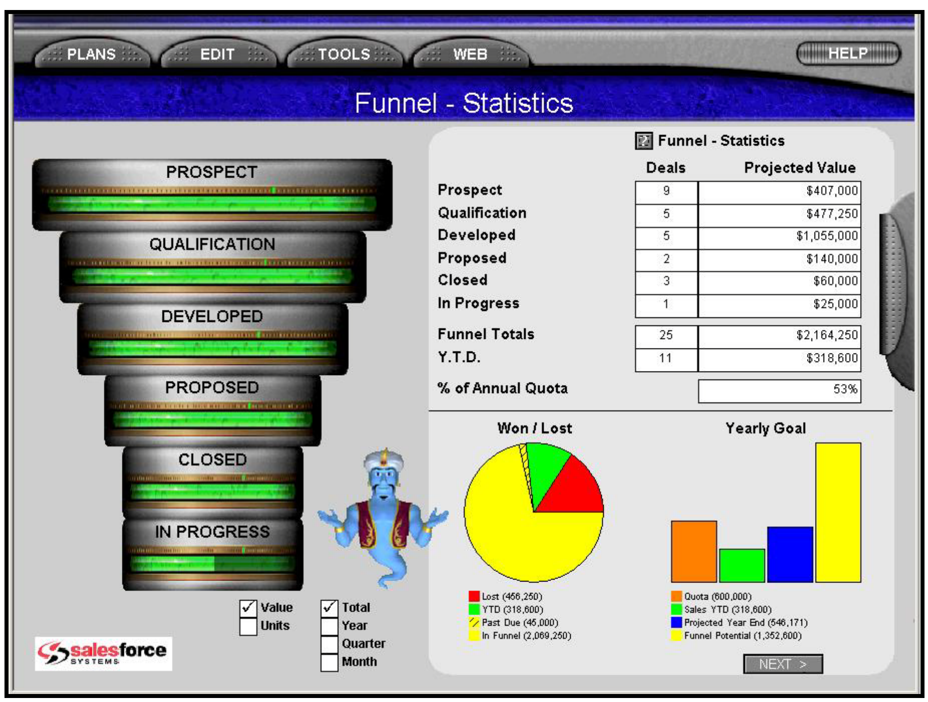
Version 4.4

Impact "Quick Start" Guide

business value selling®

A solution for complex selling situations



Note:

A copy of the complete **Impact User Manual** is installed as part of the installation process. To view or print the entire manual, install the software and then go to the bottom left of your Windows screen and left click on the START button, then click on ALL PROGRAMS and select SFSI. You will find the complete Impact User Guide there.

Copyright Statement

For more information, visit our web site at. http://www.salesforcesystems.com/

Contents

Introduction 3
Installing the Program 4
Setup 4
Options 6
Getting Help 7
  Help Button 7
  Genie Help 7
Using the Menus 8
  Main Menus 8
  Taskbar Menus 10

Introduction

Impact™ is an automated an account and opportunity planning and forecasting tool that helps you create and institutionalize a winning sales process. A formal sales process insures that you, as a sales professional, will close more business, shorten your selling cycle, and positively differentiate yourself from the competition in an increasingly competitive sales world.

The free version of Impact comes with a “generic” sales process imbedded in the software. Once you have become familiar with the generic BVS process, additional software is available from Sales Force Systems that can be used to easily customize all aspects of the software to reflect you unique sales process and selling needs.

Impact incorporates Sales Force Systems **Business Value Selling Process.** Business Value Selling will improve your chance to win new business and make more money.

Impact will help you:

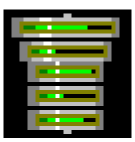
- Create a unique Business Value and Competitive differentiation.
- Identify where opportunities are really positioned in the sales cycle and funnel
- Develop Account Plans that will increase your share of addressable business.
- Develop Opportunity Sales Plans that will increase your chance to win.
- Identify your prospect’s business problems and need-to-buy.
- Identify and quantify your unique value and competitive differentiation.
- Develop the Activities required to dramatically shorten the sales cycle.
- Develop an accurate “Win Probability” for each opportunity in your funnel.
- Define and chart the prospect’s Decision-Making Process for each opportunity.
- Develop Sales Call Plans that communicate value, and reduce number of calls to close.
- Develop an competitive analysis and sales strategy based on your unique value.
- Provide a financial snapshot of your business at any moment in time.
- Identify critical problems early in the sales cycle.
- Significantly increases the accuracy of your 30-60-90 day forecast.
- Immediately increase your effectiveness and productivity.
- Create documents of your plans with “one click” output to WORD and PowerPoint.
- Win more business and make more money.

How to install Impact Software on your computer

The Impact software is downloaded from the internet as a ZIP file. Once downloaded you must extract the contents of the ZIP file to a temporary location on your computer, and then double-click on **setup.exe**.

1. Since Impact is a Windows based application you must use/have an **Administrator** account permissions in order to install the software on your computer.
2. Follow the instructions on the setup wizard screens to complete the installation.
3. If you are prompted to **overwrite newer files**, reply **No to all**.
4. If the installation process initiates the setup of the **speech recognition engine**, you can **Cancel** that part of the process.
5. After the Impact software has been installed, select **Yes, I want to restart my computer now** to complete the installation.
6. When the computer restarts, the installation is complete, and Impact will be ready for use.
7. If you are upgrading a previous version of Impact, the Database Upgrade program will be run automatically the first time you run the new version of Impact.

After Impact software is installed, you can go to the Start menu or double click the **Funnel** shortcut icon on your Windows desktop. Impact can be found on the **Start** menu under **Programs > SFSI > Impact**.



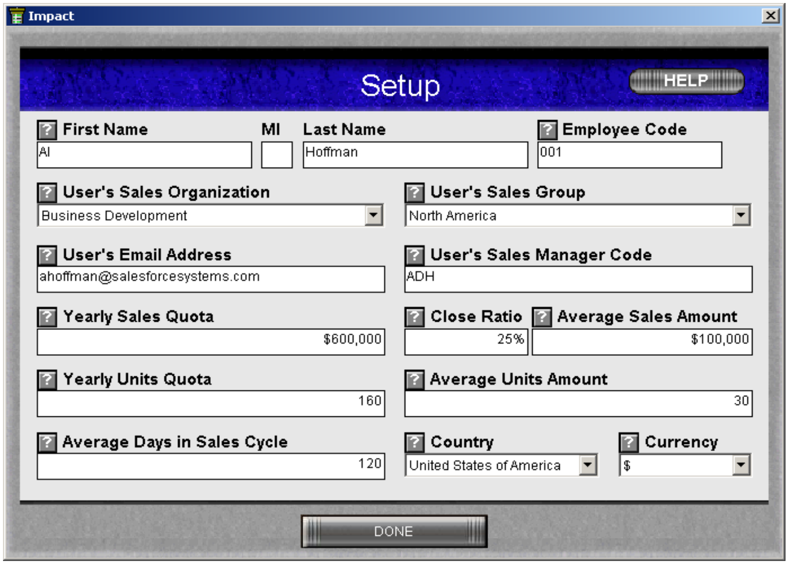
Impact desktop icon

How to create your Profile (Setup and Options screens)

The Setup screen is used to establish your User Name and other key information that is used by Impact to manage the metrics that describe the way you sell now and want to sell in the future. Click the **question mark** icon, or the **Help button** if you are unsure about what should be entered in each section.

You cannot proceed to other parts of Impact until you have completed the setup screen.

Information in the SETUP and OPTIONS screens may be changed at any time after the initial setup process by selecting **Setup or Options** from the **Tools** menu.



Setup screen

First Name, MI and Last Name - Input your name in these fields. This will be used to identify you on the server. Your name will also appear on many of the Impact reports.

Employee Code - This can be used to input your employee code if your company assigns such codes. This field is optional.

User's Sales Organization - Select your sales organization from the list. This list will typically contain division or business units within your organization. This information is used on the server to organize reports.

User's Sales Group - Select your sales group from the list. This list will typically contain sales territories within your organization. This information is used on the server to organize reports.

Impact User's Email - Input your email address in this space. It is only used in the Impact WEB version.

Sales Manager's Code - Use the field to identify your Sales Manager's name. This field is optional.

Yearly Sales Quota - This number is your annual revenue goal. This information is critical to Impact, because the whole purpose is to help you meet, or exceed, this goal.

Close Ratio - This is the percentage of opportunities in your business funnel that you actually win.

Average Sale Amount – This is the average revenue generated from one sale.

Yearly Units Quota - If you want to track quota based on the number of units you have sold you can input your unit's quota in this field. If you do not track quota based on units, put the number of deals you expect to close for the year in this field.

Average Units per Sale - This value is used in conjunction with the Yearly Units Quota to provide funnel information about your progress versus your yearly objective in terms of units sold. If you do not track quota based on units, input 1 in this field.

Average Days in Sales Cycle - This represents the average time it takes to move a deal through your sales cycle. Impact uses this information to populate target dates for the Process Checklist.

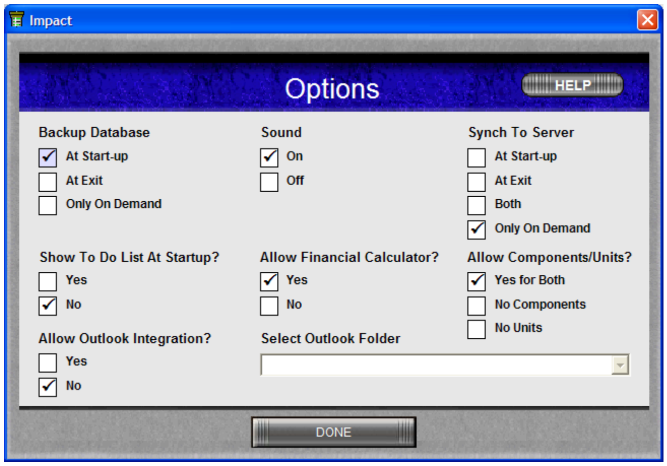
Country - Select your country from the drop down list. This information is used by the system if your organization has established "language specific" customizations.

Currency - Choose the currency symbol or ISO currency code you want displayed with your currency values. If you select one of the 1 character symbols, it will be displayed in front of the number.

Options

There are a few options that you can set to control some of the operational characteristics of the Impact system.

To change your Options settings, select click **Options** from the **Tools** menu.



Options screen

Backup Database - This option determines when to make a backup of your Impact database. The backup routine will run automatically at the time you specify here.

The options are:

- *At Start-up* - Back up your database when you start Impact.
- *At Exit* **-** Back up your database when you exit Impact.
- ***Only On Demand* - The database is backed up when you select *Tools* > *Backup*.** **RECOMMENDED**

Sound - Turn the sound *On* or *Off*.

Synch to Server – **DOES NOT APPLY TO THE IMPACT LIGHT VERSION.**

Therefore the option that needs to be checked is:

- **Only On Demand** - Synch only when you select Tools > Synch to Web.

Show To Do List at Startup? - Display the To Do List at start-up, *Yes* or *No*. **NO**

Allow Financial Calculator? - Check *Yes* or *No* to turn on or off the ability to input revenue, cost and units information for an Opportunity through the Financial Calculator. The Financial Calculator is used when revenue, cost or units information is recognized over multiple months. If you are not sure if the Financial Calculator will be needed, leave this option set to *Yes*, since using the Financial Calculator on any specific Opportunity is always optional.

Allow Components/Units? - There are three selections in this category that determine how Units and Components are treated in the system.

- *Yes for Both* - This option turns on both Units and the Components function. With this option selected you can enter the number of product units for each opportunity and, optionally, configure the components that make up a unit.
- *No Components* - This option allows you to enter product units on an opportunity, but the Components function is not available for configuring the units.
- *No Units* - This selection removes the Units metric from the system. With this option selected, you can only enter the value (or revenue) for an opportunity.

Allow Outlook Integration? - Check *Yes* or *No* to turn on or off Impact's integration with Microsoft Outlook. Changes you make to the Contact information in Impact will be passed back to Outlook. In addition, the system will create Outlook Calendar appointments for your Sales Call Plans and Outlook Tasks for some To Do List tasks. Refer to the section on Outlook Integration for more information.

Select Outlook Folder - If you have checked *Yes* for Outlook Integration, this drop down list will contain the names of all folders in your Outlook system that contain Contact information. Choose the folder that has the contacts that will be synchronized with the Impact Contact table. By default, the default contact folder ("Personal Folders\Contacts") will be used to synchronize the contact information.

For example, you can create a new folder in Outlook called ImpactContacts. In that folder you can put all the contacts that are specific to Impact. This allows you to keep personal contacts, etc. separate from the contacts that you will use in the Impact system.

HELP! - How to get instant Help

There are two forms of Help available in the Impact software.

- **Help Button**
- **Genie Help**

Help Button

In the top right corner of every Impact screen there is a **Help** button that you can click to load the HTML version of the Impact User Guide. You will be positioned in the guide in the chapter and section most appropriate based on the screen that was displayed when the help button was clicked.

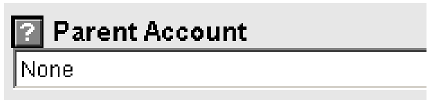
You can use the Contents, Index and Search or the Next, Previous, Forward and Back buttons on the Help screen to navigate though the User Guide.

Impact Help button

Genie Help

You can also get help from the Impact **Genie**. The Help Genie can be summoned by clicking on the question mark icon above many of the information fields. The Genie will:

- Target his advice for the area in which you are working
- Describe what should be entered in a given field
- Offer tips and tricks about the overall business process



Genie Help button

How to use Impact's Drop Down Menus

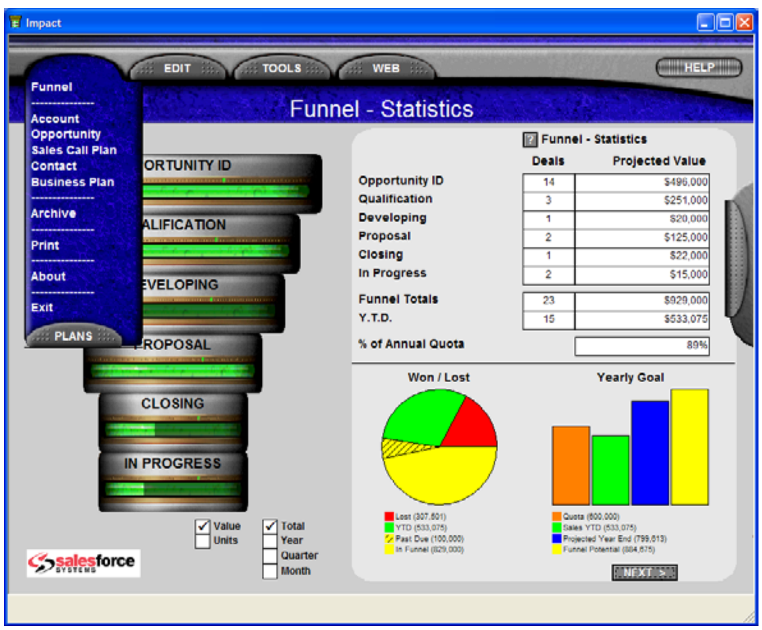
Impact has two types of menus that provide easy access to territory, account, opportunity and sales call plan information.

1. **Drop down menus for access to sales planning functions within Impact.**
2. **Taskbar menus for navigating within a function or sales plan.**

1. Main Menus

There are four Main Menus found at the top of the main Impact screens. Click on one of the Main Menu buttons to expand the menu so you can make a selection. As an example, to enter a new opportunity you must select the PLANS menu, then select the OPPORTUNITY section. The OPPORTUNITY PLANS screen will appear. At this time you can select an existing OPPORTUNITY or enter a new OPPORTUNITY.

All Impact functions can be run from these four Menus.



Funnel screen with Plans menu expanded

<u>PLANS Menu</u>

The Plans Menu contains the major Impact functions for working with accounts and opportunities. Use these functions to apply the Business Value Selling Process to your "must win" deals.

Funnel - This entry displays you business Funnel. The Funnel is the first screen displayed when Impact is loaded. The funnel contains only your active sales opportunities, not accounts or sales call plans.

Account - Select this entry to work with accounts. Using this selection will enable you to open an existing account or create a new account. Accounts can contain multiple sales opportunities. Accounts are not shown in the funnel.

Opportunity - Select this entry to work with sales opportunities. Using this selection will enable you to open an existing opportunity plan or create a new opportunity. Only opportunities are shown in the funnel screen.

Sales Call Plan - Select this entry to work with sales call plans. Using this selection will enable you to open an existing sales call plan or create a new sales call plan.

Contact - Select this entry to work with executive level contacts. Using this selection will enable you to open an existing contact profile or create a new contact record.

Business Plan - Select this entry to work with your business plan. When you make this selection, your business plan is opened so you can review or update your plan.

Archive - Archive accounts and opportunities to remove them from your active funnel. They are not deleted from your system. This function is also used to re-activate an archived plan.

Print - Generate an Impact report. The report generated depends on the screen currently displayed. For example, selecting Print while viewing the Funnel screen, generates the Funnel Report.

EDIT Menu

The Edit Menu contains text manipulation functions that are useful when working with fields on the Impact screens.

Copy - The highlighted text is copied to the Windows clipboard. The function is also performed if you hold down the **Ctrl** key and press the **C** key. You can also click the **right mouse button** and select **Copy**.

Cut - The highlighted text is copied to the Windows clipboard and removed from the screen. The function is also performed if you hold down the **Ctrl** key and press the **X** key. You can also click the **right mouse button** and select **Cut**.

Paste - The contents of the Windows clipboard is placed on the screen starting at where the cursor is positioned. The function is also performed if you hold down the **Ctrl** key and press the **V** key. You can also click the **right mouse button** and select **Paste**.

Spell Check - the Spell Check function is performed on the text in the box where the cursor is currently positioned.

TOOLS Menu

The Tools Menu contains Impact utility functions.

Notes - This selection loads the Notes Organizer so you can find and review notes that you have entered into the system.

To Do List - This selection loads the summarized list of all tasks to be completed within a specified date range. Some of these tasks are generated automatically by the software based on the BVS Process and some you have input manually using various Impact functions.

Clone - This function can be used to make a duplicate copy of one of your plan records.

Import/Export - This function is used to import data from other applications into the Impact system or to export data from Impact so it can be used by other applications.

Year End - At the beginning of each year, this function can be used to reset the BVS Funnel and to generate previous year's performance reports.

Setup - This function is used to maintain your personal setup information.

Options - This function allows you to set and change various operational options for Impact.

Backup - Select this function to make a backup of your Impact database.

<u>WEB Menu</u> – ***THE WEB FUNCTIONS ARE NOT AVAILABLE IN IMPACT LIGHT (Free version)***

The WEB Menu contains functions that are specific to the use of Impact WEB software.

How to use Impact's Taskbar Menus

The **Taskbar Menu**, located on the right side of each Impact screen, allows you to navigate easily within the main Impact functions. The Taskbar menu is available when you are working with the Funnel, an Account, an Opportunity, a Sales Cal Plan, a Contact or the Business Plan.

Move the mouse pointer to the gray strip on the right side of the screen. The Taskbar menu for the current area within Impact will be displayed. Select an entry by moving the mouse pointer to the entry (the entry will turn black) and click.

The entries in the Taskbar menu represent the screens and sub-functions available within the main function in which you are working. The Taskbar menu is different for each of the main Impact functions.

The entries above the dashed line represent the main screens for this function. If you click the **Next** and **Back** buttons at the bottom of the screen, you will proceed from screen to screen in the order that they appear in the top portion of the Taskbar menu. Optionally, you can click on an entry in the Taskbar to go directly to that screen.

The entries below the dashed line are utility functions related to this main function. These screens will not appear in the "flow" of screens using just the **Next** and **Back** buttons. You can select these functions directly from the taskbar menu or using a button on the appropriate screen.