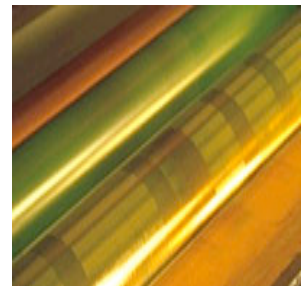


# JOBZ!

**Getting Organized &  
Forecasting Your Sales  
With the JOBZ! Pipeline**



## The JOBZ! Pipeline Answers These Questions

- How's it going?
- What jobs have you sold recently?
- What jobs have you quoted recently?
  - Which of those do we have a chance of selling?
  - And what are our chances?
- What does the month look like at this point?
  - And next month, and so on...

**It answers these questions for sales reps and managers alike.**

- By spending a few seconds on each job you have recently quoted or sold.
- By keeping yourself organized.



## Every Job Has Status

- In Estimating
  - Before you quote it (automatically set)
- Pending
  - After you quote it (automatically set)
- Dead
  - Not needed, surplus version, or Lost to Competitor
- Working
  - When you turn in the SOP (automatically set)
- Shipped
  - Ready to Invoice
- Billed
  - Done and filed away for future reference

## The Pipeline (and your organization) depends on job Status being current

In Estimating

✓ Pending

Dead

Working

Shipped

Billed

➔

📖	RFE	New Job	Clone Job	Find..
ADDRESS	email RFE	SPEX	QUOTE	ORDER
MEMOS	Dummy	1	2	3
		4	+ Mail	

**Pending** Project # 826-3739 [Edit Sales Contact](#)

**Company** **Database Testing, Inc.** **Sales Contact** 05

101 California Street Suite 4000 San Francisco CA 92124 USA 408 395-6

**Job Title**  
Went To See The Gypsy

**Description**  
64 Pages plus Cover, Order Envelope and 8 Page Insert



## Main Menu Dashboard

- Automatically shows your jobs based on Status
- Just click on a job to work with it

In Estimating		Templates	Estimate Due
11 by Seventeen - Tombstone Blues			Mon 11/16/09
Database Testing, Inc - Drifter's Escape			Mon 11/16/09
File Edit View, Inc - Example Job			Mon 11/16/09

Pending		Forecast	Follow Up	Invoice
Database Testing, Inc - I Want You	75%			11/23/09
Database Testing, Inc - Lonesome Death of Hattie Carroll				11/24/09
Database Testing, Inc - Love Sick				11/23/09
Database Testing, Inc - Maggie's Farm	100%			11/19/09
Database Testing, Inc - Nettie Moore				11/23/09

Working		Pipeline	Files Due	Invoice
11 by Seventeen - A- Chimes of Freedom				11/22/09
11 by Seventeen - B- Like a Rolling Stone				11/22/09
11 by Seventeen - C- Father of Night				11/22/09
Abort Retry Ignore - You're Gonna Make Me Lonesome				12/3/09
Database Testing, Inc - I Dreamed I Saw St				11/23/09

Today's Contacts			Next
Lois Steem	Control Alt Delete	Follow up mailing	
Serge Protector	Abort Retry Ignore	Get meeting	
Paige Turner	11 by Seventeen	Set up lunch	




Scroll for more- sorted by company name.



## Every Job Also Has an Invoice Date

- Before it is Billed, it's only a guess
- But it should be in the FUTURE

Pending	Forecast	Follow Up	Invoice
Database Testing, Inc - I Want You	75%	11/23/09	
Database Testing, Inc - Lonesome Death of Hattie Carroll		11/24/09	
Database Testing, Inc - Love Sick		11/23/09	
Database Testing, Inc - Maggie's Farm	100%	11/19/09	
Database Testing, Inc - Nettie Moore		11/13/09	

Dates in the past are displayed in Red 

Clear Schedule	Auto >	1
Art Files	Fri 11/20/09	4
Proofs	Mon 11/23/09	1
Press	Tue 11/24/09	
Mail		
November Ship	Wed 11/25/09	1
1st Deliv		
1st Deliv Qty		
Bal Deliv	Thu 11/26/09	2
November Invoice	Fri 11/27/09	

Job schedule as shown on SPEX, QUOTE and ORDER entry screens.

Enter the Invoice Date manually or set it by clicking Auto, based on the Ship Date.



NEW jobs are set automatically a month hence.

## The Pipeline depends on the Invoice Date being realistic

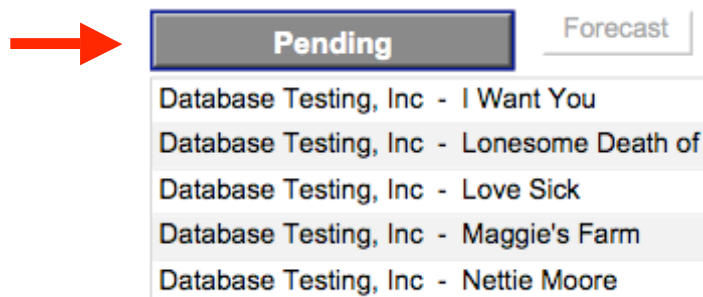


## Just One More Thing

- For Pending jobs, you need to indicate:
  - Likely Sale? “Yes”, “No” or “Report Lost”
  - If “Yes” then how likely is the sale?

<u>Customer</u>	<u>Job Title</u>
<b>Database Testing, Inc - Nettie Moore</b> 12 pages plus cover, with BRC and Foldout IBC	Jim Taylor
 Pending	Yes 50%
<b>Database Testing, Inc - Love Sick</b> 24 pages + cover	Jim Taylor
 Pending	Yes 100%

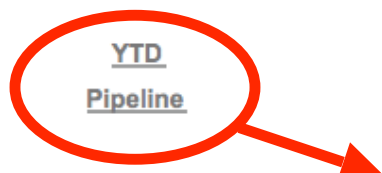
List View, “Pending” jobs. Get here by clicking the Pending button on the Dashboard...



## That's all there is to it!

- Now, when you run your own Pipeline, it will give you an accurate snapshot of your current and near-future business situation.
- When a manager runs the Pipeline, it rolls up all the reps in the sales region.

OUTPUT		
Proposals	Confirmations	
Forms	Mail	Business
Invoices	Summaries	



### Main Menu

Click Pipeline to display the results

Click YTD to display your Year To Date Sales

YTD \$5,228,886

You have estimates due today. (In Estimating)  
 You have quotes to follow up. (Pending)  
Pipeline \$1,504,938

Click Pipeline button to produce a report.

Working	Pipeline
11 by Seventeen - A- Chimes of Freedom	
11 by Seventeen - B- Like a Rolling Stone	
11 by Seventeen - C- Father of Night	



## What is in the Pipeline?

The Pipeline is simply a measure of the business you are currently doing, but it provides more insight than a typical booked sales report would contain. The Pipeline includes:

Sold jobs that will invoice in the current month, which are in Shipped or Billed status.

Sold jobs that are in Working status, summarized within their invoice month.

Jobs that are in Pending status (quoted but not yet ordered), summarized within their invoice month, that the Sales Rep has indicated are "Likely Sales."

The Pipeline amount for a Working, Shipped or Billed job is the job costs to date, which is the order entry amount, plus any Author's Changes.


The Pipeline amount for a Pending job is an average of the quantities quoted, modified by the percentage of likelihood.

When a Sales Rep runs the Pipeline, it will only report jobs on which he or she is the Sales Rep. When a Manager runs the Pipeline, the Manager's Sales Region is reported, unless a smaller subset is selected, such as a single Sales Office, or Sales Rep. Executive users see all Sales Reps in all Sales Regions.



## The Business Menu

OUTPUT		
Proposals	Confirmations	
Forms	Mail	Business
Invoices	Summaries	



- A number of ways of looking at your sales
- Available to Sales Reps and Managers alike
  - Sales Reps see their own sales
  - Managers see their region rolled up
- Get yourself organized and take a look!

Looking Forward...		
3 Pipeline Reports →	Pipeline	... Summary
Sold Jobs Only →	Current Month's Sales	
Pending / Likely Jobs Only →	Pending Sales Forecast	... by Likelihood
Book	Looking Back...	
	YTD Sales	Paper
	Billed Sales	Lost Jobs
	Cust.	Analysis
	Summary by Rep & Customer	Commish
	Export Jobs .xls	
	Sales / Company	.../ Contact
	.../ Product	
	Budget Analysis	Account Analysis
	VA	
	Billed Sales with Average	Billed Sales by Quarter
	Recent Activity	JOBZ! Activity
	Customer Activity	



## Other Benefits

- Pipeline-related capabilities:

The screenshot shows a software interface with a top navigation bar. A red arrow points to the 'Estimates Due Today' notification. Below the navigation bar, there are tabs for 'Forms', 'Proposals', 'Invoices', 'Mail', 'Confirmations', 'Business', and 'Summaries'. A message window is open, displaying the text: 'Estimates for these jobs are due today.' The message is from Jim Taylor and includes a 'Thanks' button. Below the message, there is a table with columns: Customer, Title, Rep, Date In, Date Due, and Select X. The table contains entries for 'Database Testing, Inc - Drifter's Escape' and 'Clan Tech, Inc - Bud'.

Set a Follow-up date on the QUOTE screen

The screenshot shows a software interface with a 'Tracking' window on the left and a main interface on the right. The 'Tracking' window has a 'Follow Up' field circled in red, showing 'Mon, Nov 16, 2009'. The main interface has a 'Follow Up' notification bar at the top, with a red arrow pointing to it. Below the notification bar, there are tabs for 'List', 'Today', 'Week', 'Invoices', 'Mail', 'Confirmations', 'Business', and 'Summaries'. A message window is open, displaying the text: 'These quotes are scheduled for follow up today or earlier.' The message is from Jim Taylor and includes a 'Thanks' button. Below the message, there is a table with columns: Title, Rep, On Press / Invoice, Quoted / FU +, and Pipeline \$. The table contains entries for 'Flow Me One' and 'Database Testing'.



On the Working list, based on Files In date.



Message

These jobs have files due today.

Thanks

Customer	Job Title	Rep	Files	Press	Ship	Inv	Ship Qty.	Quote	Job#
Database Testing, Inc - Love Minus Zero No Limit			11/16	11/20	11/21	11/24	10,000	\$49,729	
32 pages plus cover, with BRC at center									
Operamatica - Gotta S									
24 pages + fold-out cover									

From the Business Menu



## Lost Jobs Report

### Jobs Reported as Lost

#### Jim Taylor

Federal Motors - Shelter From The Storm

Arrowspace - Positively Fourth Street

Control Alt Delete - The Levee's Gonna Break

Cursory Software - Just Like A Woman

Five, Inc - Return to Me

Tracking Pending Jobs List

Follow Up

Likely Sale **Report Lost**

**P** Lost To Nemesis Printing

Their \$ Qty 1 \$16,500 = 82%

These guys are killing me!

On the QUOTE screen

November 16, 2009

Quote Dates: 11/7/08 to 11/19/09

Lost To	Their Quote	@
Nemesis Printing	\$16,500	82%
Loballer Printing	\$16,850	89%
Nemesis Printing	\$14,500	78%
Usual Suspects	\$14,000	75%
Nemesis Printing	\$15,000	72%

February	2009	S	\$17,457	90.0%	Just missed it.
February	2009	S	\$16,736	90.0%	FSC paper- couldn't get any.
February	2009	S	\$17,666	95.0%	We discounted to 95%, but looks like we need to be below 80% with these guys.
February	2009	S	\$18,034	86.7%	Note about the quote





JOBZ! is a productivity tool designed to enable Sales Reps to manage themselves, and by extension to help Managers to manage a Sales Force.

Thanks for using JOBZ!

For questions, please contact:

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408-395-8183

888- SEIZE IT

