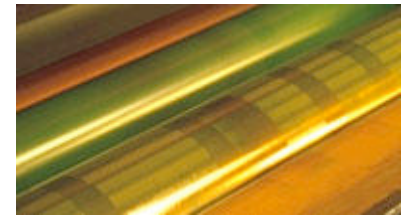


JOBZ!

Management Aspects



JOBZ! is a Sales Database with Management Aspects

- Sales Reps are the source of the data and the primary beneficiaries of it.
 - Fast, efficient paper workflow- making the sale, turning in the order.
- Current, consolidated sales data provides valuable business intelligence.
- Some discipline is required for data to remain current.
 - Jobs and customers are both moving targets.
 - Data accuracy and maintenance are supported by automation routines in JOBZ!
 - Collaboration enables sales support to assist in maintaining data currency.



JOBZ! is a Sales Database with Management Aspects

- Sales Reps are able to and should be expected to “manage” themselves.
 - Most “Management” functions in JOBZ! are available to the individual sales rep.
 - Sales Reps are responsible for their own data and benefit from its maintenance.
 - Self-managed sales reps “roll up” to a well managed sales force.
- If Management provides direction and communicates their expectations, JOBZ! can provide both Sales and Management with business intelligence.



Management Expectations- Two Key Areas

- Sales Reps will maintain their own sales **Pipeline**:
 - Job status and invoice date for **sold** jobs.
 - Status = *Working, Shipped or Billed*.
 - Invoice date = Anticipated or Actual (approximate.)
 - Likelihood of sale and anticipated (approximate) invoice date for *Pending* status jobs.
 - Likelihood = No, or Yes, with a percentage of likelihood.
- Sales reps will keep accurate, complete **Contact Data** on customers and prospects:
 - Including Categories, Market Segments, and Contact History.

Management Objective-Regional Sales Pipeline

Sale		
June		
San Francisco June		\$2,101,224
Jim Taylor June		
3 Billed		\$98,064
13 Pending		\$620,491
4 Shipped		\$402,711
23 Working		\$979,958
Jim Taylor June		\$2,101,224
San Jose June		\$322,342
Eric Clapton June		
8 Working		\$322,342
Eric Clapton June		\$322,342
Seattle June		\$272,870
Jimmy Buffett June		
1 Pending		\$8,950
10 Working		\$263,920
Jimmy Buffett June		\$272,870
June 2009 Total		\$2,696,436
July		
San Jose July		\$242,429
Eric Clapton July		
3 Pending		\$114,981
4 Working		\$127,448
Eric Clapton July		\$242,429
Seattle July		\$32,432
Jimmy Buffett July		
1 Pending		\$32,432
Jimmy Buffett July		\$32,432
July 2009 Total		\$274,861
Grand Total		\$2,971,297

Summary view by Sales Office

Business Menu:

Looking Forward...		
Pipeline	... Summary	... by Office





Pipeline

June 10, 2009



Method- Roll Up Individual Sales Pipelines

		Invoice Date	Sale
June			
The Block Design Group - Visions Of Johanna	SF Pending 50%	6/11/09	\$8,950
	June Jimmy Buffett Pending		\$8,950
The Block Design Group - Visions Of Johanna	SF Working	6/12/09	\$23,456
Garden Supply - Up To Me	LA 8264444 Working	6/16/09	\$26,094
Buffalo Rome - One Too Many Mornings	NY 97998 Working	6/16/09	\$26,864
Client, Inc - LA ONE, 3 versions 16p	LA 8264245 Working	6/16/09	\$16,774
Garden Retail - JOBZ! Enhancements	SF 98990 Working	6/16/09	\$23,498
The Block Design Group - Roll Your Own 8	826-4360 Working	6/16/09	\$8,983
Garden Supply - Up To Me	LA 8264444 Working	6/16/09	\$26,094
Client, Inc - You're Gonna Make Me Lonesome	LA 862-2667 Working	6/16/09	\$12,345
Buffalo Rome - Joey	LA 5643739 Working	6/16/09	\$73,718
Garden Supply - Up To Me	LA 8264444 Working	6/16/09	\$26,094
	June Jimmy Buffett Working		\$263,920
	June Jimmy Buffett Total		\$272,870
	June 2009 Total		\$272,870
July			
Buffalo Rome - Bob Dylan's 116th Dream	NY Pending 50%	7/20/09	\$32,432
	July Jimmy Buffett Pending		\$32,432
	July Jimmy Buffett Total		\$32,432
	July 2009 Total		\$32,432
	Grand Total		\$305,302

Sales Reps each keep their own Pipeline.

Manager access privileges roll up their own regions, Executive privileges include all regions.

The following slides illustrate how easy it is for the sales reps to keep their own Pipelines current.

Working Jobs Sort:

Files Due Today			Clear X
Business	Summaries	Find Select X	
VC'S	INVOICE	ADMIN	
oice	Billed	Pipeline	... Sum
ess	Ship	Inv	Shi Qty. Quote Job#

Business Menu:

Looking Forward...		
Pipeline	... Summary	... by Office



Sales Reps keep "Pending" jobs current, and in their PIPELINE

Click Pending button



	Pending	Forecast	Invoice
11 by Seventeen - Mailing To From Ramona			50% 8/26/09
Control Alt Delete - Forever Young			8/20/09
Database Testing, Inc - Down The Highway			9/7/09

JOBZ! will find jobs with date / status problems and help them make adjustments.

[Templates](#)
[Jobs:](#)
[In Estimating](#)
[Pend](#)
[LS](#)
[Working](#)
[To Invoice](#)
[Billed](#)
[Forecast](#)
[Pipeline](#)
[... Sum](#)
[Push a Month](#)

Customer	Job Title	Rep	On Press / Invoice	Quoted / FU +	Pipeline \$	Project
Control Alt Delete - Forever Young			8/10/2009 < Press	8/9/2009	\$25,399	<input type="checkbox"/> O
24 pages + cover			8/17/2009 < Invoice	8/24/09		Del.
	Jim Taylor		August			
	<input type="checkbox"/> Pending	<input type="checkbox"/> Yes	<input type="checkbox"/> 100%	<< PIPELINE a job with "Yes," and a % of likelihood, and invoice date in the future.		
11 by Seventeen - Mailing To From Ramona			8/17/2009 < Press	8/28/2009		<input type="checkbox"/> O
24 pages + cover			8/20/2009 < Invoice	8/28/09		Del.

Pending Status / Invoice Date Problem!

These jobs are in Pending status, yet have Invoice Dates in the past. You should change either the Invoice Date or the Status of these jobs, then click Pending again. Click "Push" to add a week to all of them at once.

PIPELINE a Pending Job

From the Pending list:

Customer	Job Title	Rep	On Press / Invoice	Quoted / FU +	Pipeline \$	Project	
11 by Seventeen - To Ramona			8/31/2009 < Press	7/28/2009	\$21,379	<input type="checkbox"/> <u>O</u>	
24 pages + cover			9/3/2009 < Invoice	9/1/09		<u>Del.</u>	
	Jim Taylor		September				
	Pending	Yes	50%	<< PIPELINE a job with "Yes," and a % of likelihood, and invoice date in the future.			

Also on the QUOTE screen:

Tracking
Pending Jobs List

Follow Up Tue, Sep 1, 2009

Likely Sale? Yes 50%

Pipeline \$21,379

P

PIPELINE a job with "Yes," and a % of likelihood, + invoice date in future.

Pipeline amount is an average of the prices quoted, X the % of likelihood.

It will sort into the month of the invoice date.

Working Jobs

Click Working button



Working	Pipeline	Invoice
11 by Seventeen - Just Like A Woman		8/21/09
Abort Retry Ignore - Gotta Serve Somebody		9/3/09
Control Alt Delete - Things Have Changed		9/3/09

JOBZ! will find jobs with date / status problems and help sales reps adjust them.

Status	Company	Contact	Job Title	Sales Rep	Press Date / Invoice	...Month	Job#	Part#	Plant	Press	Project
Working	Database Testing, Inc	Jim Taylor	I Dreamed I Saw St		8/19/2009 < Press 8/24/2009 < Invoice	LA SF-1 August	826-3953123	2009351			[] Working
These schedule notes appear in many places- schedule requests, schedules sent to customers, internal daily schedules an so on.											
Working	11 by Seventeen	Jim Taylor	Just Like A Woman		8/18/2009 < Press 8/21/2009 < Invoice	NY W-2 August	8264096				[] Working

Message

Using the buttons below, you can either Push their Invoice Dates to next week or change them all to Shipped status. Click Cancel to edit them individually.

Until you fix this problem, you will not be able to use the Working jobs sort.

Pipeline Includes

- Working, Shipped and Billed status jobs.
 - With invoice dates in the current month or future months.
- Pending status jobs marked as Likely Sales, with % of likelihood, and invoice dates in the future.
 - Pipeline amount for a pending job is an average of the prices for the quantities quoted, times the % of likelihood.
- Results displayed depend on your access level.
 - Sales reps see only their own.
 - Managers see their region rolled up.
 - Executives see all regions.

Business Menu:

Looking Forward...		
Pipeline	... Summary	... by Office

Working Jobs Sort:

Files Due Today				Clear X
Business	Summaries			Find Select X
AC'S	INVOICE	ADMIN		
oice	Billed	Pipeline	... Sum	
ess	Ship	Inv	Shi	Qty. Quote Job#

Lost Jobs Report

June 10, 2009
 Invoice Dates: 11/7/08 to 6/12/09



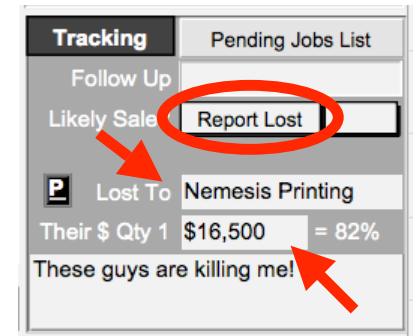
Management Objective-Competitive Pricing Analysis

Lost Jobs Report on Business Menu

Jobs Reported as Lost	Billing	Press	Our Quote @	Lost To	Their Quote @
Jim Taylor					
Federal Motors - Shelter From The Storm <i>These guys are killing me!</i>	January	2009 SF	\$21,066 100.0%	Nemesis Printing	\$16,500 82%
Arrowspace - Positively Fourth Street <i>Just missed it.</i>	February	2009 SF	\$17,457 90.0%	Loballer Printing	\$16,850 89%
Control Alt Delete - The Levee's Gonna Break <i>FSC paper- couldn't get any.</i>	February	2009 SF	\$16,736 90.0%	Nemesis Printing	\$14,500 78%
Cursory Software - Just Like A Woman <i>We discounted to 95%, but looks like we need to be below 80% with these guys.</i>	February	2009 SF	\$17,666 95.0%	Usual Suspects	\$14,000 75%
Five, Inc - Return to Me <i>Note about the quote</i>	February	2009 SF	\$18,034 86.7%	Nemesis Printing	\$15,000 72%
More than Enough - Thunder On the Mountain <i>UV Job</i>	February	2009 SF	\$20,456 110.0%	Nemesis Printing	\$16,500 89%
Claymore Information Systems - Don't Think Twice, It's All <i>Should have quoted web</i>	March	2009 SF	\$18,164 88.0%	Ink Scum Bags	\$12,580 68%
Claymore Information Systems - A Hard Rain's A-Gonna <i>Lost this one because of the schedule</i>	March	2009 SF	\$18,235 92.0%	Nemesis Printing	\$18,500 93%
Control Alt Delete - Time Passes Slowly <i>Went digital</i>	March	2009 W	\$18,536 90.0%	Whozits Printing	\$15,245 82%
Control Alt Delete - Knockin' On Heaven's Door <i>Need a half web!</i>	March	2009 SF	\$17,681 89.7%	Cheapo Printing	\$14,500 78%
Control Alt Delete - The Times They Are a <i>Mailing price under \$4,000</i>	March	2009 SF	\$18,536 90.0%	Ink Scum Bags	\$14,000 75%
Federal Motors - Gotta Serve Somebody <i>Quality not the issue</i>	March	2009 SF	\$15,342 82.5%	Nemesis Printing	\$13,500 73%
Federal Motors - Things Have Changed <i>These guys are killing me!</i>	March	2009 SF	\$17,142 82.5%	Whozits Printing	\$14,258 77%
File Edit View, Inc - Lay Down Your Weary Tune <i>I give up</i>	March	2009 SF	\$11,111 90.0%	Unknown	\$10,000 81%
Five, Inc - Visions Of Johanna	March	2009 SF	\$21,925 112.0%	RRD	\$18,750 96%
Bell Labs - Lay Lady Lay <i>Should get the next one.</i>	November	2008 SF	\$15,481 100.0%	Nemesis Printing	\$11,500 74%
Clan Tech, Inc - Stuck Inside Of Mobile With	November	2008 W	\$22,256 110.0%	Ink Scum Bags	\$17,852 96%
Federal Motors - You've Gotta Serve Somebody <i>Need to be more aggressive.</i>	November	2008 SF	\$19,500 100.0%	Nemesis Printing	\$15,000 77%

Method

QUOTE Screen:



The price the job went for, and the calculated % of our Estimate Total Cost that it represents.



Where is this Business Intelligence?

JOBS ADDRESS MEMOS

JOBZ!

NEW JOB Database Testing, Inc - Heidelberg Folder

INPUT

SPEX QUOTE ORDER AC'S

SCHEDULE INVOICE ADMIN

OUTPUT

Proposals Confirmations

Forms Mail Business

Invoices Summaries

The Business Menu

Find... List Today Week INVENTORY

Forms Proposals Invoices Mail Confirmations **Business** Summaries

ADDRESS SPEX QUOTE ORDER SCHEDULE AC'S INVOICE ADMIN

MEMOS

Business Menu Jobs: In Estimating Pending Working To Invoice Billed

Looking Forward...			Looking Back...		
Pipeline	... Summary	... by Office	YTD Sales	Paper	Lost Jobs
Current Month's Sales		...one Rep	Billed Sales	Cust.	Analysis
Pending Sales Forecast		... by Likelihood	Summary by Rep & Customer		Commish
Booked Sales (Working)		Sales by OE Date	Sales / Company	.../ Contact	.../ Product
Current Month's Sales by Ship Month			Budget Analysis		Account Analysis
Annual Sales Budget			Billed Sales with Average		Billed Sales by Quarter
On Press	In Production	Quote Activity	Recent Activity	JOBZ! Activity	Customer Activity
Management					
Booked Sales Summary by Region			Month End	Billing Detail	Reps Standings
VA	Rep	Office	Press	Plant	Region / Rep / Plant
Housekeeping / Working		... Pending	... Estimating	Regional Summary	
Sales Activity by Query			Production Mgr. Load		Lost Jobs
Manager Pipeline by Query			Statement of Account		
Pipeline- Excel			Accounts Receivable		
PO List			Sales Tax Report		
Manager's Job Status Report			Accounting Summary		Accounting Summary .xls

This section visible to Sales Reps & Management

This section visible only to Management

Explore the options here!



Where is this Business Intelligence?



Account Lists with Annual Budgets

- [1\) Accounts & Prospects ...XLS ...Filtered](#)
- [2\) By Rep/Co.Type](#)
- [3\) By Co.Type/Rep](#)
- [4\) Accounts & Prospects by Temperature](#)
- [5\) ...with Account Plans](#)
- [6\) ...without](#)
- [7\) Summary: Company/Temperature/Sales Rep](#)
- [8\) Summary: Company/Sales Rep/Temperature](#)

[\\$ Plan Report](#)
[\\$ Plan List](#)

Recent Contacts Calendar 30 days prior to:
Jun 12, 2009

	Last Contact	Next Contact
Jim Taylor		
Wednesday 6/10		
Printing Today	Spoke Needs upgrade proposal	Thu, Jun 11 Proposal
Terry Myers 877-641-0299 <i>User Account</i> 14360 NW Science Park Drive Portland OR 97229		
Monday 6/8		
Emerald City Graphics	JOBZ 931 for ECG + Outlook Plugins	
Craig Heisinger 253-520-2600 <i>User Account</i> 23328 66th Ave S Kent WA 98032-1827		
Santa Clara Family Health Plan	Sent eMail Anatole Chat	Tue, Apr 28 Get meeting Show progress
Kathleen King 408-874-1998 <i>User Account</i> 210 E. Hacienda Ave. Campbell CA 95008		

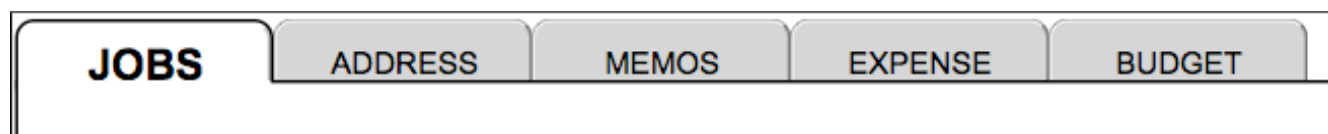
Calendars

- Appt. Calendar
- Annual Report FY End
- Appt. Calendar
- Recent Contacts Calendar
- By CSR

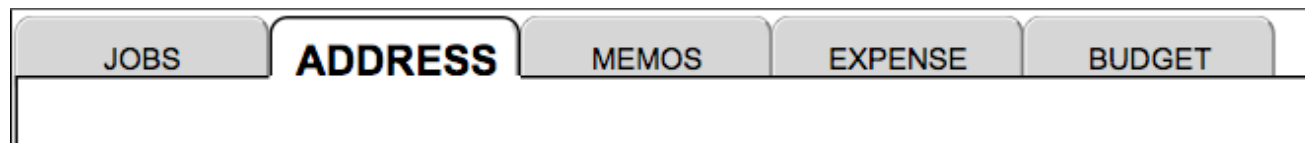


Management Objective- CRM*

- Paperwork Flow & Communications
 - RFE, Proposal, Order Entry, Confirmations, Author's Changes, etc.
- The JOBS tab:



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



(*Customer Relationship Management)

ADDRESS Contact Management: Sales Automation

This is the button to send contact or appointment data into Outlook, and sync to a PDA.

Google Map

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.

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

Record a last contact with a group of people.

Plan a next contact with a group of people.

List of all the people in the company. Click on them to navigate, and isolate the company as a found set.

Contact History is kept by clicking the Today button and using the fields below it, then clicking the Next Contact buttons.

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



ADDRESS Categories

Visible only to a Manager, takes a Manager to the Manager Screen- see Sales Management slide.

Company-wide Segments on this tab.

Multiple ways to categorize a person.

MANAGER

Regional-specific Segments are behind this tab.

Check all boxes that apply. Management defines available selections.

Check or uncheck a found set of people.

Build a marketing campaign around these segments, in combination with any of the other categories.

Export selected contact data to Excel to upload to an email campaign service.

Or use the data to drive a digital variable data press. You are a printing company, right?



ADDRESS: Merge Mail Capabilities



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

JOBZ! February 25, 2007
Hugh Saturation
File Edit View, Inc
18338 Las Cumbri
Los Gatos CA 95033

JOBZ! February 25, 2007
Amber Lith
Database Testin
18338 Las Testi
Los Gatos CA 95033

JOBZ! February 25, 2007
Richard Head
Database Testin
7525 SE Lake R
Milwaukie OR 97122

JOBZ! February 25, 2007
Ben Around
The Block Desig
665 Third Street
San Francisco CA 94103

JOBZ! February 25, 2007
Seymour Hickies
One.com
665 Third Street
San Francisco CA 94103

JOBZ! Printing Sales Software
February 25, 2007
Serge Protector
Database Testing, Inc.
1740 Technology Dr. Suite 100
San Francisco CA 94080

18338 Las Cumbres Road
Los Gatos, CA 95033
408-395-8183
jim@carpedata.com
www.ca.podata.com

February 25, 2007
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

Thanks,
Jim Taylor
Carpe Data

Thanks,
Jimmy Buffett
Carpe Data

Thanks,
Jimi Hendrix
Carpe Data

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

Address Manager Screen

Company: **Database Testing, Inc.** Entertain Account Challenges, Reassign Accounts.

Name: **Rich Text**

Account Exec: 408 395-8183 x123
101 California Street Suite 4000
San Francisco CA 92124
rich@dti.com

Assigned Sales Rep: **Jim Taylor**

Region: **Northern California**

CSR: **George Martin**


Category: **Account**

Temperature: **Target**

Manager Temperature: **Hot** Your own category

[Contact History & Notes](#)
[Challenge](#)
[Reassign](#)
[Segments](#)
[Housekeeping](#)
[Shark List](#)
[Budget](#)

Month	Year	Plant	Type	Amount
June	X 2010	LA	S	\$110,000
September	X 2010	LA	S	\$10,000
October	X 2010	SF	W	\$10,000
November	X 2010	CAD	W	\$200,000
December	X 2010	LA	S	\$60,000
	X			

Budget Reports
[/Rep /Month /Customer /Contact](#)
[/Month /Rep /Customer /Contact](#) 
[/Month /Plant /Rep /Customer](#)

Filtered Budget Reports
Detailed [/Rep /Month /Cust /Contact](#)
Summary [/Region /Rep](#)
[/Month /Rep /Cust /Contact](#) [/Month /Rep](#)
[/Plant /Region /Month](#)

Last Year: \$92,703 Budget: \$390,000
 YTD: \$429,386

\$ Plan: How to sell Rich Text \$390,000
 Rich buys the best printing and the best wine.

Filtered Budget Report Title: **Jimmy Buffet Only**
 Budget Year Default: **2010**
[Reset all existing to above year](#) [Table](#)

Keep private Manager notes, and monitor selected contacts.



ADDRESS Sales Management

INPUT
COMPANY
LINKS
OUTPUT
LIST
CHANGE TABLE
FIND...
HELP

Address Manager Screen

Company
Database Testing, Inc.

Name
Rich Text

Account Exec
408 395-8183 x123
101 California Street Suite 400
San Francisco CA 92124
rich@dti.com

Assigned Sales Rep: **Jim Taylor**

Region: **Northern California**

CSR: **George Martin**

Category: **Account**

Temperature: **Target**

Manager Temperature: **Hot**

Contact History & Notes
Challenge
Reassign
Segments
Housekeeping
Shark List
Budget

Challenged Reassigned Neither

Reassigned From
Eric Clapton

Reassign Date
10/6/09

[Clear](#)

[Set to History](#)

[List Reassigned](#)

[Reassign Notice](#)

[Print Reassign List](#)

Batch Reassignments

Make the Assigned Sales Rep above be the new rep, and Reassigned Rep to the left be the old rep. Put today's date in Reassigned Date. Then click:

Reassign all contacts in Database Testing, Inc. to Jim Taylor from Eric Clapton

Build a found set of records, then make the Assigned Sales Rep above be the new rep, enter a date in the Reassigned Date field, then click:

Reassign all 2 contacts in the found set to Jim Taylor

Entertain Account Challenges, Reassign Accounts.



Reassign Accounts en masse.



The Shark List



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

The screenshot shows a software interface with a top navigation bar containing tabs: JOBS, ADDRESS, MEMOS, EXPENSE, BUDGET, MANAGER, DEVO, and HELP. Below the navigation bar, the user's name 'Jim Taylor' and the date 'Wednesday, June 10, 2009' are displayed. The main area contains several sections:

- A section with 'INPUT' and 'Rich Text Database Testing, Inc.' and two 'LIST' buttons with menu icons.
- A row of buttons: 'NEW PERSON' (red), 'FIND...' (blue), and 'LIST ALL' (blue).
- A row of buttons: 'Contact Today' (orange), 'Next' (yellow), 'Missed' (pink), 'Recent' (light blue), '\$Plan' (green), 'Modified Today' (light green), and 'Birthdays' (purple).
- A bottom section with 'Export/Import Options', 'Email Rich Text's Info', and a 'Shark List' button (green) which is highlighted with a red box and pointed to by a red arrow.

The Shark List: Account Challenge

Who calls on...?

Name **SEARCH**

Company **SEARCH**

DISPLAY SHARK LIST

[Request a Challenge](#)

[Show Challenges to You](#)

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:
Recent Financial Performance, Stock Price Trend, Mergers & Acquisitions, etc. :
Top Priorities of CEO:
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.)

Strategic Account Profile

[Home](#) | **JOBS** | MEMOS | INPUT | **COMPANY** | LINKS | OUT

Database Testing, Inc.

Name: Lois Bidder
 Title: Account Exec
 Category: Account
 Hot: Hot

\$ Plan: How to sell Lois Bidder
 Each contact can be set with a sales budget for the year based upon month-by-month predictions in 4 categories of work.

Web Site
<http://www.carpedata.com>

Industry & Marketplace of Database Testing, Inc.
 Computer Manufacturer | FY End: Jan | County (HQ): Alameda

# Employees	SIC	Annual Sales	Year Estab.	County (HQ)
200,001	55-966	50,000,000,000	1951	Alameda

Click [here](#) to set all contacts in company with **common** fields and to create a NEW Company Level Strategic Account Profile below.

Strategic Account Profile
 Company Name: Database Testing, Inc.
 Established 1951
 Sales Rep: Jim Taylor
 Our Current Relationship with this Company:

This screen helps a sales rep to approach a prospect in a professional manner, with forethought, displaying knowledge of the prospect's needs, and how those needs can be met with your company's capabilities.

- 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: _____
- Recent Financial Performance, Stock Price Trend, Mergers & Acquisitions, etc. : _____
- Top Priorities of CEO: _____
- Primary Business Objectives: _____
- Strategies in Place to Achieve these Objectives: _____
- Critical Success Factors: _____
- Performance Indicators: _____
- Issues & Challenges: _____
- 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: _____
- Sales Cycle, Accelerators: _____
- Org Chart (Formal) and Informal (Political): _____
- Short Term & Long Term Goals for this Account: _____
- Team & Resources Needed, Management Participation Required: _____



Business Letter Templates

		INPUT	TEMPLATES	NEW TEMPLATE	LIST ALL
Templates are shared by all. Anyone can "Use" a template as well as create, edit or delete them.					
Subject		Text			
1) Introductory Letter	Use	This is to introduce our company.			<input type="button" value="Edit"/> <input type="button" value="Del"/>
2) Follow-up letter	Use	First, I selected a group of people that I wanted to send a message to,			<input type="button" value="Edit"/> <input type="button" value="Del"/>
3) Cover Sheet	Use	Thanks for meeting with me the other day.			<input type="button" value="Edit"/> <input type="button" value="Del"/>
		I chose this template from the MEMOS database, and addressed it to you,			<input type="button" value="Edit"/> <input type="button" value="Del"/>
		Thanks for your interest in JOBZ! Please review the accompanying materials for more information.			<input type="button" value="Edit"/> <input type="button" value="Del"/>

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

📍
JOBS
MEMOS
INPUT
COMPANY
LINKS

Ⓛ Name Mr. Noah Dia

Title Marketing

Company Database Testing, Inc.

Co. Type Computer Manufacturer

🌟 Address 18338 Las Cumbres Road

Address Line 2 Country: ▾

City, State, Zip Los Gatos CA 95033

📧 Email pressok@yahoo.com

Office 408 395-8183 Cell 408 666-7356

Fax 408 395-0813

Cust. # 051.0004

Category **Account** Temp. **Target**

JOBS
/ date
MEMOS
Notes
Delivery
Budget
Coworkers
Alt.

Month	Year	Plant	Type	Amount
January	2010	PDX	W	\$125,000

\$Plan Last Year **\$114,036** Budget **\$125,000**

Budget Report YTD **\$49,729**

\$ Plan: How to sell Noah Dia \$125,000

Noah likes classic muscle cars and plays golf. Has the entire collateral budget.



Sales Reps Can Keep Their Eyes on the Ball

ADDRESS List View: \$Plan

JOBS		MEMOS		HELP	
Clear X	Find Select X	X All	ALL	FIND	NEW
Next	+1	+30	Temp.	Segment	\$Plan Report
Next	Thu 6/18	Target	Prospect	Sheetfed Brochures	The company-level plan enables strategic selling.
Check in	Need to get qualified for distribution.	What	Why		
Last Year	\$85,980	YTD	\$113,066	Budget	\$146,000
Next	Mon 5/11	Target	Prospect	Digital Variable Data Mailing Fulfillment	Rich buys the best printing and the best wine.
Get meeting	Corporate Brochure job specs, breakfast	What	Why		
Last Year	\$233,759	YTD	\$327,828	Budget	\$446,000

“\$Plan Report”

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

\$146,000 Abort Retry Ignore

Rita Goodbook
408 395-8183

Red = You are under budget

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

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

\$631,000 Database Testing, Inc.

Rich Text
408 395-8183 x123

Amber Lith
408 395-8183

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

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

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

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

Hugh Saturation
408 395-8183

Yuri Dickulous
408 395-8183

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

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

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

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

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

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



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.

INPUT		COMPANY		OUTPUT		LIST		JOBS		MEMOS		MANAGER		HELP	
Accounts	Prospects	Suspects	All Accounts & Prospects		Clear X	Find Select X	X All	ALL	FIND	NEW					
Contact Today- HOT		Contact Next		Missed Next		Recent		Modified Today		Birthdays		Calendar		\$Plan	
Company	Name	Omit	Select	Last Contact	Since Last	#	Next	+	-	Temp.	Segment	\$Plan Report			
11 by Seventeen Paige Turner 408-395-8183				Today	Thu 9/17	10 / 1	Next	+1	+30	Wed 9/23	Target	Demo Catalogs	Paige likes to do everything by email.		
What Sent Proposal										Account					
Result Hecht With it All										Follow up		What			
9/23/2009 Previous Cust. # 051.301796										Reason for the follow-up; something to talk about.					
9/17/2009: Sent Proposal Hecht With it All										Last Year \$37,856		YTD \$339,252	Budget	\$632,000	
8/20/2009: Sent Email Re: Shipping hours															
Jim Taylor															
Database Testing, Inc. Rich Text 408 395-8183 x123				Today	Thu 9/17	10 / 44	Next	+1	+30	Thu 10/22	Target	Digital Variable Data Mailing Fulfillment Demo	Rich buys the best printing and the best wine.		
What Mailing										Account					
Result Bud sample										Get meeting		What			
9/23/2009 Previous Cust. # 100061										Need to quote the annual report this year!		Why			
9/17/2009: Mailing Bud sample										Last Year \$77,920		YTD \$267,386	Budget	\$390,000	
9/16/2009: Good Conversation Will let us quote															
9/7/2009: Sent Proposal Down The Highway															
4/1/2009: Reassigned From: Jimmy Buffett															
Jim Taylor															

Run a screen view of the \$Plan.

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

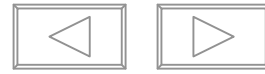
Annual Total for the rep

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

INPUT
COMPANY
LINKS
OUTPUT
LIST
CHANGE TABLE
FIND...
HELP

Address Manager Screen

Company
Database Testing, Inc.

Name
Rich Text

Account Exec
408 395-8183 x123
101 California Street Suite 4000
San Francisco CA 92124
rich@dti.com

Assigned Sales Rep:

Region:

CSR:

Category:

Temperature:

Manager Temperature:

Contact History & Notes
Challenge
Reassign
Segments
Housekeeping
Shark list
Budget

Month	Year	Plant	Type	Amount
June	X 2010	LA	S	\$110,000
August	X 2010	SF	S	\$10,000
September	X 2010	LA	S	\$10,000
October	X 2010	SF	W	\$10,000
November	X 2010	CAD	W	\$200,000
December	X 2010	LA	S	\$60,000
	X			

Budget Reports

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

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

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

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

[Reset all existing to above year](#)

Last Year: \$92,703 Budget:

YTD: \$469,386

\$ Plan: How to sell Rich Text \$400,000

Rich buys the best printing and the best wine.

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
/Rep /Month /Cust /Contact	/Region /Rep
/Month /Rep /Cust /Contact	/Month /Rep
	/Plant /Region /Month

Filtered Budget Report Title

NorCal Sales Region, SF Plant, Q1 Sales

 Enter filter criteria and click:

Region

Sales Rep

Plant

Press

Month

Quarter

Year

Contact

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>			

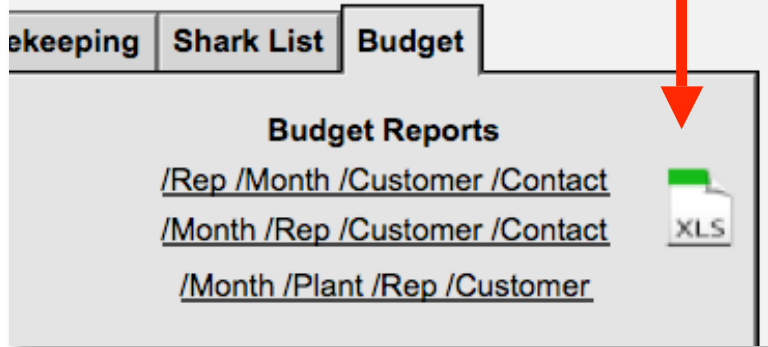
Another example, focus on a single rep

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

	A	B	C	D	E	F	G	H	I
	Contact	Company	Month	Year	Quarter	Plant	Type	Amount	SalesRep
2	Megan Whoopie	Cursory Software	January	2010	1 SF	S	S	\$100,000	Eric Clapton
3	Megan Whoopie	Cursory Software	February	2010	1 SF	W	S	\$125,000	Eric Clapton
4	Justin Thyme	Synthesystems	March	2010	1 SF	S	S	\$135,000	Eric Clapton
5	Justin Thyme	Synthesystems	April	2010	2 SF	W	S	\$130,000	Eric Clapton
6	Noah Dia	Database Testing, Inc.	January	2010	1 PDX	W	S	\$125,000	Jim Taylor
7	Phil Thepresses	Database Testing, Inc.	January	2010	1 SF	W	S	\$10,000	Jim Taylor
8	Ken Tankerous	File Edit View, Inc.	January	2010	1 SF	W	S	\$100,000	Jim Taylor
9	Noah Dia	Database Testing, Inc.	February	2010	1 SEA	S	S	\$25,000	Jim Taylor
10	Phil Thepresses	Database Testing, Inc.	February	2010	1 OC	S	S	\$20,000	Jim Taylor
11	Noah Dia	Database Testing, Inc.	March	2010	1 OC	D	S	\$10,000	Jim Taylor
12	Rich Text	Database Testing, Inc.	June	2010	2 LA	S	S	\$110,000	Jim Taylor
13	Paige Turner	11 by Seventeen	July	2010	3 PDX	D	S	\$152,000	Jim Taylor
14	Paige Turner	11 by Seventeen	August	2010	3 OC	WF	S	\$250,000	Jim Taylor
15	Paige Turner	11 by Seventeen	September	2010	3 LA	S	S	\$10,000	Jim Taylor
16	Rich Text	Database Testing, Inc.	September	2010	3 LA	S	S	\$10,000	Jim Taylor
17	Rich Text	Database Testing, Inc.	October	2010	4 SF	W	S	\$10,000	Jim Taylor
18	Rich Text	Database Testing, Inc.	November	2010	4 CAD	W	S	\$200,000	Jim Taylor
19	Rich Text	Database Testing, Inc.	December	2010	4 LA	S	S	\$80,000	Jim Taylor
20	Caesar Boldly	Abort Retry Ignore	January	2010	1 SEA	W	S	\$10,000	Jimmy Buffett
21	Allen Wrench	Buffalo Rome	January	2010	1 SEA	D	S	\$125,000	Jimmy Buffett
22	Caesar Boldly	Abort Retry Ignore	February	2010	1 SEA	S	S	\$50,000	Jimmy Buffett
23	Allen Wrench	Buffalo Rome	February	2010	1 SEA	S	S	\$250,000	Jimmy Buffett
24	Caesar Boldly	Client, Inc.	August	2010	3 SEA	S	S	\$25,000	Jimmy Buffett
25	Caesar Boldly	Client, Inc.	October	2010	4 SEA	W	S	\$125,000	Jimmy Buffett

Month	Region	SalesRep	Total
January	Northern California	Eric Clapton	\$ 100,000
		Jim Taylor	\$ 235,000
	Northern California Total		\$ 335,000
	Pacific Northwest	Jimmy Buffett	\$ 135,000
	Pacific Northwest Total		\$ 135,000
January Total			\$ 470,000
February	Northern California	Eric Clapton	\$ 125,000
		Jim Taylor	\$ 45,000
	Northern California Total		\$ 170,000
	Pacific Northwest	Jimmy Buffett	\$ 300,000
	Pacific Northwest Total		\$ 300,000
February Total			\$ 470,000
March	Northern California	Eric Clapton	\$ 135,000
		Jim Taylor	\$ 10,000
	Northern California Total		\$ 145,000
March Total			\$ 145,000
April	Northern California	Eric Clapton	\$ 130,000
	Northern California Total		\$ 130,000
April Total			\$ 130,000
June	Northern California	Jim Taylor	\$ 110,000
	Northern California Total		\$ 110,000
June Total			\$ 110,000
July	Northern California	Jim Taylor	\$ 152,000
	Northern California Total		\$ 152,000
July Total			\$ 152,000
August	Northern California	Jim Taylor	\$ 250,000
	Northern California Total		\$ 250,000
	Pacific Northwest	Jimmy Buffett	\$ 25,000
	Pacific Northwest Total		\$ 25,000
August Total			\$ 275,000
September	Northern California	Jim Taylor	\$ 20,000
	Northern California Total		\$ 20,000
September Total			\$ 20,000
October	Northern California	Jim Taylor	\$ 10,000
	Northern California Total		\$ 10,000
	Pacific Northwest	Jimmy Buffett	\$ 125,000
	Pacific Northwest Total		\$ 125,000
October Total			\$ 135,000
November	Northern California	Jim Taylor	\$ 200,000
	Northern California Total		\$ 200,000
November Total			\$ 200,000
December	Northern California	Jim Taylor	\$ 80,000
	Northern California Total		\$ 80,000
December Total			\$ 80,000
Grand Total			\$ 2,187,000

Pivot Table



It's a Win - Win

- What benefits the Sales Rep, by extension and design, benefits Management.
 - And vice versa.
- Communicate your expectations.
- You have the tools to actively manage Sales & Marketing.

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 Pipeline.