

Gold Sheet v5.2 User Online Help

September 2014

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Welcome

Miller Heiman's Sales Access ManagerSM integrated software toolset enhances, maintains, and encourages interactive use of the Large Account Management Process SM (LAMP®) methodology within a CRM environment.

Using the tool reinforces your Large Account Management Process SM skill sets while making the intuitive process fun and interesting within your own contact management environment.

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Getting Started

About the Gold Sheet

The online **Large Account Management Process** SM (**LAMP**®) Strategic Account Analysis Worksheet (Gold Sheet) looks almost exactly like the Gold Sheet in your training course with the addition of the application menu and icon buttons.

The Gold Sheet is designed to assist you in managing your long-term account relationships.

It combines Miller Heiman's philosophy of interaction with thinking with an easy-to-use, intuitive user interface that links to your organizations' CRM. *Real time data interchange with real time results!*

The screenshot displays the Miller Heiman Large Account Management Process (LAMP) Strategic Account Analysis Worksheet (Gold Sheet) interface. The interface is yellow-themed and contains several sections:

- Header:** Miller Heiman logo, "Large Account Management Process (LAMP)", "Sales Access Manager", and a toolbar with icons for home, refresh, print, help, and close.
- Metadata:** "Drag and drop marker" with icons, "Author: Perspecsys Sys Admin", "Date: 06/10/2013", and "Field of Play: WS Test Account".
- SELLING ORGANIZATION TEAM:** A table with columns "Name" and "Role".

Name	Role
Perspecsys Sys Admin	Strategic Coach
- FIELD OF PLAY STRATEGIC PLAYERS:** A table with columns "Name", "Role", and "Buy/Sell".

Name	Role	Buy/Sell
Rose Gonzalez	Anti-Sponsor	Level 3
- FIELD OF PLAY'S TRENDS:** A list containing "FOP Trend 1".
- FIELD OF PLAY'S OPPORTUNITIES:** A list containing "FOP Opty 1".
- OUR STRATEGIC STRENGTHS:** A list containing "Our Strategic Strength 1".
- OUR CRITICAL VULNERABILITY:** A list containing "SAMPLE Critical Vulnerability One", "SAMPLE Critical Vulnerability Two", and "SAMPLE Critical Vulnerability Three".
- POSITION ON THE BUY-SELL HIERARCHY:** A diagram showing a 5-step hierarchy:
 1. Deliver Commodity that Meets Specifications
 2. Deliver 'Good' Products & Services
 3. Provide 'Good' Service & Support
 4. Contribute to Business Issues
 5. Contribute to Organizational Issues
- OUR VIEW / FIELD OF PLAY'S VIEW:** Two columns of dropdown menus for time periods: "Now", "Last Year", "1 Year", and "3 Years".
- CHARTER STATEMENT:** A text area containing "SAMPLE Charter Statement One".
- GOALS:** A table with columns "Status" and "Description".

Status	Description
	Goal Description 1
- BEST ACTIONS:** A table with columns "Description", "Assigned To", and "When".

Description	Assigned To	When
Test Task 1 6/10/2013	Perspecsys Sys Admin	06/10/2013
- Footer:** "Last Updated By Perspecsys Sys Admin 76 minutes ago" and "Reviewed By Manager".

We believe that providing you the Gold Sheet in an interactive format will increase your productivity as well as your ability to effectively manage your long-term account relationships.

If at any time you are experiencing an issue or need additional assistance, check with your system administrator or reference the Sales and Support section.

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About the Gold Sheet

The online **Large Account Management Process** SM (**LAMP**®) Strategic Account Analysis Worksheet (Gold Sheet) looks almost exactly like the Gold Sheet in your training course with the addition of the application menu and icon buttons.

The Gold Sheet is designed to assist you in managing your long-term account relationships.

It combines Miller Heiman's philosophy of interaction with thinking with an easy-to-use, intuitive user interface that links to your organizations' CRM. *Real time data interchange with real time results!*

The screenshot displays the Miller Heiman Large Account Management Process (LAMP) Gold Sheet interface. The interface is yellow-themed and contains several sections:

- SELLING ORGANIZATION TEAM:** A table with columns for Name and Role. It lists "Perspecsys Sys Admin" as a Strategic Coach.
- FIELD OF PLAY STRATEGIC PLAYERS:** A table with columns for Name, Role, and Buy/Sell. It lists "Rose Gonzalez" as an Anti-Sponsor at Level 3.
- FIELD OF PLAY'S TRENDS:** A section titled "FIELD OF PLAY'S TRENDS" with a sub-item "FOP Trend 1".
- FIELD OF PLAY'S OPPORTUNITIES:** A section titled "FIELD OF PLAY'S OPPORTUNITIES" with a sub-item "FOP Opty 1".
- OUR STRATEGIC STRENGTHS:** A section titled "OUR STRATEGIC STRENGTHS" with a sub-item "Our Strategic Strength 1".
- OUR CRITICAL VULNERABILITY:** A section titled "OUR CRITICAL VULNERABILITY" with sub-items "SAMPLE Critical Vulnerability One", "SAMPLE Critical Vulnerability Two", and "SAMPLE Critical Vulnerability Three".
- POSITION ON THE BUY-SELL HIERARCHY:** A diagram showing a 5-step hierarchy. The steps are: 1. Deliver Commodity that Meets Specifications, 2. Deliver Good Products & Services, 3. Provide Good Service & Support, 4. Contribute to Business Issues, and 5. Contribute to Organizational Issues. It includes "OUR VIEW" and "FIELD OF PLAY'S VIEW" dropdowns for time periods (Now, Last Year, 1 Year, 3 Years).
- CHARTER STATEMENT:** A section titled "CHARTER STATEMENT" with a sub-item "SAMPLE Charter Statement One".
- GOALS:** A table with columns for Status and Description. It lists "Goal Description 1".
- BEST ACTIONS:** A table with columns for Description, Assigned To, and When. It lists "Test Task 1" assigned to "Perspecsys Sys Admin" on "06/10/2013".

At the bottom, it shows "Last Updated By Perspecsys Sys Admin 76 minutes ago" and "Reviewed By Manager".

We believe that providing you the Gold Sheet in an interactive format will increase your productivity as well as your ability to effectively manage your long-term account relationships.

If at any time you are experiencing an issue or need additional assistance, check with your system administrator or reference the Sales and Support section.

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System Requirements

Hardware

The hardware requirements are:

	<u>Minimum</u>	<u>Recommended</u>
Screen Resolution	1024 x 768	1024 x 768 or higher

Software

Miller Heiman's Sales Access ManagerSM v5.0 is designed for multiple operating systems and browser combinations. The software requirements are:

	<u>Minimum</u>	<u>Recommended</u>
Software Drivers	Print Driver for network or local printer	
Computer Software	Adobe Reader 8 (for viewing printed pdf)	Adobe Reader 8.0 or above

Operating Systems & Browsers

Operating System	Supported Browsers *not compatibility mode
Windows XP	Internet Explorer 8 Safari 5.1.7 Chrome 23 and higher Firefox 17 and higher
Windows Vista	Internet Explorer 8, 9 Safari 5.1.7 Chrome 23 and higher Firefox 17 and higher
Windows 7	Internet Explorer 8 , 9, 10 Safari 5.1.7 Chrome 23 and higher Firefox 17 and higher
Windows 8	Internet Explorer 10 Safari 5.1.7 Chrome 23 and higher Firefox 17 and higher
OSX and Ipad	Safari 6
Android 4.0.1	WebKit 534.30

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Key Features

This powerful software tool ensures that your *Large Account Management™ (LAMP®)* is supported. Key features include:

- New HTML5 version compatible with tablet devices
- Easy-to-use, intuitive user interface and navigation
- Collaborative team selling
- Promotes Increased sales process adoption
- Bidirectional read/write capability with common CRM/SFA fields and best action plans
- Extended contact search
- Captures Manager's and Additional Notes
- Ability to display lists of suggested Strengths, Red Flags, and Possible Actions
- Auto-saving capability
- Interactive with Strategic Selling® (Blue Sheet) and Conceptual Selling® (Green Sheet)
- Quick link access to Miller Heiman's eCoaching and eLearning database

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What's New

SAM 5.2 August 2014

All Platforms

Enhanced Print Routine – the print routine has been re-written to handle printing sheets with over five pages of data.

Microsoft Dynamics CRM and Oracle CRM On Demand

New Funnel ScoreCard®, Relationship Maps and Sales Process Funnel tools have been added.

Salesforce

New Auto-Mapping option in the SAM Admin Tool for use when setting up a new SFDC org.

Resolved Issues

- MHSAM-786 - Blue Sheet Revenue field wasn't printing when changed to a non-numeric field type.

SAM 5.1 April 2014

Salesforce

The following new enhancements have been added to Sales Access Manager v5.1:

- **New Relationship Maps tool** – The opportunity level Relationship Maps graphically display the reporting and influence structure of the contacts within an opportunity. It is available to any Blue Sheet or Green Sheet licensed user and is launched from the opportunity record.
- **New Funnel ScoreCard® tool** - The Funnel ScoreCard® allows the rating and scoring of the business and opportunity criteria of an opportunity, and is launched from the opportunity record. The Funnel ScoreCard® totals can be mapped out to the opportunity record and also in to the Blue Sheet. Separate licenses are required to access this tool. Please inquire with your SC or the Miller Heiman Products Team at sam@millerheiman.com for more information.
- **New Sales Process Funnel tool** – The Sales Process Funnel visually displays the opportunities in your funnel grouped by sales stage. It has multiple filter options available to view the funnel in different ways and is accessed from a separate tab in the CRM. Thresholds can be set by your administrator for specific stages and opportunities which will color-code the opportunities "red" when they are outside the

pre-determined thresholds. Separate licenses are required to access this tool. Please inquire with your SC or the Miller Heiman Products Team at sam@millerheiman.com for more information.

- **New Blue Sheet enhancement allowing Suggested Actions to be imported from the Sales Process Funnel stage Allocation section** – The administrator can add an asterisk in front of a selling or customer action in the Sales Process Funnel stage Allocation section of the Admin Reference Data, to allow those actions to be imported into the Blue Sheet. By checking the new “Show recommended actions for stage” checkbox which has been added to the Suggested Actions dialog, a pick list displays for each stage a recommended action has been created for. These actions can then be selected for import to the Possible Actions section of the Blue Sheet.

Resolved Issues

- WS07340 & WS07373 – Blue Sheet issue resolved when mapping the revenue field to a text field.
- WS07498 – Blue Sheet issue resolved where Adequacy of current position text wrapped to a second line when viewed in the following languages: French, German, Spanish Latin, Spanish Europe, Danish or Russian.
- WS06251, WS06604 & WS07035 - Green Sheet issue resolved where the SSO was not populating.

SAM 5.0 September 2013

Microsoft Dynamics CRM and Oracle CRM On Demand

The following new enhancements have been added to Sales Access Manager v5.0:

- **New HTML5 version compatible with tablet devices** – the flash applet has been rewritten in HTML5 to be compatible with tablet devices. Note: SAM 4.9 requires the 4.9 iPad version, and SAM 5.0 requires the 5.0 iPad version. The CRM & iPad versions must be the same.
- **Enhanced Print Layout** – New print layout expands fields vertically and wrap to ensure all data is visible. Where this expands the height of any section, all sections below the expanded section move downwards to ensure that they always started at the same vertical point. The groups which should always start at the same vertical point are shown below. Thick lines indicate where sections should be treated as all starting at the same point.

OPPORTUNITY DETAILS	COMPETITION/SALES FUNNEL	SCORECARD
BUYING INFLUENCES INVOLVED	BUYING INFLUENCES KEY WIN – RESULTS	HOW WELL IS BASE COVERED
MY POSITION vs COMPETITION	POSSIBLE ACTIONS	BEST ACTIONS
		INFORMATION NEEDED

- **A new “Created Date” can now be mapped from the Sheets to the CRM** – There is a new Mapping option for each of the sheets to map the date the sheet was created.
- **Two ways to edit table items: Inline Entry or Dialog Method** – Single clicking any field in a table will allow the user to enter information directly into that field. Double clicking on any cell in any table row will open the relevant EDIT DIALOG for that item. Note: Double clicking will not be possible on touchscreen devices. When

the sheets are used on these devices, a single click will be treated as a double click, and there will be no inline editing

- **All EDIT DIALOGs include a SAVE & NEW button** – Clicking this button will add the item, and reset the dialog with defaults so that another item can be added. Failing to complete any mandatory fields before selecting the SAVE & NEW button will result in the same warning as per the SAVE button.'
- **Table rows can be rearranged by dragging & dropping up or down** – All sections with tables should allow the user to drag and drop rows creating a user defined row order. The initial sort order will be defined by the order in which rows are added to a table. The user sort order is saved when the user saves the sheet. Clicking the column header will toggle between sorting the column in ascending alphanumerical order / descending alphanumerical order and back to user saved sort order. The saved sort order will always be the order the user has created by dragging and dropping the rows.
- **Visibility to New Table Rows** – When a row item is added to a table, the application will scroll the table if necessary to ensure that the new item is visible.
- **Tooltips** – Hovering over any field in a table will display a tooltip with the value of the cell in it.
- **User prompts added with checkboxes to “Not Show this Message Again”** – A number of user prompts have been added to the Blue Sheet in V5. In order to minimise intrusion, users will be able to prevent these pop ups from appearing by selecting a ‘Do Not Show this Message Again’ checkbox. There will be one checkbox on each separate warning prompt. For example, if a user is prompted to update their Adequacy of Current Position, they will be able to suppress further prompts of this message. However, they will still see any other automatic warnings until they choose to suppress those other warnings. An admin function allows administrators to reenable each type of warning message for any particular user.
- **The default format for all numeric and currency fields is zero decimal places** – For example, numbers display as 47,000 rather than 47,000.00.
- **For currency fields display the currency symbol or text in the field label** e.g. [Label: "Volume (\$)"] [Value: "50000.00"], [Label: "Volume (cHR)"] [Value: "50000.00"]. This functionality is required for the following fields: Blue Sheet Current Volume, Potential Volume, Revenue, Product. Green Sheet Sales Rev/Other Units. Gold Sheet Rev Target (Low, Realistic, High), SSO Rev/Units Column. Platinum Sheet Revenue Targets (Exist, Est From Proposed Programs, Total Target Revenue).
- **Different sets of ICC descriptions are allowed by Blue Sheet type.**
- **“Last Updated” information now displays as days, hours, and minutes ago** – As specific dates and times cannot be used due to timezones, when the sheets are updated the information appears as “Last Updated: 477 days, 7 hours and 27 minutes ago”.
- **Inactive users are not displayed in drop list for new Actions** – To ensure actions are not assigned to inactive users, only Active user names will display when assigning users for new Actions. Historical data will remain.
- **Inactive users are no longer pulled into the SAM Admin tab** – To reduce the user list in the SAM Admin tab, only active users will be pulled in from the CRM. Because of this change, the “CRM Active” option within user maintenance of the SAM Admin tab will no longer be shown.
- **Allow users to select multiple roles** – Users can select multiple roles in the following sections: Blue SheetBuying Influences, Green SheetGetting Started, Gold SheetField of Play & Strategic Players, Platinum SheetSituation Appraisal, Key Players, Team Members.

- **Competitor Positioning can be entered against each competitor** – Competitor section is now a table that allows the Positioning (Only Alternative, Front Runner, Shared, Zero) to be entered for each competitor listed.
- **Checkboxes added to "Summary of my Position Today" for Possible and Best Actions** – Checkboxes have been added to the table rows to allow the action to be automatically added to the "Possible Actions" and "Best Actions" sections. The "Best Action" checkbox is only enabled when the "Possible Action" checkbox is checked.
- **For all values from 5 to +5 (except 0) the value must be preceded by its sign value** – This applies to the "Ideal Customer Criteria" and "How Well is the Base Covered" sections in the Blue sheet.
- **Editing Managers Notes saves username and date stamp** – Whenever Managers Notes are edited and saved, the username and date/time stamp are saved and display in the dialog.
- **The Admin User list can be exported to a CSV which can also be printed** – The User List on the User Maintenance screen will output all of the active users (inactive users are excluded). "Auto delete" users no longer in the CRM system and determined when user list is refreshed.
- **"Create Action in CRM" checkbox added to Gold Sheet & Blue Sheet** – A checkbox has been added to the Gold & Blue Sheet (Account & Opportunity record) that allows users to create actions directly in the CRM and autoadd to the associated sheet.
- **Green Sheet Admin option added for SSO section** – Mapping option allow either 1) pull the data from CRM as Read Only into the Green sheet (default) or 2) allow the user to edit the data in "Company / Specific Area", "Sales Revenue / Other Units" and "Product / Service". Note: for option 2, the data will not be pulled from or written back to CRM.
- **Green Sheet pick lists added** – Pick list values can be defined for the following fields: 'Valid Business Reason', 'Credibility', 'Giving Information', 'Getting Information', 'Getting Commitment'
- **Green Sheet Debrief Icon changes color when data entered** – Debrief icon displays in grayscale with no data, and pencil is colored when data entered, the same as the Manager and Additional Notes icons.

Resolved Issues

- WS02154 Remove the inactive users from the CRM in the SAM Admin tab
- WS02159 Update mapping in SAM Gold Sheet for Additional Notes to be Bi directional
- WS02160 Update mapping in SAM Blue Sheet for Additional Notes to be Bi directional
- WS02161 Update mapping in SAM Green Sheet for Additional Notes to be Bi directional
- WS02245 Add a "status" column on best action plan section (blue sheet)
- WS02318 Allow for mapping to tasks and appointments for Green Sheet
- WS02833 Possible Actions showing completion dates
- WS02933 eCoaching button and eLearning links in Platinum Sheet do not work
- WS03010 Buying Influence information truncated on Blue Sheet Printout
- WS03182 PDF Green sheet header does not match Green Sheet header
- WS03234 Add the ability to display both Product and Opportunity Name in Blue

SAM 5.0 March 2013

Salesforce

New HTML5 version compatible with tablet devices

You can use Sales Access Manager v 5.0 on your tablet device.

NOTE:

SAM 4.9 requires the SAM 4.9 tablet client version, and SAM 5.0 requires the SAM 5.0 tablet client version. The SAM CRM & tablet client versions must be the same.

Enhanced print layout

The Gold Sheet print layout auto-expands fields vertically to ensure all entered data is visible. When a section expands to accommodate data, all sections below the expanded section shift downwards to ensure that they always start at the same vertical point.

New Sheet Creation Date mappable option

There is a new Gold Sheet field mapping option to map the date the Gold Sheet was created.

Save and New button in edit dialog boxes

All edit dialog boxes now include a **Save and New** button. When you click the **Save and New** button, your field entry is saved and the edit dialog remains open for you to add another entry. If you did not complete all mandatory fields before clicking **Save and New** (if applicable), a warning message appears.

Inline editing ability

You can now edit existing table row items two ways: inline or using a dialog. To edit inline, click an existing table row entry and edit as needed. To edit using a dialog box, double-click on a table row. The edit dialog box for that field appears.

NOTE:

If you are using a touchscreen device, you will not be able to use inline editing. On touchscreen devices, a single click is treated as a double-click, so the edit dialog box will always open when you click in an applicable field.

Re-order table rows using drag and drop

You can re-order existing table rows by dragging and dropping the rows where desired. Click and hold the mouse button on the list icon to the left of a desired entry, drag the item to the desired location in the list, and release the mouse button. Click **Save** to save the new list order.

Visibility to new table rows

When you add a new row item to a table, the application will scroll down the table to display the new item if applicable. For example, there are four visible rows in the Field of Play Trends table. When you add a fifth Trend entry, the table scrolls to the fifth line so that you can view the entry in the table. A scroll bar appears in the right border of the table when there are more entries in the table than the default view displays.

Context-sensitive tooltips

Hovering the cursor over any row in a table displays a tooltip box that shows the entire row entry.

Last Updated information format display changed

The Gold Sheet Last Updated date information now displays as days, hours, and minutes since the change occurred to accommodate different timezones. For example, the bottom of the Gold Sheet displays "Last Updated by John Patel 10 days, 7 hours and 27 minutes ago."

Inactive CRM users not available in selection lists

To ensure actions are not assigned to inactive users, only active user names will display in the Assigned To selection lists for new actions.

Addition of Manager Notes user and date stamp

When Manager Notes are saved, the user name and date stamp are now saved and display at the bottom of the Manager Notes dialog.

Resolved Issues

- WS02154 - Remove the inactive users from the CRM in the SAM Admin tab
- WS02159 - Update mapping in SAM Gold Sheet for Additional Notes to be bidirectional
- WS02833 - Possible Actions showing completion dates

New in Version 4.9.2 - March 2012

There have been no updates to the Gold Sheet in this release.

New in Version 4.7.3 - April 2011

Case WS01998 – Sheets not displaying Blue, Gold, Green icons with Unlimited Licenses (bug fixed).

Language Translation – The latest Language Translation files have been updated.

New in Version 4.7.2 - March 2011

Exclusion of Opportunities in Gold Sheet based on a probability of zero percent – An Admin option has been added to exclude Opportunities with a 0% probability from the Gold Sheet SSO section. Not setting this option allows all opportunities, regardless of probability percentage, to appear in the Gold Sheet SSO section.

Gold Sheet "Blank" or "Clear" pick list options – The following Gold Sheet pick lists now have either a "blank" or "clear" option, which allows the field to be cleared if pick-list data is entered in error: 1) Best Action Contact, 2) Best Action Type/Additional Actions.

Gold Sheet FOP Mapping Options for child data - The ability to map the Field Of Play child data (Revenue Targets, Selling Team and Strategic Players) is now available to your system administrator in the Admin panel.

New in Version 4.6.2 - February 2011

Multi-Select pick-list capabilities on Our Critical Vulnerabilities – The Vulnerabilities pick-list now allows for multiple selections.

Reviewed by Manager auto-updates when Manager Notes are input – The Reviewed by Manager Date field is now automatically updated with the current date when any Managers Notes data is entered.

Print Dialog defaults to "ALL" selected – The print dialog now defaults to "ALL" print options selected. Users can deselect any options as desired.

New Features in Version 4

Goal Status Ability on Individual Goals

Manager's Notes

Additional Notes

Easier Access to Revenue Targets, Single Sales Objective and Other Activities not Goal Specific

Selectable Enhanced Printing Capability

Access to both Gold & Green Sheets directly within the Gold Sheet

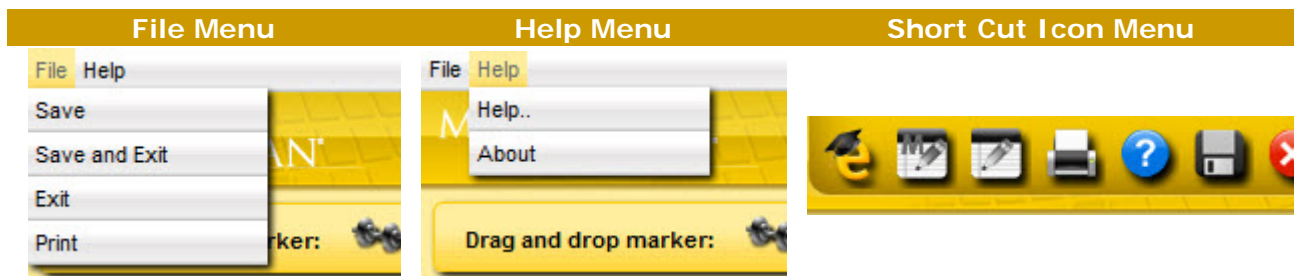
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Navigation

Menu Bar, Short Cuts, and Buttons


The Menu Bar provides drop-down menus for a few basic functions. Alternatively, you can use short cut icons to invoke the same and additional options. The menu bar is located at the top-left of the screen and the short cut icons are located on the top-right of the screen.

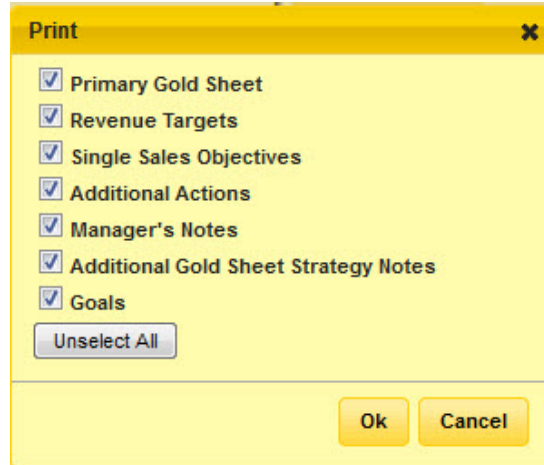




File Menu - You may Save, Save and Exit, Exit, and Print from the Gold Sheet by selecting the relevant choice from the drop-down menu. To ensure data is saved properly, you need to utilize the Save or Save and Exit and Exit functions.



Save  - saves the information within the sheet so if a session time out occurs the information will not be lost.


Save and Exit  then  - saves the Gold Sheet and closes it upon completion of the save.


Print  - When selecting the Print option, a dialog window displays to allow you to select which Gold Sheet sections you would like to print. The print dialog defaults to ALL items selected. De-select any items not desired and click **OK** to print or click **Cancel** to stop without printing.





Manager Notes  (*none*)  (*exists*) - Managers may add information without affecting the strategy planning by clicking the pencil icon with the "M". When text has been entered and saved, the pencil icon displays in color to indicate there are Manager Notes within the sheet. The **Reviewed by Manager** field at the bottom-right of the work sheet automatically updates to the current system date when Manager Notes are saved.


Additional Notes  (*none*)  (*exists*) - Users may add information without affecting the strategy planning by clicking on the pencil icon. When text has been saved, the pencil icon displays in color to indicate there are Additional Notes saved within the sheet.

Help  - Detailed help for each area of the Blue Sheet is available within the Help File. Click the "Book" icons in the left panel of the help screen to expand relevant topics. Search and Glossary functions are also available. For more information about Sales Access Manager, click "About" in the file menu for product version, or go to the Sales & Support Contacts section for details on how to contact Miller Heiman.

eLearning  - Users that have been through the full web-based training session may take advantage of the eLearning function. This is great for any users who need a refresher course or new users that do not have time available for a class room session. For more information on gaining access to the eLearning, contact Miller Heiman directly. Users who have been through the web-based training program may access the eLearning with their same login credentials.

Drag and Drop Markers  - Located on the top-left just above the **Opportunity Details** section are the electronic Strength (barbell) and Red Flag icons that are like the stickers used in the training class.


Strengths  - Strengths are elements that make your solution significantly different from those being offered by your competition (in the Drag and Drop markers section). The Strengths icon can be dragged and dropped to appropriate places within the Blue Sheet.

Red Flags  - Red Flags are symbols used for highlighting areas of strategy that require further attention; a method for designating areas of risk. Red Flags are a positive way to help remember where important information is currently missing, needs clarification, or perhaps needs review.


Adding Drop and Drag Markers - Select the Strength or Red Flag from the Drop and Drag Marker section of the Blue Sheet and drag it to the area that requires it. If you see an "X" symbol, then that is not an area where the marker can be placed. The icons can only be


placed within the top two thirds sections of the Blue Sheet, and only where data has been entered.


Removing Strengths and Red Flags - There are two methods for removing or deleting Strengths and Red Flags.


1. Use the Eraser  - Click and hold the mouse button on the Eraser icon, then drag the eraser to the relevant section of the blue sheet to erase the Strengths or Red Flags that you wish to remove. Release the mouse button when finished.
2. Click and drag off the screen - Click and hold the mouse button on the Strength or Red Flag and drag it off of the screen. to left-click on the icon, and while holding down the left mouse button, drag the icon to the edge of the screen. When the icon changes to a trash can, release the mouse button and the marker is removed.





Add  - Click to add an entry to a table.


Remove  - Click to remove the selected entry from a table.


Repository  - Click to view suggested items you may wish to include in a particular sheet section.

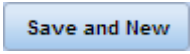
Drag and Drop Table Row  - Click and drag to reposition a row in a table.

Drop List  - Click to view drop list options.

Expand  - Click and drag to expand a dialog window.

OK  - Click to perform an action (if prompted) and close the dialog.

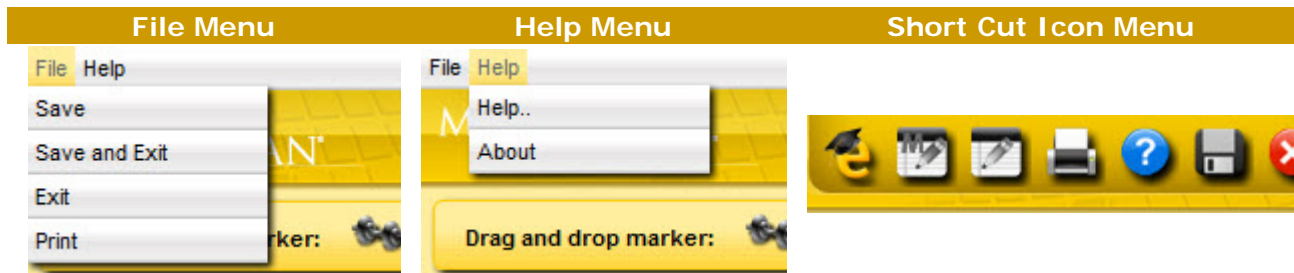
Cancel  - Click to close the dialog without performing any action.

Save and New  - Click to save the dialog data and the dialog stays open for you to add another entry.


Menu Bar, Short Cuts, and Buttons

The Menu Bar provides drop-down menus for a few basic functions. Alternatively, you can use short cut icons to invoke the same and additional options.


The menu bar is located at the top-left of the screen and the short cut icons are located on the top-right of the screen.

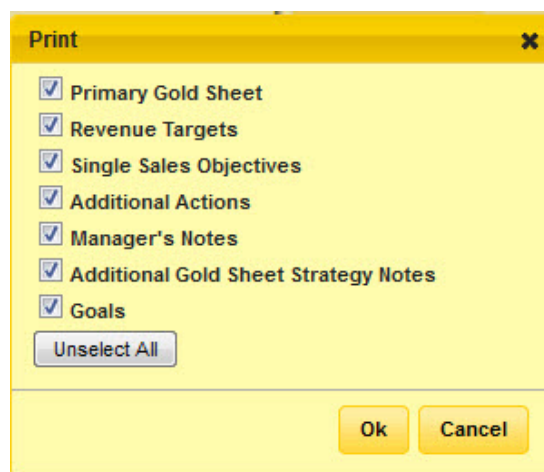




File Menu - You may Save, Save and Exit, Exit, and Print from the Gold Sheet by selecting the relevant choice from the drop-down menu. To ensure data is saved properly, you need to utilize the Save or Save and Exit and Exit functions.



Save  - saves the information within the sheet so if a session time out occurs the information will not be lost.


Save and Exit  then  - saves the Gold Sheet and closes it upon completion of the save.


Print  - When selecting the Print option, a dialog window displays to allow you to select which Gold Sheet sections you would like to print. The print dialog defaults to ALL items selected. De-select any items not desired and click **OK** to print or click **Cancel** to stop without printing.





Manager Notes  (*none*)  (*exists*) - Managers may add information without affecting the strategy planning by clicking the pencil icon with the "M". When text has been entered and saved, the pencil icon displays in color to indicate there are Manager Notes within the sheet. The **Reviewed by Manager** field at the bottom-right of the work sheet automatically updates to the current system date when Manager Notes are saved.


Additional Notes  (*none*)  (*exists*) - Users may add information without affecting the strategy planning by clicking on the pencil icon. When text has been saved, the pencil icon displays in color to indicate there are Additional Notes saved within the sheet.

Help  - Detailed help for each area of the Blue Sheet is available within the Help File. Click the "Book" icons in the left panel of the help screen to expand relevant topics. Search and Glossary functions are also available. For more information about Sales Access Manager, click "About" in the file menu for product version, or go to the Sales & Support Contacts section for details on how to contact Miller Heiman.

eLearning  - Users that have been through the full web-based training session may take advantage of the eLearning function. This is great for any users who need a refresher course or new users that do not have time available for a class room session. For more information on gaining access to the eLearning, contact Miller Heiman directly. Users who have been through the web-based training program may access the eLearning with their same login credentials.


Drag and Drop Markers  - Located on the top-left just above the **Opportunity Details** section are the electronic Strength (barbell) and Red Flag icons that are like the stickers used in the training class.

Strengths  - Strengths are elements that make your solution significantly different from those being offered by your competition (in the Drag and Drop markers section). The Strengths icon can be dragged and dropped to appropriate places within the Blue Sheet.

Red Flags  - Red Flags are symbols used for highlighting areas of strategy that require further attention; a method for designating areas of risk. Red Flags are a positive way to help remember where important information is currently missing, needs clarification, or perhaps needs review.


Adding Drop and Drag Markers - Select the Strength or Red Flag from the Drop and Drag Marker section of the Blue Sheet and drag it to the area that requires it. If you see an "X" symbol, then that is not an area where the marker can be placed. The icons can only be placed within the top two thirds sections of the Blue Sheet, and only where data has been entered.


Removing Strengths and Red Flags - There are two methods for removing or deleting Strengths and Red Flags.

1. Use the Eraser  - Click and hold the mouse button on the Eraser icon, then drag the eraser to the relevant section of the blue sheet to erase the Strengths or Red Flags that you wish to remove. Release the mouse button when finished.
2. Click and drag off the screen - Click and hold the mouse button on the Strength or Red Flag and drag it off of the screen. To left-click on the icon, and while holding down the left mouse button, drag the icon to the edge of the screen. When the icon changes to a trash can, release the mouse button and the marker is removed.





Add  - Click to add an entry to a table.

Remove  - Click to remove the selected entry from a table.

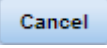
Repository  - Click to view suggested items you may wish to include in a particular sheet section.

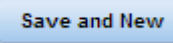
Drag and Drop Table Row  - Click and drag to reposition a row in a table.

Drop List  - Click to view drop list options.

Expand  - Click and drag to expand a dialog window.

OK  - Click to perform an action (if prompted) and close the dialog.

Cancel  - Click to close the dialog without performing any action.

Save and New  - Click to save the dialog data and the dialog stays open for you to add another entry.

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eCoaching

Throughout the Gold Sheet when you click on the title of the section, a browser window will appear behind the sheet as a separate window or a tab depending on your web-browser settings, with specific information from the Miller Heiman Knowledge Center regarding the section of the sheet.

The screenshot displays the Gold Sheet interface with a yellow theme. At the top, there is a navigation bar with the Miller Heiman logo, the text 'Large Account Management ProcessSM (LAMP®)', and 'Sales Access Manager'. Below this, there are several input fields: 'Author: MH V4 Beta Test', 'Date: 04/08/2013', and 'Field of Play: MetroAtlantic Bank'. The main content area is divided into several sections:

- SELLING ORGANIZATION TEAM:** A table with columns for Name and Role.
- FIELD OF PLAY STRATEGIC PLAYERS:** A table with columns for Name, Role, and Buy/Sell. It lists Andy Young (Sponsor, Level 1) and Barbara Levy (Sponsor, Level 3).
- FIELD OF PLAY'S TRENDS:** A list of trends including 'This is a new trend', 'trend 2', 'Trend 4', and 'Trend 5'.
- FIELD OF PLAY'S OPPORTUNITIES:** An empty table.
- OUR STRATEGIC STRENGTHS:** An empty table.
- OUR CRITICAL VULNERABILITY:** An empty table.
- POSITION ON THE BUY-SELL HIERARCHY:** A diagram showing a 5-step hierarchy: 1. Deliver Commodity that Meets Specifications, 2. Deliver Good Products & Services, 3. Provide Good Service & Support, 4. Contribute to Business Issues, 5. Contribute to Organizational Issues. To the left is 'OUR VIEW' with dropdowns for 'Now', 'Last Year', '1 Year', and '3 Years'. To the right is 'FIELD OF PLAY'S VIEW' with similar dropdowns.
- CHARTER STATEMENT:** An empty text area.
- GOALS:** A table with columns for Status and Description. Below it are tabs for 'BEST ACTIONS', 'REVENUE TARGETS', 'SINGLE SALES OBJECTIVES', and 'ADDITIONAL ACTIONS'. A sub-table has columns for Description, Assigned To, and When.

At the bottom, there is a status bar with 'Last Updated By MH V4 Beta Test 7 hours ago' and 'Reviewed By Manager 04/10/2013'.

The following headers link to eCoaching in the Gold Sheet:

- Selling Organization Team
- Field of Play Strategic Players
- Field of Play's Trends
- Field of Play's Opportunities
- Our Strategic Strengths
- Our Critical Vulnerability
- Position on the Buy-Sell Hierarchy
- Charter Statement

The following headers link to eCoaching in the Goals dialog:

- Goal Description
- Focus Investments
- Stop Investments
- Sales and Support Programs
- Information Needed
- Activity

For example, if you click on the title **Field of Play Strategic Players**, information specifically about the section appears. You may also login to the Knowledge Center as well with your Miller Heiman username and password. If you cannot remember your Miller Heiman Knowledge Center username and password, please contact Miller Heiman directly or create an account on the website.

The screenshot shows the Miller Heiman Knowledge Center website. At the top, there is a navigation bar with links for N.America, Europe, Asia Pacific, CEO's Blog, eWorksheets, Login / Create Account, Store, and Cart: 0. The Miller Heiman logo is on the left, and a 'Contact Us' link and search bar are on the right. Below the navigation bar, there is a secondary menu with links for About Us, Value We Deliver, Sales Solutions, Workshops & Events, Knowledge Center (highlighted), and Research Institute. The main content area features a sidebar with links to Articles and White Papers, Sales Performance Journal, Sales Performance Tips, Books and Audio, Alumni, and Frequently Asked Questions. The main article is titled 'Field of Play and Strategic Players' and includes a search bar and a dropdown menu set to 'All of Knowledge Center'. The article text defines the Field of Play and lists categories: Sponsors, Checkpoints, Anti-Sponsors, Key Players, and another Checkpoints section.

Field of Play and Strategic Players

Field of Play is the portion of the strategic account that your team can realistically manage.

Sponsors
Sponsors have influence over other Strategic Players; they support the salesperson's presence and have ultimate authority.

Checkpoints
- Must exercise authority over all or much of the Field of Play. Authority is the distinguishing factor.
- Have influence and credibility with the other key players
- Strong supporter of your tenancy – they have self-interests that are being served as a result of the relationship

Anti-Sponsors
A type of Strategic Player who has a high level of authority and influence and seeks to negate your efforts.

Checkpoints
- The anti-sponsors goal is to negate your efforts
- Have authority and influence with the strategic players
- Aren't necessarily direct in their opposition – naïve to think that you don't have one

Key Players
Anyone in the Field of Play who doesn't quite fit the other three categories of Strategic Players but is critical to your success.

Checkpoints
- Have a high degree of credibility

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Manager and Additional Notes

Manager Notes

Managers can add information about an Account Executive's Gold Sheet strategy without interfering with the Large Account Management Plan.

Managers Notes  (*none*)  (*exists*)

When text has been entered into the Manager Notes dialog and the notes are saved, the M pencil icon displays in color to indicate Manager Notes exist for the Gold Sheet. The **Reviewed by Manager** date field at the bottom of the Gold Sheet displays the date the Manager Notes were last saved.

Additional Notes

Users may add information in the Additional Notes section without affecting the overall strategy within the Gold Sheet. This allows for collaboration of information that is internal to the organization and is not intended to be shared with the client.

Additional Notes  (*none*)  (*exists*)


When text has been entered and the notes are saved, the pencil icon displays in color to indicate Additional Notes exist for the Gold Sheet.

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Using the Gold Sheet

Entering, Editing, and Deleting Data


To add an entry to a Gold Sheet section, click the plus button  to open a dialog box for that section. Complete the dialog box fields and click **OK**. The entry appears in the desired section.


To add an entry to a Gold Sheet section that does not have a plus button (for example, Charter Statement), click in the section and type the desired text.

To edit an existing entry in a Gold Sheet section, either click in the entry and edit inline or double-click on the entry to edit using the dialog box.


NOTE:

If you are using a touchscreen device, you will not be able to use inline editing. On touchscreen devices, a single click is treated as a double-click, so the edit dialog box will always open when you click in an applicable field.

To use a selection list to populate a Gold Sheet section, click the Repository button , select and an option. You can edit that option inline if desired. Repository buttons only appear if your System Administrator has set up possible selections for a Gold Sheet section.

To delete an existing entry, click in the applicable row and click the minus button . A message box appears asking you to confirm the deletion. Click **Yes** to delete or **No** to cancel.


To delete an existing entry from a section that does not have a minus button (for example, Charter Statement), highlight the desired text and press **Delete** on your keyboard.

To re-order table rows, click and hold the mouse button on the list button  to the left of a desired entry, drag the item to the desired location in the list, and release the mouse button.

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Entering, Editing, and Deleting Data


To add an entry to a Gold Sheet section, click the plus button  to open a dialog box for that section. Complete the dialog box fields and click **OK**. The entry appears in the desired section.


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To re-order table rows, click and hold the mouse button on the list button  to the left of a desired entry, drag the item to the desired location in the list, and release the mouse button.

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Situation Appraisal

Situation Appraisal

A Situational Appraisal is the summary of everything known or discovered so far about the account. There are six specific sections that help focus the thinking process in strategically analyzing the account overall:

- Selling Organization Team
- Field of Play Strategic Players
- Field of Play's Trends
- Field of Play's Opportunities
- Our Strategic Strengths
- Our Critical Vulnerability

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Situation Appraisal

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About Roles

There are four roles that you can assign to Strategic Players and Selling Organization Team members:

Sponsor
Anti-Sponsor
Strategic Coach
Key Player

Sponsor

Three key components are necessary to identify the sponsors for your business relationship: authority, influence and support.

Authority

Sponsors must exercise some degree of authority over that portion of the Large Account that you've chosen as your Field of Play. In essence they must be essential to making those decisions that will move your relationship forward. Regardless of where you find your Sponsors and at what level within your organization and the Account, it is their word, directly or indirectly that makes things happen.

Influence

Sponsors have influence and credibility with other key players. If you have a Sponsor that can personally vote your relationship up or down the Buy-Sell Hierarchy, but that person has no support or only grudging support, from other interested parties in the Large Account, you don't really have a reliable Sponsor. A Sponsor must be able to get other people behind your presence in the account, so that it enjoyed at the broad-based support that a relationship requires.

Support

Sponsors support your presence in their account. A sponsor must want to exercise his/her influence. He/she must be a strong supporter of your tenancy in the Large Account.

Sponsors must see their own self-interest served by development of a relationship between the firm and yours. By definition sponsors want you in there, not just for a given project, but over the long term.

Anti-Sponsor

An Anti-Sponsor is generally a credible person within the organization like a Strategic Coach or Sponsor. However, one major difference is that this individual is working against you and has the authority to exert influence on how the account and its key players are thinking. By definition, an Sponsor is someone within the Large Account Organization that wants you out or someone or something else in. Therefore, the role of the Anti-Sponsor is to negate your efforts to improve your position within the Account. Reasons for Anti-Sponsors could include, internal politics or difference in business philosophy for example, however, whatever the reasons, as the Strategic Coach sees you being closely tied into the account as a "Win", the Sponsor sees you wants to see you Lose.

Strategic Coach

Strategic Coaches have a wider role in that they have impact on your work account-wide. For a Strategic Coach to be considered, the individual must meet three areas of criteria: creditability, support and insight.

Credibility

Credibility pertains to someone who has major influence and who is often the actual decision-making authority in the Large Account and sometimes even beyond your chosen Field of Play. Good Strategic Coaches must have high credibility with senior management and be respected at all levels of the company's hierarchy, without that credibility they could never get the coaching data that you need.

Support

Determine if the Strategic Coach is ready, willing and able to actively support your efforts in the Large Account. This individual sees a personal "Win" in promoting your tenancy in the Large Account. Strategic Coaches must be able to give advice and guidance on the relationship as a whole and must want you in the account for the long term.

Insight

In this area, a Strategic Coach is able to support your long-term tenancy because they can provide you the kind of insight that only insiders know. Individuals in this role are often upper-management in the Large Account. They know at a high level what Trends are keeping the Strategic Players awake at night and what is driving the business. In addition, on an operational level, Strategic Coaches, know how the organization sets its budgets, allocates its resources, and makes significant purchasing decisions, which is information that can be critical to you in setting a good LAMP Strategy.

Key Player

After identifying the three major roles within an account and or own team, the final direct or indirect role is a Key Player. Even though such individuals may not exist in every relationship-building scenario, their presence is common, sometimes hidden, and potentially deadly to ignore. In order to identify additional Key players ask yourself the following:

- Is there anyone else, wither within the Large Account or outside, who might impact the way this Field of Play makes decisions. For example, outside contractors, consultants or analysts.
- Who else might have a high degree of authority, credibility, or influence with the Strategic players in the Field of Play. For example, people who have been important in previous transactions, even though they do not seem to be central now.
- Are there any industry "gurus" or internal experts on technology, legal issues, or employee relations that should be considered?
- Are there any critical touch points in the Field of Play that are not represented in the other roles?
- Do we have a gut feeling that a given individual is important, even though we're unable to define exactly how?

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Selling Organization Team




The Selling Organization Team consists of individuals within your own organization that have a specific role within the Field of Play for the account. Identifying your Team to the Strategic Players in the Field of Play is part of the overall account strategy. Three important questions to ask yourself when assigning the roles for your team include:

1. Internally, have we established cross-functional links in our own organization?
2. For each of the Strategic Players we've identified, have we linked that person to someone with an equivalent level of authority in our own organization.
3. Have we ensured that, as the relationship moves forward, we have established links that will make the right resources available at the right time.

Alignment often works well where members of the two teams are linked through common interests as well as levels of authority. For example, finance people are aligned with finance, legal to legal, technical to technical, VP to VP, and manager to manager. The role of the account manager is then to orchestrate this web of contacts to ensure that the various touch points in the account are activated as frequently as necessary and that the contacts are made with a common purpose in line with the strategy for the account. For more information, see About Roles.


SELLING ORGANIZATION TEAM	
Name	Role
John Patel	Key Player
Shelby Smith	Strategic Coach


To add a Selling Organization Team member:

1.
 1. Click the **plus** button  to open the Selling Organization Team dialog box.
 2. Click the **drop down button**  in the **Name** field and do one of the following:
 - If the desired name appears in the drop down list, select the name and proceed to step 5.
 - If the desired name does not appear in the drop down list, select **Search** from the list and proceed to step 3.
 3. Type the desired search criteria in the **First Name**, **Last Name**, or **Account** field and click **Search**.
 4. From the list of items that match the search criteria, select the desired team member and click **OK**.
 5. Click the **drop down button**  in the **Role** field and select the desired role.

6. Click **OK**.

To delete a Selling Organization Team member:

1. Click the desired team member name and click the minus button .
A message box appears asking you to confirm the deletion.
2. Click **Yes** to delete or **No** to cancel.

Initially, you may choose to leave the Role field blank until the Field of Play Strategic Players has been clearly identified. Remember to add a Red Flag  in the Role field if left blank or unsure about your choice until such time a confirmation on the role is made.

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Field of Play Strategic Players


The Field of Play Strategic Players consists of individuals within your Large Account or associated with your Large Account that have a specific Role within the Field of Play for the account. For more information, see About Roles and Strategic Player Buy-Sell Hierarchy.

FIELD OF PLAY STRATEGIC PLAYERS		
Name	Role	Buy/Sell
☰ Andy Young	Sponsor	Level 1
☰ Babara Levy	Key Player	Level 3

To add a Strategic Player:

1.
 1. Click the **plus** button  to open the Field of Play Strategic Player dialog box.
 2. Click the **drop down button**  in the **Name** field and do one of the following:
 - If the desired name appears in the drop down list, select the name and proceed to step 5.
 - If the desired name does not appear in the drop down list, select **Search** from the list and proceed to step 3.
 3. Type the desired search criteria in the **First Name**, **Last Name**, or **Account** field and click **Search**.
 4. From the list of items that match the search criteria, select the desired team member and click **OK**.
 5. Click the **drop down button**  in the **Role** field and select the desired role.
 6. Click the **drop down button**  in the **Position of the Buy-Sell Hierarchy (NOW)** field and select the desired level.
 7. Click **OK**.

To delete a Strategic Player

1. Click the desired Strategic Player name and click the minus button . A message box appears asking you to confirm the deletion.
2. Click **Yes** to delete or **No** to cancel.



Field of Play Trends

A Trend is any change in you Field of Play's market, its customer base, the behavior of those customer's' or the business environment that is significant to the account. Trends can be up, down or constant. Additionally, ongoing Trends are fundamental patterns that impact the account over time. The time element is essential, and if it is not taken into consideration, it is difficult to identify a "so-called" Trend, which can simple be a transient shift in customer interest.

One type of Trend is related to a direct significant impact on the way account relationships are managed today versus ten years ago. However, other Trends that are equally significant and not so obvious, but are directly tied in to the relationship management are widespread economic Trends that change over time. For example, increased foreign competition in both markets and jobs. Globalization of markets, supply chains, and manufacturing bases. The major increase in virtual businesses and virtual offices, and so on.



Trends exist whether the Field of Play recognizes a Trend or not as important and whether they choose to follow the Trend or resist it. However, very often Trends serve to trigger an event or condition that obligates the Field of Play to take quick action.

Questions that assist in evaluating the appropriate Trends and/or Opportunities are:


1. Which changes in market dynamics (Trends) are having the most significant impact on your Field of Play environment?
2. Have these Trends been in existence for a least a couple of years?
3. How is your Field of Play reacting to those Trends and what issues or business needs (Opportunities) are being driven, positively or negatively, by these Trends?
4. If you help the Field of Play realize one or more of these Opportunities, what value will it bring them?



To add a Trend:

1.
 1. Click the **plus** button  to open the Field of Play's Trend dialog box.
 2. Do one of the following:
 - Type the desired trend text in the Description field and click **OK** to save and close the dialog or **Save and New** to add another Trend.
 - If there is a selection list of possible Trends available, click the Repository button , select a Trend, and click **OK**.

To delete a Trend:


1. Click the desired Trend and click the minus button . A message box appears asking you to confirm the deletion.
2. Click **Yes** to delete or **No** to cancel.

To edit an existing Trend:

Either click in the entry and edit the text inline or double-click on the entry to edit the text using the dialog box.

NOTE:

If you are using a touchscreen device, you will not be able to use inline editing. On touchscreen devices, a single click is treated as a double-click, so the edit dialog box will always open when you click in an applicable field.

Initially, you may choose to leave Field of Play Trends or Opportunities blank, remember to add a Red Flag  in the field if left blank or unsure about your choice until such time as a confirmation is made.

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Field of Play Opportunities



Like Trends, Opportunities can exist "out there," in the account's immediate environment or in the market at large, or they can be internal within the account. However, these may not be opportunities in the construct of the Field of Play. An Opportunity within the Field of Play has to strengthen or expand its business with its customers. Try to find Opportunities that, in your Field of Play assessment, will have at least a one-year impact and that, therefore, may take a year or so to accomplished. Focus on the midterm doable. Additionally, opportunities come in negative as well as positive forms. They often describe something that the Large Account feels need to be fixed or avoiding a situation.

Questions that assist in evaluating the appropriate Trends and/or Opportunities are:


- Which changes in market dynamics (Trends) are having the most significant impact on your Field of Play environment?
- Have these Trends been in existence for a least a couple of years?
- How is your Field of Play reacting to those Trends and what issues or business needs (Opportunities) are being driven, positively or negatively, by these Trends?
- If you help the Field of Play realize one or more of these Opportunities, what value will it bring them?



To add a Field of Play Opportunity:

1.
 1. Click the **plus** button  to open the Opportunity dialog box.
 2. Do one of the following:
 - Type the desired Opportunity text in the Description field and click **OK** to save and close the dialog or **Save and New** to add another Opportunity.
 - If there is a selection list of possible Opportunities available, click the Repository button , select an Opportunity, and click **OK**.

To delete a Field of Play Opportunity:

1. Click the desired Opportunity and click the minus button . A message box appears asking you to confirm the deletion.
2. Click **Yes** to delete or **No** to cancel.

To edit an existing Field of Play Opportunity:

Either click in the entry and edit the text inline or double-click on the entry to edit the text using the dialog box.

NOTE:

If you are using a touchscreen device, you will not be able to use inline editing. On touchscreen devices, a single click is treated as a double-click, so the edit dialog box will always open when you click in an applicable field.

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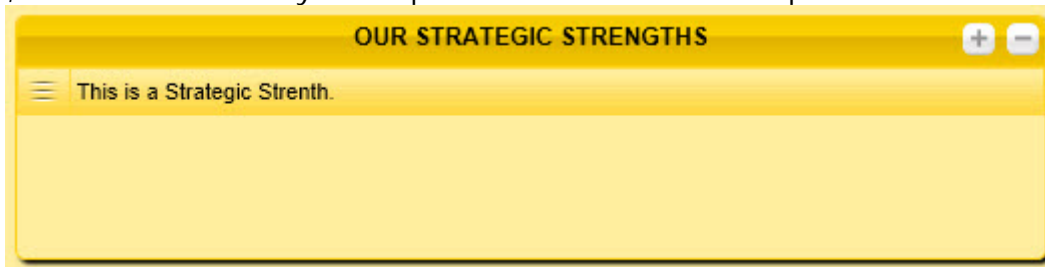


Our Strategic Strengths



The first criterion of finding a strategic Strength is determining its value by the customer, which ultimately comes from Miller Heiman's precepts in Conceptual Selling "that nobody buys a product in and of itself; they buy what they think the product will do for them." In this interpretation, "product" is broadly used. Strengths are found beyond your organizations products and services. Your company's core competencies, its brand, its reputation in the market, its delivery options are all sources of strengths. But only if the custom perceives them as accomplishing something of value.

Furthermore, solutions do not have inherent value any more than products do. When creating your Strengths match each Strength to an account Opportunity, which are issues or needs driving the Large Account's (no your) business. A true strategic Strength helps with the driving. It usually helps the customer fix or accomplish something that registers high on his radar screen. It may also serve to ameliorate a problem or eliminate a risk in which case you'd be leveraging your Strength against a customer Red Flag.


Differentiation, the last criterion ensures that in providing value to your customers, you don't neglect your own. The long-standing philosophy of "Win-Win" specifically relates in relationship building. You want to win, meaning winning out against someone else. The competitive differentiators, which provide you with measurable competitive advantage, are a true strategic Strength, not just a value that the Field of Play sees your company con provide, but one that it sees you can provide better than the competition.



To add a Strength:

1.
 1. Click the **plus** button  to open the Strength dialog box.
 2. Do one of the following:
 - Type the desired trend text in the Description field and click **OK** to save and close the dialog or **Save and New** to add another Strength.
 - If there is a selection list of possible Strengths available, click the Repository button , select a Strength, and click **OK**.

To delete a Strength:


1. Click the desired Strength and click the minus button . A message box appears asking you to confirm the deletion.
2. Click **Yes** to delete or **No** to cancel.

To edit an existing Strength:

Either click in the entry and edit the text inline or double-click on the entry to edit the text using the dialog box.

NOTE:

If you are using a touchscreen device, you will not be able to use inline editing. On touchscreen devices, a single click is treated as a double-click, so the edit dialog box will always open when you click in an applicable field.

Initially you may choose to leave Strengths blank. Remember to add a Red Flag  in any field left blank or if you are unsure about your choice until such time as a confirmation is made.

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Our Critical Vulnerability


Vulnerabilities should be considered as significant weaknesses, if left unprotected they could cripple your strategy. Use the following criteria uncover and neutralize Vulnerabilities:

- A Vulnerability is serious. More than a Red Flag that you might be able to work around, a Vulnerability is something that if left unattended to, can do significant damage to your strategic position within the Field of Play.
- A Vulnerability implies mission value. It usually entails a lack of knowledge, capabilities, resources or something else that is critical to the relationship, and that the Field of Play sees as adding value.
- Even though a Vulnerability may be hidden, if key people in your Field of Play were aware of it, they would see it as a serious problem.

The image shows a screenshot of a software interface. At the top, there is a yellow header bar with the text "OUR CRITICAL VULNERABILITY" in black, bold, uppercase letters. Below the header is a large, light yellow rectangular area with a thin black border. Inside this area, the text "This vulnerability is critical." is displayed in a small, black font. On the right side of the yellow area, there is a vertical scrollbar with a white track and a grey handle.

To add a Critical Vulnerability:

Do one of the following:

- Click in the **Our Critical Vulnerability** field and type the desired text directly in the field..
- If there is a selection list of possible Vulnerabilities available, click the Repository button , select a Vulnerability, and click **OK**.


To delete a Critical Vulnerability:

Highlight the desired text in the **Our Critical Vulnerability** field and press **Delete** on your keyboard.

To edit an existing Vulnerability:

Click in the entry and edit the text inline.

Initially you may choose to leave **Our Critical Vulnerability** blank. Remember to add a

Red Flag  in any field left blank or if you are unsure about your choice, until such time as a confirmation is made.

Strategy

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Strategy is just as important in formulating your complete Strategic Account Analysis as the Situation Appraisal. Before you can completely develop your strategy, you need to know where you stand with the Account right now and then figure out where you want to be with the account.

Strategy contains multiple elements for effective relationship management over time. In order to have a better understanding the elements are broken down:

- Position on the Buy-Sell Hierarchy
- Charter Statement
- Goals
- Best Actions
- Revenue Targets
- Single Sales Objectives
- Additional Actions

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Buy-Sell Hierarchy

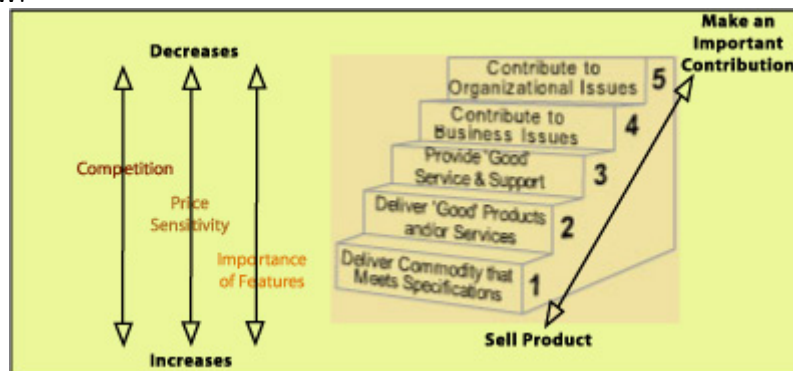
About the Buy-Sell Hierarchy

The Buy-Sell Hierarchy is a visual method of assessing the current situation and where you want it to be within three years from now. It provides reliable benchmarks to measure not only how you see the account, but, far more importantly, how the account, right now sees you and your company.

It's not you, but your customer, rather, the key individuals your Field of Play, who decide at what level of the hierarchy you're positioned, and each Field of Play Strategic Players may have a different view of the matter. Moving up the hierarchy means earning the right to be perceived as an "upper-level" supplier, and that is why the descriptions at each level of the hierarchy refer to the Field of Play's assessment of your company's position.

Additionally, although in the diagram the levels of the Buy-Sell Hierarchy look like steps, more accurately think of them in terms as positions along a continuum. Your customers will probably have a pretty solid sense of where you're positioned, but it may not be quantifiable.

Finally, the hierarchy isn't as stable as it looks in the diagram. It is more relative to an escalator that moves unpredictably and in both directions. Which means that even though you may be positioned at Level 3 today, unless you're vigilant you may find yourself at Level 2 tomorrow.



Buy-Sell Hierarchy Levels

Level 1 - The Commodity Corner

Level 1 - The Commodity Corner is the lowest level of business relationship. You are seen as the supplier of a commodity. It's easy to get positioned at this level, but there isn't much leverage here for establishing long-term relationships. In this position, the customer does not have the ability to differentiate that defines a product or service as a commodity.

When there's no perceived difference, and all vendors meet minimum specifications, it doesn't matter what you are selling. There is nothing wrong with this position if that is where you would like to stay, but in targeting Large Accounts, it's usually a precarious position. When customers see you as a commodity supplier, you have virtually no control over what happens in their account and almost no chance of growing a long-term relationship because of commodity trading rules-"Buy cheap, sell dear." In other words, if your customer sees you are merely pushing a product rather than developing a relationship,

then your only bargaining chips are availability and low price. This is not a very secure position.

Level 2 - Providing "Good" Products

Level 2 moves you up on the Hierarchy in that the customer sees you as a supplier that is above a commodity. Any product or service feature that sets you apart from the competition, that gets you recognized by your customers as an innovator, can help you establish second-level business relationships. But to be seen as providing "good product" is still a tenuous relationship position because of competition. You can establish a competitive position with bells and whistles, but you can't maintain it. Unless you've got a patent lock on your distinctive feature or benefit, eventually the competition not only catches up, but leapfrogs over you and you're back to selling commodity-style again. If you want to stay at this level, you have to give more and better service to stay at the level.

Level 3 - Dedicated Service

Level 3 means you've earned the right to be seen not just as the provider of excellent products, services, or solutions, but as a company that makes a special effort on the customer's behalf. In Level 3 the Field of Play's understanding is that it's getting something more than your other customers are getting. For example, at Level 2 you install bug-free computer systems on time, for all your customers Level 3, you provide a system training program that is tailored to a specific customer's skill sets. At Level 2 you provide everyone with 24/7 technical support; at Level 3 you give one Field of Play a dedicated help line. The differentiating factor is going above and beyond all other Level 2 requirements for a specific customer.

Level 4 - Crossing the Chasm to Business Issues

Level 4 is taking a major leap to Level 4 of the Buy-Sell Hierarchy over the Level 3 relationship areas "the high quantity of competitors and customer's sensitivity to product price". A customer at Level 4 perceives your company as providing not just good products and extra service, but help in the understanding of their business issue. When you're positioned here, you understand each account's business problems and objectives almost as well as you do your own. You generate ideas for addressing not just customer's day-to-day operational needs, but their ongoing concerns about things like profit, productivity, and go-to-market strategies. You may provide a wide range of ancillary supports that may have virtually nothing to do with your product or service on top of products and services that address those concerns. As you cross the chasm into a Level 4 relationship, you're contributing something that few competitors even think about providing, and you can begin to sell up to value, not down to price, meaning your conversations with the account are less likely to be price sensitive, because you're perceived as delivering value that includes your product and service offerings, but also goes beyond them. Delivering bottom-line value will get you positioned as a Level 4 supplier only if people in the Large Account see a clear and explicit connection between your contribution and the added value to their firm.

Organizations that are most successful at managing high-level relationships invest considerable energy in "merchandising" their success in showing key account players in every instance, how their business concerns have been directly impacted by the supplier's activities.

Level 5 - Becoming the Account's "External Asset"

Level 5 is a mutual business relationship that goes both ways. At Level 5 you've become an ex officio member of the customer's team. You're no longer a competing vendor, but a trusted advisor. In this facet of business relationships, you go beyond providing your customers with good products or exceptional service and even beyond giving them help with short-term business concerns, instead you become a consulting partner rather than a mere provider. You contribute to their ongoing organizational productivity, and are therefore rightly perceived, by people up and down the scale of their organization, as helping them run their business. When it comes to "unfair competitive advantage," this is a good as it gets.

Points to Consider

- As you move up the hierarchy, competition decreases, simply because so few companies know how to present themselves as addressing their Large Accounts organizational and business concerns.
- There is less sensitivity about price. If you are recognized by key players in the account as offering not merely good products and services, but true added value, they will not want to jeopardize that value by shaving percentage points from the price.
- The importance of features decreases, because the contribution you're seen as making to your clients' businesses outweighs the significance of anybody's bells and whistles, so you're less likely to have to "cram product" and more likely to be delivering solutions rather than promises.

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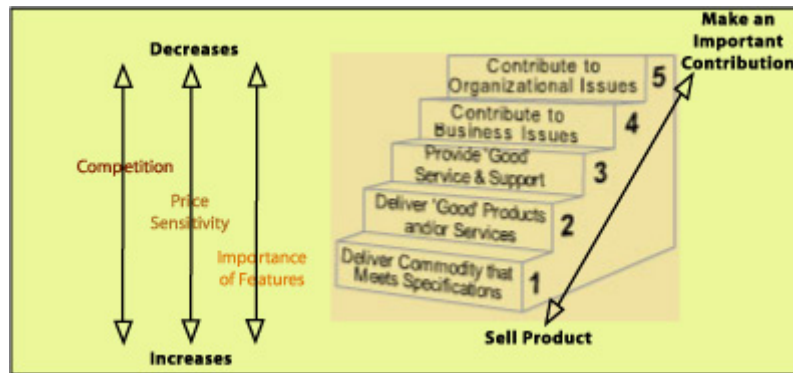
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Position on the Buy-Sell Hierarchy

The Buy-Sell Hierarchy is a guide for thinking about long-term account relationships and their value to the buying organization. See About the Buy-Sell Hierarchy for detailed information about each level.

The Gold Sheet lets you input your organization's view (Our View) of your position on the Buy-Sell Hierarchy and your Field of Play's perceived view of your position on the Buy-Sell Hierarchy.

POSITION ON THE BUY-SELL HIERARCHY				
OUR VIEW			FIELD OF PLAY'S VIEW	
Now	Level 2 <input type="button" value="▼"/>		Level 1 <input type="button" value="▼"/>	Now
Last Year	Level 1 <input type="button" value="▼"/>		Level 2 <input type="button" value="▼"/>	Last Year
1 Year	Level 3 <input type="button" value="▼"/>		Level 4 <input type="button" value="▼"/>	1 Year
3 Years	Level 5 <input type="button" value="▼"/>		Level 5 <input type="button" value="▼"/>	3 Years

To assign a position on the Buy-Sell Hierarchy:

Click the **drop down** button next to the desired field and select a Level.

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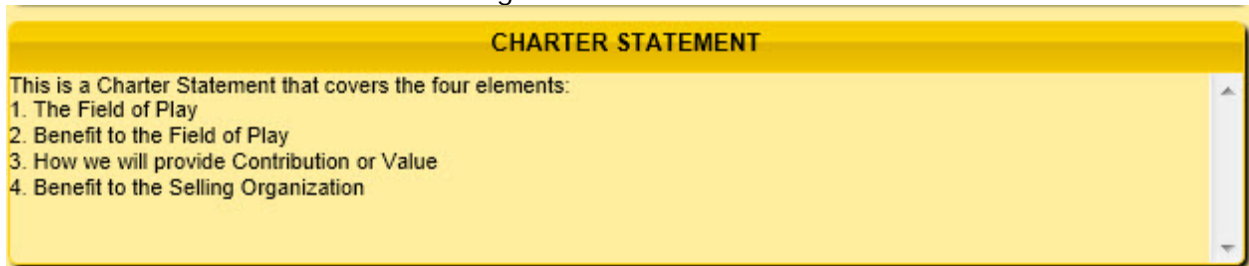
Charter Statement

Up until now, the data entry and Strategic Account Analysis has been focused on understanding your current situation with the Large Account. The Charter Statement takes you beyond this first step by allowing you to define in general terms where you want to be when the strategy is fully in place and delivery results. In other words, if everything develops the way you intend it to, what will the relationship look like three years out in terms of your two companies' relationship?

The Charter Statement is not the same as a "Goal", which is discussed in the "Goals" section, but a high-level, corporate Large Account strategy. It is tied directly into concrete, relation-based accomplishments that your team wants to make happen in the Large Account, and specifically in your Field of Play.


A good Charter Statement answers four questions:

1. What's the Field of Play
2. What value will we bring them?
3. How will they gain this value?
4. What will we gain in return?



To enter a Charter Statement:

Do one of the following:


- Click in the **Charter Statement** field and type the desired text directly in the field.
- If there is a selection list of possible Charter Statements available, click the Repository button , select a Charter Statement, and click **OK**.

To delete a Charter Statement:

Highlight the desired text in the **Charter Statement** field and press **Delete** on your keyboard.

To edit an existing Charter Statement:

Click in the entry and edit the text inline.

Initially you may choose to leave the **Charter Statement** field blank. Remember to add a Red Flag  in any field left blank or if you are unsure about your choice, until such time as a confirmation is made.

Goals

About Goals

Goals are incremental stages toward better points of value. In order to actualize your Charter Statement, your Goals have to be realistic and tied in precisely to your Large Account's perceptions. A Goal is a qualitative position that the Large Account endorses and validates. Goals in sequence should help to improve your position in the Buy-Sell Hierarchy. Goals should be specific and written in a client-centered formula, whereby the sentence structure emphasizes how clients see you. This formula also forces account teams to devise Goals that have a good chance of addressing clients' Opportunities and leveraging the supplying company's own strategic Strengths.

The Goal Statement formula consists of the following points:

- Be one of the following - seen, known, acknowledged, or recognized
- By Whom - the Field of Play Strategic Players
- As - a supplier, partner, consultant or expert
- What the Field of Play players accomplished - who helped achieve (a specific Opportunity) through (a Strength)

As a goal is a qualitative rather than quantitative statement, it will probably take a year or more to achieve and is best stated from the account's point of view. Questions to check when writing or reviewing your Goal Statements are:

- Does this Goal align with the Field of Play's mission and immediate needs?
- does it help to further the achievement of a specific Opportunity, as defined by the Field of Play?
- Which of our strategic Strengths will be brought to bear on the accomplishment of this Goal.
- Which Opportunity will that Strength help to address?
- Is this Goal realistically achievable in the next several months, give our current position on the Buy-Sell Hierarchy? If it's achieved, will our position improve or at least remain secure, if that's where we want it to be?
- Which Strategic Player(s) will feel that we have served their best interests if this Goal is accomplished?
- How will accomplishing this Goal help to actualize our Charter Statement?
- Is the Goal written in language that the Field of Play understands?



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Goal Dialog Box

When you click the plus button in the Goals section of the Gold Sheet, the Goals dialog box appears.

GOAL

Goal Status:

Drag and drop marker:

CHARTER STATEMENT

This is a Charter Statement that covers the four elements:

1. The Field of Play
2. Benefit to the Field of Play
3. How we will provide Contribution or Value
4. Benefit to the Selling Organization

GOAL DESCRIPTION

A Goal links a Strategic Player to an Opportunity (or problem) achieving a change in perception by leveraging a Strategic Strength.

FOCUS INVESTMENTS

Description	Assigned To	When	Best Action
Focus Investments are high-	MH V4 Beta Test	04/11/2013	<input type="checkbox"/>

STOP INVESTMENTS

Description	Assigned To	When	Best Action
Stop Investment decisions	MH V4 Beta Test	04/11/2013	<input type="checkbox"/>

SALES SUPPORT PROGRAM

Description	Assigned To	When	Best Action
Designed to improve the	MH V4 Beta Test	04/11/2013	<input type="checkbox"/>

INFORMATION NEEDED

Description	Assigned To	When	Best Action
Any data that needs to be	MH V4 Beta Test	04/11/2013	<input type="checkbox"/>

ACTIVITY

Description	Assigned To	When	Best Action
Additional activities that will	MH V4 Beta Test	04/11/2013	<input type="checkbox"/>

OK Cancel Save and New

You can enter data in the following sections in this dialog:

Goal Description

Focus Investments

Stop Investments

Sales Support Program

Information Needed

Activity

You can select any of the entered actions as Best Actions. When you save the Gold Sheet, tasks will be created in the CRM for the applicable Best Actions.

Although it is not taught within the methodology, there is a Goal Status field on this dialog that you can use to define the goal's condition. The Goal Status and Goal Description appear on the main Gold Sheet.




Goal Description


A Goal links a Strategic Player to an Opportunity (or problem) achieving a change in perception by leveraging a Strategic Strength. For more information, see About Goals.

GOALS	
Status	Description
Open	A Goal links a Strategic Player to an Opportunity (or problem) achieving a

To add a Goal Description:

1. Click the **plus** button  to open the Goal dialog box.
2. Click in the **Goal Description** field and type the desired text directly in the field and click **OK** to save and close the dialog or **Save and New** to add another Goal Description.

To delete a Goal:



1. In the Gold Sheet, click the desired Goal and click the minus button . A message box appears asking you to confirm the deletion.
2. Click **Yes** to delete or **No** to cancel.

To edit an existing Goal Description:

Either click in the entry and edit the text inline or double-click on the entry to edit the text using the dialog box.

NOTE:

If you are using a touchscreen device, you will not be able to use inline editing. On touchscreen devices, a single click is treated as a double-click, so the edit dialog box will always open when you click in an applicable field.

If you are unclear about your Goal Descriptions, then remember to add a Red Flag  if the field is left blank. Add a Strength  if the Goal Description is really strong and both of you in the relationship agree on the Goal.


Focus Investments

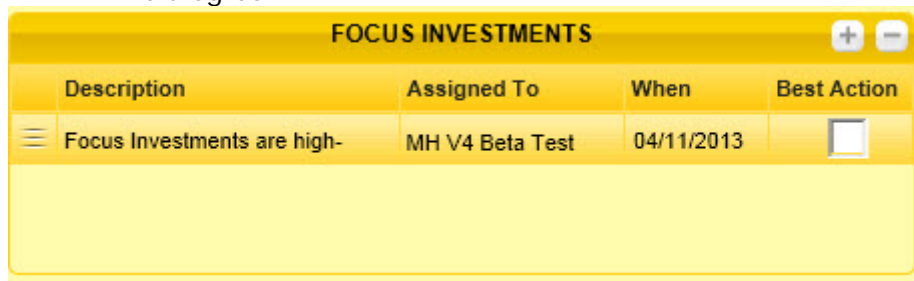
Focus Investments are "the concentration of resources directly related to achieving one or more of your Goals and thus of improving your position with the Field of Play." Since resources are limited, wise Focus Investment means making choices from among a wide array of activities that could be performed, and all of which might have good arguments in their favor. Every resource allocation, therefore, is a resource competition. A Focus Investment should have the following attributes, minimum risk and a continual long-term payoff. With the information gathered under Situation Appraisal, utilize the following questions with the five elements to evaluate your Focus Investments.


Some questions to use to help describe your Focus Investments:


- In order to accomplish our Goals, on what Strategic players do when need to focus our time and efforts?
- In the Field of Play we're looking at, are there specific processes that are "broken" or in need of expert intervention? Which of our Strengths might be leveraged against these processes?
- Do any of the Trends in the Field of Play's environment suggest an investment that might help to enhance our position?
- Of the Opportunities we've identified for this Field of Play, which ones most warrant Focus Investment because of their long-term payoff potential? Which of our Strengths might best address these Opportunities?
- Is there an area in which a focused investment of our resources might help to neutralize or reduce the impact of our Vulnerability?
- Are the investments we're already making in the account worthwhile? Has the Large account confirmed that they're bringing it value?

To add a Focus Investment:

1. From the Gold Sheet, click the **plus** button  to open the Goal dialog box.



FOCUS INVESTMENTS			
Description	Assigned To	When	Best Action
Focus Investments are high-	MH V4 Beta Test	04/11/2013	

2. Click the **plus** button  in the Focus Investments section to open the Focus Investment dialog box.

The following are descriptions of the fields in this dialog:

Description - the text description of the Focus Investment

Contact - an Account contact who may have input on the Focus Investment


When - the date the Focus Investment item was created

Assigned To - the person within your organization that will be responsible for the Focus Investment item


Completed - the date the Focus Investment item was completed

Status - the status of the Focus Investment item. The values of this field may vary according to your SAM installation.

Type - the priority of the Focus Investment item. The values of this field may vary according to your SAM installation.

- 1.
3. Type a description of the Focus Investment in the **Description** field.
4. To assign a Contact, click the **drop down button**  in the **Contact** field and do one of the following:
 - If the desired name appears in the drop down list, select the name and proceed to step 7.
 - If the desired name does not appear in the drop down list, select **Search** from the list and proceed to step 5.
5. Type the desired search criteria in the **First Name**, **Last Name**, or **Account** field and click **Search**.
6. From the list of items that match the search criteria, select the desired contact and click **OK**.
7. Complete the other fields as desired.
8. When you have completed entering the desired data, click **OK** to save and close the dialog or **Save and New** to add another Focus Investment.

To delete a Focus Investment:

1. In the Goals dialog, click the desired Focus Investment and click the minus button . A message box appears asking you to confirm the deletion.
2. Click **Yes** to delete or **No** to cancel.

To edit an existing Focus Investment:

In the Goals dialog, either click in the entry and edit the text inline or double-click on the entry to edit the text using the dialog box.

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Stop Investments

Stop Investments are the opposite of Focus Investments in that they help you identify those areas in which your current resource investment is not paying off and to work in conjunction with the Field of Play to cut back in those areas. Stop Investments refer to any business situation where you've been dedicating time, effort, people, or other resources, and the investment, as your team calculates it, is not paying off.

Stop Investments work hand-in-hand with Focus Investments. Since human nature resists change in general, Stop Investments areas may be more difficult to implement due to staunch and articulate resistance. The resistance derives from some firmly entrenched articles of the corporate culture including the fear of rocking the boat. A final piece of the concept is a entrenched believe that in order to build business, you should consider responding to every request for proposal, and fight for every piece of businesses if it meant your survival. What this really means is that throwing unlimited resources at all of its good opportunities creates a distinct competitive advantage over resource--constrained rivals.

However this sounds plausible, in economic formulas, in the real work this conventional believe spells disaster.

To add a Stop Investment:

1. From the Gold Sheet, click the **plus** button  in the Goals section to open the Goal dialog box.




STOP INVESTMENTS			
Description	Assigned To	When	Best Action
Stop Investment decisions	MH V4 Beta Test	04/11/2013	


2. Click the **plus** button  in the Stop Investments section to open the Stop Investment dialog box.

The following are descriptions of the fields in this dialog:

- Description** - the text description of the Stop Investment
- Contact** - an Account contact who may have input on the Stop Investment
- When** - the date the Stop Investment item was created
- Assigned To** - the person within your organization that will be responsible for the Stop Investment item
- Completed** - the date the Stop Investment item was completed
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2. Click **Yes** to delete or **No** to cancel.

To edit an existing Stop Investment:

In the Goals dialog, either click in the entry and edit the text inline or double-click on the entry to edit the text using the dialog box.

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Sales Support Program

A natural outgrowth of your Focus Investments, Sales and Support Programs are generally broader-based (long-term) initiatives that support account development overall. Sales and Support Programs often require the allocation of formerly unbudgeted resources, or the redirection of budgeted ones, to meet the emerging or urgent need in the Field of Play. Sales and Support Programs may result directly in sales, support existing business and enhance relationships or both, and/or actualize Focus Investments.

When you are determining your Sales and Support Programs consider the following questions:


- How can we capitalize on a Strength or key relationship?
- What can we do to solve a service problem or provide better service?
- How can we address the Field of Play's business issues or organization concerns? What actions should we take?
- What can we do to make our Focus Investment happen?
- What additional sales opportunities might exist here?
- What sales and marketing approaches might we try?
- What would you do if your job depended upon a 50% increase in revenue from this Field of Play?

To add a Sales Support Program

1. From the Gold Sheet, click the **plus** button  to open the Goal dialog box.



Description	Assigned To	When	Best Action
Designed to improve the	MH V4 Beta Test	04/11/2013	

2. Click the **plus** button  in the Sales Support Program section to open the Sales Support Program dialog box.

The following are descriptions of the fields in this dialog:

Description - the text description of the Sales Support Program

Contact - an Account contact who may have input on the Sales Support Program


When - the date the Sales Support Program item was created

Assigned To - the person within your organization that will be responsible for the Sales Support Program item

Completed - the date the Sales Support Program item was completed


Status - the status of the Sales Support Program item. The values of this field may vary according to your SAM installation.

Type - the priority of the Sales Support Program item. The values of this field may vary according to your SAM installation.

1.
 3. Type a description of the Sales Support Program in the **Description** field.
 4. To assign a Contact, click the **drop down button**  in the **Contact** field and do one of the following:
 - If the desired name appears in the drop down list, select the name and proceed to step 7.
 - If the desired name does not appear in the drop down list, select **Search** from the list and proceed to step 5.
 5. Type the desired search criteria in the **First Name**, **Last Name**, or **Account** field and click **Search**.
 6. From the list of items that match the search criteria, select the desired contact and click **OK**.
 7. Complete the other fields as desired.

8. When you have completed entering the desired data, click **OK** to save and close the dialog or **Save and New** to add another Sales Support Program.

To delete a Sales Support Program:

1. In the Goals dialog, click the desired Sales Support Program and click the minus button . A message box appears asking you to confirm the deletion.
2. Click **Yes** to delete or **No** to cancel.

To edit an existing Sales Support Program:

In the Goals dialog, either click in the entry and edit the text inline or double-click on the entry to edit the text using the dialog box.

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Information Needed

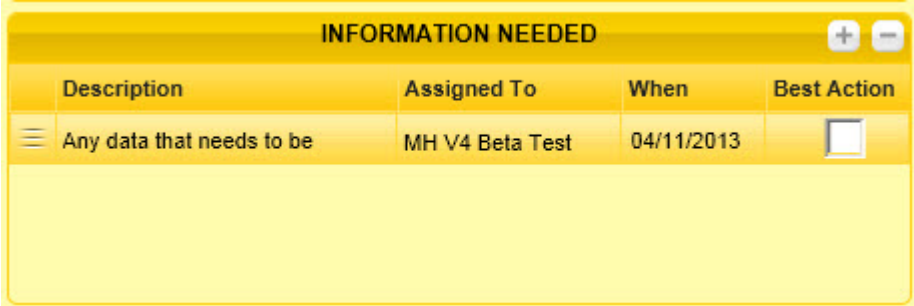
After going through the Strategic Account Analysis, you may find you have important information that is required to complete any section or all sections. The Information Needed section is an area to add items that are necessary for you to complete your full analysis and from what source, by who on your team, and when. Information needed may come from the client, another outside source, or internally.


Consider the following questions when determining what other information may be needed: :


- What kind of activities are going on in other successful accounts in regards to the relationship that we haven't considered doing here?
- What other locations or business units of the Large Account have problems that might need addressed?
- What types of actions have competitors taken in the past in other accounts to unseat us with the account?
- The last time we solved a problem for this customer, how did we do it, or the last time a competitor solved a problem for this customer how did they do it?
- What other areas of concern does this customer have in relationship to our goal, focus investment, stop investment(s) and/or sales/support programs?
- What other items do I need to justify resource allocation for the programs we suggest for this client?

To add Information:

1. From the Gold Sheet, click the **plus** button  to open the Goal dialog box.



INFORMATION NEEDED			
Description	Assigned To	When	Best Action
Any data that needs to be	MH V4 Beta Test	04/11/2013	

2. Click the **plus** button  in the Information Needed section to open the Information Needed dialog box.

INFORMATION NEEDED

Description
Any data that needs to be acquired to support you action plan for the Goal.

Source

Contact --NONE-- **When** 04/11/2013 X

Assigned To MH V4 Beta Test **Completed** X

Status In Progress **Type** Low

Best Action

OK Cancel Save and New

The following are descriptions of the fields in this dialog:

Description - the text description of the Information

Source - where the information will come from (for example, from the Customer)

Contact - an Account contact who may have input on the Information


When - the date the Information item was created

Assigned To - the person within your organization that will be responsible for the Information item

Completed - the date the Information item was completed


Status - the status of the Information item. The values of this field may vary according to your SAM installation.

Type - the priority of the Information item. The values of this field may vary according to your SAM installation.

- 1.
3. Type a description of the Information in the **Description** field.
4. To assign a Contact, click the **drop down button**  in the **Contact** field and do one of the following:
 - If the desired name appears in the drop down list, select the name and proceed to step 7.
 - If the desired name does not appear in the drop down list, select **Search** from the list and proceed to step 5.

5. Type the desired search criteria in the **First Name, Last Name,** or **Account** field and click **Search**.
6. From the list of items that match the search criteria, select the desired contact and click **OK**.
7. Complete the other fields as desired.
8. When you have completed entering the desired data, click **OK** to save and close the dialog or **Save and New** to add another Information item.

To delete an Information item:

1. In the Goals dialog, click the desired Focus Investment and click the minus button . A message box appears asking you to confirm the deletion.
2. Click **Yes** to delete or **No** to cancel.

To edit an existing Information item:

In the Goals dialog, either click in the entry and edit the text inline or double-click on the entry to edit the text using the dialog box.

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Activity

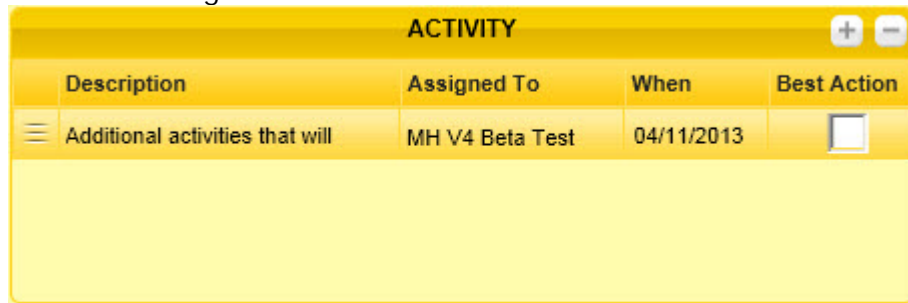
Activities of all sorts can arise through the Strategic Analysis process. Each item needs to be address and assigned to ensure anything associated with the Account Relationship that has a task, a phone call, or some other item internally or with the client is also noted and set within the Activity section. However, these activities should concretely and specifically support the strategy elements that your team has worked with in the Situation Appraisal and analysis segments of the LAMP process - everything from your position on the Buy-Sell Hierarchy to the realization of your Revenue Targets.


Consider the following when determining additional Activities:


- Is it likely to further the realization of one or more Single Sales Objectives?
- What would be a way to quantify to contribute to our Revenue Targets?
- If we were about to loose the account, what defense in a form of an activity would we take?
- What activities could we pursue to position us higher up on the Buy-Sell Hierarchy?
- How can we improve the account's own productivity?
- What actions can we undertake that will have a positive impact on the customer's profit?

To add an Activity:

1. From the Gold Sheet, click the **plus** button  to open the Goal dialog box.



Description	Assigned To	When	Best Action
Additional activities that will	MH V4 Beta Test	04/11/2013	

2. Click the **plus** button  in the Activity section to open the Activity dialog box.

The following are descriptions of the fields in this dialog:

Description - the text description of the Activity

Contact - an Account contact who may have input on the Activity


When - the date the Activity was created

Assigned To - the person within your organization that will be responsible for the Activity


Completed - the date the Activity was completed

Status - the status of the Activity. The values of this field may vary according to your SAM installation.

Type - the priority of the Activity. The values of this field may vary according to your SAM installation.

- 1.
3. Type a description of the Activity in the **Description** field.
4. To assign a Contact, click the **drop down button**  in the **Contact** field and do one of the following:
 - If the desired name appears in the drop down list, select the name and proceed to step 7.
 - If the desired name does not appear in the drop down list, select **Search** from the list and proceed to step 5.
5. Type the desired search criteria in the **First Name**, **Last Name**, or **Account** field and click **Search**.
6. From the list of items that match the search criteria, select the desired contact and click **OK**.
7. Complete the other fields as desired.
8. When you have completed entering the desired data, click **OK** to save and close the dialog or **Save and New** to add another Activity.

To delete an Activity:

1. In the Goals dialog, click the desired **Activity** and click the minus button . A message box appears asking you to confirm the deletion.
2. Click **Yes** to delete or **No** to cancel.

To edit an existing Activity:

In the Goals dialog, either click in the entry and edit the text inline or double-click on the entry to edit the text using the dialog box.

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Best Actions

Best Actions support all the elements under the Situational Appraisal and analysis segments of the LAMP process including your position on the Buy-Sell Hierarchy to the realization of your Revenue Targets. Each Action, therefore, would support all these elements, but every reasonable Action must support at least one. You should also make sure that you assign at least one Action to mitigate the effect of every Red Flag - that is, elements in your analysis that you consider wear or uncertain. Depending on severity, such elements may require more than one Action.


Consider the following when determining which actions are Best Actions:

- Which Strategic Player or Players will this Action impact positively? In what way will he or she be affected?
- Will this Action have a positive impact on how the Field of Play perceives a current or emerging Trend?
- Will the Action help them capitalize on an Opportunity? Which one, and how will it do so?
- Does this Action play from at least one of our strategic Strengths? If so, will it be clear to the Field of Play that this is so? If not, will the Action at least serve to offset our Vulnerability? Will that be clear to the Field of Play?
- Does this Action follow logically from one or more of our decisions about Focus Investment and Stop Investment?
- Will it serve to reinforce the perceived value of one or more of our Sales and Support Programs?
- Is it likely to further the realization of a Single Sales Objective or multiple Single Sales Objectives? Can we quantify what it is likely to contribute to our Revenue Targets?

Identifying Actions that meet all of these points may not be possible, however, the better an Action measures up against these questions, the more likely it is to help you achieve your Goals. Also be aware, that some of the Actions may require complementary or enabling Actions by Individuals in your Large Account, for example your Sponsor.

BEST ACTIONS		REVENUE TARGETS	SINGLE SALES OBJECTIVES	ADDITIONAL ACTIONS
	Description	Assigned To	When	
☰	Set up initial meeting	MH Demo 25	11/04/2013	

The Best Actions section of the Gold Sheet displays any actions within the Goal section and any actions with the Additional Actions section that have been designated Best Actions.

If you have implemented Green Sheets in your SAM installation, a Green Sheet icon  appears next to a Best Action when the Gold Sheet is saved. Clicking this icon launches the Green Sheet for that Action.

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Revenue Targets

Revenue Targets are the sales results that your team believes can be achieved in the Field of Play within a specific time frame-usually one to three years out from today. Revenue Targets have two related functions:

- They enable you to measure the success of the Focus Investments you are making-to "quantify the yield" of those critical and often expensive resource allocations.
- They provide a business case to convince members of your own organization-senior management and other who free up resources-that those investments are worth the company's efforts.

To add a Revenue Target:

1. Click the Revenue Target Tab in the bottom-right section of the Gold Sheet.

BEST ACTIONS REVENUE TARGETS SINGLE SALES OBJECTIVES ADDITIONAL ACTIONS							
+ -							
	Description	From	To	Curr.	Low	Realistic	High
☰	Revenue Target 1	04/08/2013	04/30/2013	USD	2,000.00	20,000.00	200,000.00
☰	Revenue Target 2	04/08/2013	04/23/2013	USD	5,000.00	10,000.00	15,000.00

2. Click the **plus** button  to open the Revenue Target dialog box.

REVENUE TARGET ✕

Description
Revenue Target 1

Low From

Realistic To

High

Currency ▼

The following are descriptions of the fields in this dialog:

Description - the text description of the Revenue Target

Low - the lowest value of the Revenue Target

From - the date the Revenue Target begins

Realistic - the most realistic value of the Revenue Target

To - the date the Revenue Target ends


High - the highest value of the Revenue Target

Currency - the currency associated with the Revenue Target

3. Complete the fields as desired.

4. When you have completed entering the desired data, click **OK** to save and close the dialog or **Save and New** to add another Revenue Target.

To delete a Revenue Target:

1. In the Gold Sheet, click the desired Revenue Target and click the minus button . A message box appears asking you to confirm the deletion.

2. Click **Yes** to delete or **No** to cancel.

To edit an existing Revenue Target:

In the Goals dialog, either click in the entry and edit the text inline or double-click on the entry to edit the text using the dialog box.


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Single Sales Objectives

The Single Sales Objective (SSO) is the focus of any sales call - the product or service you are intending to sell to the customer. The information in the Gold Sheet is a snapshot of the Opportunities that reside within.

The SSO in relationship to the Gold Sheet isn't just one SSO, but all of the SSOs related to this specific account. In relationship to LAMP, Single Sales Objectives contribute to the broader Revenue Targets-above and beyond what you are already receiving from the account as an ongoing revenue stream. To a degree, you can define those broader, one-to-three-year targets by rolling up all your SSOs into an aggregate projection.

BEST ACTIONS		REVENUE TARGETS	SINGLE SALES OBJECTIVES	ADDITIONAL ACTIONS	
					Include Closed Items <input type="checkbox"/>
	Products	Revenue/Units	Stage	Close Date	
	Support Center Upgrade	200,000.00	Above	04/10/2013	

Your System Administrator can specify the Opportunities that are displayed in the Single Sales Objectives area of the Gold Sheet by the following criteria:

- The number of days from the Close Date (default is Close Date + 90 days)
- Whether or not to include 0% Opportunities (default is to include 0% Opportunities)

A user can choose to include all Closed Opportunities regardless of the number of days past the Close Date by clicking the Include Closed Items checkbox.

If you have implemented Blue Sheets in your SAM installation, a Blue Sheet icon appears next to an Opportunity if that Opportunity has a Blue Sheet associated with it. Clicking this icon launches the Blue Sheet for that Opportunity

To access the Single Sales Objectives:

Click the **Single Sales Objectives** Tab in the bottom-right section of the Gold Sheet.

The following are descriptions of the fields in this section:

Products - the text description of the Opportunity

Revenue/Units - the estimated Revenue or units generated by the Opportunity

Stage - the Sales Stage or Place in the Sales Funnel

Close Date - the date by which the Opportunity will close

To sort the Single Sales Objectives:

Click on any of the columns titles (for example Revenue/Units) to sort the SSOs in ascending or descending order. The up arrow indicates ascending order. The down arrow indicates descending order.

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Additional Actions

Actions of all sorts can arise through the Strategic Analysis process. Each item needs to be address and assigned to ensure anything associated with the Account Relationship that has a task, a phone call, or some other item internally or with the client is also noted and set within the Additional Actions section that may not be specifically related to a Goal. However, these activities should concretely and specifically support the strategy elements that your team has worked with in the Situation Appraisal and analysis segments of the LAMP process - everything from your position on the Buy-Sell Hierarchy to the realization of your Revenue Targets.


Consider the following questions when determining Additional Actions:

- Is it likely to further the realization of one or more Single Sales Objectives?
- What would be a way to quantify to contribute to our Revenue Targets?
- If we were about to loose the account, what defense in a form of an activity would we take?
- What activities could we pursue to position us higher up on the Buy-Sell Hierarchy?
- How can we improve the account's own productivity?
- What actions can we undertake that will have a positive impact on the customer's profit?

To add an Activity:

1. Click the Additional Actions Tab in the bottom-right section of the Gold Sheet.

BEST ACTIONS				REVENUE TARGETS				SINGLE SALES OBJECTIVES				ADDITIONAL ACTIONS			
Actions which do not relate to a specific goal												+	-		
Description?				Assigned To?				When?				Best Action			
Schedule RFP Review meeting				MH V4 Beta Test				04/10/2013				<input checked="" type="checkbox"/>			

2. Click the **plus** button  to open the Activity dialog box.

The following are descriptions of the fields in this dialog:

Description - the text description of the Activity

Contact - an Account contact who may have input on the Activity

When - the date the Activity was created

Assigned To - the person within your organization that will be responsible for the Activity


Completed - the date the Activity was completed

Status - the status of the Activity. The values of this field may vary according to your SAM installation.


Type - the priority of the Activity. The values of this field may vary according to your SAM installation.

Best Action - whether or not to include the Activity in Best Actions

1.

3. Type a description of the Activity in the **Description** field.
4. To assign a Contact, click the **drop down button**  in the **Contact** field and do one of the following:
 - If the desired name appears in the drop down list, select the name and proceed to step 7.
 - If the desired name does not appear in the drop down list, select **Search** from the list and proceed to step 5.
5. Type the desired search criteria in the **First Name**, **Last Name**, or **Account** field and click **Search**.
6. From the list of items that match the search criteria, select the desired contact and click **OK**.
7. Complete the other fields as desired.
8. When you have completed entering the desired data, click **OK** to save and close the dialog or **Save and New** to add another Activity.

To delete an Additional Activity:

1. In the Gold Sheet, click the desired **Additional Activity** and click the minus button . A message box appears asking you to confirm the deletion.
2. Click **Yes** to delete or **No** to cancel.

To edit an existing Additional Activity:

In the Gold Sheet, either click in the entry and edit the text inline or double-click on the entry to edit the text using the dialog box.

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Sales and Support

Sales and Support Contacts

Sales

For more information about **Sales Access ManagerSM** or the variety of other products and services that Miller Heiman offers, please see the Miller Heiman Web site:
<http://www.millerheiman.com>

Support

See the following Web site for FAQs: www.salesaccessmanager.com
See your System Administrator for Sales Access Manager issues. Your System Administrator can contact our Support team directly by phone or e-mail:
USA +1 312-523-0715
ASIA +61 280-363-107
ROW +44 207-570-0324
support@salesaccessmanager.com

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Sales and Support Contacts

Sales

For more information about **Sales Access ManagerSM** or the variety of other products and services that Miller Heiman offers, please see the Miller Heiman Web site:
<http://www.millerheiman.com>

Support

See the following Web site for FAQs: www.salesaccessmanager.com
See your System Administrator for Sales Access Manager issues. Your System Administrator can contact our Support team directly by phone or e-mail:
USA +1 312-523-0715
ASIA +61 280-363-107
ROW +44 207-570-0324
support@salesaccessmanager.com

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Troubleshooting and Tips

Troubleshooting

Problem

When saving a change to your Gold Sheet you receive an error.

Possible Solution

The error occurs when your session has logged you out of your CRM/SFA system from being idle for too long. Close your browser windows and log back into your CRM/SFA system to update your Sheet.

Problem

A printed page does not appear if Acrobat Reader is not installed on the computer.

Possible Solution

Download the free Adobe Acrobat Reader from the official Adobe Web site.

Problem

Unable to launch a Blue Sheet from the Gold Sheet.

Possible Solution

Ensure you have a Blue Sheet license by contacting your SAM Administrator.

Problem

Unable to open a new window section or Gold Sheet due to Pop Up Blocker settings.

Possible Solution

One of the most common issues is opening a new window with your browsers. The problem stems directly from "pop-up" blockers in web browsers.

Both Internet Explorer and Firefox include the option to select specific sites to unblock.

Problem

When using Internet Explorer, a new browser tab opens each time a sheet is saved.

Possible Solution

Please follow these directions to update IE to prevent the additional browser windows from opening.

- a. Ensure that both the salesforce server (*.salesforce.com) and www.saleswebsrvr.net are in the same security zone (Internet , Trusted Sites etc.)
- b. Within IE8 go to Tools / Internet Options / Tools / Security / (click on the zone) / Custom Level
- c. Within the Miscellaneous section set 'Navigate windows and frames across different domains' to "Enable"
- d. Restart IE8

Tips

Configuring Popup Blocker Settings in Internet Explorer

Internet Explorer Pop-up Window Blocker works on version Internet Explorer 6.0.2900.2180... and above for Windows XP. If using Windows NT and a previous version of IE, there are no pop up blocker options.

In order to configure your Internet Explorer Pop-up Blocker Settings, please follow the instructions listed below which you can also find in your Internet Explorer Help Window.

Allow Web Site Lists

You can allow pop-up windows to open in a Web site by adding the Web site to the Allowed sites list. To do this, follow these steps:

1. Click Start, point to All Programs, and then click Internet Explorer.
2. On the Tools menu, point to Pop-up Blocker, and then click Pop-up Blocker Settings.
3. In the Address of Web site to allow box, type the address of the Web site, and then click Add.
4. Click Close.

Block all pop-up windows

To block all pop-up windows, including the pop-up windows that are opened by a user, follow these steps:

1. Click Start, point to All Programs, and then click Internet Explorer.
2. On the Tools menu, point to Pop-up Blocker, and then click Pop-up Blocker Settings.
3. In the Filter Level list, select High: Block all pop-ups [Ctrl to override], and then click Close.

Override key

To open a pop-up window yourself, even though you have set the filter level to High: Block all pop-ups [Ctrl to override], keep the CTRL key pressed, and then open the pop-up window.

Configure sound

To play a sound when a pop-up window is blocked, follow these steps:

1. Click Start, point to All Programs, and then click Internet Explorer.
2. On the Tools menu, point to Pop-up Blocker, and then click Pop-up Blocker Settings.
3. Select the Play a sound when a pop-up is blocked check box, and then click Close.

Configuring the Pop-up Blocker for zones that are considered safe.

Because the Trusted sites and Local intranet Web content zones are considered safe, they never have their pop-up windows blocked. To configure the Pop-up Blocker for these zones, follow these steps:

1. Click Start, point to All Programs, and then click Internet Explorer.
2. On the Tools menu, click Internet Options.
3. Click the Security tab, and in the Select a Web content zone to specify its security settings box, click Local intranet.
4. Click Custom Level, and under Use Pop-up Blocker click Enable to turn on the Pop-up Blocker, or click Disable to turn off the Pop-up Blocker.
5. Click OK two times.
6. Repeat steps 1 through 2.
7. Click the Security tab, and in the Select a Web content zone to specify its security settings. box, click Trusted sites.

8. Click Custom Level, and under Use Pop-up Blocker click Enable to turn on the Pop-up Blocker, or click Disable to turn off the Pop-up Blocker.
9. Click OK two times.

Configuring Popup Blocker Settings In Firefox

When blocking a pop-up, Firefox displays an information bar, as well as an icon in the status bar. When you click either the information bar or the icon, a menu is displayed with the following choices:

- Allow/Block pop-ups for this site
- Edit Pop-up Blocker Options

(show a blocked pop-up)

If you're not already viewing it, open the Web Features panel and enter the "Edit Pop-up Blockers Option" as follows:

1.
 1. Select Tools > Options Edit > Preferences Firefox > Preferences.
 2. Click on the Web Features category. In this category, you can do the following:
 - Selection: Exceptions dialog: This is a list of sites that you want to allow to display pop-ups.
 - Allow: Click this to add a web site to the exceptions list.

Viewing the Gold Sheet on a Laptop

The Gold Sheet is designed for a 1024x786 monitor. In order to view the Sheet larger, press the function key F11 to enhance it's size. Press F11 again to shrink it back to normal.

Maximize your web browser window prior to entering into the Sheet. When the Sheet appears it should be the full size of your screen. In some laptops the display size can be changed. In order to increase the Sheet size, you need to go to Start->Control Panel->Display. Under Settings, change the screen resolution to 1024 x1536 pixels. Click "Apply" and then "Ok". Your display will increase in size and when you reenter the Sheet it may go off the screen. You will need to scroll through it to see the items. If you choose to do this, remember to reset your display to its original settings upon completion.

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