V.7Training

STEP1® SOFTWARE SOLUTIONS

ONE STEP AHEAD

STEP1 CRM FOR SALES REPS

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- SALESREP REVIEW SCORECARD

TO GET STARTED

LOGIN TO YOUR STEP1 CRM

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MOST MODULE TRAINING SESSIONS TAKE ABOUT AN HOUR

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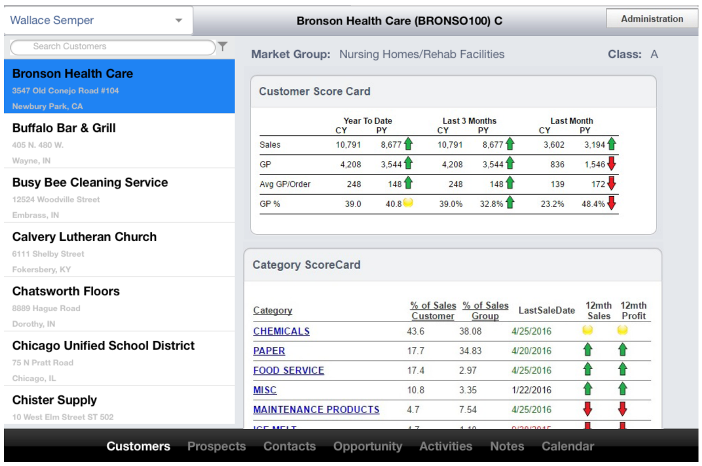
Customer Score Card - Category Score Card - Dispenser/Refills

When first logging into CRM you will land on your Customers list, as you can see Customers is highlighted on the bar at the bottom. Here you will find all of your customers on the left. To locate a certain customer, one can scroll down the list or you can search for the customer in the search field. Once you find your customer you will then be able to look at this Customer's Score Card.

Here you will find comparisons for Sales, GP, Ave.GP/Order, and GP% all with CY/PY comparisons for Year to Date, Last Three Months and Last Month.

Colors of the arrows indicate:

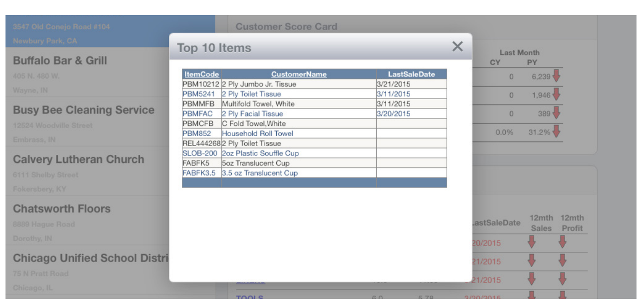
- Green indicates an increase over the same time period (.01% or more)
- Yellow is for values lower than the same period last year but within 10% (.00% to -10%)
- Red is for a decrease over 10% (-10% or more)



Below the Customer Score Card, you will see this customer's Category Score Card. Here you will see how this customer is performing in each category, category score card gives you both alerts and opportunities. Last Sale Date will alert you that you may have lost business in an Item Category. The colors of the last sale date: Green indicates last sale date within 3 months, Black 3 months or longer, and Red is 6 months or longer.

An opportunity might present itself in the form of % of Sales. % of Sales Group relates to the product mix that this type of customer buys from your company.

% of Sales Customer relates to the product mix for this customer. In this case: Paper accounts for 34.83% of purchases for the average customer in the Market Group. 17.7% of this customers purchases are Paper items. This would represent an opportuntity. Click on the underlined category to bring up the Top 10 items like customers are purchasing, if there is no last sale date, this would indicate an item/s to present to this customer to increase sales.



Below the Category Score Card you will see Dispenser/Refill Information, if this customer has purchased a Dipsenser or Refill from your company they will show up here.

Another alert shows last sale date for proprietary dispensers and more important refills. The color code is the same as Item Categories: Green = < 3 months, Black = > 3 months < 6 months, Red > 6 months.

Dispenser / Refill

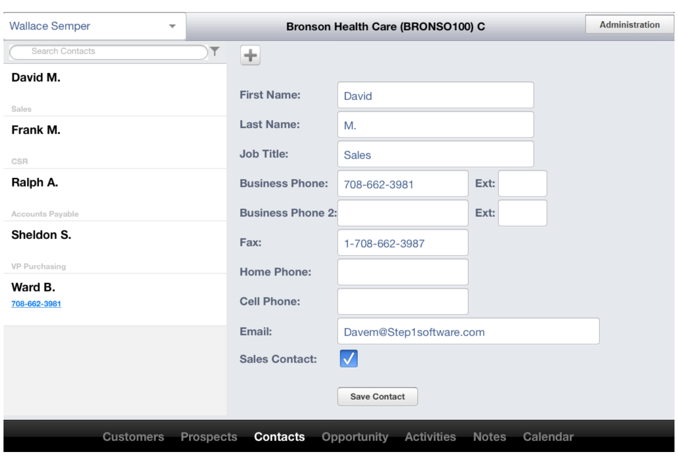
ItemCode	Description	SubCat	d/r	Qty	LastSalesDate
5116	SeaBreeze Dispenser	CHEM DISPENSER: Air Freshener	D	8.0000	10/7/2015
9346	ClearVu 46oz Soap Dispenser	CHEM DISPENSER: Hand Soap	D	5.0000	11/23/2015
YH100-12	1000 Plus Dispenser,White	CHEM DISPENSER: Hand Soap	D	5.0000	10/20/2015
5134	Cinnamon spice gel air fresh	CHEM: Air Fresheners	R	12.0000	4/20/2016

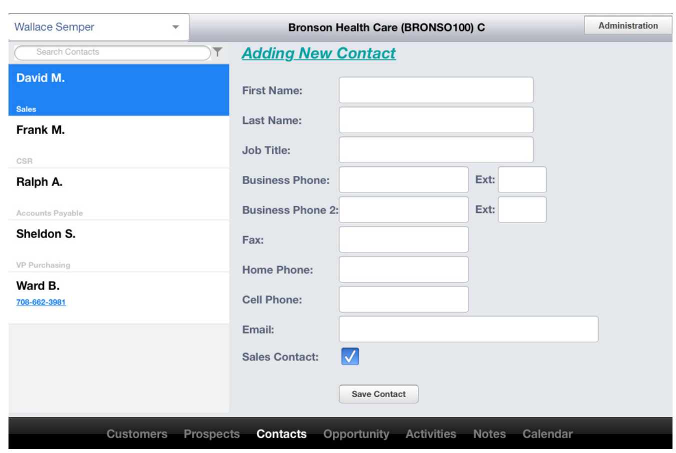
The next button on the bottom bar is the Prospect button, skip over this button for now, we will come back to this later in the guide.

Contacts - Adding New Contact

Now click on the Contact button. Here you will find all the contacts associated with this customer.

Click on the plus button to add a new contact or click on a contact to look up their information or to edit this contact.

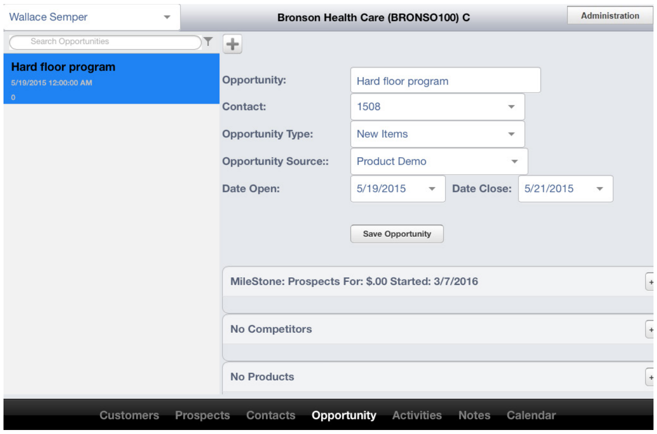


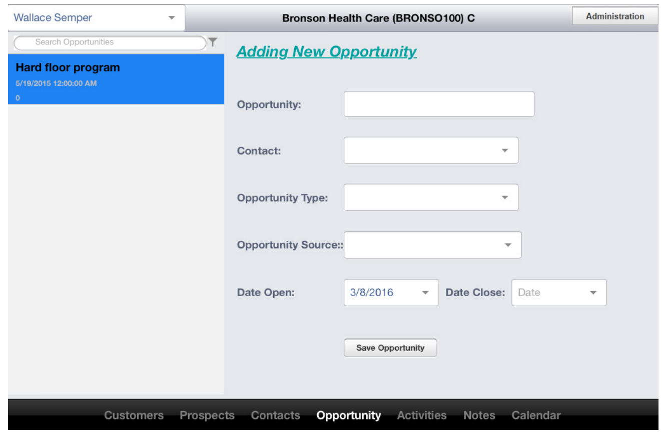


After clicking on the plus button the screen on the right will come up, enter all the new contact's information that you have and click Save Contact, you can always come back to the contact to add additional info.

Opportunities - Adding New Opportunity

Click on the Opportunity Button. Here you will find all of the Opportunties that are current with this customer on the left, click on an opportunity to view or edit. If adding a new opportunity click on the plus button in the upper left and the screen to the right will open to set up the opportunity.

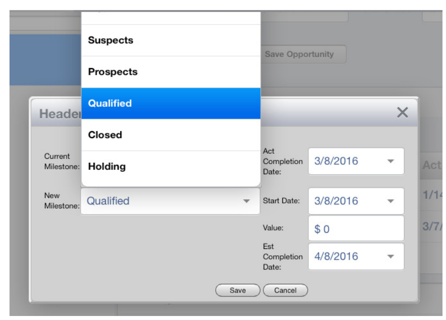




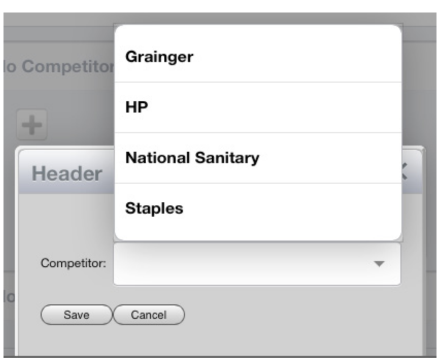
Name the Opportunity, (Remember, we are already positioned on the customer) Suppose you notice during your sales call that you are not getting any of the glove business. You could name the opportunity 'Gloves'. Or, you might notice that there is a department within the customer that you need to penetrate (ie, 'Grounds Maintenance'). Or you might be aware of an upcoming project (summer gym floor finishing) If entering an opportunity for a Prospect, it works exactly the same way.

Choose the Contact, Opportunity Type (determined by your CRM Admin), Opportunity Source (determined by your CRM Admin), choose Date Open, choose Date Close when the opportunity is closed. Click Save Opportunity.

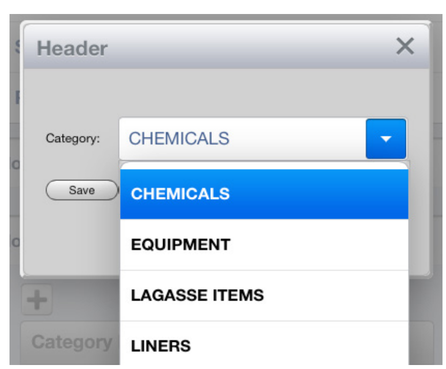
Now one can add the following to the Opportunity: Milestone, Competitors, and Products by clicking on the plus sign next to each one.



Adding a Milestone - Milestones are used to track the progress of the opportunity through the sales cycle, this is also one way to forecast what might be coming down the pipeline.



Adding a Competitor - Adding a competitor can determine who you are up against, one can also see if they are losing their opportunities to a competitor and a plan can be created to beat the competition.

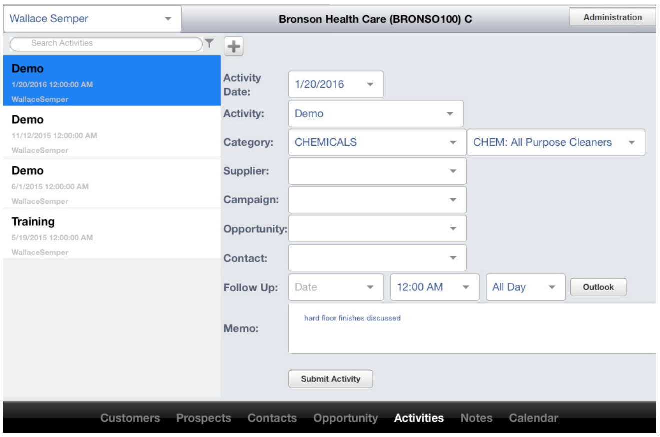


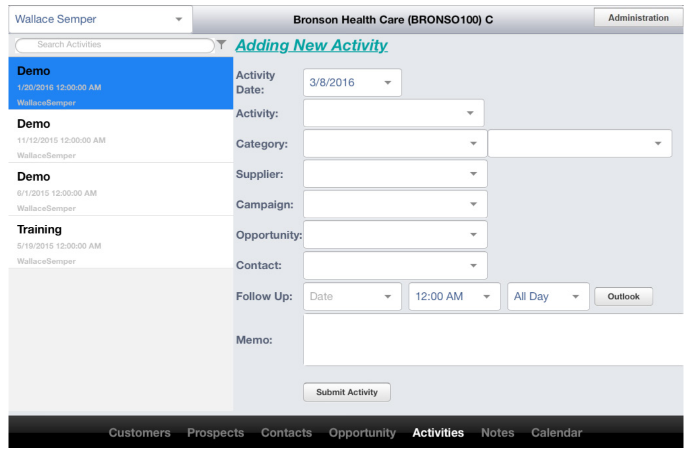
Adding a Category - Helps the rep remember what to be focusing on for the opportunity, also helps to figure what is attributing to the increase in a certain item category when the opportunity is closed.

Note: Once you have moved the opportunity through all of the Milestones and you get an order, change the milestone to the last milestone and leave it there (don't enter the Actual Completion Date). This will provide gratification when looking at the Baseline Status Dashboard and seeing all the opportunitites you closed.

Activities - Adding Activities

Click on the Activities Button. Here you will find all of the Activities that have been recorded with the current customer you are under in CRM. If you are entering a new activity click on the plus sign in the upper left.





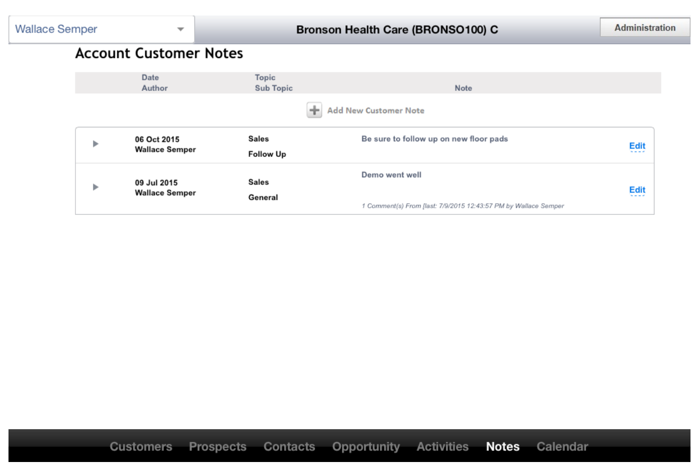
When setting up an activity, choose the following from the drop downs that apply to the activity:

Activity Date, Activity (determined by your CRM Admin), Category, Sub-Cateory, Supplier, Campaign (if the activity is directed at a Campaign), Opportuntiy (if the activity applies to an opportuntity that is set up under this customer) Contact, and Follow Up date, if you are using Outlook as a calendar, click the Outlook button to add this appt. to your Outlook calendar. One can also add a memo for more detail on the activity.

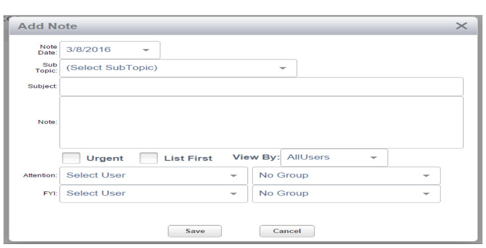
Notes - Adding Notes

Notes are used to communicate between staff, this could be many things from reminding your sales rep to demo something to informing staff that a contact is no longer in charge of purchasing. This all ties into SNAP, STEP1 Notes And Photos.

Click on the plus sign to add a new customer note, pick the note date, Sub Topic, Subject, enter information that you want in the note, from here you need to decide who the note pertains to by choosing from the drops downs.

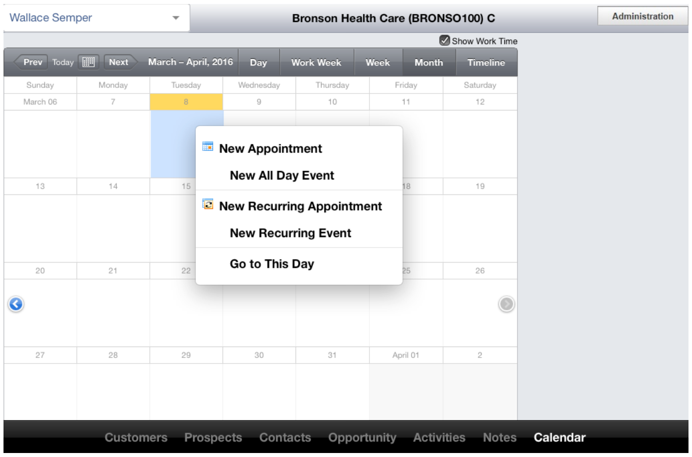


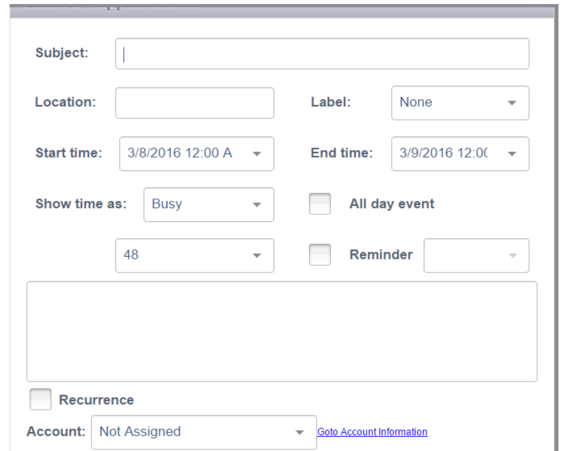
For more info refer to SNAP Training Guide



Calendar - (only if you are not using one already)

Click on the calendar and choose new appointment. Choose the information that pertains to the appointment that is being set up.



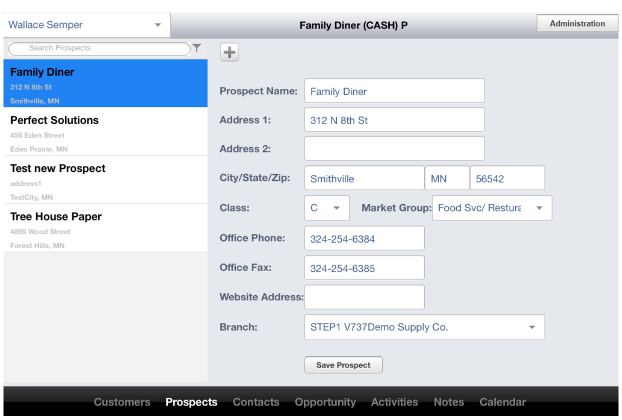


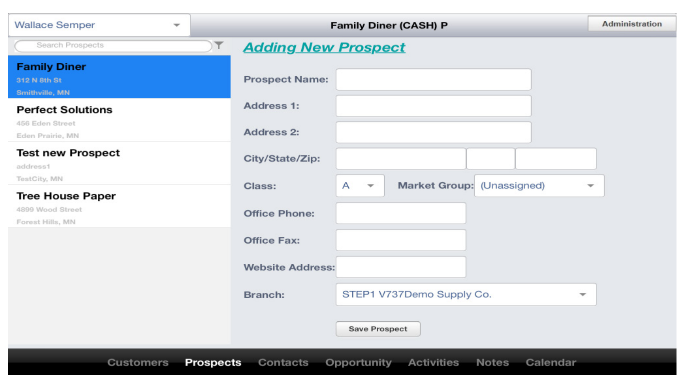
Tip: Choosing Recurring Event allows you to organize your territory: this customer weekly, this one monthly, etc. Then, to plan your week, you can click and drag to time slots.

When looking at an event one can click on Goto Account Information to jump right to that customer's account information.

Prospects - Adding New Prospect

Click on the Prospects button to bring up your list of prospects. Click on the plus button in the upper left to add a new prospect.





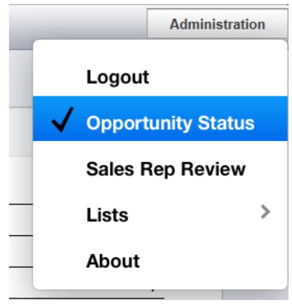
Note: Everything that was covered for entering Contacts, Opportunities, Activities, Notes, and Calendar info for Customers; the process is the same for Prospects.

Opportunity Dashboard

The opportunity dashboard, this is your pipeline of new business. This shows how many customers are at each phase (Milestone) of the sales cycle, potential annual revenue and, how long the customers have been at each Milestone (by average).

MileStoneName	Customers	Value	Avg Q Days
List	3	$13,011	188
Suspects	1	$500	299
Prospects	2	$2,500	5
Qualified	1	$1,000	8
Closed	2	$3,000	154
Holding	0	$0	0

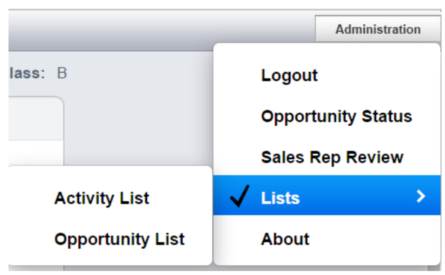
To get to your dashboard, click on the Administration button in the upper right and choose Opportunity Status from the drop down.

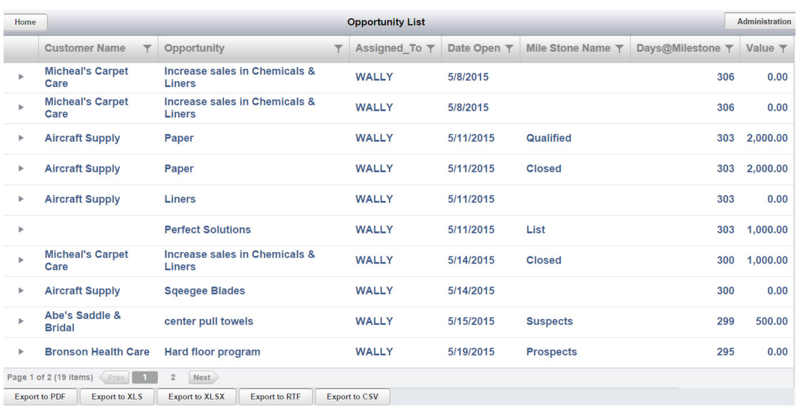


Opportunity List and Activity List

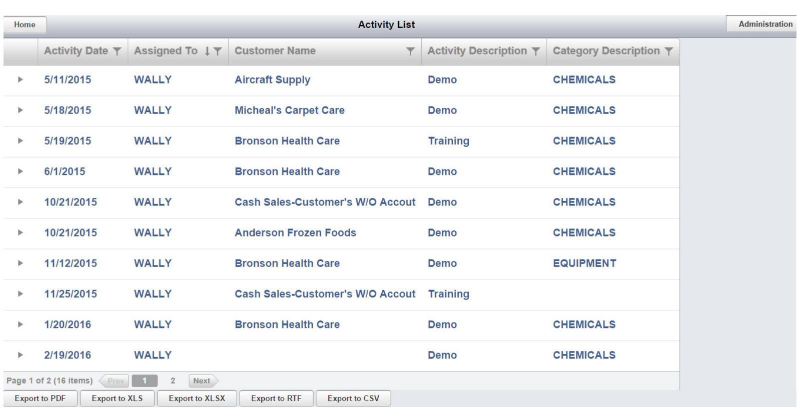
Opportunity List is where one will find all of their opportunities. Activity List is where one will find all of their activities.

To get to these lists, click on the Administration button in the upper right, choose Lists and choose either Activity List to view your activities or Opportunity List to view your opportunities.





Customer Name	Opportunity	Assigned_To	Date Open	Mile Stone Name	Days@Milestone	Value
Micheal's Carpet Care	Increase sales in Chemicals & Liners	WALLY	5/8/2015		306	0.00
Micheal's Carpet Care	Increase sales in Chemicals & Liners	WALLY	5/8/2015		306	0.00
Aircraft Supply	Paper	WALLY	5/11/2015	Qualified	303	2,000.00
Aircraft Supply	Paper	WALLY	5/11/2015	Closed	303	2,000.00
Aircraft Supply	Liners	WALLY	5/11/2015		303	0.00
	Perfect Solutions	WALLY	5/11/2015	List	303	1,000.00
Micheal's Carpet Care	Increase sales in Chemicals & Liners	WALLY	5/14/2015	Closed	300	1,000.00
Aircraft Supply	Sqeegee Blades	WALLY	5/14/2015		300	0.00
Abe's Saddle & Bridal	center pull towels	WALLY	5/15/2015	Suspects	299	500.00
Bronson Health Care	Hard floor program	WALLY	5/19/2015	Prospects	295	0.00



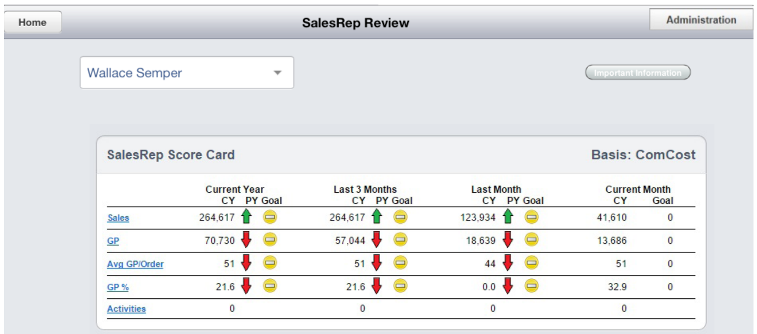
Activity Date	Assigned To	Customer Name	Activity Description	Category Description
5/11/2015	WALLY	Aircraft Supply	Demo	CHEMICALS
5/18/2015	WALLY	Micheal's Carpet Care	Demo	CHEMICALS
5/19/2015	WALLY	Bronson Health Care	Training	CHEMICALS
6/1/2015	WALLY	Bronson Health Care	Demo	CHEMICALS
10/21/2015	WALLY	Cash Sales-Customer's W/O Accout	Demo	CHEMICALS
10/21/2015	WALLY	Anderson Frozen Foods	Demo	CHEMICALS
11/12/2015	WALLY	Bronson Health Care	Demo	EQUIPMENT
11/25/2015	WALLY	Cash Sales-Customer's W/O Accout	Training	
1/20/2016	WALLY	Bronson Health Care	Demo	CHEMICALS
2/19/2016	WALLY		Demo	CHEMICALS

Once in the list, a person can sort by clicking on the column header. One can choose different criteria by clicking on the column header to bring up a check box and choosing the criteria you would like to see or not see.

On the bottom of the list there are different file formats so one can export to analyze the data more closely.

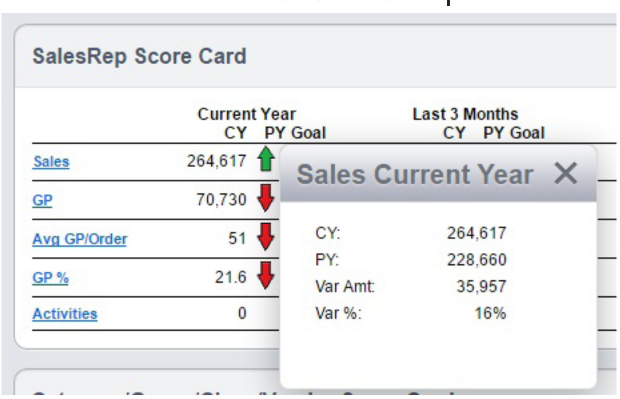
SalesRep Review - SalesRep Score Card - Catergory/Group/Class/Vendor Score Card - New Customer Score Card

The SalesRep Review is like the Customer Review except it is measuring the reps performance. In the SalesRep Score Card you will find comparisons for Sales, GP, AveGP/Order, and GP% all with CY/PY comparisons for Current Year, Last 3 Months, and Last Month. There is a row labeled Activities, this is where the activities you enter populate. You will also see their is an addtional field, Current Month, this will give you current month figures. There is also a column for each metric labeled ‘Goal’, this would be set up by the SalesMngr.



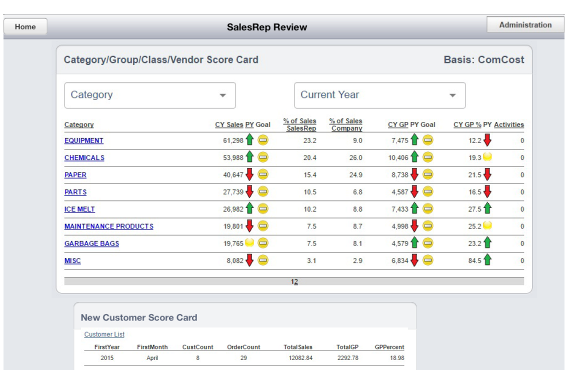
If you click on an arrow for CY/PY or Goal comparisons it will bring up a screen that will display figures that correspond to the metric you are looking at.

Current Year CY/PY Comparison



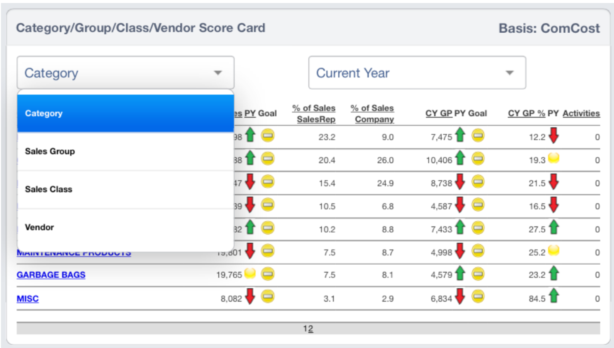
Current Year CY/PY Goal Comparison

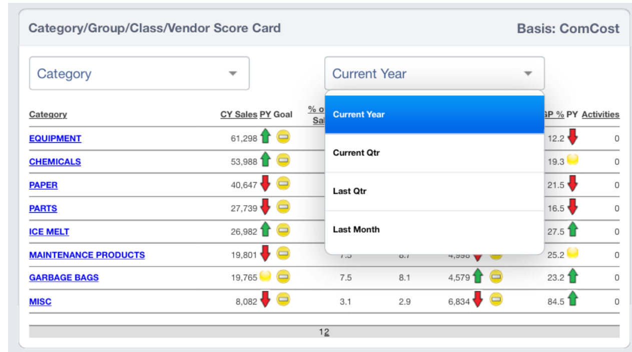
Below the SalesRep Score Card, you will see your Category/Group/Class/Vendor Score Card. Here you will find figures for Item Category, Market Groups, Sales Classes, and Vendors for Sales and Gross Profit all with CY/PY comparisons. You will also see how your sales are comparing to the rest of the company with % of Sales SalesRep vs % of Sales Company in the previously mentioned groups. The column labeled Activities is where your activities populate if they are assigned to the corresponding group.



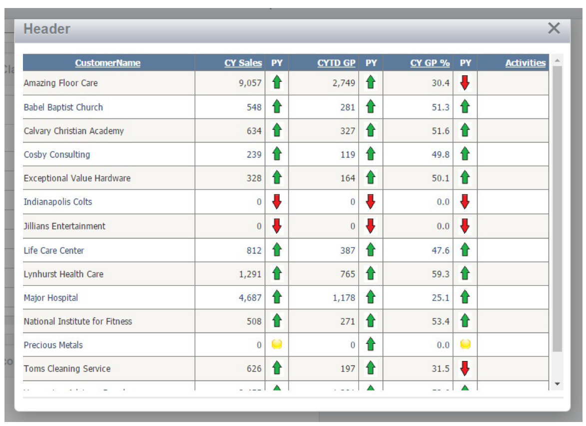
Below the scorecard is the New Customer Score Card, listed here will be the following figures for new customers: FirstYear, First Month, CustCount, Order Count, Total Sales, Total GP and GP%. This tracks new customers for 13 months. To see the list of customers click on Customer List.

If you would like to look at the Sales and GP figures for Market Groups, all one has to do is click on the drop down labeled Category, do the same if you want to see Sales Class or Vendor figures. To change the time period you are looking at, click on the drop down labeled Current Year. Time periods that are available other than Current Year are, Current Qtr, Last Qtr, and Last Month.

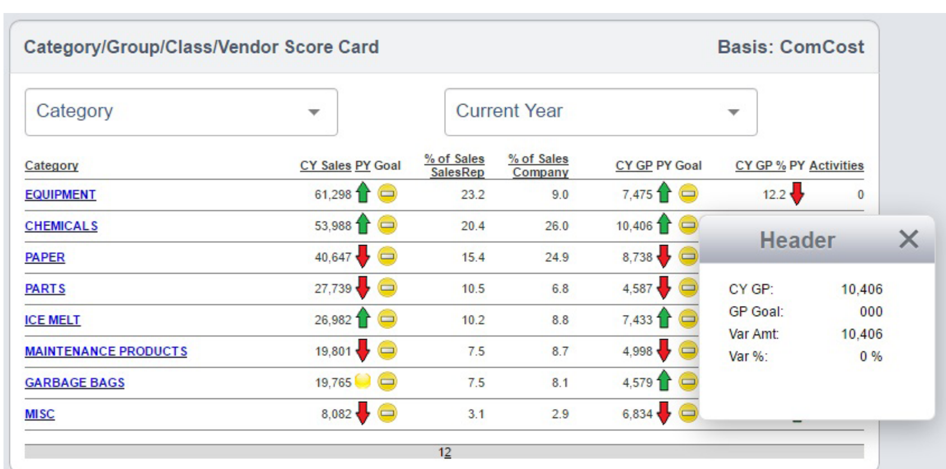




If you want to see how your customers are performing in a certain Item Category compared to previous year, click on the underlined category you want to look at. The same can be done with the other choices in the drop down as well. If you want to compare Last Month's figures to the previous year, choose Last Month from the drop down before clicking on the Item Category.



Just like the Score Card for the rep, you will notice that goals can be set for Item Categories, Market Groups, Sales Classes, and Vendors for comparison between Sales and Gross Profit. Click on the arrow that indicates there is a goal set up to do so. You can change the time frame prior to see the figures compared with the time frame you have chosen.



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BILLING MANAGER
A/R MANAGER
PURCHASING FOR BEGINNERS
WAREHOUSE RECEIVING
ACCOUNTS PAYABLE
A/P CHECKS

GENERAL LEDGER
TABLE SETUP
AR CUSTOMER SETUP
AP VENDOR SETUP
INVENTORY SETUP
REBATE MANAGER
ORDER REVIEW
CUSTOMER PRICE MANAGER
SUPERVISOR'S CONSOLE

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ADVANCED CPM
ADVANCED PURCHASING
SALES MANAGER
DISPENSER MANAGEMENT
QUERY MANAGER INTRO

REPORT MANAGER INTRO
TASKLIST MANAGER
KNOWLEDGEBASE
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WEB CSS
BANK REC
REPORT BUILDER
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