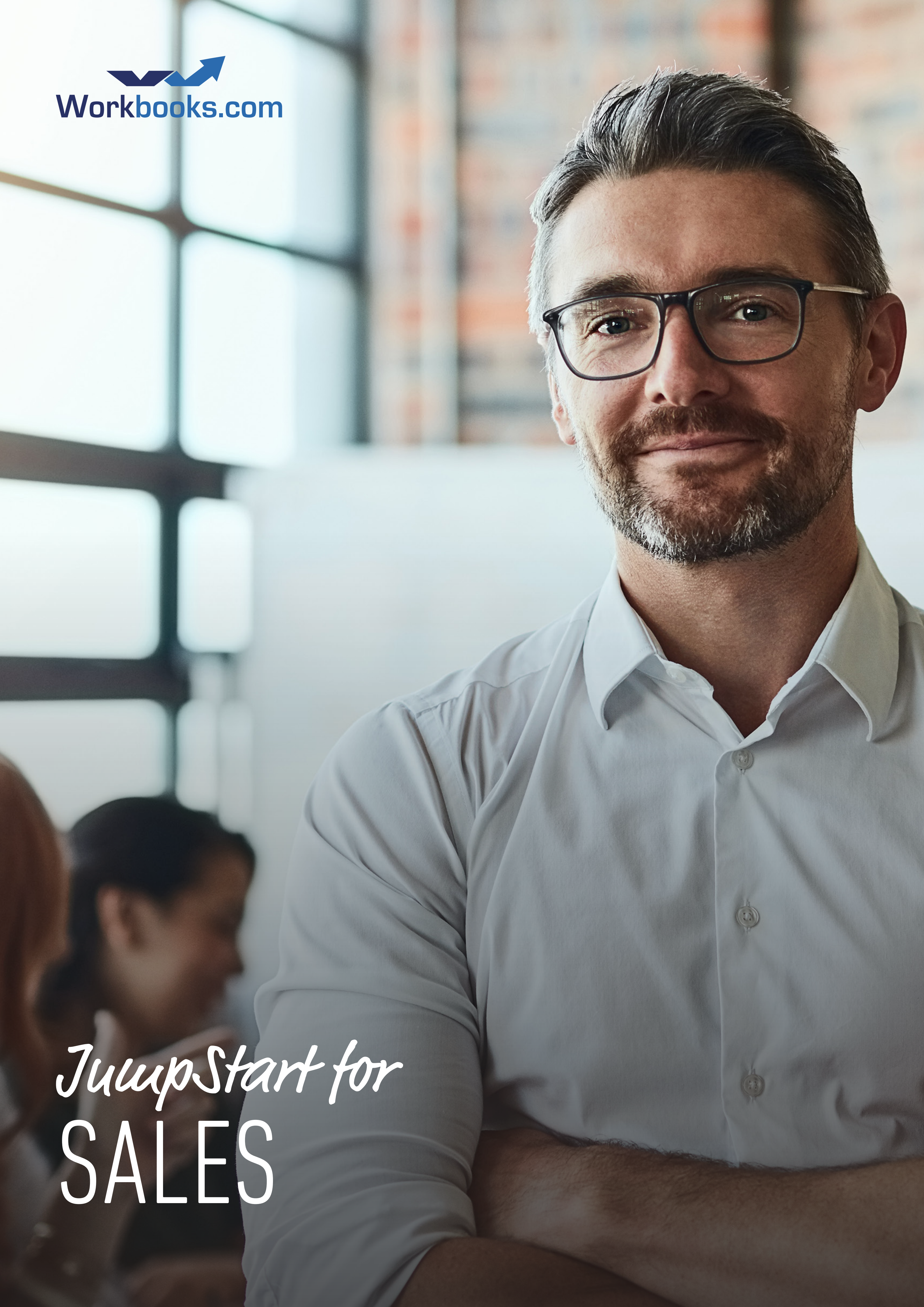

Workbooks.com

JumpStart for SALES

Contents

For further advice and guidance please contact Workbooks at
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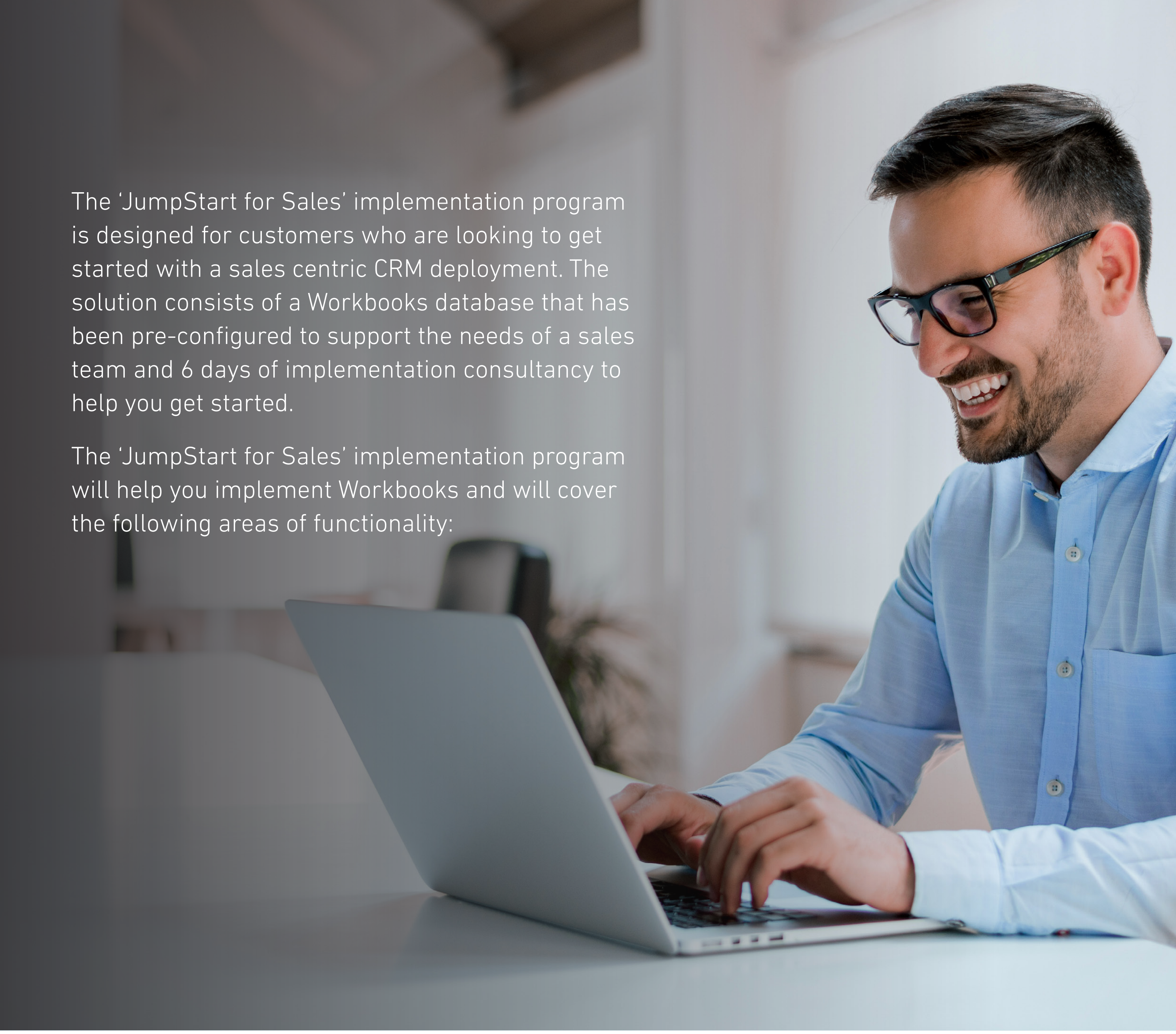


The 'JumpStart for Sales' implementation program is designed for customers who are looking to get started with a sales centric CRM deployment. The solution consists of a Workbooks database that has been pre-configured to support the needs of a sales team and 6 days of implementation consultancy to help you get started.

The 'JumpStart for Sales' implementation program will help you implement Workbooks and will cover the following areas of functionality:

CONTACT MANAGEMENT

This is a centralized database where you can store information about the organizations and people you do business with. You can record notes, activity records (such as meetings, tasks and phone calls) and emails against all record types.

Organizations and People records can be flagged as Prospects, Customers, Suppliers and Competitors. In addition these records already include basic profiling fields such as Job Role (People), Revenues, Number of Employees, Industry and Category fields.

The scope of the project also includes the ability to configure up to 3 additional fields on each record to store additional profiling information. Profiling information can be used in reporting to segment Customers and Prospects.

Integration with Microsoft Outlook (for Windows) or directly to Microsoft Exchange (including hosted Exchange and Office 365) is supported. This will enable you to push emails from Outlook/Exchange to Workbooks and store the emails against the relevant records in CRM. In addition the solution can synchronize tasks, meetings and contacts between CRM and Outlook/Exchange.

CAMPAIGN & LEAD MANAGEMENT

This is the ability to manage leads generated by your marketing teams, including the ability to capture leads directly from your website using the Web2Lead function. As part of the implementation process we will also teach you how to import leads (using CSV) into Workbooks from 'off-line' marketing activities such as a trade shows etc.

The Workbooks database comes pre-configured with a Marketing Dashboard and a set of marketing reports designed to allow you to measure lead flow and ensure leads are followed-up correctly.

Reports include:

- New Leads created by Month, by Campaign
- Open Leads with no follow-up Activity, by Sales Rep
- Leads converted into Sales Opportunities
- Opportunity Pipeline by Campaign
- Closed Won Opportunities by Campaign

SALES MANAGEMENT & PIPELINE REPORTING

The 'JumpStart for Sales' database is built with pre-configured Opportunity management, including all the management reports you need to track your sales pipeline and produce a forecast.

The Opportunity record is at the core of this functionality, allowing you to record details of the deals your sales team are working on, including:

- Sales person (Assigned To), Close Date, Type, Opportunity Stage and percentage probability
- Products to be sold (line items), including cost and sales pricing if appropriate
- Organizations and People related to the Opportunity
- Forecast status (Pipeline, Upside or Commit)
- Overall Opportunity value and Gross Margin

The Opportunities stages and probabilities are pre-defined to support the BANTS sales methodology, but can easily be changed. The BANTS methodology is a well-known approach to qualifying an opportunity, encouraging sales people to understand the **B**udget, **A**uthority, **N**eed, **T**imescale and **S**ize of an opportunity.

The database is supplied with 3 different Opportunity layouts which can be refined if required. They are:

- **Simple Layout:** Including the details above
- **BANTS Layout:** A layout designed to support the BANTS sales qualification process
- **Qualified-Out/Lost Layout:** Designed to capture information about why an Opportunity was qualified-out or lost from the pipeline

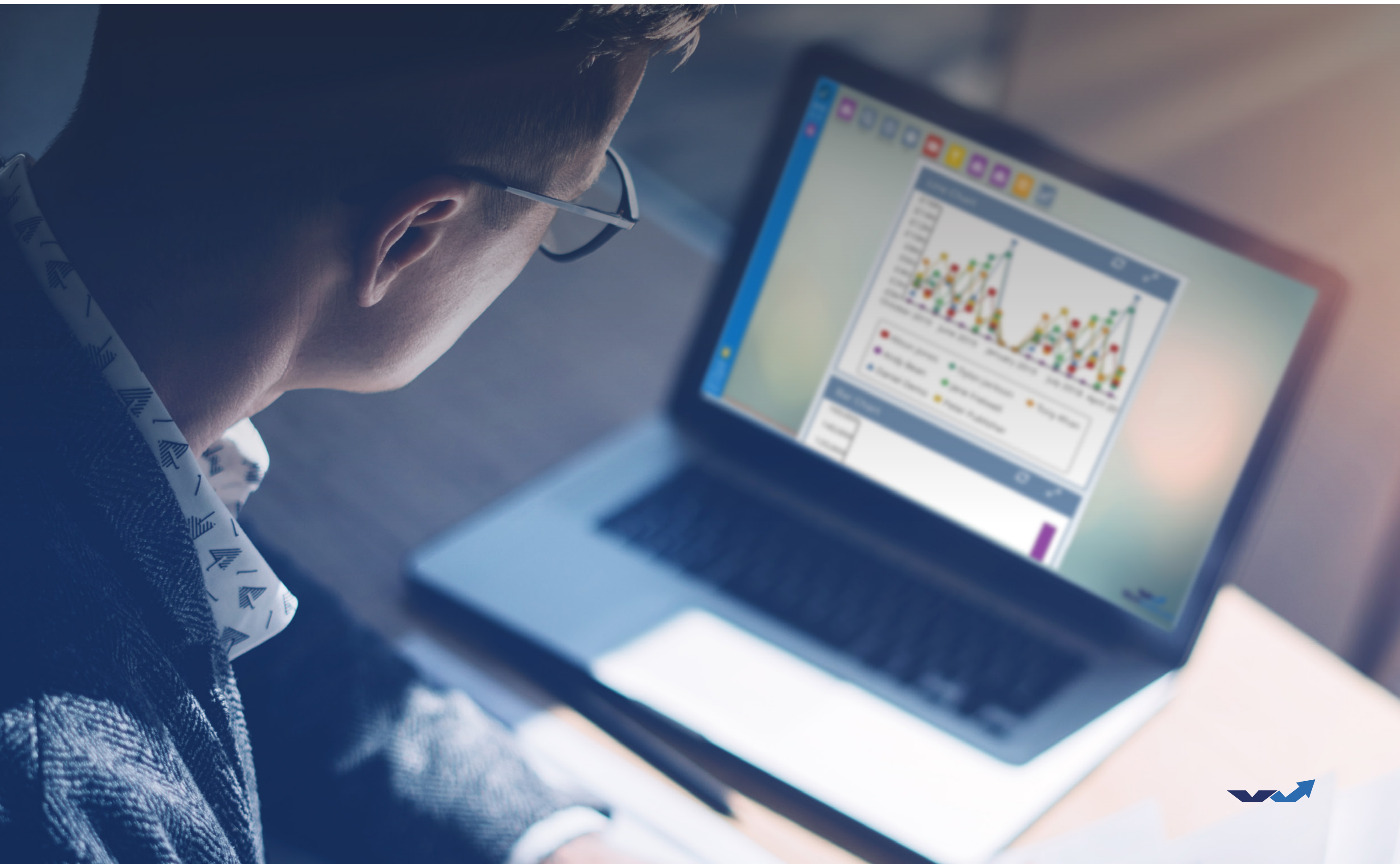
In the 'Jumpstart for Sales' database all open Opportunity records should have an open Activity record, describing the next step in the sales process with an appropriate due date. The combination of Opportunity and Activity records is what drives the sales process to ensure all deals are being proactively followed-up.

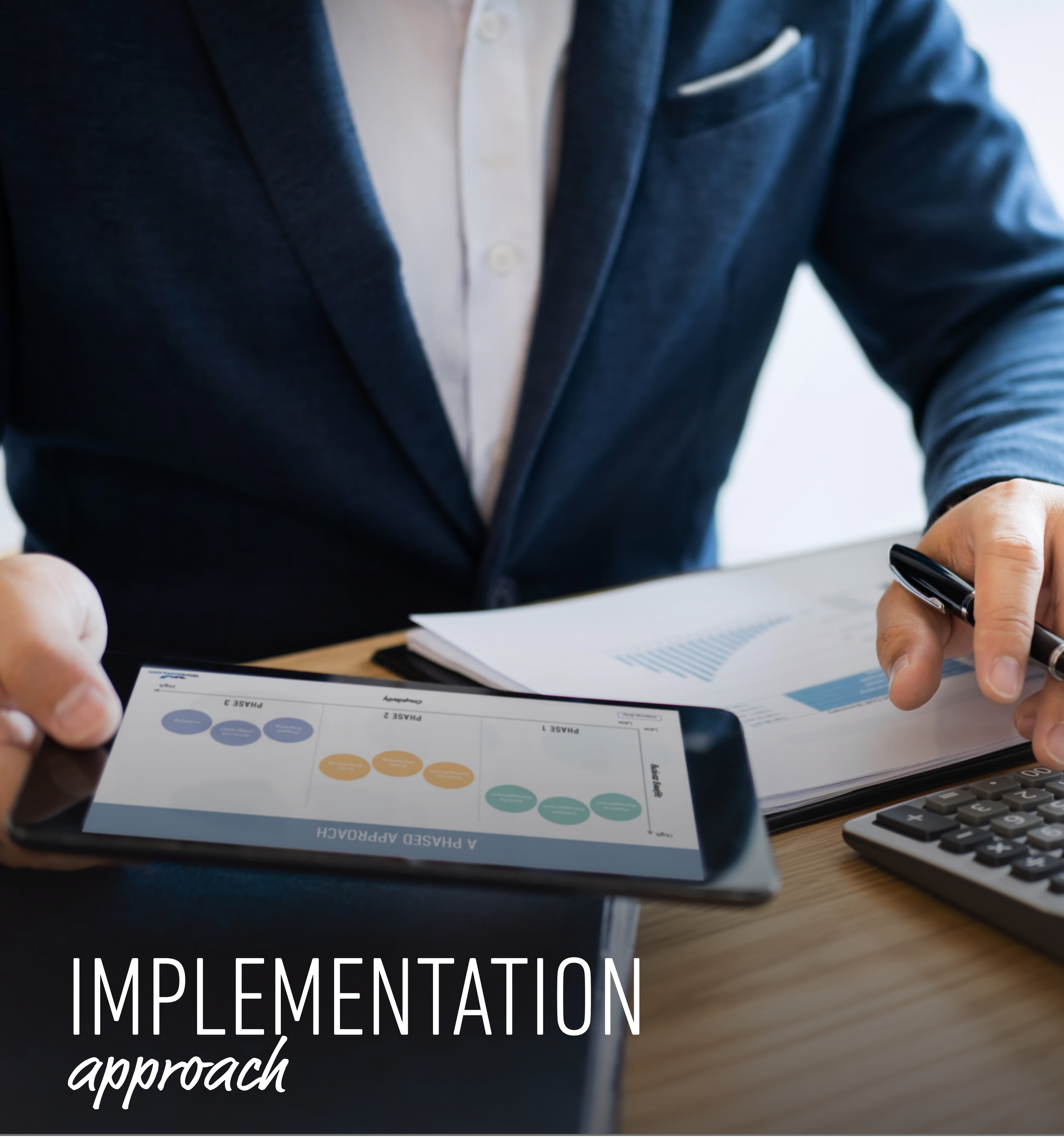
The pre-built database includes a Sales Executive Dashboard to provide an overview for an individual sales person on their activities and pipeline. The Dashboard includes the following reports:

- My Opportunities and Activities, sorted by Due Date (Action Report)
- My Forecast: (Commit, Upside & Best Case) by month or quarter
- My sales achievement against target
- My Pipeline, by Stage, by month or quarter
- My Opportunities with no next step activity (exception report)
- My Leads with no next step activity (exception report)

In addition to the Sales Executive Dashboard the configuration includes the following Dashboards for Sales Management:

- **Sales Management Dashboard**: A collection of reports that provide visibility of sales performance, forecast and pipeline by sales person including:
    - Sales Performance (closed won Opportunities) by month or quarter, against target, by rep
    - Sales Forecast – commit, upside and best case overall and broken down by sales person
    - Sales Pipeline by sales person by stage, by month or quarter
    - Opportunities with overdue or no Activities (Exception Report)
    - Conversion Rate by sales person for the year
    - Creating Mailing Lists, including auto-refreshing lists from Reports
- **Sales Adoption Dashboard**: Reports designed to ensure sales teams are using the CRM solution appropriately, including:
    - Activities created by sales person by week/month
    - Opportunities created by sales person by week/month
    - Sales Leads created by sales person by week/month
    - Emails created by sales person by week/month
- **Pipeline Analysis Dashboard**: Reports designed to give you insight into movement in the sales pipeline, including:
    - New Opportunities to Stage 0
    - New Opportunities to Stage 1 (Pipeline)
    - Pipeline by deal size (small, medium, large)
    - Opportunities lost this month
    - Opportunities qualified-out this month
    - Lost and qualified-out Opportunities summarized by lost/qualified-out category





IMPLEMENTATION *approach*

The 'JumpStart for Sales' implementation is designed to get your organization using the platform within 2 weeks. The implementation consists of 5 days of consultancy delivered over an initial 2 week period, followed by a 6th day delivered several weeks later, to provide additional support once the system has been in use for a few weeks.

The initial 2 week period allows time for the client to prepare their customers, prospects and pipeline data for import into the Workbooks system.

A typical timetable will be as follows:

Week 1	Overview	Description
Days 1 & 2	Configuration & Build	Typically delivered on-site, the objective in the first 2 days of the project is to review the 'JumpStart for Sales' configuration with the client, agree any customization such as pick list values and any additional custom fields that are required and build the configuration. At the end of the 2nd day we will have fully configured the Workbooks database and will be able to create import templates (in the form of spreadsheets) which will be given to the customer to populate for data import.
Days 3 to 5	Data Preparation	During this period, the customer will be responsible for populating the import templates with the data that will be imported into Workbooks. Once complete, the customer will send this information to Workbooks for import.

Week 2	Overview	Description
Day 1	Data Import	The Workbooks consultant imports the customer data into the CRM platform. This work would typically be done in the Workbooks offices and not at client site.
Day 2	Sales Training & Go-Live	Workbooks will deliver a ½ day of on-site training for the sales team. The training will cover basic contact management, activity management and opportunity management. The Outlook Connector will also be covered during this session. In the 2nd half of the day, the Workbooks consultant will 'walk the floor' answering questions and providing real-time support for the sales team.
Day 3	Marketing & Sales Management Training	On the day we will run 2 additional training sessions, 1 focused on marketing activities and a 2nd on sales management. This will build on the sales training already provided. The marketing training, will include importing leads, an introduction to marketing campaigns and building reports to segment people and organization data. The sales management training will cover how to use the sales management reports in Workbooks to get the management information and visibility sales leaders need to run an effective sales organization and ensure the CRM platform is being adopted by the sales teams.

The 6th day of consultancy will be delivered 2 to 3 weeks after the Go-Live date to meet with the customer, review progress and address any issues that may have arisen with the project.

PROJECT *scope & cost*

PROJECT SCOPE

The scope of the 'JumpStart for Sales' implementation is defined in this document. It does not include any other elements of configuration, reporting or data migration.

The scope for data import is only for the following records:

- Organization records
- People records (connected as employees to Organizations)
- A simple product book (does not including pricing schemes)
- Opportunity records + line items

All other record types are excluded from the scope, but may be included if the customer purchases additional consultancy days.

The customer is responsible for populating the Excel templates Workbooks provides with the necessary data for import. Customers should take care to ensure the templates are correctly populated and fields validated.

For clarity, the following elements are specifically excluded from the scope of 'JumpStart for Sales':

- Quotations, Orders, Invoices, Supplier Purchase Orders and Credit Notes
- Creation and modification of PDF Templates
- Case Management
- Email Marketing & Marketing Automation
- Workbooks Web Insights
- Any automated workflows or web processes

PROGRAM COSTS

The 'JumpStart for Sales' program includes:

- 6 x days of implementation consultancy at $1,400 per day
- 1 x Workbooks Level-1 System Admin Training Course (2 days)

The total cost for the 'JumpStart for Sales' program is $9,800 + VAT + Expenses. Expenses will be charged in line with our standard policy, set out in our **terms of service**.