
Lois Bidder	Jim Taylor
Robin M. Blind	Jim Taylor
Lance Boyle	Jim Taylor
Max Clearance	Jim Taylor
Phil N. Goode	Jimmy Buffett
Richard Head	Jim Taylor
Tim Iddley	Jimmy Buffett
Amber Lith	Jim Taylor
Ruby Lith	Jim Taylor
Rhoda Long	Jimmy Buffett
Di Lux	Jim Taylor
Aart Major	Jim Taylor
New Name	Jim Taylor
Accounts Payable	Jim Taylor
Al Payslo	Jim Taylor
Jean Pool	Jim Taylor
Serge Protector	Jim Taylor
Susie Queue	Jim Taylor
Jonathan A.	Jonathan
Receiving	Jim Taylor

Entertain Account Challenges, Reassign Accounts.

Manager's own category

Keep private Manager notes, and monitor selected contacts.

History Challenge Segments Campaigns Housekeeping Budget Account Lists

Number of Contacts: 165 Budget \$407,500
Days Since Last Contact: 0 YTD \$102,529
Last Year \$28,412

Last Contact: 10/28/2011
What: Good Conversation
Comment: Encouraging
Next Contact: 11/4/2011
What: Check in
Why: Get a chance to quote

Manager's Private Notes
Keep an eye on this contact- may need to be reassigned.

Contact History
10/28/2011 10:49:44 AM JT: Good Conversation Encouraging
5/25/2011 7:29:51 AM JT: Get meeting Dismissing a contact-origin toDo from the ToDo list
5/1/2011 6:43:15 PM JT: Left Voice Mail Requested info
5/1/2011 6:11:34 PM JT:

Monitor This Contact > X
List Monitored Single Contact Report
Sales Rep's Manager as set in Personalization: Jim Taylor jim@carpedata.com



A systematic approach to active account maintenance.

Go To Organize **New...** Actions = 3 / 9 = << < > >> Find...

Address Manager Screen

Company: **One.com** Assigned Sales Rep: Jimi Hendrix
Name: **Art Major** Region: Pacific Northwest
408 395-8183 665 Third Street Suite F San Francisco CA 94111 pressok@yahoo.com
Category: **Prospect**
Temperature: **Target**
Manager Temperature: **Red**

Entertain account Challenges

History Challenge **Segments** Campaigns Housekeeping Budget Account Lists

Challenged

Challenged By: Jimmy Buffett
Challenge Date: 10/28/11
Review Date: 1/26/12
Clear

List Challenged
Challenge Notice
Print Challenge List

Promote active account maintenance.

To reassign single contacts to a new sales rep, simply change the name of the Assigned Sales Rep above. To reassign contacts en masse perform a Find, and proceed to the \$ List view; verify the correct contacts are listed.

Reassign accounts en masse.

Go To 1 / 8 << < > >> Organize **New...** Actions Output Find... **HELP**

Segment View Date View **\$ View** Clear X Find Select X X All [Prepare to Reassign Accounts](#)

Company	Name	Modified	Select X	Category	Temp.	Sales Rep	Budget	YTD	Last Year	12 Months
Eight, Inc	Billy Rubin 408 395-8183			Account	Annual	Jim Taylor				Reassign 8
Garden Supply	Sal Monella 408 395-8183			Account	Cool	Jimi Hendrix				
One.com	Art Major 408 395-8183									
The Block Design Group	Ben There 408 395-									
The Block Design Group	Chip Offah 408 395-									
Eight, Inc	Accounts Payable 408 395-8183									
Cameloid Concepts	Al Pacca									
American Imaging Solutions (AIS)	Tim White									

Reassign All

Assign all 8 contacts in the found set to this rep: Jim Taylor

Cancel OK

10/28/11 11:30:41 AM JOBZ!





The Shark List

- Answers the question: Is anybody calling on...?
- Enables the question: May I call on them instead?
- Encourages competition for accounts.

Go To

ADDRESS		MEMOS	EXPENSE
= 1 / 8		Billy Rubin - Eight, Inc	
Friday, October 28, 2011			
To Do	...	Delegated To Do	
		Due	Done
rubin		10/28/11	<input type="radio"/>
... duty after installation.			
... list (PDF? xlsx?)		10/20/11	<input type="radio"/>
			<input type="radio"/>
1 (Budgeting etc)			<input type="radio"/>
			<input type="radio"/>

The Shark List: Keep the waters churning

Done

MANAGER

[Request a Challenge](#)

[Show Challenges to You](#)

Name

Company

You can inquire by company or contact name.

This will display the entire list of Assigned Accounts and Prospects, and who the assigned rep is.

Bold Face company name indicates that there are sales in the trailing 12 months to that company.

The Manager's view includes the \$ amount of those sales.

Companies NOT in Bold might be ripe for re-assignment.

**Assigned Accounts and Prospects
By Company Name**

BBDO Detroit	Paul Simon	Portland
Cameloid Concepts	Jimi Hendrix	San Ramon
Cursory Software	Paul Simon	Portland
Eight, Inc	Jimi Hendrix	San Ramon
Evolo	Paul Simon	Portland
Henpect	Paul Simon	Portland
One.com	Jimi Hendrix	San Ramon
The Block Design Group	Jimi Hendrix	San Ramon

The Shark List: Account Challenge

These questions are also available on the contact's Strategic Account Profile, accessed on the Company tab. (next slide)

This generates an email to the manager, with list of questions:

The manager then decides whether or not to entertain the challenge, and if so, records it on the Sales Management screen, sets a date for review, and notifies the current rep by email. This message then appears on the contact's input screen:

Challenged!
Review
9/8/2009

Company Name:
 Primary Contact:
 Why this Account Should Be Assigned to Me:
 Describe Our Current Relationship with this Company:
 Company's Annual Sales: \$ Fiscal Year End Month:
 Describe the Company's Industry & Marketplace:
 Number of Employees:
 Names of Divisions:
 Number of Facilities & Locations:
 Major Products & Recent Product Introductions:
 Products & Services We Offer That They Need:
 Their Annual Spend in these Segments: \$
 Our Potential Annual Sales: \$
 Where is their Pain?
 Who is Our Competition?
 What is Their Incentive to Change Suppliers?
 Ease of Implementation:
 Seasonality of Work:
 Profitability of Work:
 (etc.)

Business Letter Templates

Go To		NEW TEMPLATE	List All
Templates are shared by all. Anyone can "Use" a template as well as create, edit or delete them.			
Subject	Modified	Text	
Introductory Letter; Folding Cartons	10/28/2011 4:06:26 PM	We are pleased to announce the grand opening of our Folding Carton Division.	<input type="button" value="Use"/> <input type="button" value="Edit"/>
Introductory Letter	10/28/2011 4:06:13 PM	This is to introduce our company. To begin, I selected a group of people that I wanted to send a message to,	<input type="button" value="Use"/> <input type="button" value="Edit"/>
Follow-up letter	10/28/2011 4:05:49 PM	Thank you for meeting with me the other day. I chose this template from the MEMOS database, and addressed it to you,	<input type="button" value="Use"/> <input type="button" value="Edit"/>
Cover Sheet	10/28/2011 4:05:35 PM	Thanks for your interest in our company. Please review the accompanying materials for more information.	<input type="button" value="Use"/> <input type="button" value="Edit"/>

Compose, or hire a professional writer to compose, standard business letters that any of the sales reps can use when they need to correspond with a prospect.

A sales rep simply clicks Use, then addresses the letter, and prints it out.

Annual Sales Budget

- Sales reps build a budget
- One row at a time
- One contact at a time
- It will all roll up

Go To = 1 / 2 = << < > >> Organi

Name Mr. Rich Text
 Title Designer
 Company Database Testing, Inc.
 Co. Type Computer Software
 Address 1999 S. Bascom Ave.
 Address Line 2 Suite 700 USA
 City, State, Zip Campbell CA 95008
 Email pressok@yahoo.com
 Direct 408 395-8183 Cell 408 666-7356
 Fax 408-395-0813
 Toll Free 888-734-9348
 Pager 408-666-7356 Cust. # 36779
 Category Account Temp. Target

JOBS	/ date	PO	MEMOS	- from	Notes	Delivery	Budget	Alt.
Month	Year	Plant	Type	Amount				
January	X 2012	CD	Litho	\$125,000				
February	X 2012	CD	Litho	\$250,000				
March	X 2012	SF	WF	\$12,500				
March	X 2012	CD	Litho	\$10,000				
May	X 2012	CD	Litho	\$10,000				
12 Mo	\$102,529	2010	\$28,412	Budget	\$407,500			
				YTD	\$102,529			

\$ Plan Note \$Plan Budget Report Chart
 Rich buys the best printing and the best wine.



Sales Reps Can Keep Their Eyes on the Ball

ADDRESS List View: \$Plan

Next	Temp.	Segment	\$Plan Report
Next +1 +30 Mon 11/28 9:00 AM Follow Up Memo Filemaker question Last Year \$566,118 YTD \$513,579 Budget \$1,102,000	Target Account What	Demo Brochures Direct Mail Web	The "\$ Plan" shows last year's sales, this year's sales and your budget for the contact (in red until it is met.)
Next +1 +30 Fri 11/11 Follow up re: Cartons Last Year \$94,348 YTD \$228,134 Budget \$500,000	Target Account What	Folding Cartons	This is a brief description of how you intend to sell to this contact. There is also a detailed company-level plan.

Jim Taylor Budget \$1,377,500 7 Contacts

\$146,000 Abort Retry Ignore

Rita Goodbook
408 395-8183

Budget: **\$146,000**
YTD: \$113,066
2008: \$85,980

The company-level plan enables strategic selling.
Since Last Contact: 30 #5

Red = You are under budget

\$631,000 Database Testing, Inc.

Rich Text
408 395-8183 x123

Budget: **\$446,000**
YTD: \$327,828
2008: \$233,759

Rich buys the best printing and the best wine.
Since Last Contact: 39 #41

Amber Lith
408 395-8183

Budget: \$185,000
YTD: \$192,155
2008: \$34,650

A budget is month-by-month predictions in 4 categories of work.
Since Last Contact: 80 #5

\$455,500 File Edit View, Inc.

Rachel Tensions
408 395-8183

Budget: **\$255,500**
YTD:
2008: \$301,256

This is a brief description of how you intend to sell to this contact.
Since Last Contact: 95 #2

Hugh Saturation
408 395-8183

Budget: \$150,000
YTD: \$505,700
2008: \$106,278

The only real question is what to do next. Though what you did last year can be informative.
Since Last Contact: 91 #12

Yuri Dickulous
408 395-8183

Budget: **\$50,000**
YTD: \$11,111
2008: \$164,841

Sales budgets are rolled up from individual contacts into company summaries and sales office totals.
Since Last Contact: 74 #15

Days since last contact

Number of contacts

Sales Plan

6/12/2009

JOBZ!

1



The \$Plan

Set a Budget for a contact in the Budget tab on the ADDRESS input screen.

- Run the \$Plan or print the \$Plan Report.
- Keep your eye on the plan.

Screen view of the \$Plan.

Company	Name	Omit	Select	Last Contact	Since Last	#	Next	+	-	Temp.	Segment	\$Plan Report
11 by Seventeen Paige Turner 408-395-8183				Today	Wed 10/19		Next	+1	+30		Demo Brochures Direct Mail Web	The "\$ Plan" shows last year's sales, this years sales and your budget for the contact (in red until it is met.)
				Since Last / #	9 / 104		Mon 11/28			Target		
				What	Sent Proposal		9:00 AM			Account		
				Result	Digital Example		Follow Up Memo			What		
				10/19/2011 10:41:51 AM JT: Sent Proposal Digital Example 10/3/2011 3:58:27 PM JT: Sent Proposal JOBZ! Savannah Accounting Locked			Filemaker question					
Jim Taylor							Last Year	\$566,118	YTD	\$513,579	Budget	\$1,102,000
Buffalo Rome Allen Wrench 408 395-8183				Today	Sat 9/24		Next	+1	+30		Folding Cartons	This is a brief description of how you intend to sell to this contact. There is also a detailed company-level plan.
				Since Last / #	34 / 5		Fri 11/11			Target		
				What	Reassigned					Account		
				Result			Follow up			What		
				5/11/2010: Reassigned 1/5/2010: Imported 12/31/2009: Mailing FoldingCtnDiv 8/20/2009: Good Conversation Will let us quote 9/12/2005: Spoke Encouraging			re: Cartons					
Upcoming Birthday! Jimmy Buffett							Last Year	\$94,348	YTD	\$228,134	Budget	\$500,000

Print a hard copy of the \$Plan.

Total will be red until you meet the budget with YTD (Year To Date) sales.

Sold jobs from last year and current year total here.



The \$Plan

11 by Seventeen Paige Turner 408-395-8183	Today Thu 9/17 Since Last / # 14 / 1 What Sent Proposal Result Hecht With it All 9/23/2009 Previous Cust. # 051.301796 9/17/2009: Sent Proposal Hecht With it All 8/20/2009: Sent Email Re: Shipping hours	Next +1 +30 Wed 9/23 Target Account Follow up Reason for the follow-up; something to talk about.	Demo Catalogs The "\$ Plan" shows last year's sales, this year's sales and your budget for the contact (in red until it is met.)
Jim Taylor	Last Year \$37,856 YTD \$302,484 Budget \$632,000		
Database Testing, Inc. Rich Text 408 395-8183 x123	Today Thu 9/17 Since Last / # 14 / 44 What Mailing Result Bud sample 9/23/2009 Previous Cust. # 100061 9/17/2009: Mailing Bud sample 9/16/2009: Good Conversation Will let us quote 9/7/2009: Sent Proposal Down The Highway 4/1/2009: Reassigned From: Jimmy Buffett	Next +1 +30 Thu 10/22 Target Account Get meeting Need to quote the annual report this year!	Digital Variable Data Mailing Fulfillment Demo Rich buys the best printing and the best wine.
Jim Taylor	Last Year \$92,703 YTD \$469,386 Budget \$400,000		
		\$1,032,000	

At the bottom of the \$Plan will be the rep's total rolled-up budget.



Budget Report

Annual Total for the rep

Total for the rep for the month

Total for the company for the rep for the month

Sales Budget		10/1/09	
Jim Taylor \$1,102,000			
January	\$435,000	\$335,000 Database Testing, Inc.	
		Rich Text	\$200,000 CAD
		Phil Thepresses	\$10,000 SF
		Noah Dia	\$125,000 PDX
		\$100,000 File Edit View, Inc.	
		Ken Tankerous	\$100,000 SF
February	\$55,000	\$55,000 Database Testing, Inc.	
		Rich Text	\$10,000 SF
		Phil Thepresses	\$20,000 OC
		Noah Dia	\$25,000 SEA
March	\$20,000	\$20,000 Database Testing, Inc.	
		Rich Text	\$10,000 LA
		Noah Dia	\$10,000 OC
April	\$10,000	\$10,000 Database Testing, Inc.	
		Rich Text	\$10,000 SF
May	\$60,000	\$60,000 Database Testing, Inc.	
		Rich Text	\$60,000 LA
June	\$110,000	\$110,000 Database Testing, Inc.	
		Rich Text	\$110,000 LA
July	\$152,000	\$152,000 11 by Seventeen	
		Paige Turner	\$152,000 PDX
August	\$250,000	\$250,000 11 by Seventeen	
		Paige Turner	\$250,000 OC
September	\$10,000	\$10,000 11 by Seventeen	
		Paige Turner	\$10,000 LA
	\$1,102,000		

Plant sold into



For Managers:

- Budget Tab on Manager screen

Address Manager Screen

Company: **Database Testing, Inc.**

Name: **Rich Text**

Designer: 408 395-8183 x123
1999 S. Bascom Ave. Suite 700
Campbell CA 95008
pressok@yahoo.com

Assigned Sales Rep: **Jim Taylor**

Region: **Northern California**

CSR:

Category: **Account**

Temperature: **Target**

Manager Temperature: **Red**

History | **Challenge** | **Segments** | **Campaigns** | **Housekeeping** | **Budget** | **Account Lists**

Month	Year	Plant	Type	Amount
January	X 2012	CD	Litho	\$125,000
February	X 2012	CD	Litho	\$250,000
March	X 2012	SF	WF	\$12,500
March	X 2012	CD	Litho	\$10,000
May	X 2012	CD	Litho	\$10,000
	X			

12 Mo: \$102,529 2010: \$28,412 Budget: \$407,500
YTD: \$102,529

\$ Plan: How to sell Rich Text \$407,500
Rich buys the best printing and the best wine.

Budget Reports

[/Rep /Month /Customer /Contact](#)

[/Month /Rep /Customer /Contact](#) 

[/Month /Plant /Rep /Customer](#)

[Budget Pie Chart](#)

Filtered Budget Reports

Detailed **Summary**

[/Rep /Month /Cust /Contact](#) [/Region /Rep](#)

[/Month /Rep /Cust /Contact](#) [/Month /Rep](#)

[/Plant /Region /Month](#)

Filtered Budget Report Title:

Budget Year Default: **2011**

[Reset all existing to above year](#) [Table](#)

Budget Reports, including Excel export.

Filtered Reports allow you to specify regions, reps, plants, months or quarters.

And optionally give the report a title.



Filtered Manager Reports

Focus on a subset of data

2. Click a report link

1. Give it a title

Filtered Budget Reports

Detailed	Summary
<u>/Rep /Month /Cust /Contact</u>	<u>/Region /Rep</u>
<u>/Month /Rep /Cust /Contact</u>	<u>/Month /Rep</u>
	<u>/Plant /Region /Month</u>

Filtered Budget Report Title

NorCal Sales Region, SF Plant, Q1 Sales

Enter filter criteria and click: Continue

Region	Northern California
Sales Rep	
Plant	SF
Press	
Month	
Quarter	1
Year	2
Contact	4
Contact Company	

3. Apply the criteria, click Continue



Filtered Report Result

To printer or PDF, with title & footer

Sales Budget NorCal Sales Region, SF Plant, Q1 Sales

Eric Clapton			
January	\$100,000	\$100,000	Cursory Software
			Megan Whoopie
		\$100,000	SF
February	\$125,000	\$125,000	Cursory Software
			Megan Whoopie
		\$125,000	SF
March	\$135,000	\$135,000	Synthesystems
			Justin Thyme
		\$135,000	SF
	<u>\$360,000</u>		Eric Clapton
Jim Taylor			
January	\$110,000	\$10,000	Database Testing, Inc.
			Phil Thepresses
		\$10,000	SF
		\$100,000	File Edit View, Inc.
			Ken Tankerous
		\$100,000	SF
	<u>\$110,000</u>		Jim Taylor
	<u>\$470,000</u>		

Sales Budget Jimmy Buffet Only

Jimmy Buffett			
January	\$135,000	\$10,000	Abort Retry Ignore
			Caesar Boldly
		\$10,000	SEA
		\$125,000	Buffalo Rome
			Allen Wrench
		\$125,000	SEA
February	\$300,000	\$50,000	Abort Retry Ignore
			Caesar Boldly
		\$50,000	SEA
		\$250,000	Buffalo Rome
			Allen Wrench
		\$250,000	SEA
August	\$25,000	\$25,000	Client, Inc.
			Caesar Boldly
		\$25,000	SEA
October	\$125,000	\$125,000	Client, Inc.
			Caesar Boldly
		\$125,000	SEA
	<u>\$585,000</u>		Jimmy Buffett
	<u>\$585,000</u>		

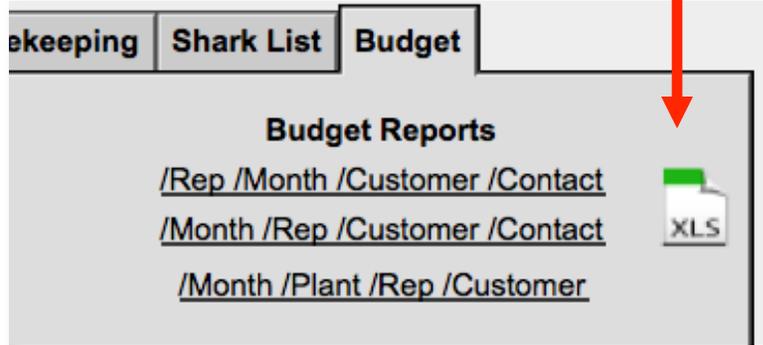
Another example, focus on a single rep

Footer shows date, page count and report author.



Spreadsheet

Will export data as an Excel file that can then be combined with others and manipulated.



Export Format

The screenshot shows an Excel spreadsheet titled 'Budget.xls'. The data is organized into columns: A (Contact), B (Company), C (Month), D (Year), E (Quarter), F (Plant), G (Type), H (Amount), and I (SalesRep). The rows list various contacts and their associated data for each month from January to December 2010. A 'Grand Total' row at the bottom shows a total amount of \$2,187,000.

Contact	Company	Month	Year	Quarter	Plant	Type	Amount	SalesRep
Megan Whoopie	Cursory Software	January	2010	1 SF	S	S	\$100,000	Eric Clapton
Megan Whoopie	Cursory Software	February	2010	1 SF	W	S	\$125,000	Eric Clapton
Justin Thyme	Synthesystems	March	2010	1 SF	S	S	\$135,000	Eric Clapton
Justin Thyme	Synthesystems	April	2010	2 SF	W	S	\$130,000	Eric Clapton
Noah Dia	Database Testing, Inc.	January	2010	1 PDX	W	S	\$125,000	Jim Taylor
Phil Thepresses	Database Testing, Inc.	January	2010	1 SF	W	S	\$10,000	Jim Taylor
Ken Tankerous	File Edit View, Inc.	January	2010	1 SF	W	S	\$100,000	Jim Taylor
Noah Dia	Database Testing, Inc.	February	2010	1 SEA	S	S	\$25,000	Jim Taylor
Phil Thepresses	Database Testing, Inc.	February	2010	1 OC	S	S	\$20,000	Jim Taylor
Noah Dia	Database Testing, Inc.	March	2010	1 OC	D	S	\$10,000	Jim Taylor
Rich Text	Database Testing, Inc.	June	2010	2 LA	S	S	\$110,000	Jim Taylor
Paige Turner	11 by Seventeen	July	2010	3 PDX	D	S	\$152,000	Jim Taylor
Paige Turner	11 by Seventeen	August	2010	3 OC	WF	S	\$250,000	Jim Taylor
Paige Turner	11 by Seventeen	September	2010	3 LA	S	S	\$10,000	Jim Taylor
Rich Text	Database Testing, Inc.	September	2010	3 LA	S	S	\$10,000	Jim Taylor
Rich Text	Database Testing, Inc.	October	2010	4 SF	W	S	\$10,000	Jim Taylor
Rich Text	Database Testing, Inc.	November	2010	4 CAD	W	S	\$200,000	Jim Taylor
Rich Text	Database Testing, Inc.	December	2010	4 LA	S	S	\$80,000	Jim Taylor
Caesar Boldly	Abort Retry Ignore	January	2010	1 SEA	W	S	\$10,000	Jimmy Buffett
Allen Wrench	Buffalo Rome	January	2010	1 SEA	D	S	\$125,000	Jimmy Buffett
Caesar Boldly	Abort Retry Ignore	February	2010	1 SEA	S	S	\$50,000	Jimmy Buffett
Allen Wrench	Buffalo Rome	February	2010	1 SEA	S	S	\$250,000	Jimmy Buffett
Caesar Boldly	Client, Inc.	August	2010	3 SEA	S	S	\$25,000	Jimmy Buffett
Caesar Boldly	Client, Inc.	October	2010	4 SEA	W	S	\$125,000	Jimmy Buffett
Grand Total								\$ 2,187,000

Pivot Table



It's a Win - Win

- Self Management is the origin and philosophy of JOBZ!
- Sales Management applies the same tools & skills to a larger data set.
- Communicate your expectations. Share this presentation with Sales.
- Thanks for using JOBZ!

What's good for the goose, is good for the gander.



A sure-fire way to spark a conversation:

Ask one of your sales reps to bring you their Sales Budget.