



Plan2Close

User Guide

Version 4.0+



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Plan2Close Overview

Plan2Close (P2C) is a methodology for managing major **Sales Opportunities**, increasing win rates and delivering value that differentiates you from your competition.

The objective is to help salespeople win more business by focusing their efforts and their company's support resources on the right deals.

The main features of **Plan2Close** are...

The Question Set

The standard pre-saved **P2C Question Set** consists of 16 questions, made up of **4 Groups**, each consisting of **4 Questions**, which is why it's called the **4x4**.

The Question Group headers are...

1. Qualification
2. Justification
3. Differentiation
4. Influence

Objectives and Tasks

Salesforce Objectives and Tasks can be assigned to the Users managing the Opportunity. These allow you to create a plan of action that is based on the questions in the **P2C Question Set** to develop the Opportunity.



What's new in v4?

SalesMethods Lightning Experience

With the **Plan2Close** fresh, clean and contemporary Lightning look we now offer our customers a more intuitive experience.

We have also improved and enhanced the workflow, which means less clicks, so you can see your results with less effort.

We have added some new features that enable your Team to provide evidence and gain Management approval more rapidly and effectively...

- The **Question Chat** facility to enable discussion on each Question.
- The **Evidence File Attachment** to provide proof of the Evidence.
- New Statuses: 'in Progress' and 'Team Member Request' to complete the process.
- A **Risk Chart** embedded in the plan provides prompts on the outstanding Questions.

The screenshot displays the Plan2Close interface for an opportunity named 'SUMMIT: EnterpriseAccounts: Gold 50 Users'. The account name is 'Rapid Biker Insurance Company Ltd', the close date is '16/09/2021', and the amount is '£150,000.00'. The opportunity owner is 'Mark Mogridge'. The interface shows a progress bar with stages: Prospecting, Qualification, Needs Analysis, Value Proposition, Id. Decision Makers (current), Perception Analysis, Proposal/Price Qu..., Negotiation/Review, and Closed. The 'Id. Decision Makers' stage is highlighted with a blue bar and a 'Mark Stage as Complete' button.

The main content area is divided into two sections: 'Details' and 'Coaching'. The 'Details' section shows a 'plan2close' logo and a 'Closing Plan' button. Below this is a table of 16 questions, grouped into four categories: Qualification, Differentiation, Justification, and Influence. Each question has a status indicator (green checkmark, red triangle, or yellow triangle) and a question icon.

Qualification	Differentiation
1 Business Drivers	9 Buying Criteria
2 Business Responses	10 Alignment
3 Purchasing Process	11 Competitive Differentiation
4 Pain or Gain Objective	12 Strategy

Justification	Influence
5 Client Competency	13 Visibility / Credibility
6 Short-term Revenue	14 Personal Insight
7 Ability to Respond	15 Political Insight
8 Strategic Value	16 Positioning

The 'Plan Risk' section shows a circular progress indicator at 65% and a 'You may want to consider' box listing: 1. Business Drivers, 5. Client Competency, and 9. Buying Criteria.

The 'Coaching' section shows a 'Plan2Close Overview' with a 'PURPOSE' section: 'To guide you to build a winning sales plan (the Plan2Close) for your sales opportunities.' and a 'DESCRIPTION' section: 'The 4x4 asks questions focused on the four areas fundamental to achieving a successful sale - qualification, justification, differentiation and influence.' It also lists four key questions in each of the four categories (the 4x4) and provides instructions on how to answer them.



What's new in v4 continued...

Question Statuses

You can quickly identify the **Status** of each Question within a **Question Set** using the colours and the icons.

As mentioned above two new Question **Statuses** have been added, the full list is...

BLACK =		Not yet started	<i>The Question has not yet been looked at and there is no information included in the evidence</i>
RED =		Cannot satisfy the Question at this point	<i>The Question has been looked at but there is insufficient evidence to answer the question. More work needs to be done.</i>
GREEN =		Question satisfied	<i>There is sufficient information in the evidence and have accomplished the question's objective.</i>
AMBER =		In progress	<i>The evidence is currently being collected.</i>
REVIEW =		Team Member Request	<i>A Team Member has requested further information on this question. It could be a request for further evidence or clarification of the evidence provided.</i>



Getting Started

1. Initiating Plan2Close

To open **Plan2Close**, in the **Opportunity** page layout, either scroll down to the {Plan2Prosper} **Section** or click on the {Plan2Close} **Tab**, as shown below.

- Select a **Question Set** from the picklist and click the **[Initiate Plan2Close]** button, in this case the standard **4x4 Plan2Close Question Set**.
- And the set will be displayed.

Opportunity
SUMMIT: EnterpriseAccounts: Platinum 30 Users

Account Name: Rapid Biker Insurance Company Ltd | Close Date: 17/09/2021 | Amount: £220,000.00 | Opportunity Owner: Mark Mogridge

Prospecting | Qualification | Needs Analysis | Value Proposition | Perception Analysis | Id. Decision Makers | Proposal/Price Qu...

Details | **Plan2Close** | OrgChartPlus

A Plan2Close process has not been started for this opportunity.
Select the question set to use:

* Question Set
Plan2Close | **Initiate Plan2Close**

Opportunity
SUMMIT: EnterpriseAccounts: Platinum 30 Users

Account Name: Rapid Biker Insurance Company Ltd | Close Date: 17/09/2021 | Amount: £220,000.00 | Opportunity Owner: Mark Mogridge

Prospecting | Qualification | Needs Analysis | Value Proposition | Perception Analysis | Id. Decision Makers | Proposal/Price Qu...

Details | **Plan2Close** | OrgChartPlus

plan2 close | Closing Plan

Qualification	Differentiation
1 Business Drivers	9 Buying Criteria
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Justification	Influence
5 Client Competency	13 Visibility / Credibility
6 Short-term Revenue	14 Personal Insight
7 Ability to Respond	15 Political Insight
8 Strategic Value	16 Positioning

Plan Risk

0%

You may want to consider
1. Business Drivers



2. Providing Evidence: Text

When you click on a Question in the **Question Set**, you are taken to a page that allows you to enter evidence which supports that question.

The image illustrates the process of providing evidence for a question in a question set. It is divided into three main sections:

- Question Set:** A table with two columns: 'Qualification' and 'Differentiation'. Under 'Qualification', '1 Business Drivers' is selected (highlighted with a red box).
- Evidence Entry:** A form titled '1 Business Drivers' with a 'Back' button. Under 'Status', the 'Complete' status (green checkmark icon) is selected (highlighted with a red box). Under 'Evidence', a text box contains the text: 'We understand that RapidBiker have a goal of growing their Corporate B2B business by 10% YoY for the next 3 years.' (highlighted with a red box). 'Discard' and 'Save' buttons are at the bottom.
- Updated Question Set:** The same table as above, but now '1 Business Drivers' has a green checkmark in the 'Qualification' column (highlighted with a red box).

1. Click on the **Question** you wish to answer in the **Question Set**
2. Enter the **Evidence**
3. Click **[Save]**
4. Click on the **Status** that reflects the completion of the criteria
5. Click on **[Back]** button to see the result in the **Question Set**.



3. Providing Evidence: Team Member Requests

The **Question Chat** feature allows you interact with your Team on each question. Perhaps your Manager would like to see more evidence to support your evidence statement, so he could request it as follows...

The screenshot illustrates the process of posting a question and requesting evidence. It shows a text input field with the question "Do we have any written proof of this goal?" and a "Post" button. Below this is the "Question Chat" area, which displays the question as a post by "Richard Gilder" on "2021/06/25 03:49:59". A "Status" bar contains several icons, with a purple megaphone icon (Review) highlighted. Below the chat is a table with two columns: "Qualification" and "Differentiation". The table contains several rows, with a purple megaphone icon (Review) highlighted in the "Qualification" column next to the row "1 Business Drivers".

Qualification	Differentiation
1 Business Drivers	9 Buying Criteria
2 Business Responses	10 Alignment

1. Click on the **Question** in the **Question Set**
2. **Type** in your Question in the **Post** area
3. Click [**Post**]
4. And the **Question Post** is added to the Chat area
5. Click on the purple **{Review}** icon to alert your team of your request
6. Click on [**Back**] button to see the result in the **Question Set**.



4. Providing Evidence: Attachments

The **Evidence File Attachment** feature allows you to provide proof of the Evidence as well as any supporting documentation. You can upload any document type; Excel, Word, Powerpoint, images, etc.

The screenshot shows the 'Evidence Attachments' interface. At the top, there is a table with columns 'Filename' and 'Created'. Below the table is an 'Upload Files' button with a red box around it and the text 'Or drop files'. Below that is a 'Status' section with five icons: a grey square, a red square with a white 'X', a green square with a white checkmark (highlighted with a red box), a yellow square with a white play button, and a purple square with a white megaphone. Below the status icons is a table with two columns: 'Reputation' and 'Ambition'. The first row in the 'Reputation' column is '1 Significant Value Derived' with a green checkmark icon next to it, highlighted with a red box. The first row in the 'Ambition' column is '9 Mutual Business Value' with a grey square icon next to it. The second row in the 'Reputation' column is '2 Significant Wins and Losses' with a grey square icon next to it. The second row in the 'Ambition' column is '10 Relationship Plan' with a grey square icon next to it. Red arrows point from the 'Upload Files' button to the green checkmark icon, and from the green checkmark icon to the green checkmark in the table.

Filename	Created
Evidence_Q01_BD_Listing	2021/06/25 04:19:28

Upload Files Or drop files

Status

Reputation

1 Significant Value Derived	✓
2 Significant Wins and Losses	

Ambition

9 Mutual Business Value	
10 Relationship Plan	

1. Click on the **Question** in the **Question Set**
2. Click **[Upload Files]** and select your attachment file
3. Click on the **Status** that reflects the completion of the criteria
4. Click on **[Back]** button to see the result in the **Question Set**.



5. Providing Evidence: Question Groups

You can view and edit the Questions within their **Question Groups** which makes the process faster and provides you with a clearer overview of Evidence provided.

The screenshot shows the 'plan2close' interface. At the top, there is a 'Qualification' header with a sub-menu containing 'Justification', 'Differentiation', and 'Influence'. Below this, a table lists four questions:

Question	Evidence
1. Business Drivers	✓ We understand that RapidBiker have a goal of growing their Corporate B2B business by 10% YoY for the next 3 years .
2. Business Responses	▶
3. Purchasing Process	▶ RFP issued, 2 weeks to respond, shortlist of 3 suppliers, suppliers invited to present within 1 week, decision made in 1 week subject to T's and C's
4. Pain or Gain Objective	✓ Have to reduce operating costs product seen as the solution to f

The '2. Business Responses' question is highlighted with a red box. A modal window titled '2. Business Responses' is open, showing the question text 'Evaluating MIS systems in support of business processes' and a 'Save' button.

1. Click on a **Question Group** header in the **Question Set**
2. The Tab bar allows you to navigate between the different **Question Groups**
3. Click on any part of a Question to directly edit that Question
4. Click **[Save]**
5. Click **[Back]** to return to the **Question Set**



6. Providing Evidence: Tasks & Events

Using the native Salesforce **Tasks & Events** will help you to create an action plan for the Opportunity you are working on. These activities will be related to the current **[Opportunity]** record as well as the current **User** and any allocated **[Contact]**.

To add a Task...

- Go to the **{Activity}** Lightning Component
- Click on the **{New Task}** tab
 - Enter a Subject
 - Select a Due-Date
 - Select a **[Contact]**, if required
 - Assign to a User
 - The Task is related to the Opportunity
- Click **[Save]**

The screenshot shows the Salesforce 'New Task' form. The 'Activity' tab is selected, and the 'New Task' sub-tab is active. The form fields include: Subject (TASK: Q03: Evaluate RFP and allocate resources), Due Date (28/06/2021), Assigned To (Mark Mogridge), Name (Search Contacts...), and Related To (SUMMIT: EnterpriseAccounts: Platinum 30 Users). A 'Save' button is at the bottom right.

To add an Event...

- Go to the **{Activity}** Lightning Component
- Click on the **{New Event}** tab
 - Enter a Subject
 - Enter a Description
 - Select Start Date/Time
 - Select End Date/Time
 - Select a **[Contact]**
 - The Event is related to the Opportunity
- Click **[Save]**

The screenshot shows the Salesforce 'New Event' form. The 'Activity' tab is selected, and the 'New Event' sub-tab is active. The form fields include: Subject (EVENT: Q06: Short Term Revenue evaluation), Description (We need to discuss the true potential short term budget - Clifford will head discussion.), Start Date/Time (30 Jun 2021, 10:30), End Date/Time (30 Jun 2021, 12:30), Name (Clifford McNeil), and Related To (SUMMIT: EnterpriseAccounts: Platinum 30 Users). A 'Save' button is at the bottom right.



7. Providing Evidence: Guidelines & Coaching

The Coaching guidelines are there to help you know the different aims and objectives of each Question, as well as the criteria to turn the Question 'green'.

The content in the Coaching component starts with an Overview on how to use **Plan2Close**, and also synchronises with the current Question you are viewing in the Question Set.

Filename	Created
Evidence_Q01_BD_Listing	2021/06/25 04:19:28

A guideline on the best approach to answering a **Question Set**...

1. There is no correct place to start working through the Questions, the idea is to get as much information down as possibly so that you are in the best place to move the Opportunity forward.
2. The questions do not have to be 'green' straight away, they are designed to prompt you to find the key information that will allow you to further the Account.
3. As the plan is being completed, you will start to move from a **Question Set** of all black icons to a **Question Set** populated with a range of icon colours; indicating the progression of the Opportunity.



8. Providing Evidence: Risk Analysis

The **Risk Analysis** is designed to give you an indication of whether it is sensible to progress the Opportunity to the next stage.

The Risk Score parameters are set for each **Plan2Close Question Set** by your Salesforce Administrator.

Prospecting Qualification Needs Analysis Value Proposition **Perception Analysis** Id. Decision Makers Proposal/Price Qu...

Details **Plan2Close** OrgChartPlus

plan2 close Closing Plan

Qualification		Differentiation	
1 Business Drivers	✓	9 Buying Criteria	✓
2 Business Responses	✓	10 Alignment	✓
3 Purchasing Process	⚠▶	11 Competitive Differentiation	✓
4 Pain or Gain Objective	✓	12 Strategy	▶

Justification		Influence	
5 Client Competency	✓	13 Visibility / Credibility	✓
6 Short-term Revenue	✓	14 Personal Insight	▶
7 Ability to Respond	✓	15 Political Insight	□
8 Strategic Value	✓	16 Positioning	□

Plan Risk

25%

You may want to consider

- 3. Purchasing Process
- 12. Strategy

Using the example above...

- Question 3: **Purchasing Process** was scheduled to have been answered during the 'Qualification' Stage, which was 3 Stages prior. So, this carries a **Risk Score of 25%** and displays a warning icon against the question.
- Question 12: **Strategy** is scheduled to be answered in the current Stage of 'Perception Analysis' so it does not carry any Risk Score. But should you move the 'Stage to ID Decision Makers' it will carry a Risk Score of 15%, which would bring the total Risk to 40%.



Closing Plan

The Closing Plan allows you to present the overall Plan2Close strategy which consists of 3 sections...

1. The Overview
2. The Question Groups
3. Task & Events

The Closing Plan can be viewed, printed or exported in PDF format by clicking on the [Closing Plan] button in the Plan2Close header.



Closing Plan

8 Strategic Value This could take us into a new market - Insurance
Status ✔

Differentiation

Question	Evidence
9 Buying Criteria Status ✔	They are looking for a vanilla out of the box solution
10 Alignment Status ✔	We have a 'proven' - they really like that and need pain!
11 Competitive Differentiation Status ✔	We have our differences to the competition but...
12 Strategy Status ↻	Yes, we talk the same language and our product...

Influence

Question	Evidence
13 Visibility / Credibility Status ✔	We have worked with the full team already - they...
14 Personal Insight Status ▶	
15 Political Insight Status ■	
16 Positioning Status ■	

Tasks

Due Date	Subject	Assigned To
6/28/21	TASK: Q03: Evaluate RFP and allocate resources	

Events

Due Date	Subject	Assigned To
6/30/21	EVENT: Q06: Short Term Revenue evaluation	Clifford McN...

Print
PDF
Back

Plan2Close Overview

Opportunity: SUMMIT: EnterpriseAccounts: Platinum 30 Users
 Stage: Perception Analysis
 Close Date: 17/09/2021
 Plan Risk: 25%
 Account: Rapid Biker Insurance Company Ltd
 User: Mark Mogridge
 Email: mark.mogridge@salesmethods.com
 Date: 25/06/2021, 17:54

Qualification		Differentiation	
1 Business Drivers	✔	9 Buying Criteria	✔
2 Business Responses	✔	10 Alignment	✔
3 Purchasing Process	▶	11 Competitive Differentiation	✔
4 Pain or Gain Objective	✔	12 Strategy	↻
Justification		Influence	
5 Client Competency	✔	13 Visibility / Credibility	✔
6 Short-term Revenue	✔	14 Personal Insight	▶
7 Ability to Respond	✔	15 Political Insight	■
8 Strategic Value	✔	16 Positioning	■

Qualification

Question	Evidence
1 Business Drivers Status ✔	We understand that RapidBiker have a goal of growing their Corporate B2B business by 10% YoY for the next 3 years .
2 Business Responses Status ✔	Evaluating MIS systems in support of business processes
3 Purchasing Process Status ▶	RFP issued, 2 weeks to respond, shortlist of 3 suppliers, suppliers invited to present within 3 week, decision made in 1 week subject to T's and C's
4 Pain or Gain Objective Status ✔	Have to reduce operating costs by 10% by end of year or jobs will go - our product seen as the solution to this 'pain'

Justification

Question	Evidence
5 Client Competency Status ✔	Complex solution - PROSPECT has limited internal resource - require project management support - can we sell this in?
6 Short-term Revenue Status ✔	Short term additional revenue of £1,500,000 will be realised in 3 months
7 Ability to Respond Status ✔	We have confirmation from all those needed to answer that they can respond on time

Thank you for reading this

For any questions or further support on using **Plan2Close** please go to <https://salesmethods.com/support/> and complete the form.

