



SalesMethods

Plan2Close

Plan2Close MEDDPICC®

Plan2Prosper

Plan2Renew

Release Notes

Version [4.26](#)





What's new in v4?

SalesMethods Lightning Experience

With the **Plan2Prosper** & **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 **'Management Request'** to complete the process.

And very importantly, the back-end technology and structure remain the same, so as with previous releases, there won't be any continuity or security issues when you upgrade to v4.

The screenshot displays the Plan2Close interface for a case titled "SUMMIT: EnterpriseAccounts: Gold: 20 Users [50%]". The interface includes a top navigation bar with "Follow", "Edit", "New Case", and "New Note" options. Below this, there is a section for "Company Logo", "Account Name" (Rapid Biker Insurance Company), "Close Date" (9/30/2021), "Amount" (\$2,200.00), and "Opportunity Owner" (Mark Mogridge). A progress bar shows the current stage as "Perception Analysis" with a "Mark Stage as Complete" button. The main content area is divided into several sections: "Details" with a "Plan2Close" sub-section, "Plan Risk" with a 36% gauge chart, and two "P2C" (Plan2Close) completion charts. The "P2C Percentage Completed" chart shows 50% completion, and the "P2C Questions Completed" chart shows 8 (50%) questions completed. A table lists 16 items under "Qualification", "Differentiation", "Justification", and "Influence" with various status icons. A "Print Overview" button is also visible.

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



Release Notes

v4.26

Improvements

- MEDDIC Academy approved questions, groups, and question scores.
- MEDDPICC specific guidance with links to MEDDIC Academy for online training.
- New plan completion scoring system with weighted questions, scores per group, two score charts, and the overall plan score is saved to the account/opportunity.
- Question sets have new configuration options:
 - Evidence based questions with one page per question vs simplified questions where all questions are edited on one page (aka Yes/No mode).
 - Optional evidence text for individual questions when in “Yes/No” mode.
- Status can be entered as the traditional RAG colours, or the new Yes/No options or via multiple choice.
- New product logo when using MEDIC/MEDDPICC question sets.

v4.20

Improvements

- Increases the row limit in the question editor for groups.

v4.10

Improvements

- This version adds the ability to relate activities to Plan2 questions. You need to create your task or event first, you can then either assign the activity to a question, or from the question, assign the activity. The activities are listed in the Plan overview export.



v4.09

Improvements

- This fixes the crash in the Closing Plan introduced by the new activity/question assignment system.

Thank you for reading this

For any questions or further support on install **Plan2Prosper** & **Plan2Close** please go to <https://salesmethods.com/support/> and complete the form.

