OrgChartPlus

User Guide

Version 8.0+

sales methods

Contents

OrgChartPlus Overview

Here we outline what each of the views are used for and how you would use them.

If you have any problems, please go to https://salesmethods.com/support/ and complete the form.

Opening OrgChartPlus

In Lightning your **Salesforce Administrator** can add an **OrgChartPlus** tab to your Account / Opportunity layouts so you can see the chart within the current record...
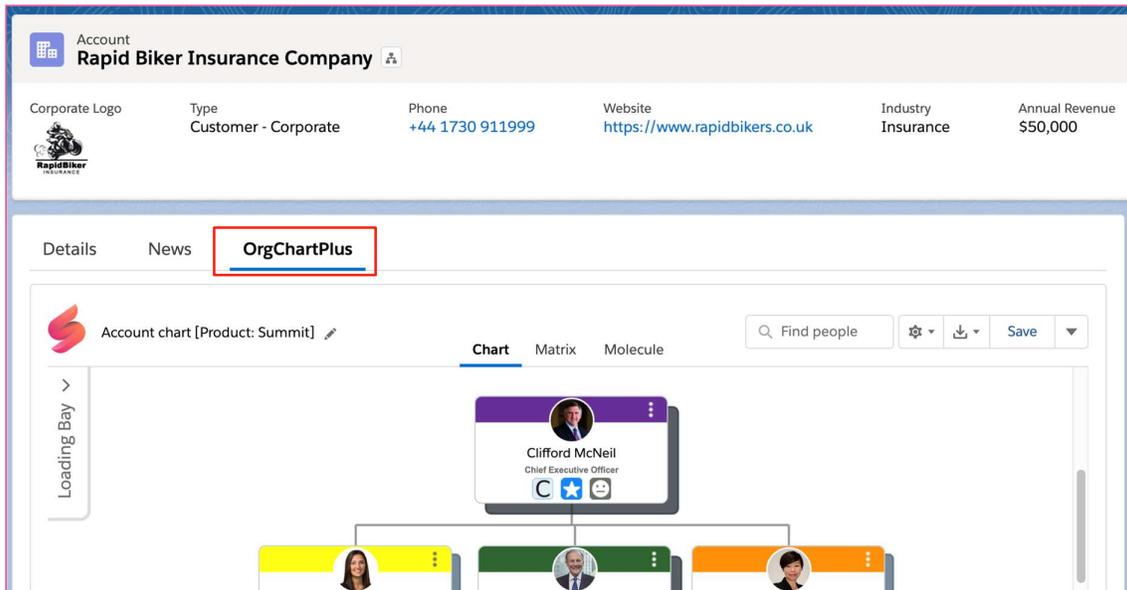
And if you want to switch the Chart to 'Full Screen' you can toggle between 'In-Screen' and 'Full Screen' modes using the {Full Screen} button at the foot of the Chart screen...

Or, you can go straight to 'Full Screen' mode by clicking on the [OrgChartPlus] button your Salesforce Administrator placed in the Lightning Action bar at the top of the page...

The Three Views

You can view your team's relationship with your Customer contacts in three different ways:

Matrix: Where you can define the one-to-one relationships and intimacies.

Chart: Where you can define the reports-to/decision hierarchy tree.

Molecule: Where you can view the interplay and dynamics of the intimacies.


The Matrix View

The Matrix is where you will typically start. It's the best place to get an overview of the contacts and team members involved in your chart. It is also the best place to carry out admin such as plotting the attributes and editing Titles and Roles. Any changes to Titles and Roles made in the Matrix view will automatically update in Salesforce.
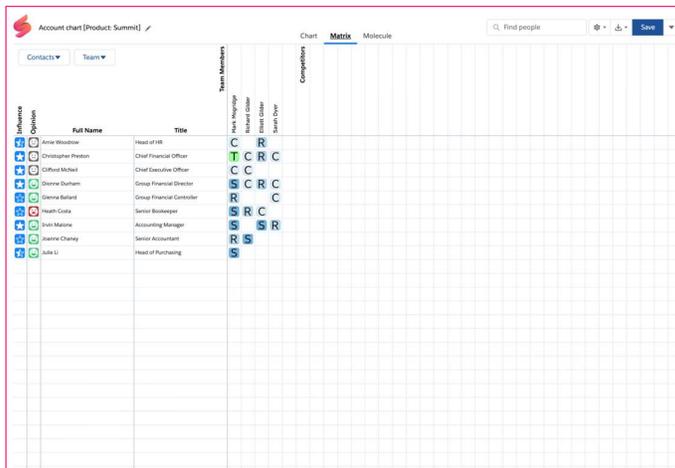
The Chart View

This is where you both build and view the org chart. The Chart view also lets you colour code, create Tasks and Events and get an understanding of the formal and non-formal connections that exist.
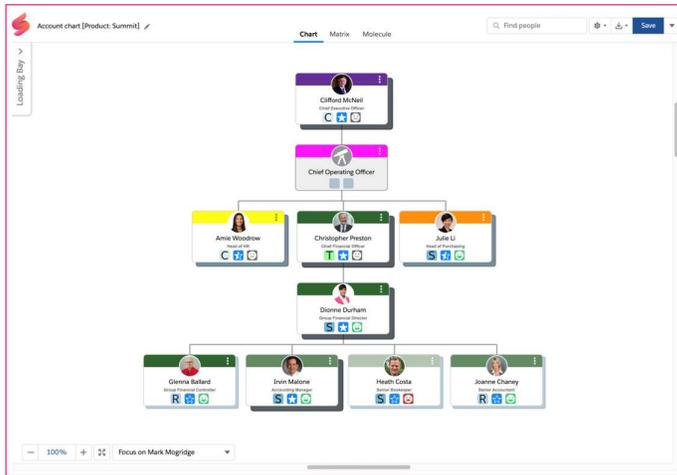
The Molecule View

The Molecule uses the 'Intimacy' attribute to position contacts in relation to the centre based on how strong your connection to them is. The stronger the connection, the closer to the centre the contact will be. It's a great way of showing how well you are positioned within an Account or Opportunity. It also exposes all the relationships that exist. You can leverage these to get introductions to the contacts who you don't know but need to.
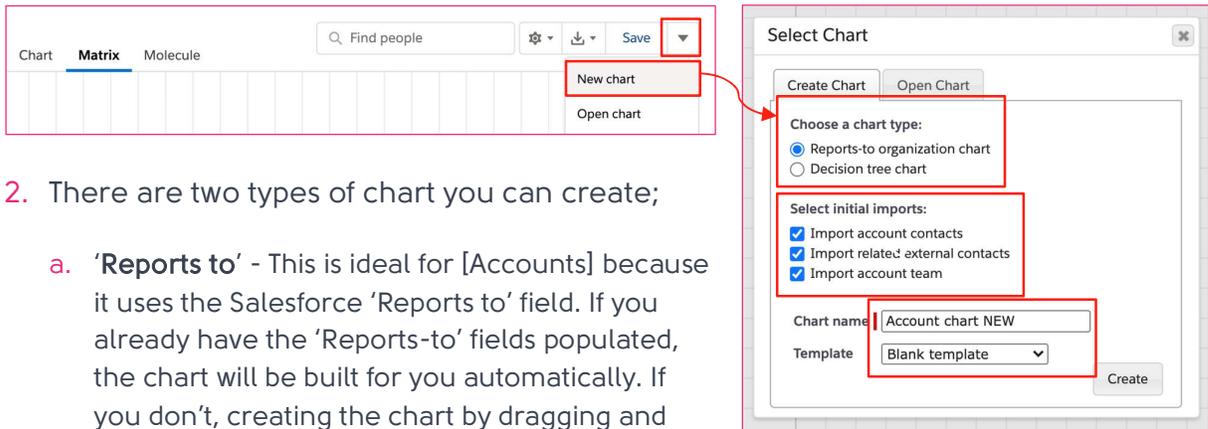
Getting Started

Creating a new [Account] chart

1. Click on the [Save ▼] > {New Chart}

2. There are two types of chart you can create;

   a. '**Reports to**' - This is ideal for [Accounts] because it uses the Salesforce 'Reports to' field. If you already have the 'Reports-to' fields populated, the chart will be built for you automatically. If you don't, creating the chart by dragging and dropping will update this field in Salesforce for you.

   b. '**Decision tree**' - This is ideal for [Opportunities] and covered in the next section.

3. There are three **Initial Import** options that will automatically import different types of related contacts;

   a. **Import account contacts**: The Contacts held against the Account record.

   b. **Import related external contacts**: Any Contact in your Salesforce Org. *

   c. **Import account team**: Your predefined 'Account Team' for this Account.

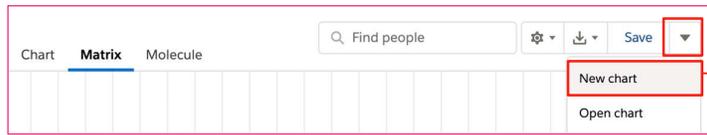4. Name the Chart and initially select the {**Blank Template**} option

5. Click the [**Create**] button.

> [*_* By default, this allows you access to every Contact in your Salesforce Org. But this selection can be customised in the OrgChartPlus Configuration page by the System Administrator]_

Creating a new [Opportunity] chart

1. Click on the [Save ▼] > {New Chart}

2. There are two types of chart you can create;

   c. 'Reports to' - This is ideal for [Accounts] and covered in the above section.

   d. 'Decision tree' - This is ideal for [Opportunities] because it won't use the 'reports to' field. This chart type will let you freely manipulate the chart without altering the 'reports to' field within Salesforce.
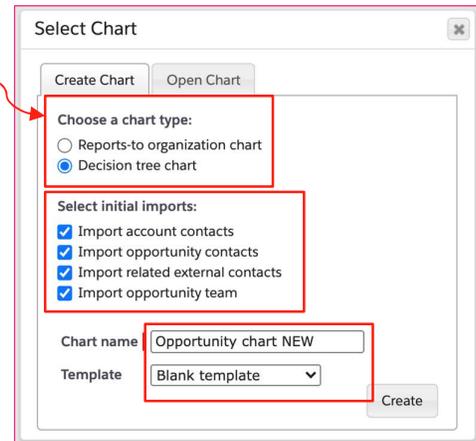
3. There are four Initial Import options that will automatically import different types of related contacts;

   a. Import account contacts: The Contacts held against the Account record.
   b. Import opportunity contacts: The Contacts in the predefined 'Contact Roles'.
   c. Import related external contacts: Any Contact in your Salesforce Org. *
   d. Import opportunity team: Your predefined 'Opportunity Team' for this Opportunity.

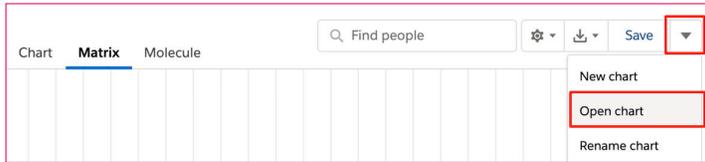4. Name the Chart and initially select the {**Blank Template**} option

5. Click the [**Create**] button.

[* By default, this allows you access to every Contact in your Salesforce Org. But this selection can be customised in the OrgChartPlus Configuration page by the System Administrator]
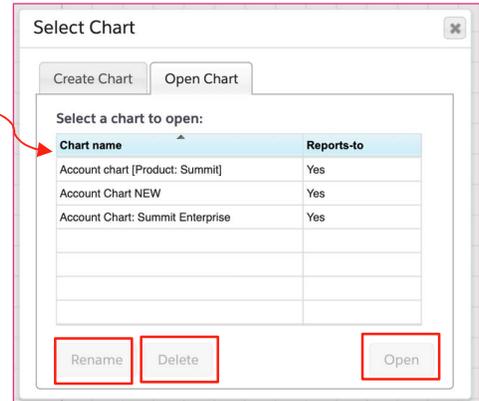
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Open/Rename/Delete an existing chart

1. Click on the [**Save ▼**] > {**Open Chart**}

2. You can create multiple charts per [Account] or [Opportunity]. And you can also **Rename** or **Delete** your saved charts from this {**Down Arrow**} picklist.
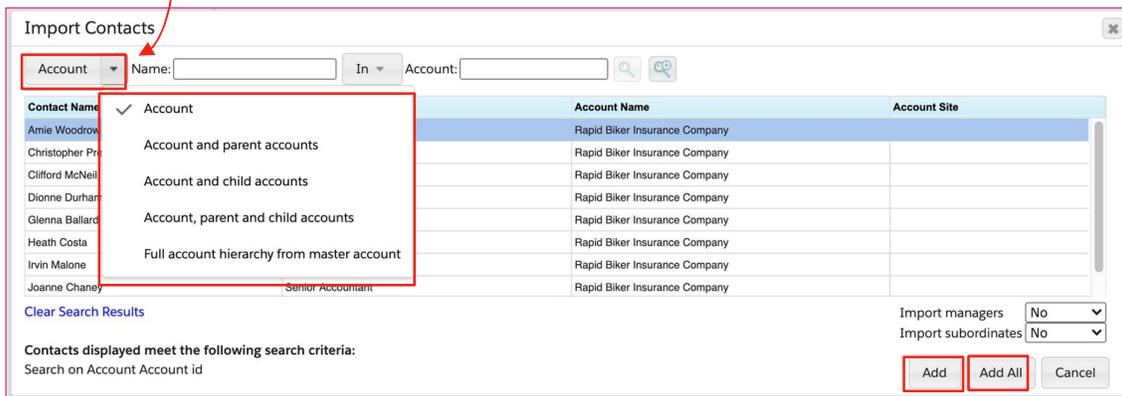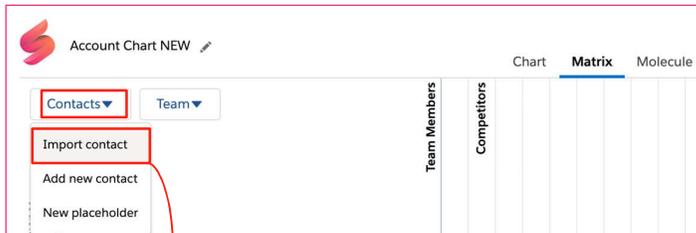
Importing Contacts

The Import Contact screens are very similar for [Accounts] and [Opportunities].

The only difference is that in the Opportunities Chart screen there is also an [**Opportunity**] button to show the 'Contact Roles'.

1.   In '**Matrix**' view, click on [**Contacts ▼**] > {**Import Contact**}.
    Note: In 'Chart' view you will need to open the 'Loading Bay' Tab first.

2.   You can display the [Contacts] using a number of selection and filtering techniques;

   a.   Press the [**Account**] button in the top left to view all contacts within that account

   b.   The [**Account ▼**] lets you specify the Account hierarchy

   c.   Select individual contacts, or hold the {Command} or {Shift} keys to select multiple contacts, or {click} and {drag} the mouse to highlight a range of Contacts.

   d.   Click the [**Add**] button to import the selected Contacts to the Chart.

   e.   Click the [**Add All**] button to import the entire list to the Chart.

More options for importing Contacts…

3. You can search for Contacts within the current Account or within <u>any</u> Account in your Salesforce database.
The example above shows a search for a Contact (Alan) in an unrelated Account (Bennetts).

4. When you click the [Add] buttons you can simultaneously import tiers of Managers and/or Subordinates. You can define the number of tiers (1-5) you wish to import of either category;

   a. 'Import Managers' will import the desired tiers of Managers of the contact(s) you have selected
   b. 'Import Subordinates' will import the desired tiers of Subordinates of the contact(s) you have selected

   The example above shows that you will simultaneously import the Alan Thomson's immediate Manager and his immediate Subordinates.

5. You can create an Advanced Search to search for Contacts that match a (multiple) set of rules by clicking on the [**Magnifying Glass +**] icon;

a. Select the **Source** of the search 'base data'…
   All Contacts / Current Account / Related Accounts.

b. Use the tiers of field picklists to select the filtering fields and enter their search values.

c. Click [**Add Rule Logic**] to add AND/OR/NOT logic to the search elements.

d. Click [**Clear All Rules**] to clear all the criteria and start again.

e. Click the [**OK**] button to execute the search criteria

Importing Team Members

Import 'Team Members' (Salesforce Users + Non-SFDC Contacts) so you can map who in your company knows who in your Accounts.

NOTE: You can read how to add Non-SFDC Contacts in the OrgChartPlus Installation Instructions.

1. In '**Matrix**' view, click on [**Team ▼**] > {**Import Team Member**}.
   *Note: In '**Chart**' view you will need to open the '**Loading Bay**' Tab first.*

1. To import Team Members;
   a. Click [**All Team Members**] to view the Salesforce Users and Non-SFDC Names. [See above]
   b. Click [**Account**] to view predefined 'Account Team'. [Not shown]
   c. Click [**Opportunity**] to view predefined 'Opportunity Team'. [See above]

Importing Partners

You can also include Partners such as Consultants and 3rd party providers

1. In 'Matrix' view, click on [Team ▼] > {Import Partner Contact}.
    Note: In 'Chart' view you will need to open the 'Loading Bay' Tab first.

2. To import Partner contacts;
    a. Click [All Partner Contacts] to view all the Contacts in your Salesforce Org. *
    b. You can search for Contacts within <u>any</u> Account in your Salesforce database.
        The example above shows a search for a Partner Name (Alan) in an unrelated Account.
    c. Tick the {Show on Org Chart} checkbox to optionally include their details in the Chart View.

        [By default, this allows you access to every Contact in your Salesforce Org. But this selection can be customised in the OrgChartPlus Configuration page by the System Administrator]*

Importing Competitors

You can also of the relationships between your Accounts and your Competitors.

NOTE: You read see how to add Competitors in the OrgChartPlus Installation Instructions.

1. In 'Matrix' view, click on [Team ▼] > {**Import Competitors**}.
    Note: In 'Chart' view you will need to open the 'Loading Bay' Tab first.

2. To import Competitors;
    a. Click [**All Competitors**] to view the Competitors.
    b. You can search for Competitors within the selection.
    c. Tick the {**Show on Org Chart**} checkbox to optionally include their details in the Chart View.

3. Click [**Save**].

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The Key Attributes in OrgChartPlus

There are four key attributes in OrgChartPlus that enable you to classify the relationships between your Team and the Contacts within your Accounts...

Opinion

This is used to map what the opinion a contact has of your organisation.

0.   None
1.   Low
2.   Medium
3.   High

Intimacy

This is used to map the strength of connection between a Team Member and a Contact.

0.   None
1. T Target
2. C Contact
3. R Regular
4. S Strong

Influence

This is used to map how much influence a contact has within their own organisation.

0.   None
1. ☆ Low
2. ★ Medium
3. ★ High

Relationships

This is used to map the informal relationships within your customer's organisation.

Collaborates   ⟶
In conflict with   ⟷
Influences   ⟶
Knows   ⟷
Socialises   ⟷
Supplies   ⟶
Supporter of   ⟶

You can change an Attribute's value by selecting the cell and clicking the appropriate numeric value, so for Opinion: {Numeric key} 3 = 🙂 High.

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Building the Chart

Matrix View: The Stakeholders

Follow these steps to build the **Matrix…**

1. Add the **Contacts**, **Team Members** and **Competitors** as described in the previous sections.
2. Determine the '**Intimacies**' between every individual and competitor.
3. Classify the '**Influence**' and '**Opinion**' of each Contact.
4. Click [**Save**].

Example: Using the numeric keyboard shortcuts…

Chart View: Stakeholder Hierarchy

Move to the **Chart View** and follow these steps to build the hierarchical chart for your Accounts and Opportunities.

Known Contacts

All the unrelated Contacts (those without the Reports-To field populated) are listed in alphabetical order in the left-hand **Loading Bay**.

1 Drag and drop the most senior Contact (Clifford McNeil) into the chart area first.

2 Drag-drop the Subordinate Contact, (Christopher Preston), <u>on top</u> of Christopher's Manager, (Clifford McNeil). The hierachy is automatically created.

3. Repeat adding Subordinates to Managers and the 'Reports-To' relationship is automatically assigned in the Salesforce Contact record in each case.

4. You can drag-drop the Contact box 'away' from it's Manager to 'undo' the hierarchy.

5. Click [**Save**].

6. You can drag-drop multiple Subordinates onto the same Manager.

7. You can move the Contact boxes to either side of an existing Contact box. (See how Christopher Preston is being placed to the right of Amie Woodrow. Click [**Save**].
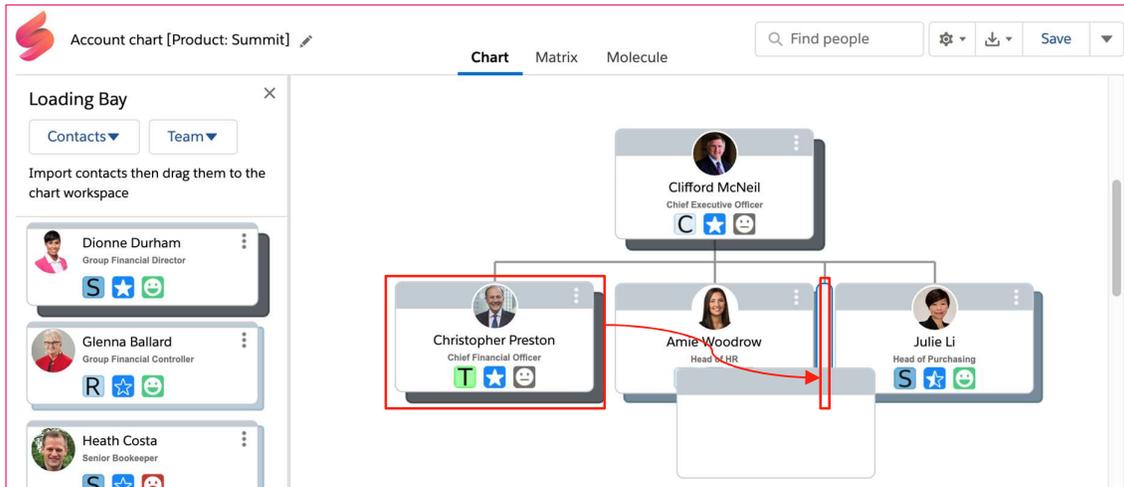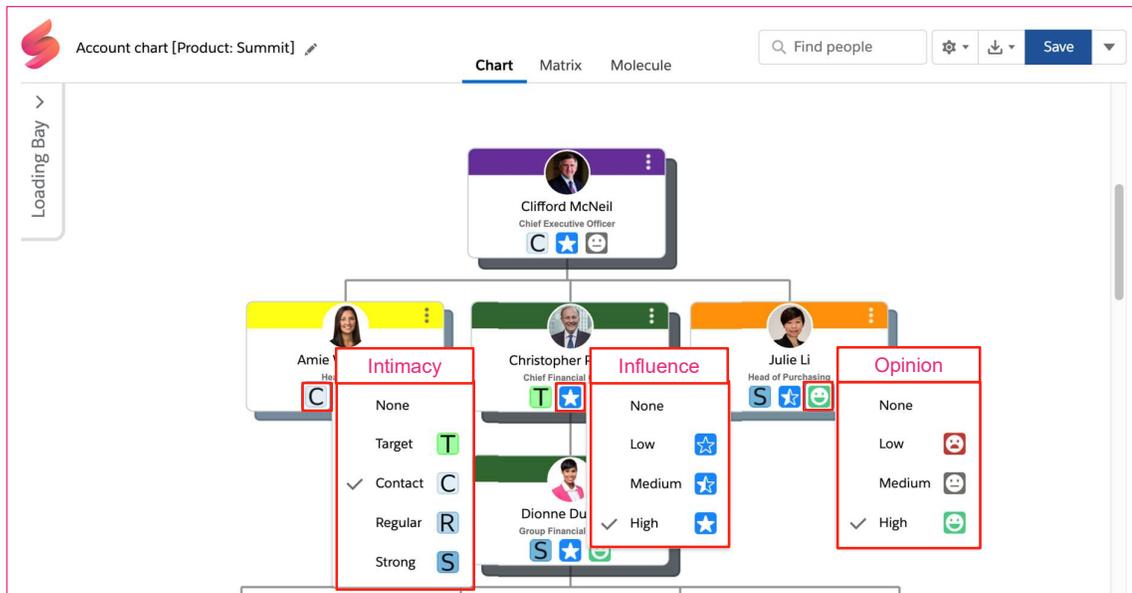

8. You can manually add colour to the Contact boxes by {right-clicking} on the Contact box > **Color** > **Choose Color**. > Click [**Save**].

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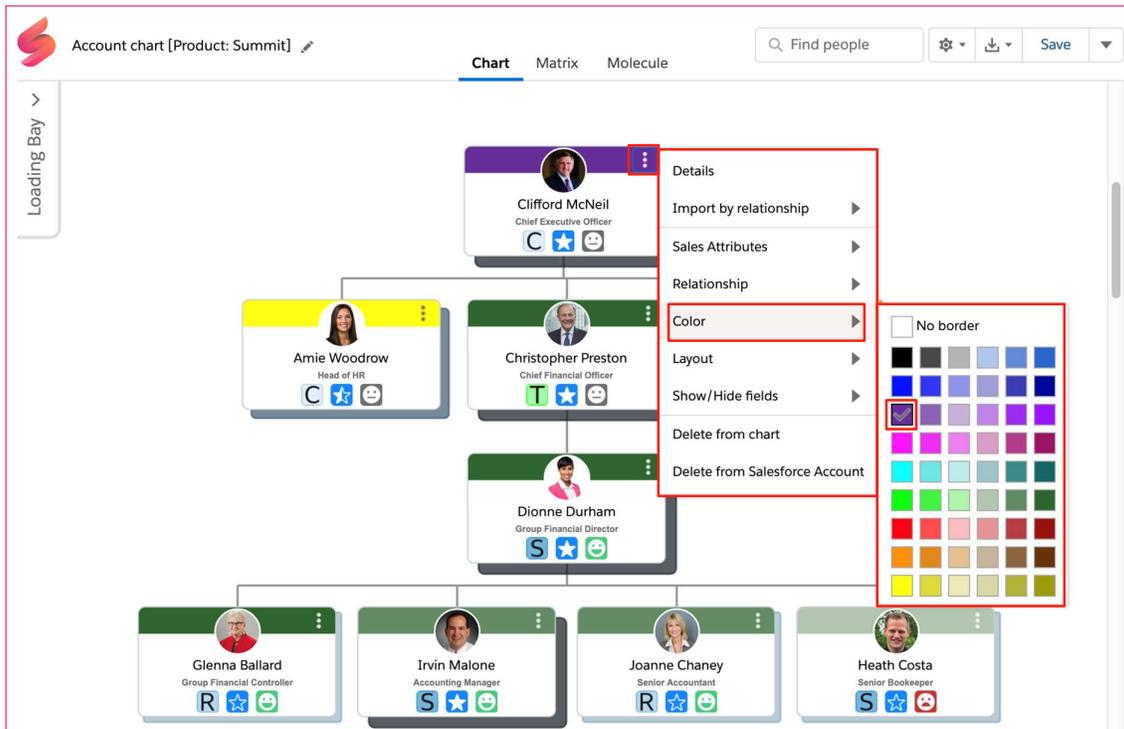
9. In Chart View you can change the Attributes of each Contact simply by clicking on the **Intimacy**, **Influence** and **Opinion** icons. Click [**Save**].

Please note: The **Intimacy** attribute relates to the '**Focus On**' Team Member selected at the bottom of the chart...
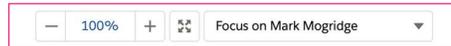
Unknown Contacts: Placeholders

If you do not know the contact details of a key Stakeholder/Role you can reserve that position in your Chart using a **Placeholder**.

The Placeholder will act as reminder for your Team to research the details of the person in that position.

1. In 'Chart' view, click on [**Contacts ▼**] > {**New Placeholder**}.
2. Enter the Job Title or Role of the stakeholder, click [**OK**]
3. The Placeholder will appear in the **Loading Bay**
4. Drag-drop the Placeholder into the correct position in the Chart.
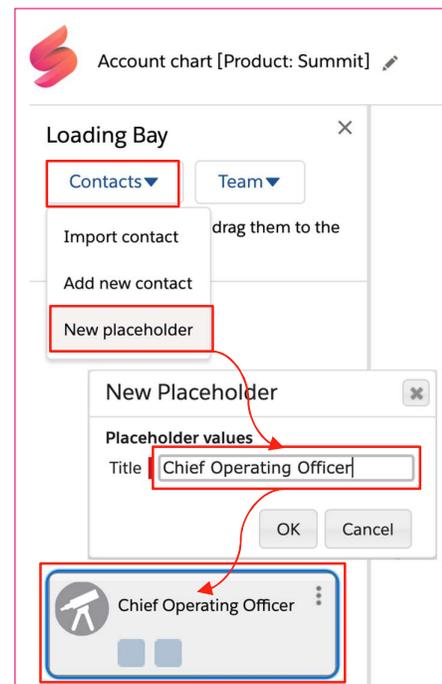
Unknown Contacts: Placeholders continued…

The final chart looks like this with the 'Chief Operating Officer' Placeholder as the Subordinate of 'Clifford McNeil' the CEO…
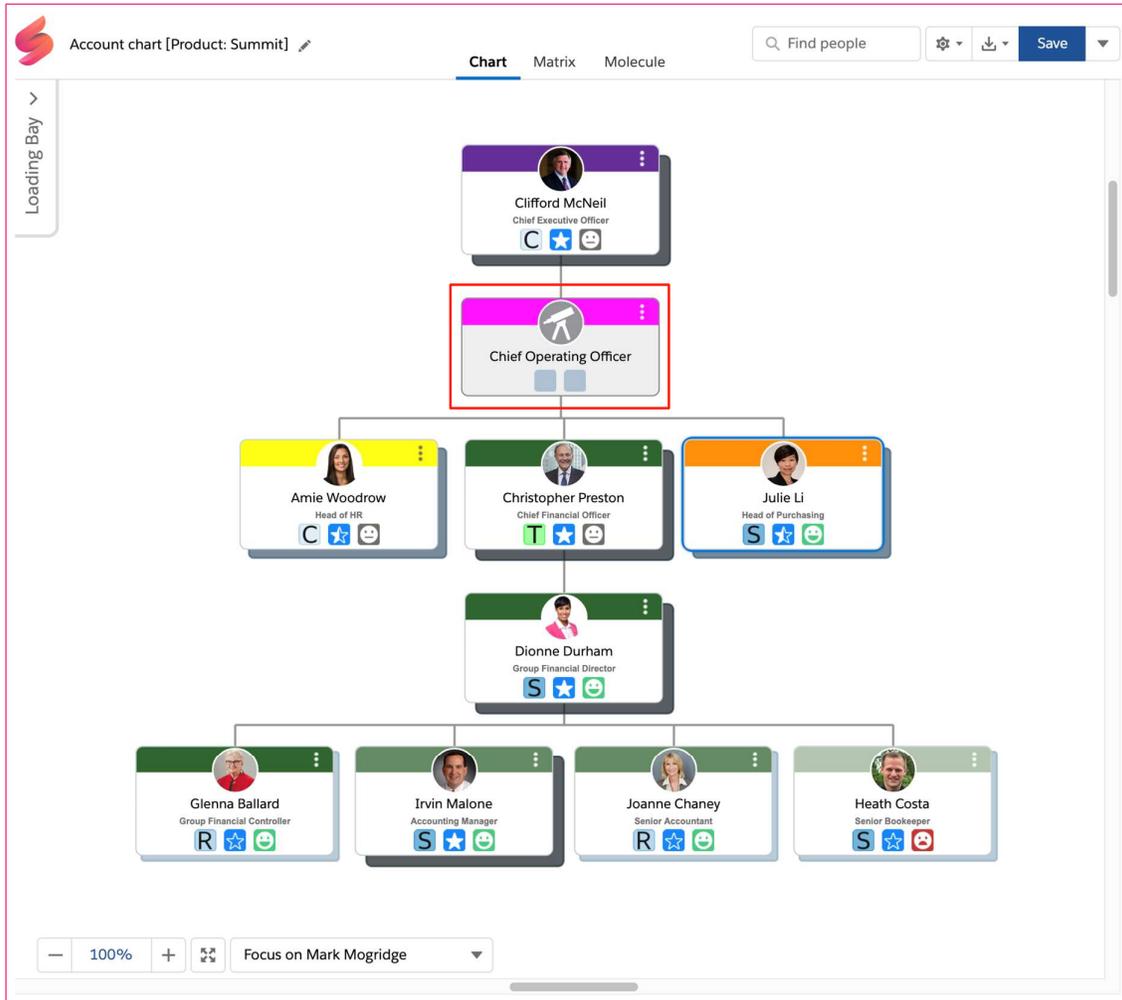
And one final thing… Click [Save].

Using the Chart

Molecule View Overview

The **Molecule View** places contacts with the highest Intimacy at the centre of the Molecule.

The main benefits of the Molecule View are ...

- Provides you with an intuitive understanding of how well positioned your Organisation is within an Account.
- Graphically shows you the most efficient route to gain introductions to key Target contacts
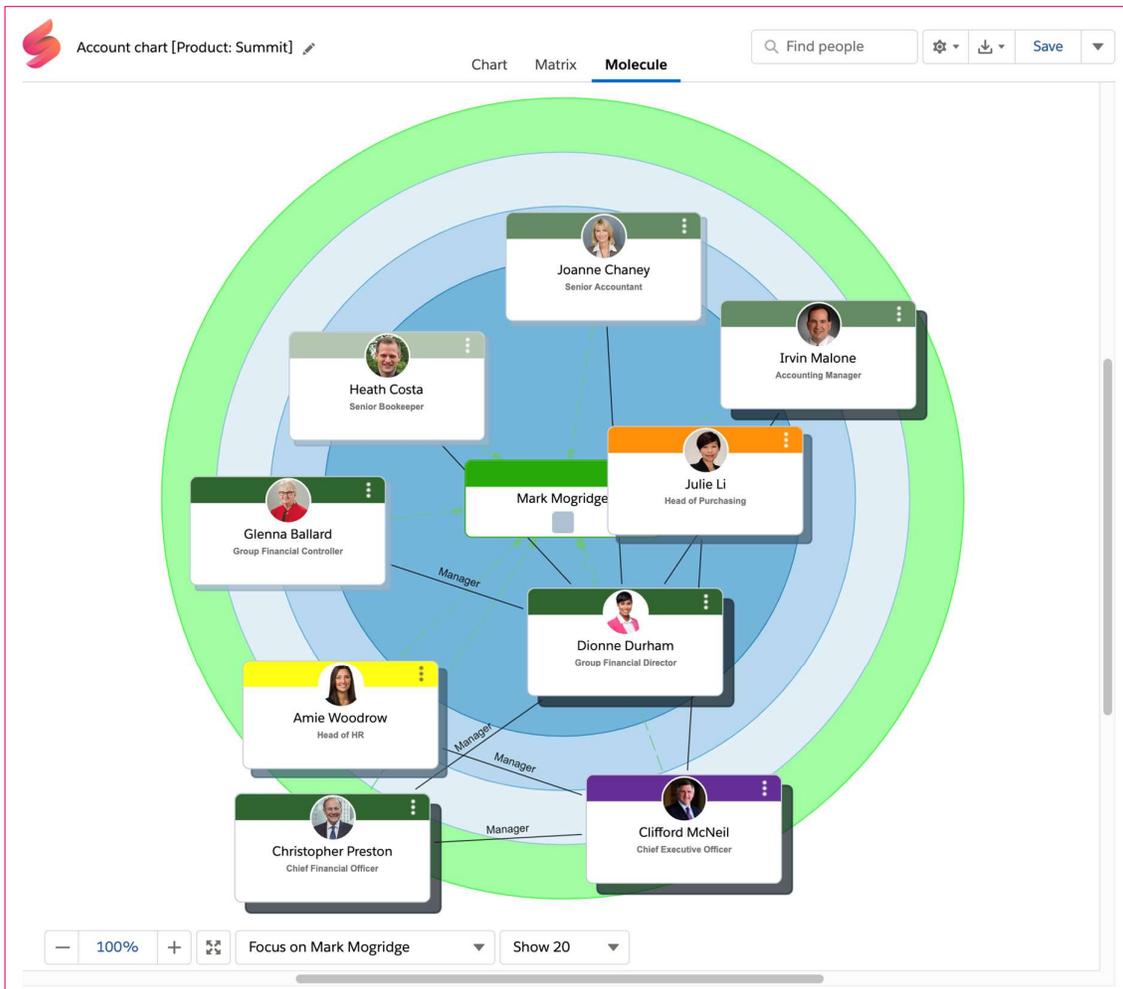
Using Molecule View continued...

By changing the {Focus} picklist at the foot of the **Molecule** screen you can change the focal point of the 'Intimacies' ...

1. {Highest intimacy} will display the strongest intimacy that exists with a contact
2. {Highest competition} will place you competitors in the centre
3. {Team Member} to see their closeness to the Accounts contacts
4. {Competitor} to see your Competitors' alliances within the Account
5. {Contact} is a great way to see who you need to speak to get introductions to key Stakeholders.

Focus on Highest Intimacy

Focus on Highest Competition

Focus on a Team Member

Focus on a Contact

Filtering Contacts

One way to narrow down the number of Contacts you see on the screen is to use the Filter. The Filter is available in **Chart**, **Matrix** and **Molecule** Views.

1. Click on [**Save ▼**] > {**Filter Visible People**}.
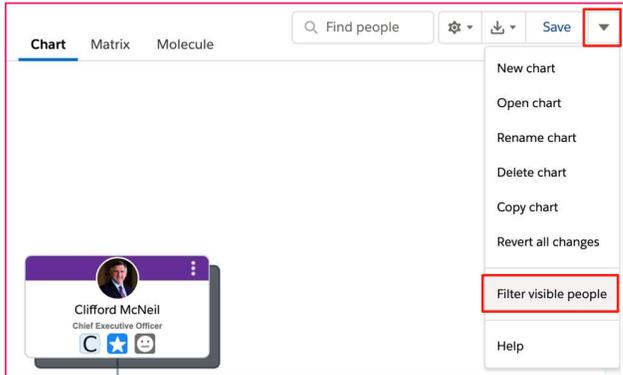
2. Use the tiers of field picklists to select the filtering fields and enter their search values.

3. Click on [**Apply**] to see the selection, or click on [**Apply and Close**] to update the selection.
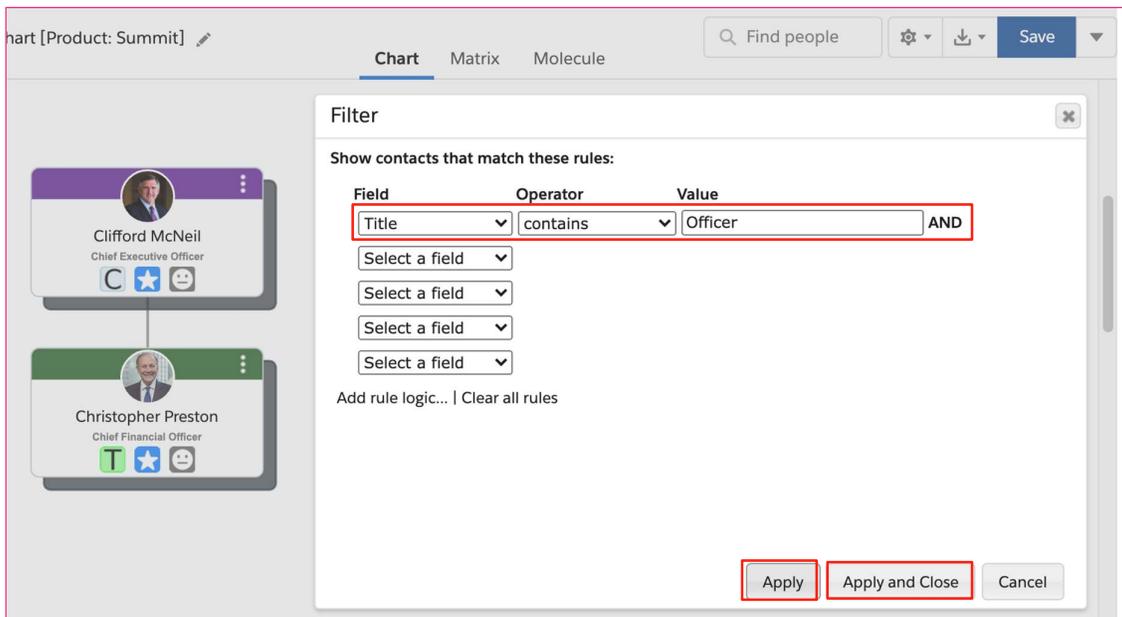
Finding Contacts

You can search for Contacts in the Chart, Matrix and Molecule Views.

1. Type the name into the {Find People} search box, and it will auto-guess and suggest Contacts.
2. Click on the correct name and the Contact box will be auto-centred and highlighted.
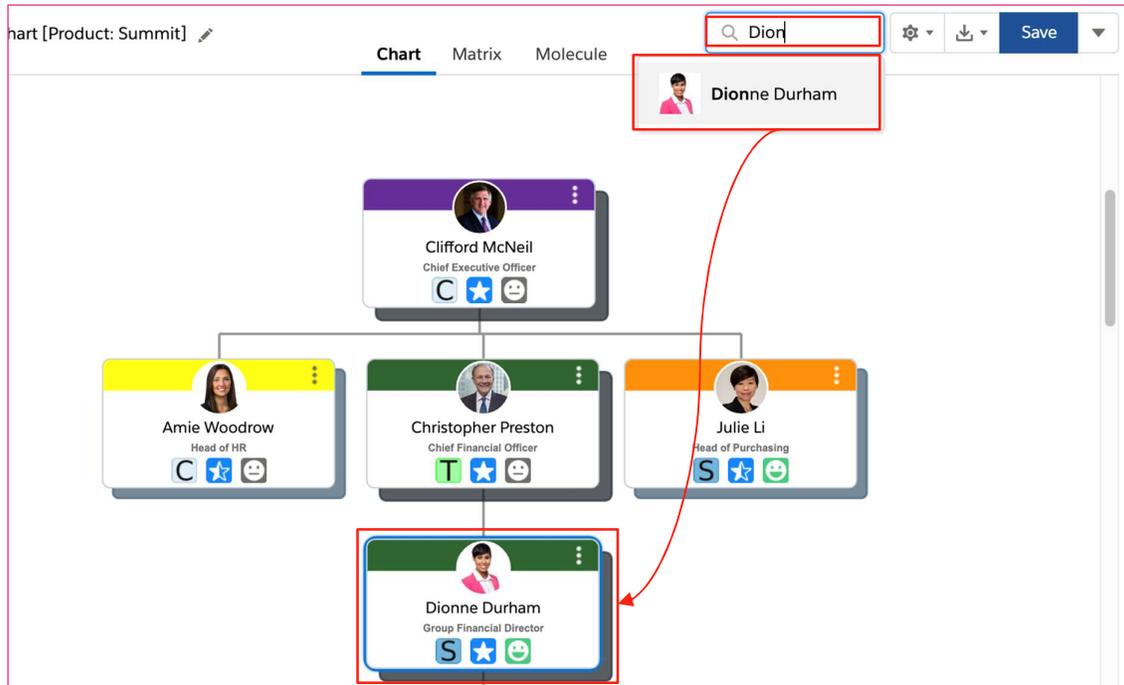
OrgChartPlus Notes

To add a note to your chart, click the notes icon on the Loading Bay:
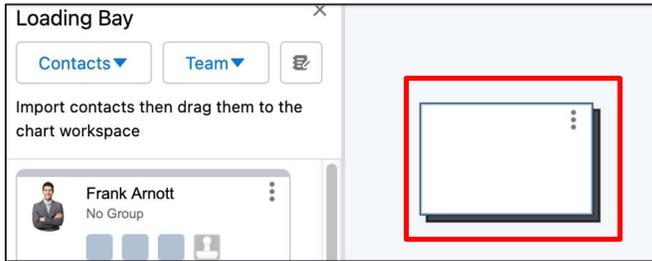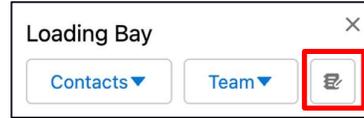
Click (or click-and-drag) in the background of the chart view to place your note.

To edit, double-click on the note (or click the 3-dot menu and select "Edit Note"):
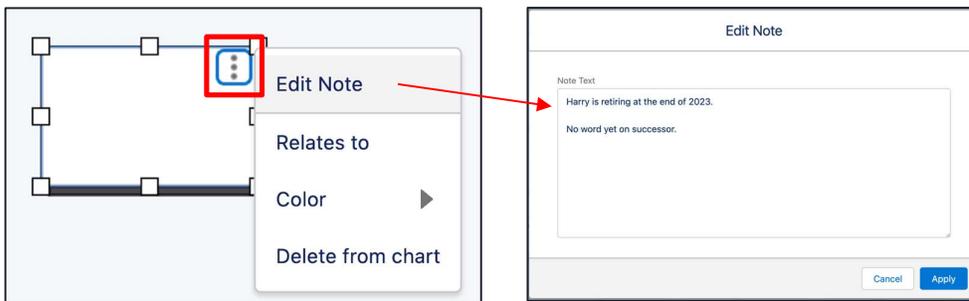
Go to the same menu to change to add a relationship. Notes can be related to Contacts, Team Members, or other Notes:
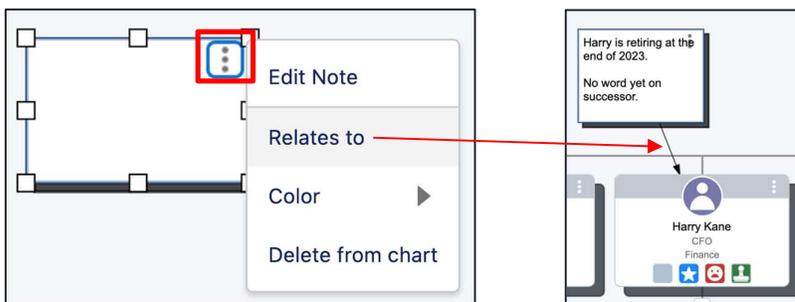
Use the menu also to change the Note's color. Notes can be related to Contacts, Team Members, or other Notes:
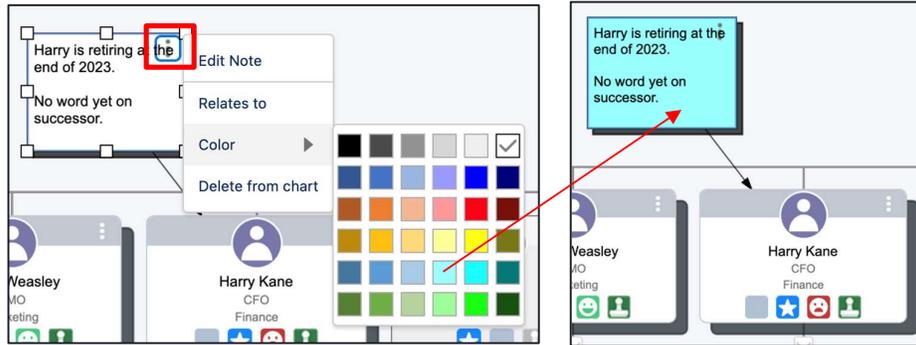
Examples of colour-coded notes:
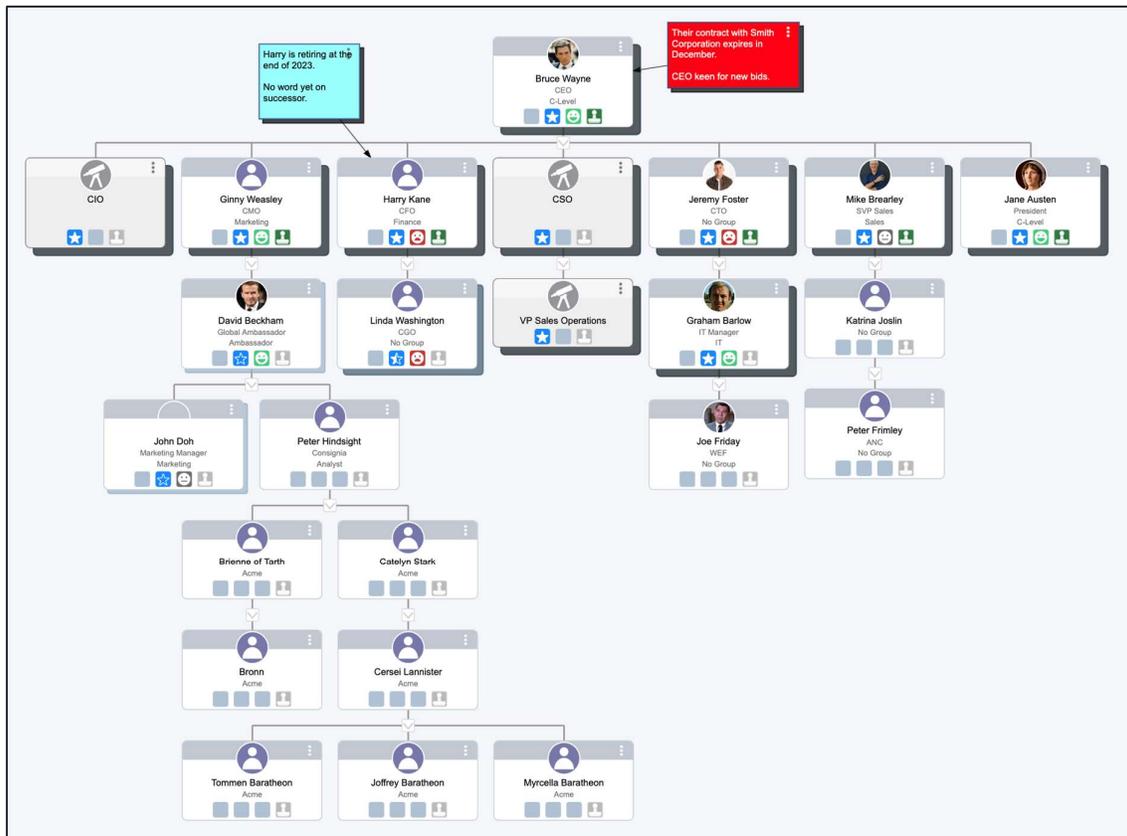
Viewing the Key Attributes Legend

To view the Key Attributes Legend …

1. Click on the {Gearwheel} Icon in the top bar.
2. Select {Show legend} from the menu.
3. And the Legend appears.
4. Select {Show legend} again to hide the Legend
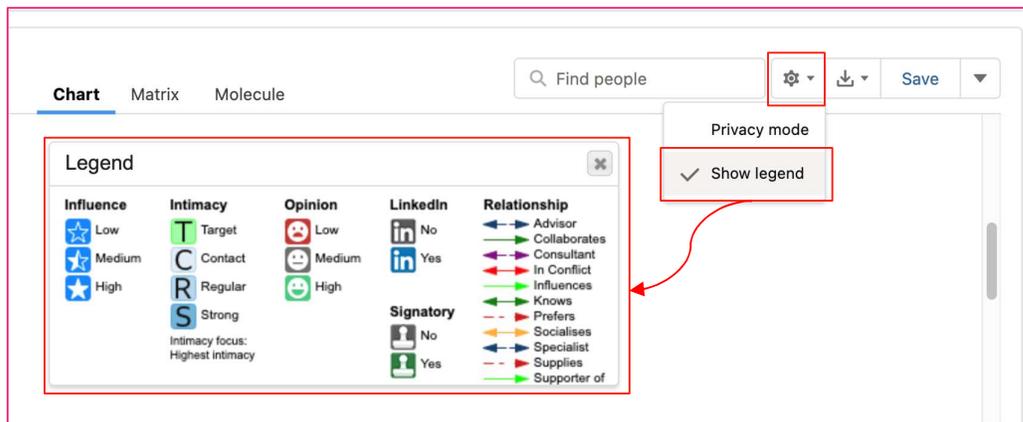
Exporting & Reporting

You can export native Microsoft Office documents of the **Chart**, **Matrix** or **Molecule** Views. You can also export images, and you can print them in paper or PDF form.

You can also export these documents as **Attachments** to the current Account or Opportunity records in Salesforce.

Click on the {**Download ⤓**} icon to see the export options available...
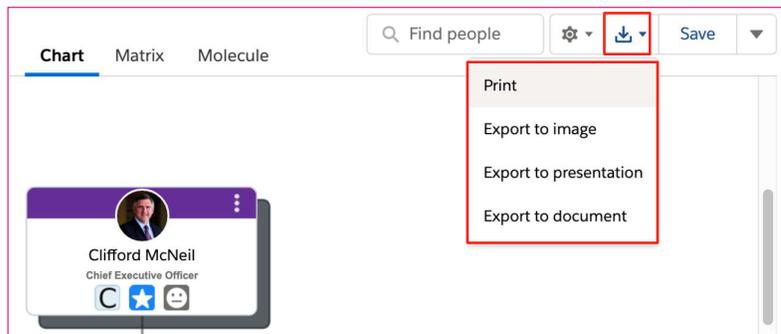
Print to Printer / PDF

The standard print to Printer/PDF process with paper size, orientation, margin and quality dpi options. Additionally, you can opt to show the Legend and hide the 'Relationship / Intimacy' details when in Privacy mode.
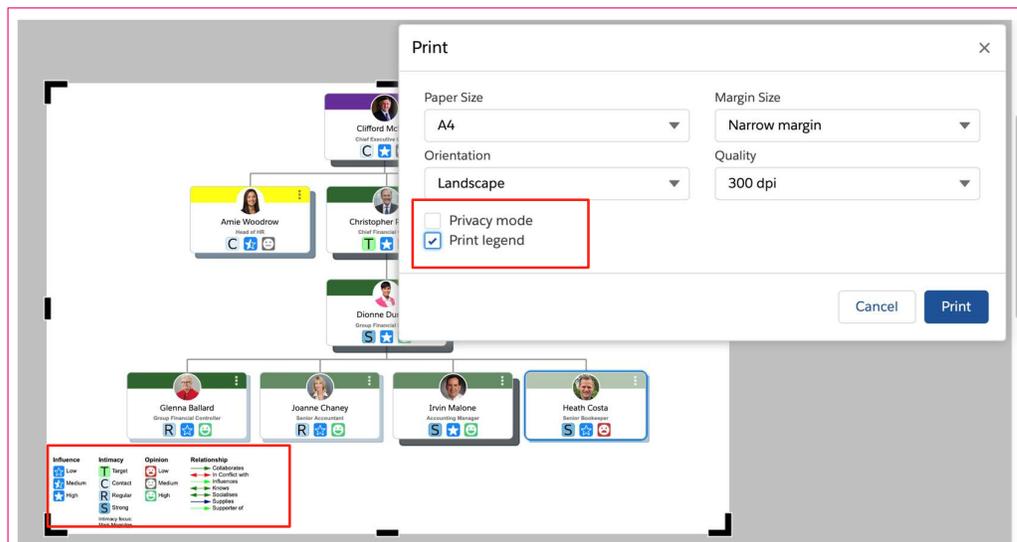
Export to Image [PNG transparent .png]
Create a PNG image with options for Image Quality, Privacy Mode and Legend.

As with all the Exports, you can export the file to a hard-drive or attach the document as a File to the current Account or Opportunity record in Salesforce.

Export to Presentation [Microsoft Powerpoint .pptx]

Create a native Microsoft Powerpoint (.pptx) presentation with options for Privacy Mode and Legend.

The Presentation export (as with the other Microsoft Office exports) has a Template option.

(1) You use an existing Powerpoint file as a template, and insert the exported content after a specified page.

(2) Or you can create a new Powerpoint presentation using one of OrgChartPlus's Blank templates.
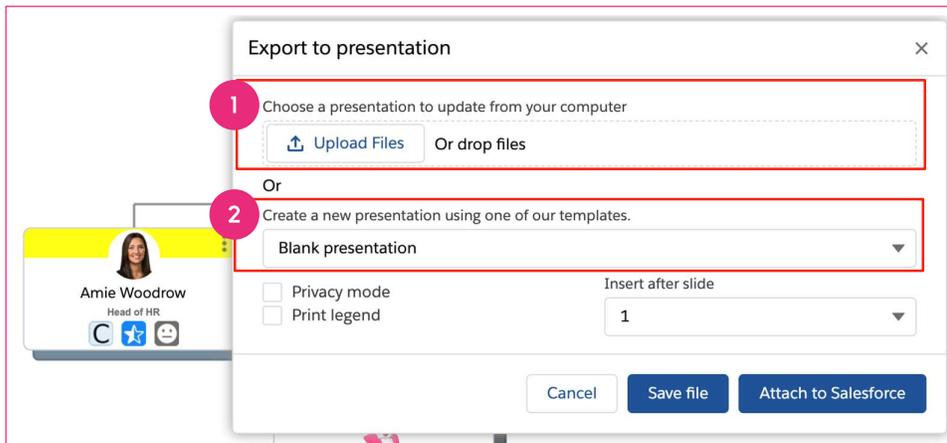
Export to Document [Microsoft Word .docx]

Create a native Microsoft Word (.docx) document with options for Image Quality, Privacy Mode and Legend.

The same Template options apply to the Document export and the Blank templates offer paper-size and paper-orientation options
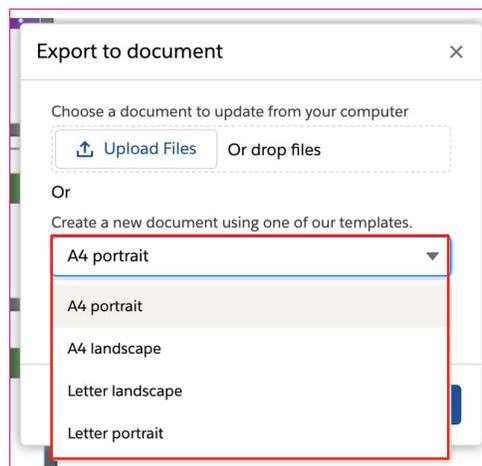
Export to Spreadsheet [Microsoft Excel .xlsx]

Create a native Microsoft Excel (.xlsx) document with options for Privacy Mode.

Note: that the export to Spreadsheet option is _only_ available in the **Matrix View**.

Using Placeholder Templates

Templates are a collection of Placeholders. Placeholders determine the pre-set hierarchy of the decision makers within an Account or Opportunity.

Using the Template to create new Charts

1. When you create a New Chart for an Account or Opportunity simply select the relevant Template from the picklist.
2. The selection of Templates will be limited to those that match the 'Auto-Match' formula.

Thank you for reading this

For any questions or further support
on using OrgChartPlus, please go to
https://salesmethods.com/support/
and complete the form.