Sales Process Funnel User Online Help September, 2014

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Welcome to Sales Process Funnel

What is Sales Process Funnel?

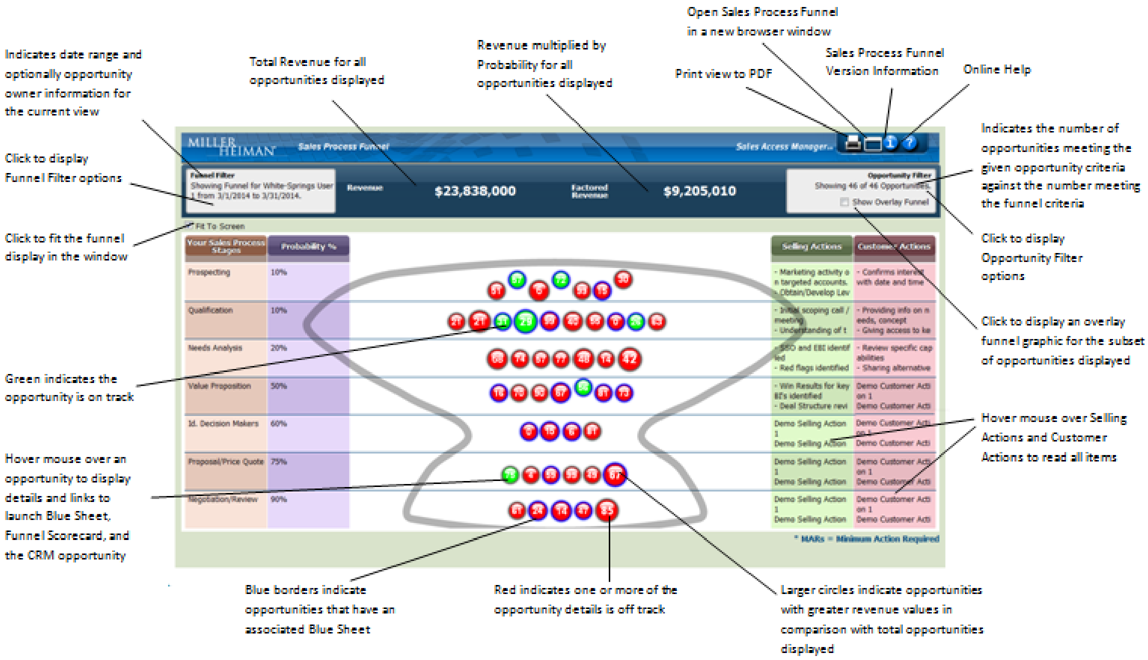
Miller Heiman's Sales Process Funnel tool provides organizations a method for analyzing opportunities within the sales funnel and for identifying ideal salesperson behaviors that will enhance sales performance. This tool can enable sales management and senior leadership to:

- Identify whether opportunities are placed in the right funnel stages based on established criteria.
- Improve forecast accuracy and funnel management.
- Identify coaching opportunities to help teams and individuals create a steadier stream of prospects to move through the funnel.

How It Works

Sales Process Funnel works in tandem with Miller Heiman's Funnel ScoreCard® tool and optionally with Miller Heiman's Blue Sheet tool. CRM users complete a Funnel ScoreCard® for their existing opportunities. The Total Score from the Funnel ScoreCard® together with the opportunity's Close Date, Revenue, Stage, Number of Days in Stage, and Number of Days Open determine where the opportunity appears in the Sales Process Funnel based on customized threshold definitions set by your system administrator. The Sales Process Funnel also displays customized action prompts based on your sales organization's selling process and the customer's buying process.

Sales Process Funnel at a Glance



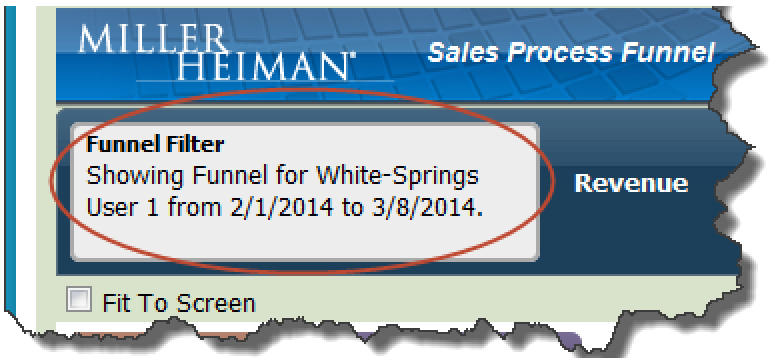
Filtering the Funnel

When you open Sales Process Funnel for the first time, the view defaults to display opportunities with Close Dates from today's date on. If you have previously saved a Funnel view and were working with that view when you closed Sales Process Funnel, that view is displayed the next time you open Sales Process Funnel.

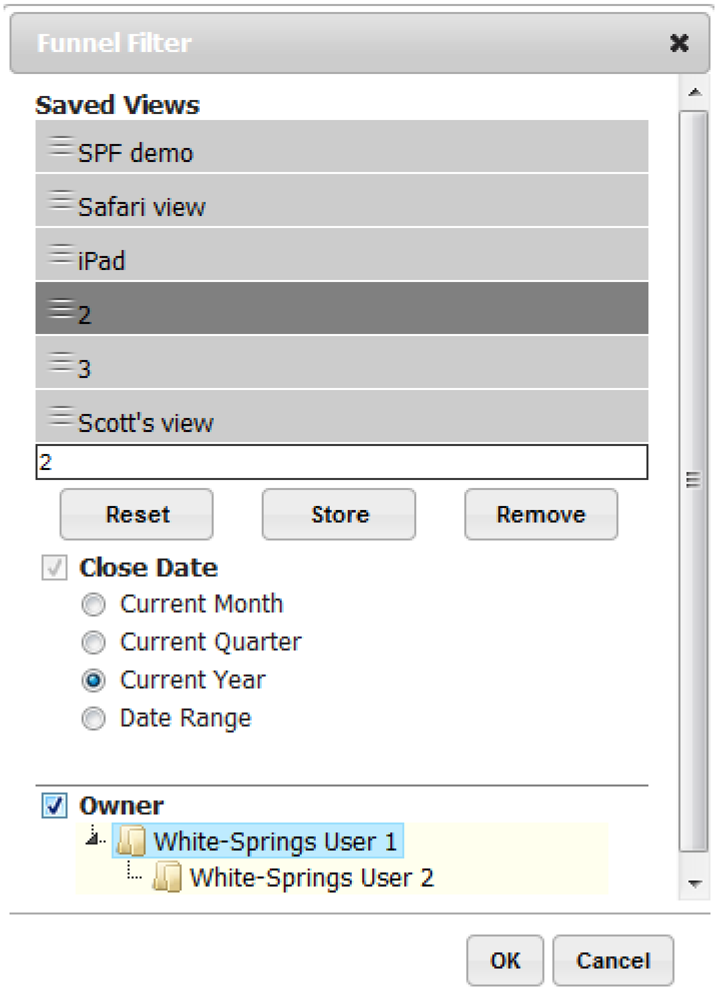
You can filter the view by opportunity **Close Date** and opportunity **Owner**. You can also save view settings to quickly adjust the display to commonly used criteria.

To filter the funnel:

1. Click anywhere in the **Funnel Filter** box in the top-left corner of the view.



The *Funnel Filter* dialog box appears.



The following are explanations of the items in this dialog box:

Saved Views	Lists any views that you have previously saved. This list becomes scrollable when there are more than five saved views. To re-order the view list, you can click the three line navigation icon next to a view name and drag the view to the desired location in the Saved Views list.
Reset	Resets the filter. This allows you to adjust the filter settings as desired without affecting a saved view and/or create a new saved view.
Store	Saves the selected Close Date range and Owner settings in a new view.
Remove	Deletes the selected view from the Saved Views list.
Close Date	Limits the Funnel view to opportunities with a Close Date within the specified criteria. Options are Current Month, Current Quarter, Current Year, and Date Range. Date Range allows you to use pop-up calendars to select a desired range.
Owner	Limits the Funnel view to opportunities belonging to a specific CRM user. You can expand your CRM User name to select owner names from your direct reports.

NOTE for Oracle on Demand users only:

Opportunities with a probability of 0% or 100% will not appear in the Sales Process Funnel. Change the opportunity's probability to a value between 0 and 100 to display the desired opportunity in the Sales Process Funnel.

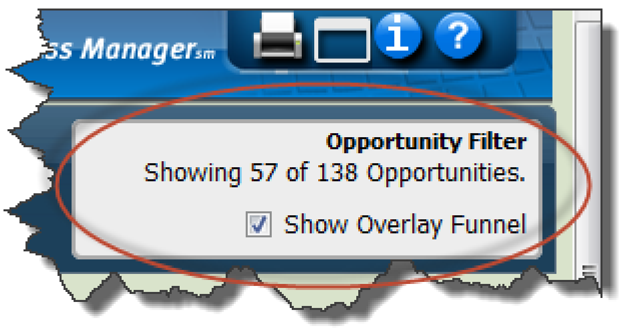
2. Click **Reset**.
3. Click the desired **Close Date** radio button. If you choose **Date Range**, use the pop-up calendars to populate the desired range.
4. To filter by a specific Owner, click the **Owner** checkbox, expand your CRM user name, and click on the desired **CRM user**.
5. Click **OK**. The Sales Process Funnel displays the opportunity bubbles that meet the selected criteria. If more than 100 opportunities meet the selected criteria, a message appears indicating that there are too many opportunities and for your to refine the opportunity criteria. See Filtering Opportunities in the Funnel.

Filtering Opportunities in the Funnel

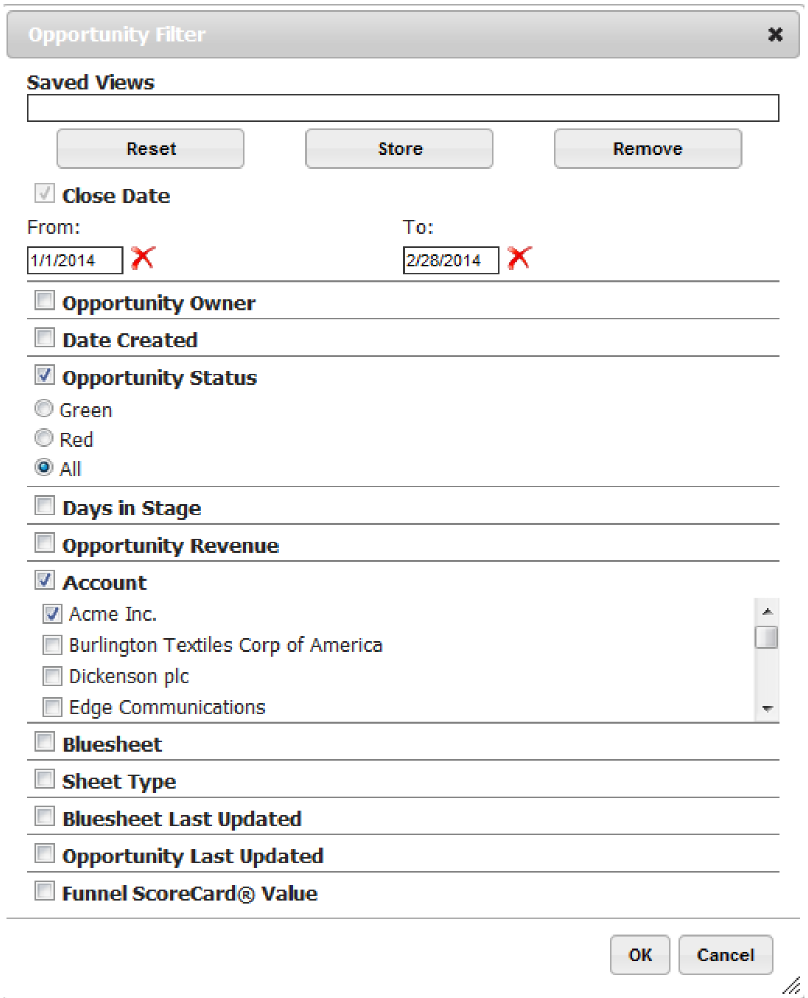
The Opportunity Filter lets you refine the record results displayed by the Funnel Filter settings. You can adjust the filter criteria to find opportunities that are relevant to your particular need. For example, you may wish to see all opportunities that have a Funnel ScoreCard® value equal to or greater than 50 and that have a green Opportunity Status. You can enter those criteria settings in the Opportunity Filter dialog and any records meeting that criteria will appear in the display. You can also save your frequently used filter settings as views.

To filter opportunities in the funnel:

1. Click anywhere in the **Opportunity Filter** box in the top-right corner of the view.



The *Opportunity Filter* dialog box appears.



The following are explanations of the items in this dialog box:

Saved Views	Lists any views that you have previously saved. This list becomes scrollable when there are more than five saved views.
Reset	Resets the filter. This allows you to adjust the filter settings as desired without affecting a saved view. It also clears the view name field to allow you to enter a name for a new saved view.
Store	Saves the selected Close Date range and Owner settings in a new view.
Remove	Deletes the selected view from the Saved Views list.
Close Date	Limits the view to opportunities with a Close Date within the specified criteria. Options are Current Month, Current Quarter, Current Year, and Date Range. Date Range allows you to use pop-up calendars to select a desired range.
Opportunity Owner	Limits the view to opportunities belonging to a specific CRM user. You can expand your CRM User name to select owner names from your direct reports.
Date Created	Limits the view to opportunities that were created within a specified date range.
Opportunity Status	Limits the view to opportunities with Red (off track), Green (on track), or All (both Red and Green) color indicators.

Days in Stage	Limits the view to opportunities that have been in the same Sales Stage for a specified number of days range (for example, from 25 to 75 days).
Opportunity Revenue	Limits the view to opportunities that have a specified revenue range (for example, from $100,000 to $500,000).
Account	Limits the view to opportunities for one or more specific accounts. The list displays all accounts to which the logged in CRM user has access.
Blue Sheet	Limits the view to opportunities that have a saved Blue Sheet.
Sheet Type	Limits the view to opportunities of a certain Blue Sheet type. This option is only valid if you organization has multiple Blue Sheet types.
Blue Sheet Last Updated	Limits the view to opportunities with Blue Sheets that were last updated within a specified date range.
Opportunity Last Updated	Limits the view to opportunities that were last updated within a specified date range.
Funnel ScoreCard® Value	Limits the view to opportunities that have a Funnel ScoreCard Total Score value within a specified range within the 0 to 100 range.

NOTE for Oracle on Demand users only:

Opportunities with a probability of 0% or 100% will not appear in the Sales Process Funnel. Change the opportunity's probability to a value between 0 and 100 to display the desired opportunity in the Sales Process Funnel.

2. Click **Reset**.
3. Click the **checkbox** next to a desired filter option. The option expands to display relevant criteria for that option. For example, Opportunity Status expands to allow the following selections: Green, Red, and All.
4. When you have completed selecting the desired filter options, click **OK**. The Sales Process Funnel displays the opportunity bubbles that meet the selected criteria. If more than 100 opportunities meet the selected criteria, a message appears indicating that there are too many opportunities and for your to refine the opportunity criteria. If that occurs, open the Opportunity Filter dialog box again and further refine your filter options.
5. (Optional) Click the **Show Overlay Funnel** checkbox to display a funnel shape for the selected opportunity set. See Displaying an Overlay Funnel Graphic.

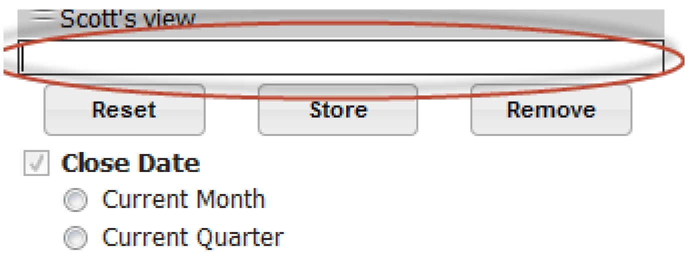
Working with Saved Views

Creating a Saved View

The procedure for creating a saved view is the same in both the Funnel Filter and the Opportunity Filter dialog boxes.

To create a saved view:

1. Click in the **Funnel Filter** or **Opportunity Filter** box in the Sales Process Funnel. The applicable dialog box appears.
2. Click **Reset.**
3. Type a **name** for the view in the blank text box above the Reset, Store, and Remove buttons.



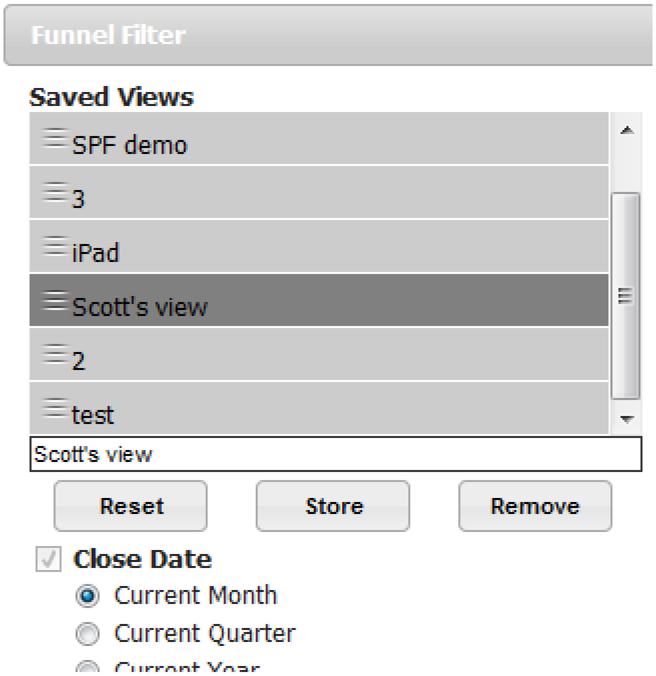
4. Set the desired view criteria.
5. Click **Store**. The view name appears in the **Saved View** list.

Using a Saved View

You can easily switch between saved views to change the opportunity set displayed in the funnel. The saved view you were last using when you exited Sales Process Funnel is used for the initial display the next time you open the tool.

To use a saved view:

1. Click in the **Funnel Filter** or **Opportunity Filter** box. The applicable dialog box appears.
2. Click the desired **saved view** to select it**.** When you click on a view, it appears highlighted in the Saved Views list and the view name appears in the text box as in the following example:



NOTE:
If you cannot see the desired view in the Saved Views list, use the scroll bar.

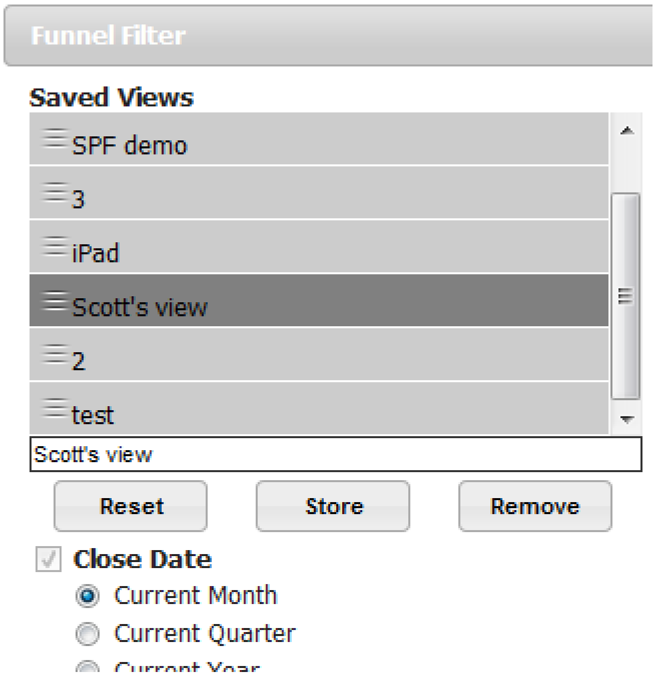
3. Click **OK.**

Deleting a Saved View

You can remove saved views that you no longer wish to use.

To delete a saved view:

1. Click in the **Funnel Filter** or **Opportunity Filter** box. The applicable dialog box appears.
2. Click the desired saved view to select it. When you click on a view, it appears highlighted in the Saved Views list and the view name appears in the text box as in the following example:



NOTE:
If you cannot see the desired view in the Saved Views list, use the scroll bar.

3. Click **Remove**. A message box appears asking you to confirm the deletion.
4. Do one of the following:
   - To remove the saved view, click **OK.** The view is removed from the Saved Views list.
   - To keep the saved view, click **Cancel**. The view remains in the Saved Views list.

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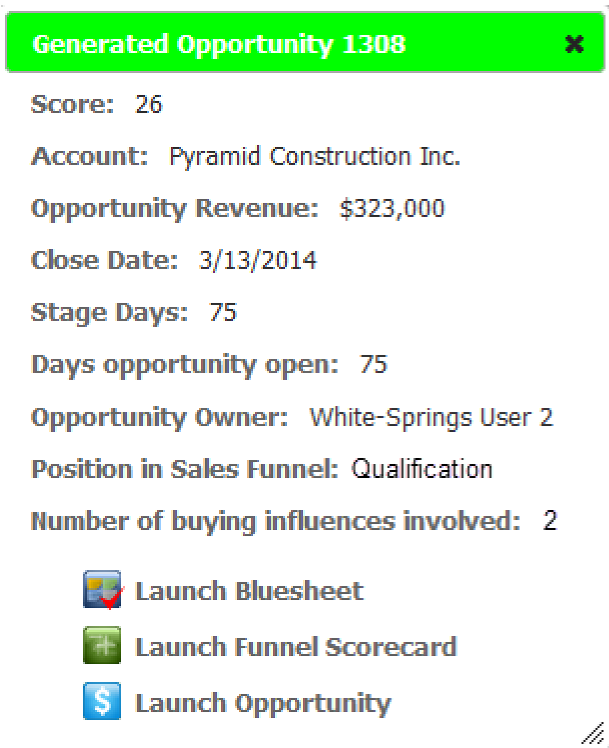
Viewing Opportunity Details

You can view details for any opportunity in the current Sales Process Funnel display by hovering the mouse over an opportunity circle. An information box similar to the following appears:



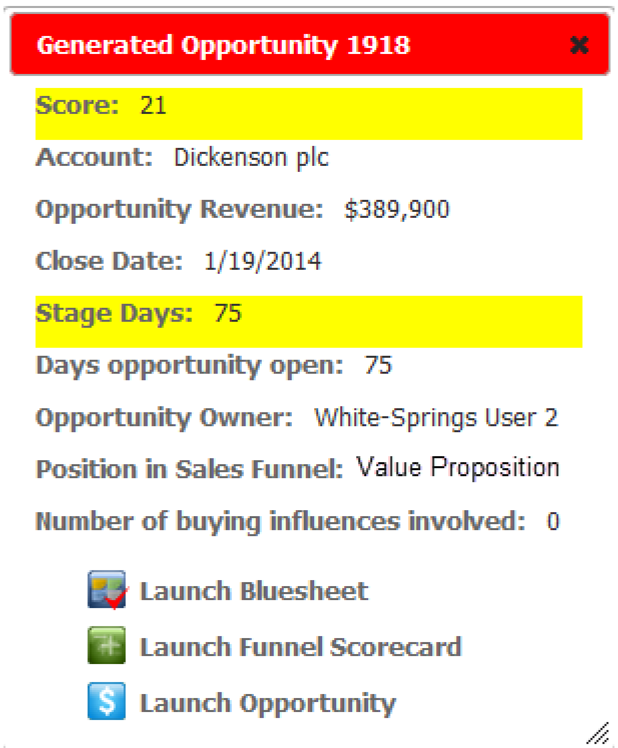
The following are explanations of the items in this box:

Score	The Total Score (Business Score plus Opportunity Score) from the applicable Funnel ScoreCard®.
Account	The name of the Account from the associated opportunity.
Opportunity Revenue	The revenue amount from the associated opportunity.
Close Date	The close date from the associated opportunity.
Stage Days	The number of days the opportunity has been in the current sales stage.
Days Opportunity Open	The number of days the opportunity has been open.
Opportunity Owner	The salesperson who owns the opportunity.
Position in Sales Funnel	The current sales stage from the associated opportunity.
Number of buying influences involved	If your organization is also using Blue Sheets, displays the number of Buying Influences identified in the associated Blue Sheet.

Launch Blue Sheet	If your organization is also using Blue Sheets, click to launch the associated Blue Sheet. If your organization is not using Blue Sheets, this item appears grayed-out in a new browser window.
Launch Funnel ScoreCard®	Click to launch the Funnel ScoreCard® for the associated opportunity in a new browser window.
Launch Opportunity	Click to launch the associated opportunity from the CRM in a new browser window.

If an opportunity circle is green, this indicates that the opportunity details are on track.

If an opportunity circle is red, this indicates that one or more opportunity details is off track. The associated information box highlights the off track details as in the following example:



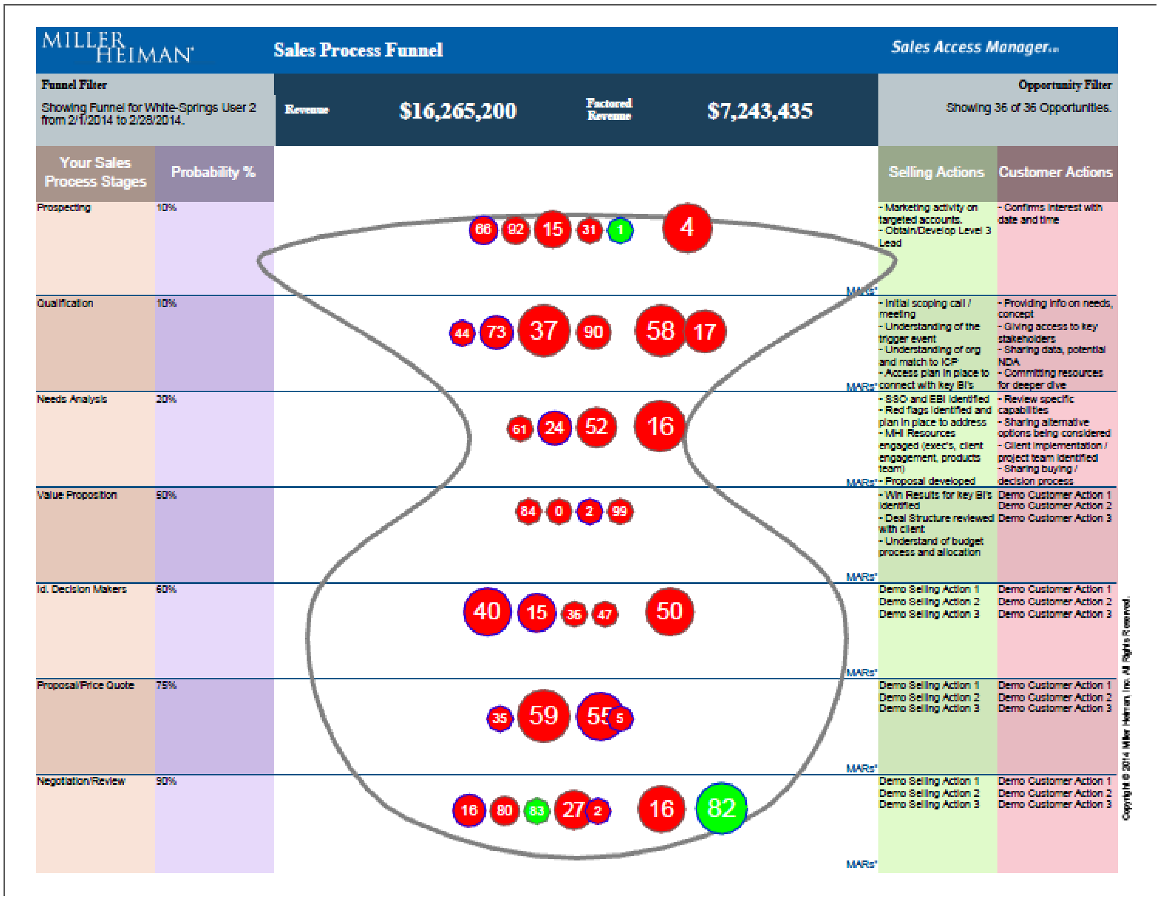
In this example, the score is too low for the associated sales stage and the number of days the opportunity has been in the current sales stage is too great. These opportunity values are compared to the threshold values set by your System Administrator according to your sales organization's preferred guidelines.

Printing the Sales Process Funnel

You can print the current Sales Process Funnel view to a PDF file. You can then print a hardcopy or e-mail the file as desired.

To Print the Sales Process Funnel:

1. Click the **Printer** icon . A message box appears and says that your print file is being generated. Depending on your Web browser, you may be prompted to open or save the file. If you are not prompted, the PDF file is usually saved to your Web browser's download location.
2. Locate the file and open it in Adobe Acrobat. The file will look similar to the following:



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Sales and Support Contacts

Sales

For more information about Sales Process Funnel or the variety of other products and services that Miller Heiman offers, please see the Miller Heiman Web site.

http://www.millerheiman.com/

Alternatively, send an e-mail with your query to sales@salesaccessmanager.com

Support

Contact your System Administrator for any problems or issues you experience using Sales Process Funnel.

Displaying an Overlay Funnel Graphic

The Sales Process Funnel graphic dynamically adjusts to indicate the funnel shape of the opportunities selected via the Funnel Filter. You can choose to display an overlay graphic that shows the funnel shape of the opportunities selected via the Opportunity Filter.

To display an overlay funnel graphic:

- Click the **Show Overlay Funnel** checkbox in the Opportunity Filter box.

NOTE:
If you do not see the **Show Overlay Funnel** checkbox in the Opportunity Filter box, you have not set any Opportunity Filter criteria. Set one or more Opportunity Filter criteria and the Show Overlay Funnel checkbox will display.

The overlay funnel appears slightly differently depending on which Web browser you are using.

If you are using IE 10 or below, the overlay graphic appears as a solid gray line that is lighter than the overall funnel graphic as in the following example:

If you are using any other Web browser, the overlay graphic displays as a dotted line funnel inside the default funnel as in the following example:

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