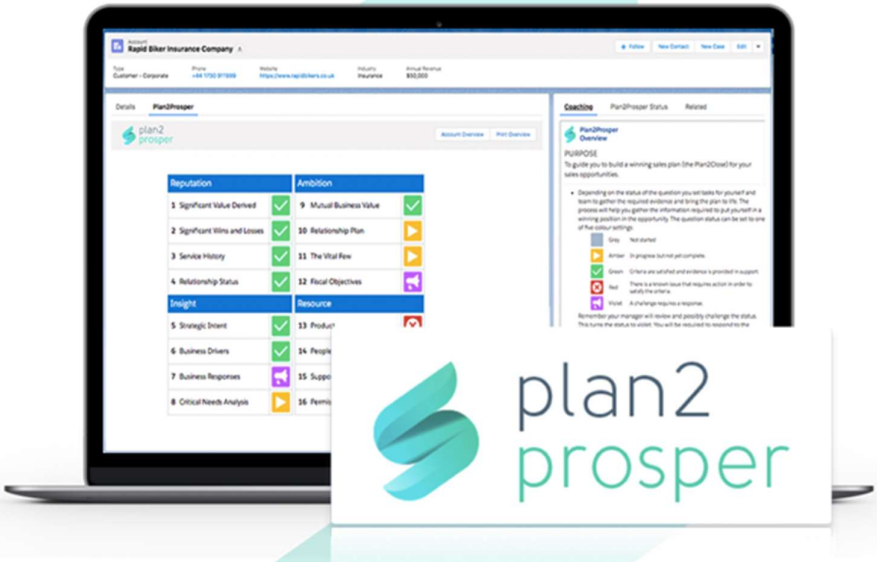

Plan2Prosper

User Guide

Version 4.0+

sales methods

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Plan2Prosper Overview

Plan2Prosper (P2P) ensures **Account Teams** employ strategies to build lasting client relationships and maximise sales opportunities.

Plan2Prosper's fundamental purpose is to move your key Account relationships to a point where you have built optimum customer loyalty, and from that position be able to optimise your revenue.

Which can be described as **long term sustainable mutual business value.**

The main features of Plan2Prosper are...

The Question Set

The standard pre-saved P2P **Question Set** consists of 16 questions, the answers to which are widely considered to a highly effective way to develop an Account's loyalty and revenue. The standard plan has **4 Groups**, each consisting of **4 Questions**, which is why it's called the **4x4**.

The Question Group headers are...

1. Reputation
2. Insight
3. Ambition
4. Resource

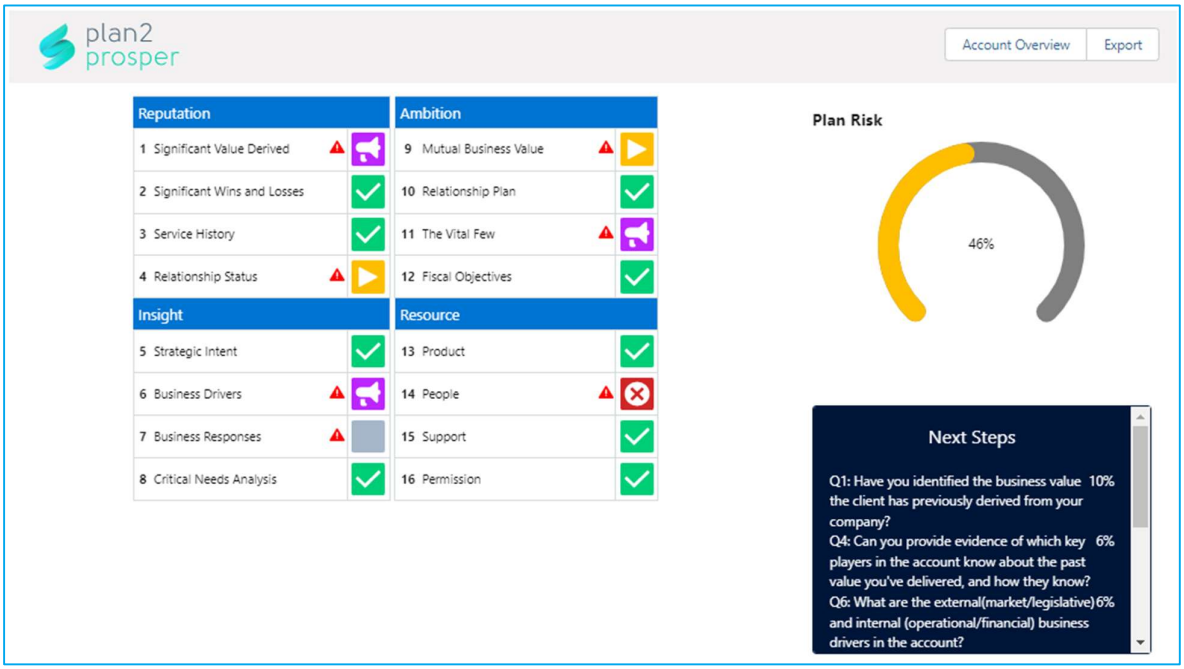
Tasks and Events

Salesforce Tasks & Events can be assigned to the Users managing the Account and create an Account plan of action based on the questions in the P2P **Question Set**.

What's new in v4?

Risk Report

Plan2Prosper includes the Risk Report to provide prompts on the outstanding Questions.



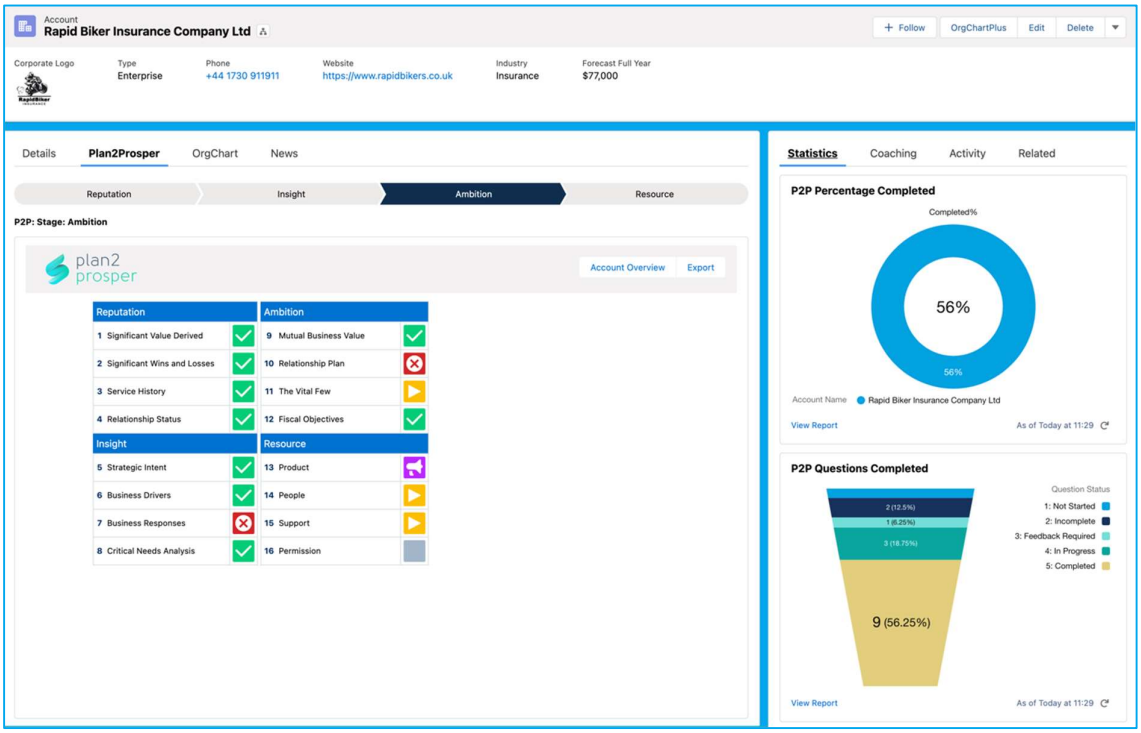
SalesMethods Lightning Experience

With the **Plan2Prosper** 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.



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

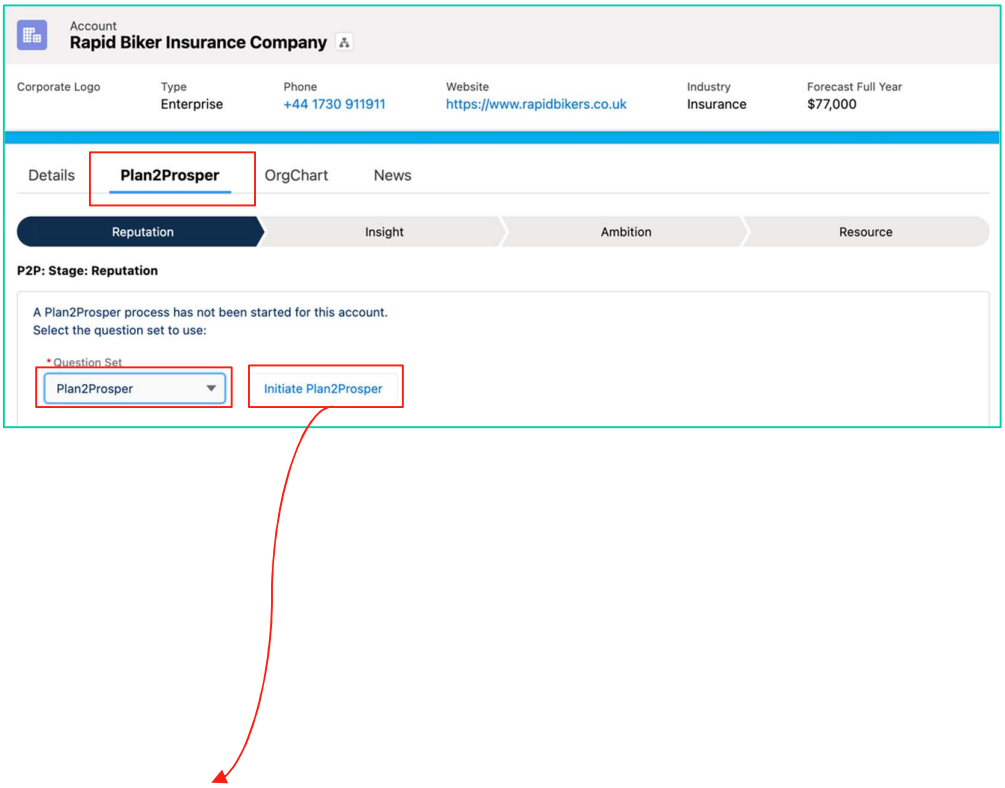
What's new in v4 continued...

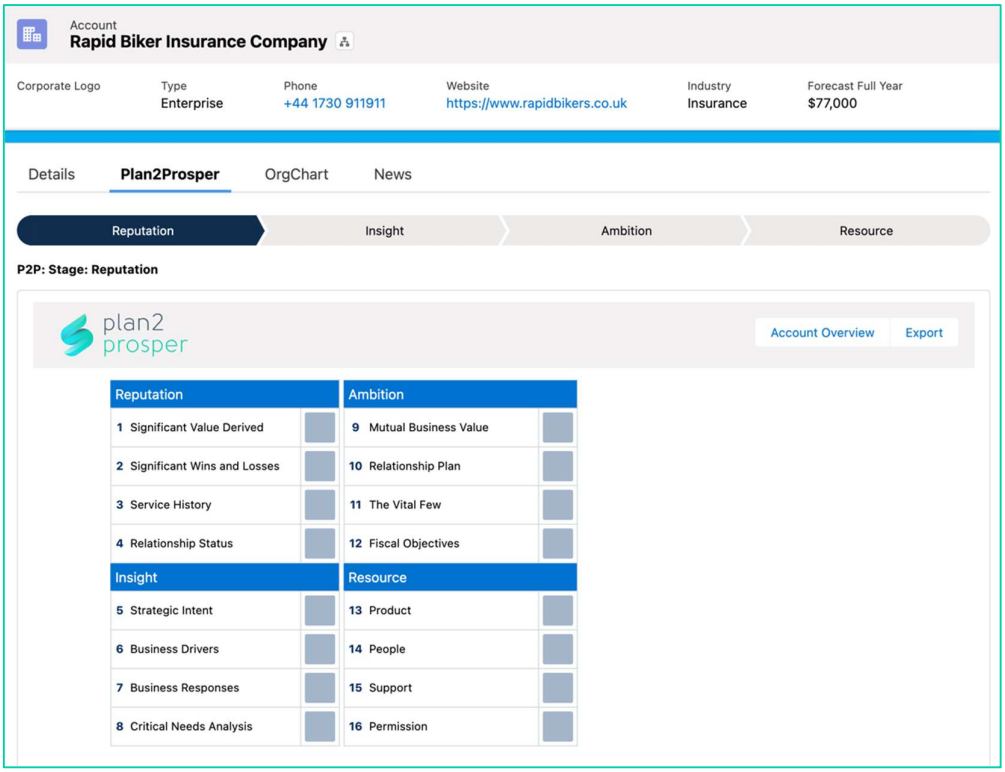
Getting Started

1. Initiating Plan2Prosper

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

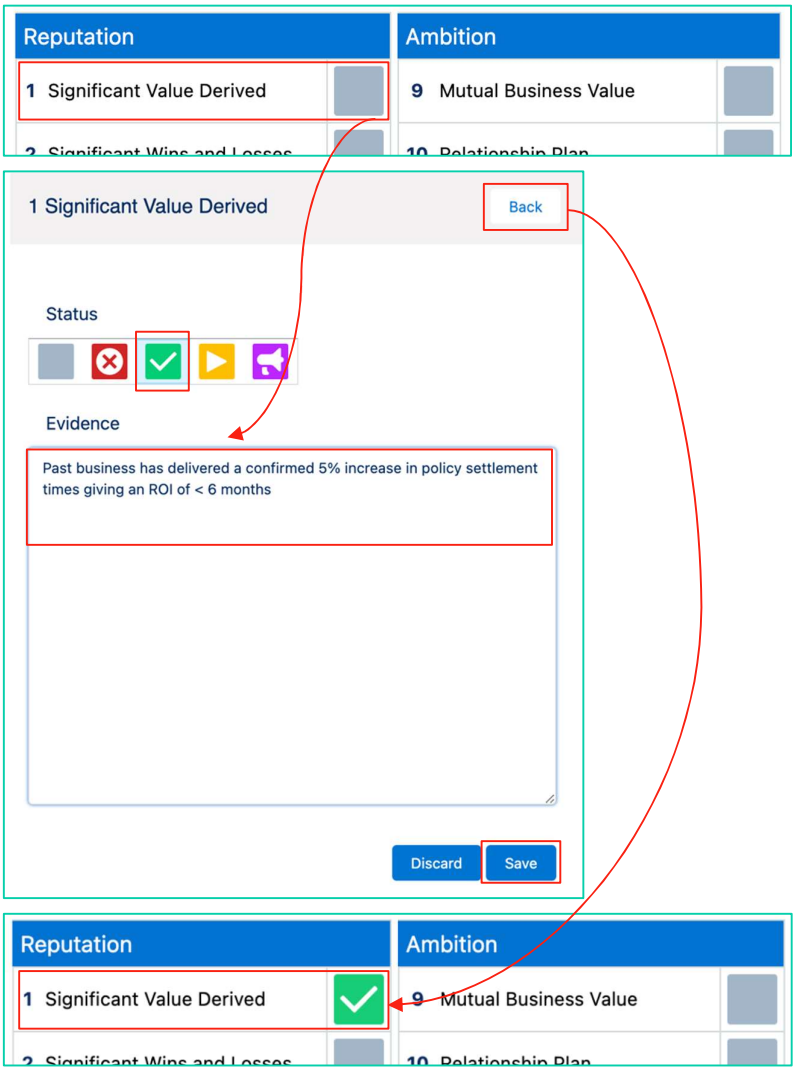
- Select a **Question Set** from the picklist and click the **[Initiate Plan2Prosper]** button, in this case the standard **4x4 Plan2Prosper Question Set**.
- And the set will be displayed.




Account
Rapid Biker Insurance Company
Corporate Logo
Type
Enterprise
Phone
+44 1730 911911
Website
https://www.rapidbikers.co.uk
Industry
Insurance
Forecast Full Year
$77,000
Details
Plan2Prosper
OrgChart
News
Reputation
Insight
Ambition
Resource
P2P: Stage: Reputation
plan2 prosper
Account Overview
Export
Reputation
1 Significant Value Derived
2 Significant Wins and Losses
3 Service History
4 Relationship Status
Ambition
9 Mutual Business Value
10 Relationship Plan
11 The Vital Few
12 Fiscal Objectives
Insight
5 Strategic Intent
6 Business Drivers
7 Business Responses
8 Critical Needs Analysis
Resource
13 Product
14 People
15 Support
16 Permission

2. Providing Evidence: Text

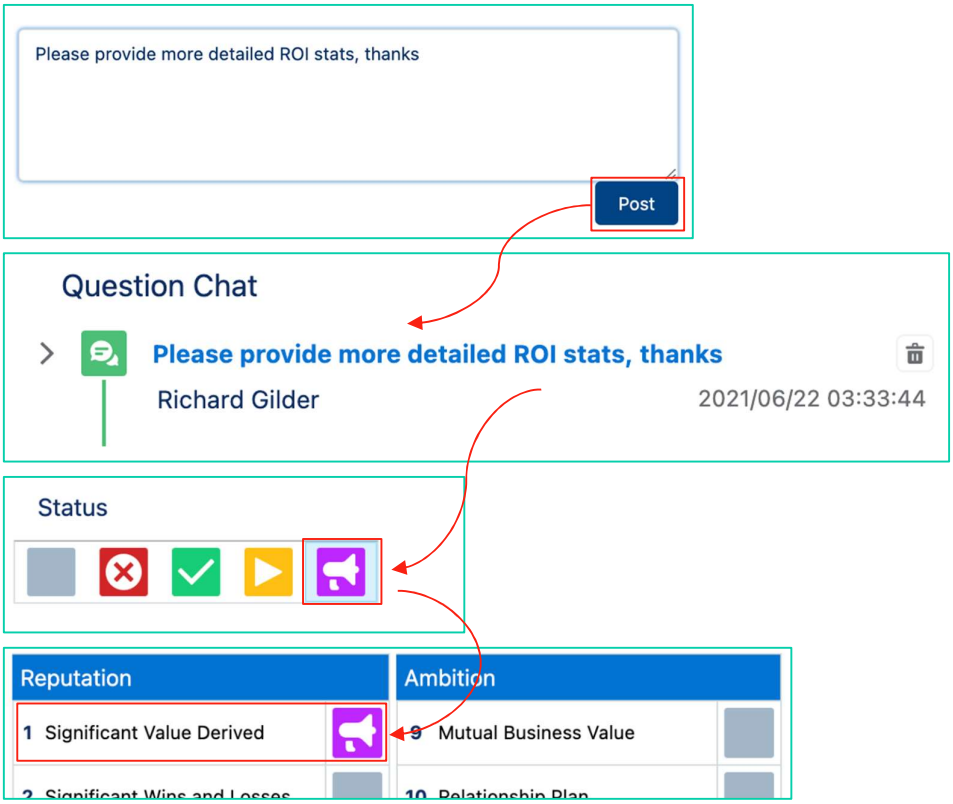
When you click on a Question in the **Question Set**, you are taken to a page that allows you to enter evidence which supports that question.



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

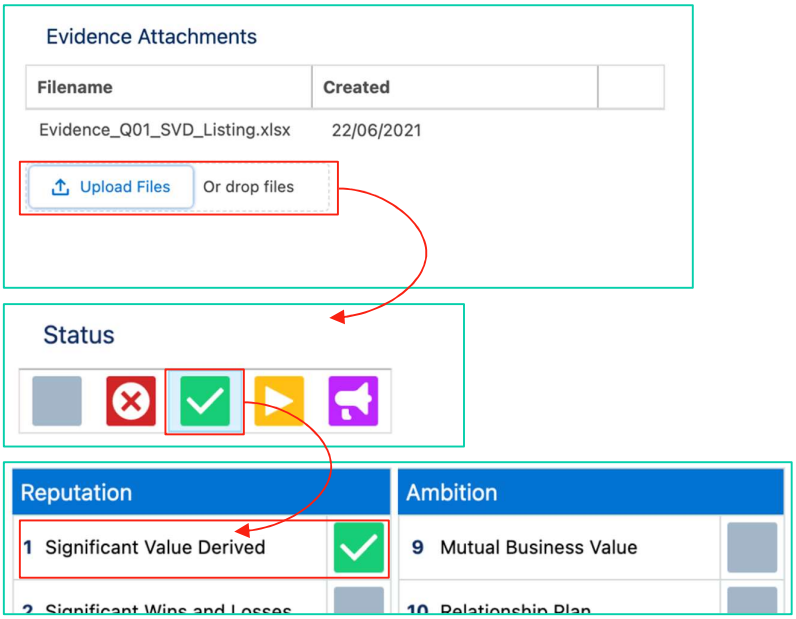
The **Question Chat** feature allows you interact with your Team on each question. Perhaps your Manager would like to see more evidence to support your evidence statement, so he could request it as follows...



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

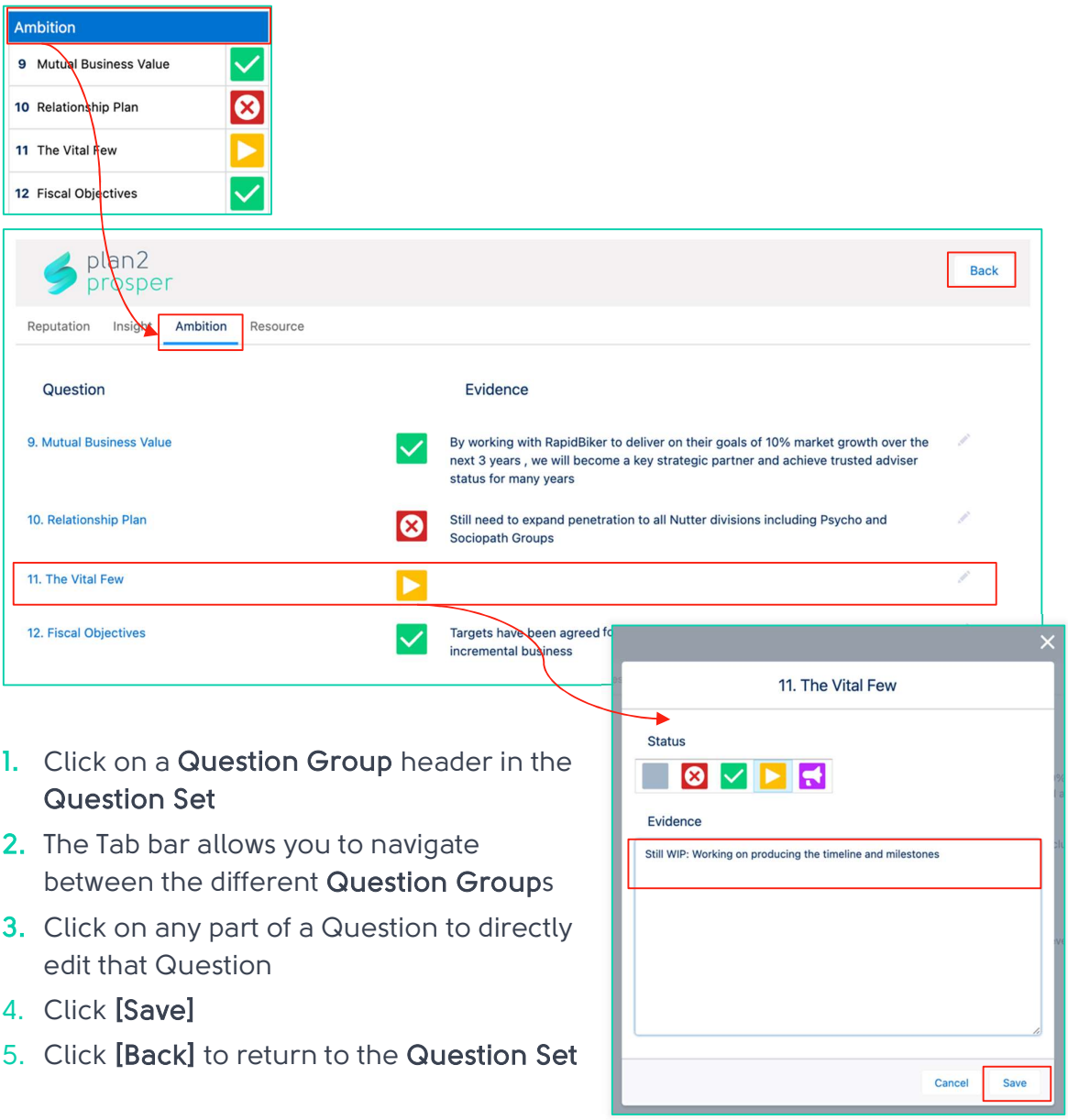
The **Evidence File Attachment** feature allows you to provide proof of the Evidence as well as any supporting documentation. You can upload any document type; Excel, Word, Powerpoint, images, etc.



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.



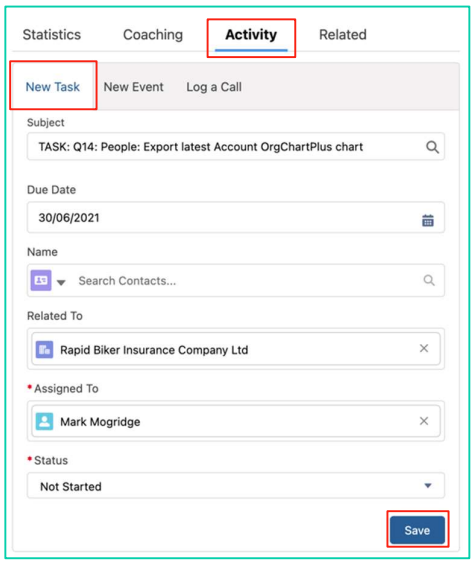
1. Click on a **Question Group** header in the **Question Set**
2. The Tab bar allows you to navigate between the different **Question Groups**
3. Click on any part of a Question to directly edit that Question
4. Click **[Save]**
5. Click **[Back]** to return to the **Question Set**

6. Providing Evidence: Tasks & Events

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

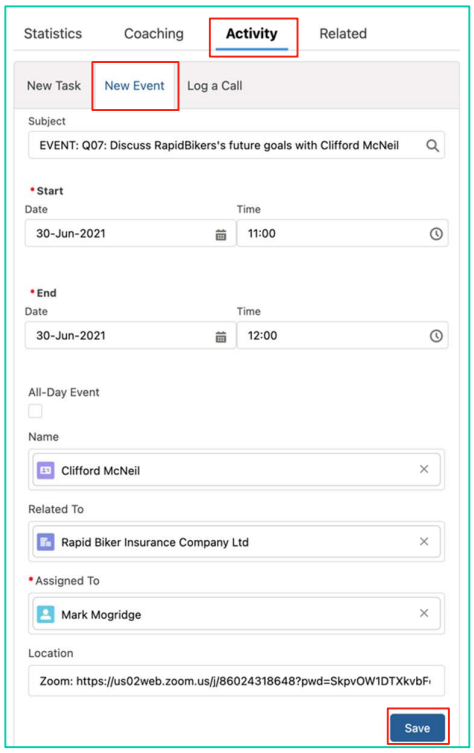
To add a Task...

a. Go to the {**Activity**} Lightning Component
b. Click on the {**New Task**} tab
   - Enter a Subject
   - Select a Due-Date
   - Select a [Contact], if required
   - Assign to a User
   - Select the current Status of the Task
c. Click [**Save**]



To add an Event...

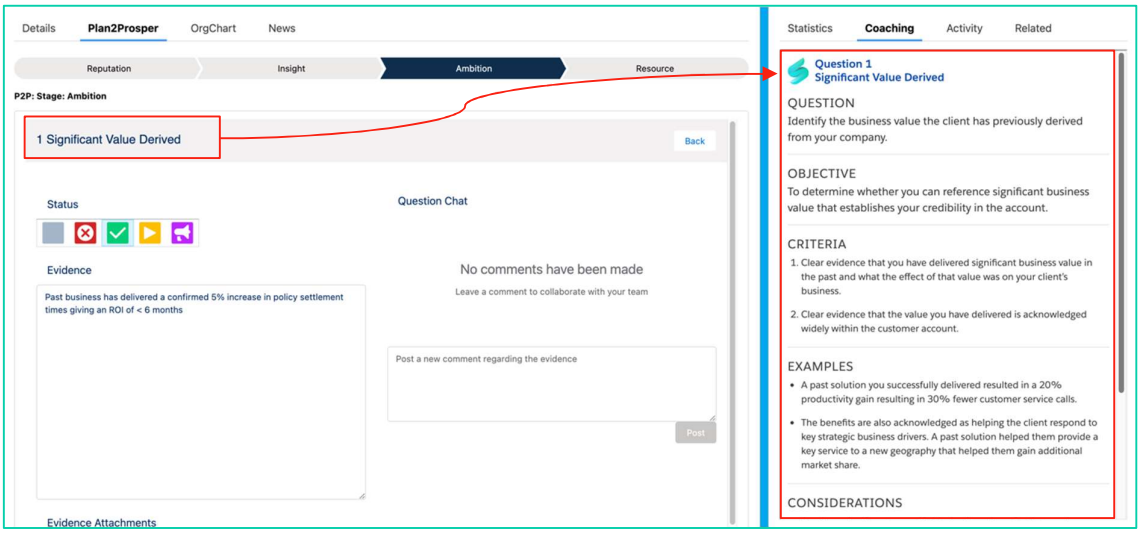
a. Go to the {**Activity**} Lightning Component
b. Click on the {**New Event**} tab
   - Enter a Subject
   - Select Start Date/Time
   - Select End Date/Time
   - Select a [Contact]
   - Assign to a User
   - Enter the meeting location
c. Click [**Save**]



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 **Plan2Prosper**, and also synchronises with the current Question you are viewing in the **Question Set**.



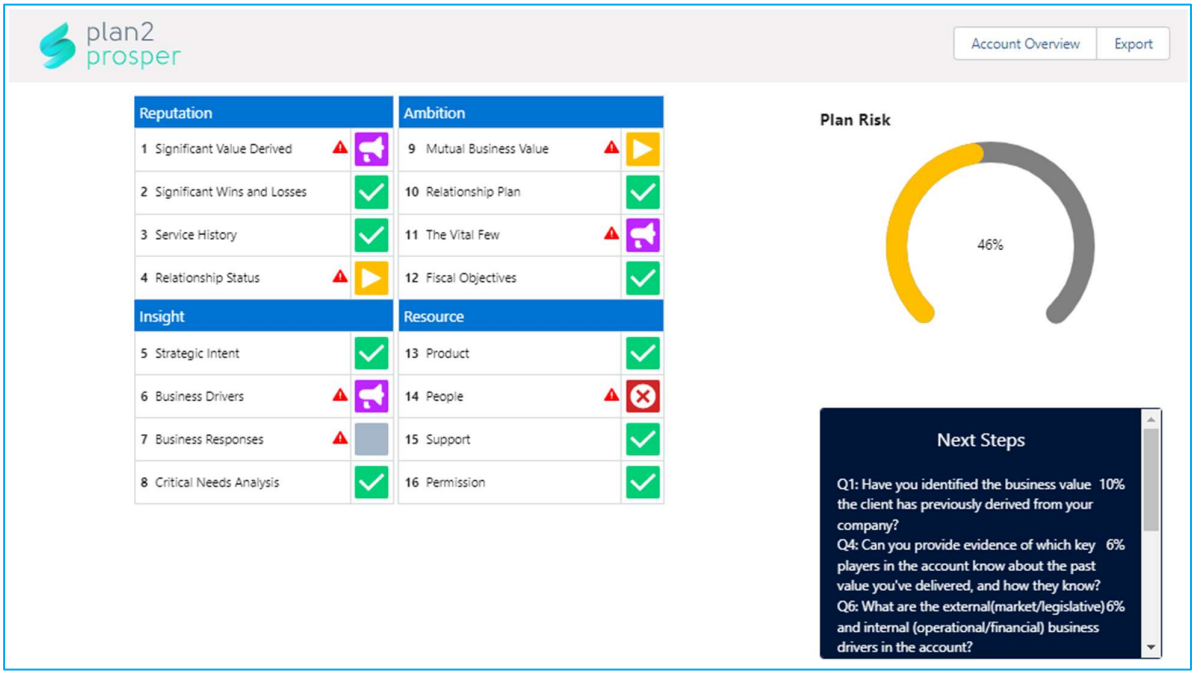
A guideline on the best approach to answering a **Question Set**...

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 Account 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 Account.

8. Providing Evidence: Risk Analysis

The **Risk Analysis** gives the plan risk for the account.

The Risk Score parameters are set for each **Plan2Prosper** **Question Set** by your Salesforce Administrator based on your criteria.



The Plan Risk report shows the corresponding assessment of the health of your account plan.

Account Overview

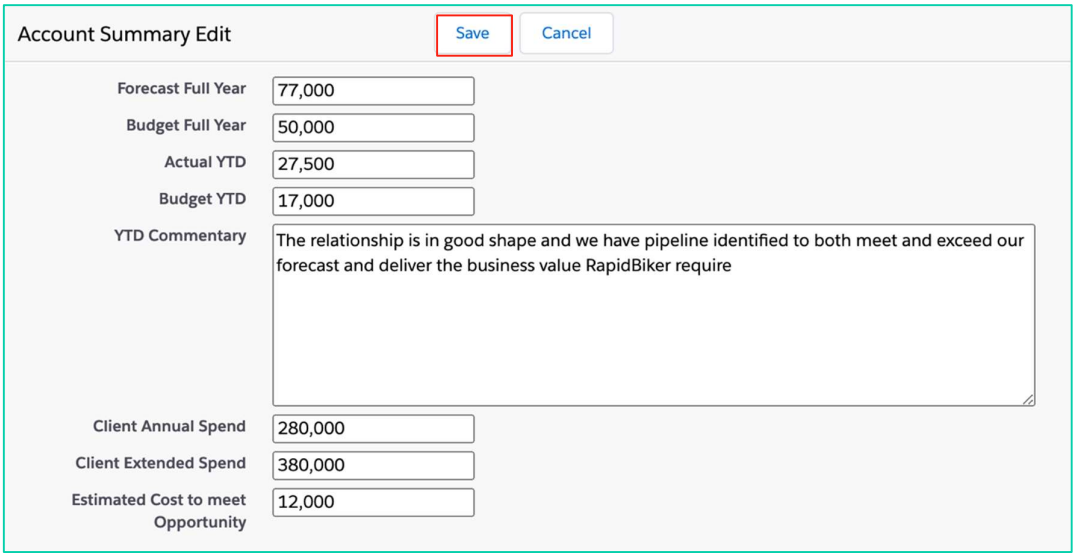
The **Account Overview** allows you to present the overall Plan2Prosper strategy which consists of 4 sections...

1. The Overview
2. Account Summary
3. Customer Profile
4. Our Account Goals and Ambitions

The **Account Overview** can be viewed within Plan2Prosper or printed or exported in PDF format.

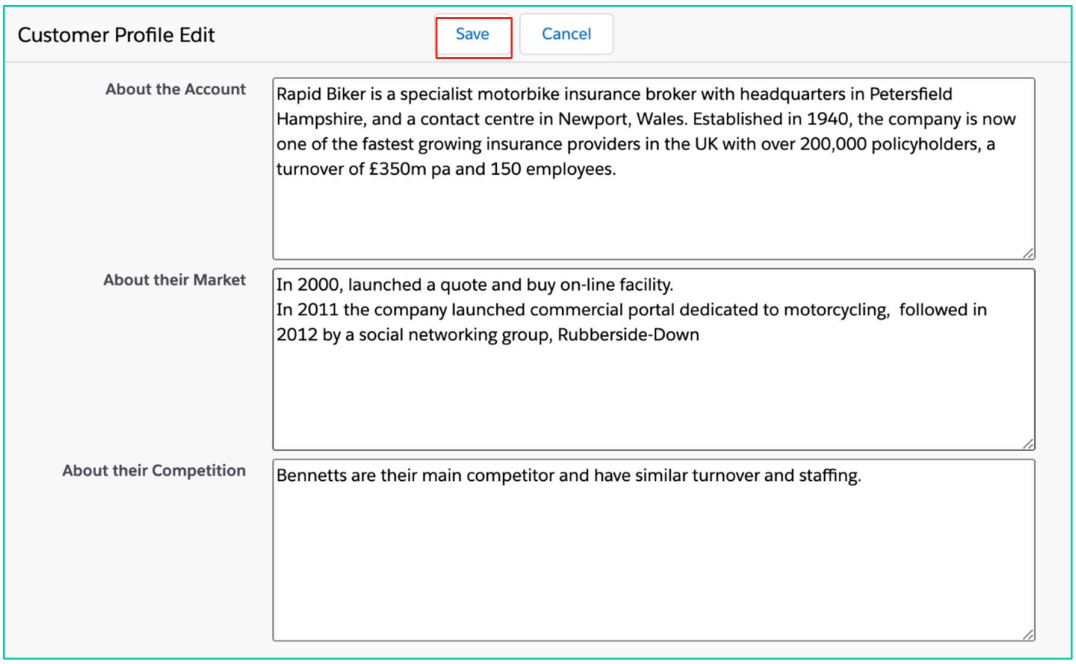
If you click on the [**Account Overview**] button in the Plan2Prosper header you can edit the **Account Overview** elements.

Click on [**Edit**] button in the **Account Summary** section and you can input the following details...



Account Overview Continued…

Click on [**Edit**] button in the **Customer Summary** section and you can input the following details…


Customer Profile Edit

Save Cancel

About the Account

Rapid Biker is a specialist motorbike insurance broker with headquarters in Petersfield Hampshire, and a contact centre in Newport, Wales. Established in 1940, the company is now one of the fastest growing insurance providers in the UK with over 200,000 policyholders, a turnover of £350m pa and 150 employees.

About their Market

In 2000, launched a quote and buy on-line facility.
In 2011 the company launched commercial portal dedicated to motorcycling, followed in 2012 by a social networking group, Rubberside-Down

About their Competition

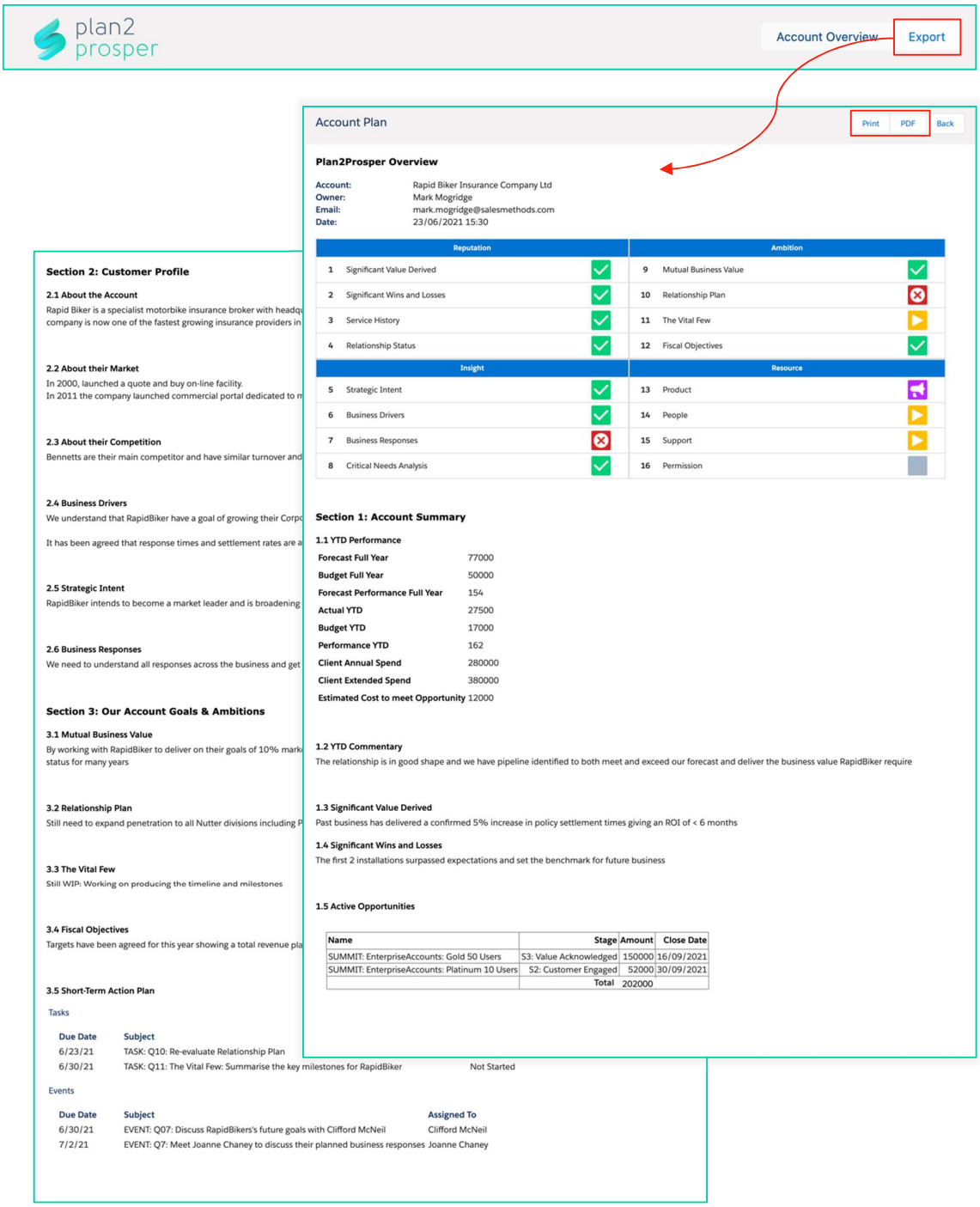
Bennetts are their main competitor and have similar turnover and staffing.

And Evidence from the following Questions in the standard **Plan2Prosper Question Set** are used to auto-populate the following **Account Overview** Sections …

Overview Section	*Evidence from Question#*
1. Account Summary	Q1: Significant Value Derived
1. Account Summary	Q2: Significant Wins & Losses
2. Customer Summary	Q6: Business Drivers
2. Customer Summary	Q5: Strategic Intent
2. Customer Summary	Q7: Business Responses
3. Our Account Goals & Ambitions	Q9: Mutual Business Value
3. Our Account Goals & Ambitions	Q10: Relationship Plan
3. Our Account Goals & Ambitions	Q11: The Vital Few
3. Our Account Goals & Ambitions	Q12: Fiscal Objectives

Account Overview Continued…

If you click on the [**Export**] button in the Plan2Prosper header you can Print or Export (PDF) the Account Overview report.



Thank you for reading this

For any questions or further support on using Plan2Prosper please go to https://salesmethods.com/support/ and complete the form.