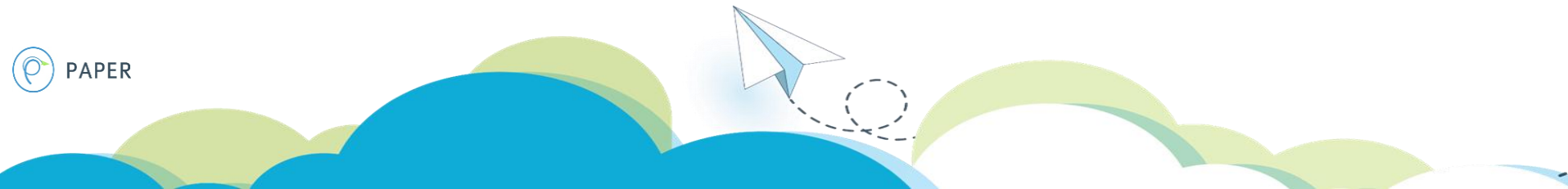


Playbook for Account Executive

Revised September 30th 2019





What is B2B & B2C

B2B & B2C

Business to Business



Business as the buyer
Repeat Transactions
Complex Negotiations
Complex Document Flow
Bigger Ticket Size
Focus on Business Needs

Business to Consumer



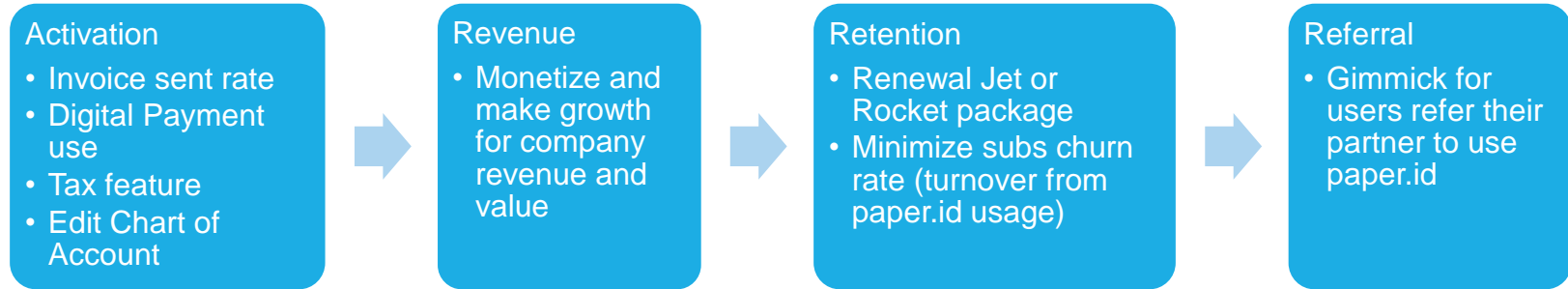
Non-Business as the buyer
Tend to Be One Off
Simpler Negotiations
Payment Receipt
Smaller Ticket Size
Focus on Personal / Consumption Needs



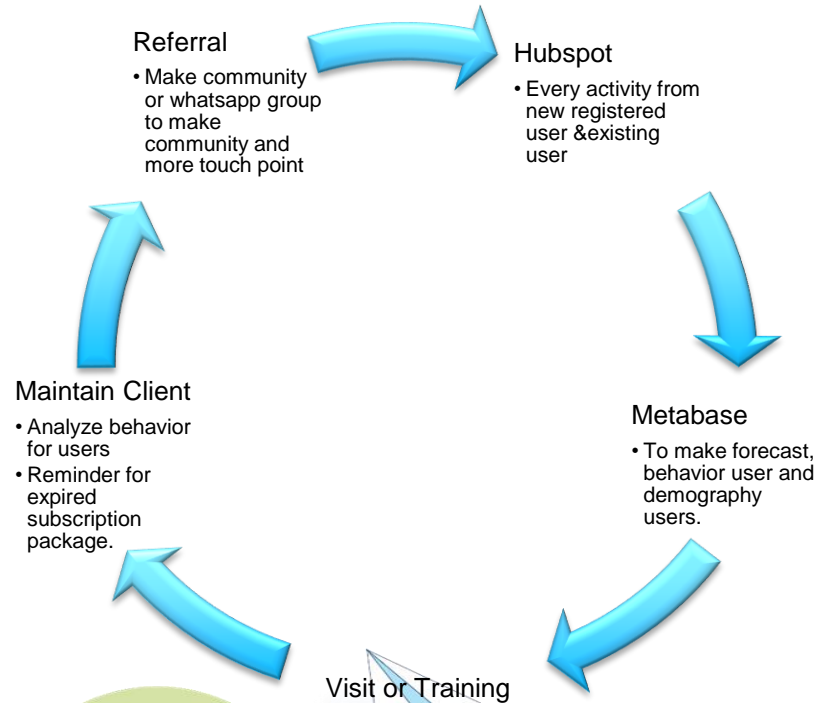
User Classification

Category	Free	Subscribe
Key Account (Active users and generate significant revenue to us).	Time to introduce digital payment to user.	Maximize every feature for paper.id (include digital payment, invoice and financing).
Users (regular users and user paper.id for fulfilled their needs).	Identify the problem of client and make encourage client to maximize paper.id	Encourage client to use paper.id because they have paid our service and give training onsite.

Role and Description



Tools to Reach Your Target



Reporting and Progress Update

Terms	Description
Weekly	Weekly report to internal division
Bi-weekly	Stakeholder meeting : if you're needed to join and have something to tell for another division.
Monthly summit	Every month with all of paper.id family, present what we've done in a month to another division.

KPI for Account Executive

- KPI is assessed for every end of the month (cut off period : for date 25th every month)
- KPI Components :
 - Attendance
 - Performance
 - Achievement:
 - SaaS
 - Digital Payment
 - Financing
 - X Factor



KPI Detailed

Aspek	Bobot	Skoring
Attendance	10%	1-5
Performance	40%	1-5
Achievement -SaaS -Digital Payment -Financing	40%	-Agregat dari (SaaS, Digpay dan Financing) -1-5
X Factor	10%	1-5

KPI Index

Kehadiran : Jumlah kehadiran harian dalam 1 bulan
(diluar meeting), kalau tidak ada meeting dan
tidak ada report dianggap alfa.

tidak ada alfa	5
alfa 1 dalam sebulan	4
alfa 2 dalam sebulan	3
alfa 3 dalam sebulan	2
alfa > 3	1

KPI Index

Kinerja

: Konsistensi jumlah telepon dan meeting AE. 1 meeting senilai 7 telepon.

≥ 320	5
280 - 319	4
240 - 219	3
200 - 160	2
< 160	1

KPI Index

SaaS
berdasarkan
jumlah deal

20	5
18 - 19	4
16 - 17	3
14 - 15	2
<14	1

Digital Payment berdasarkan
jumlah user yang tidak
menggunakan digipay kemudian
menggunakan digipay minimal 2
kali

5	5
4	4
3	3
2	2
1	1

Finance : Berapa banyak
klien yang berhasil di
disburse dananya

2	5
1	3

Introduction persona to users

- Introduce yourself as a representative from paper.id
- Say thank you to using paper.id as a platform for invoice.
- Find the information for how long they're using paper.id
(make them more confident that the person calling is a representative of paper.id).

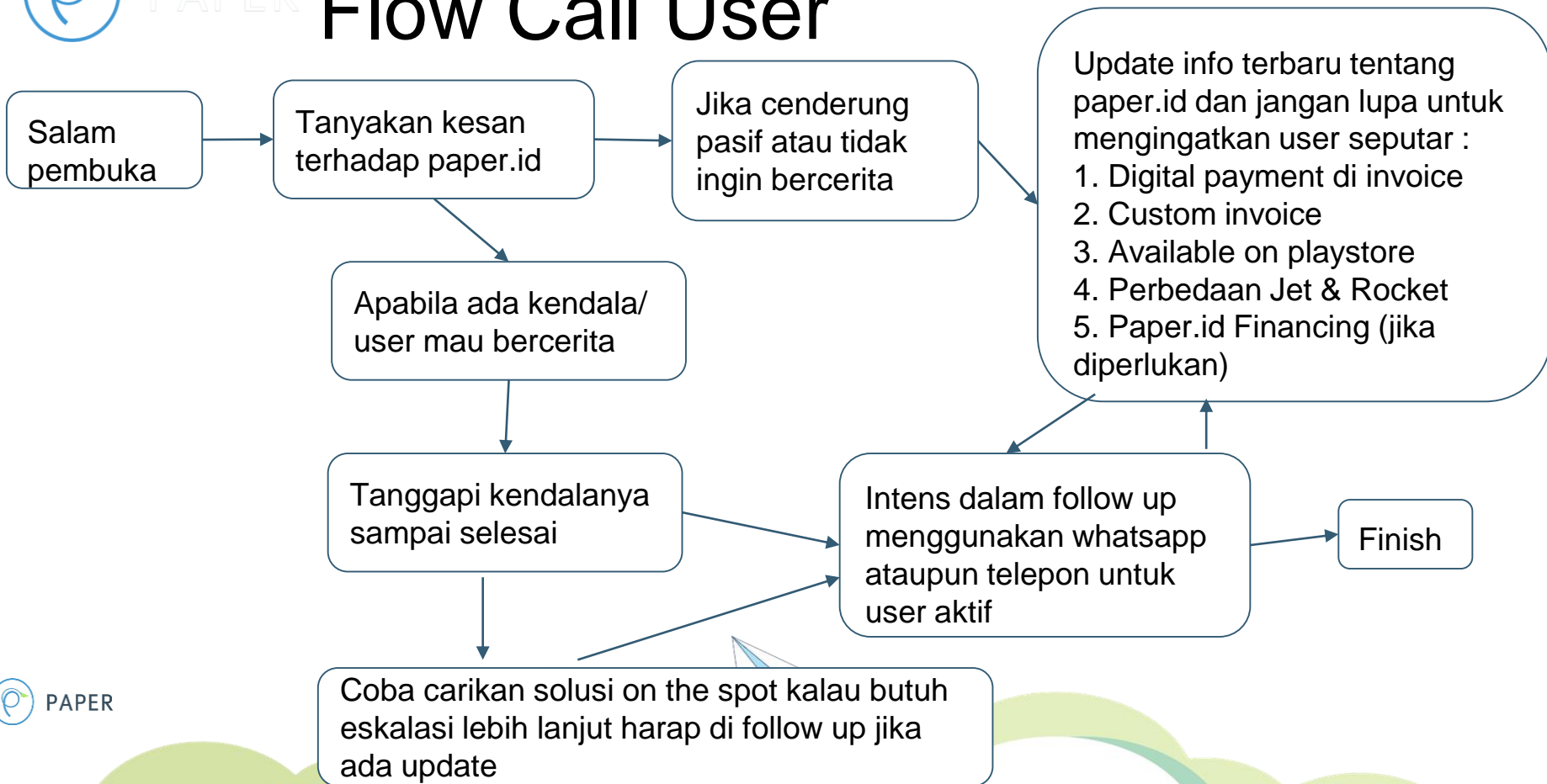




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Flow Call User

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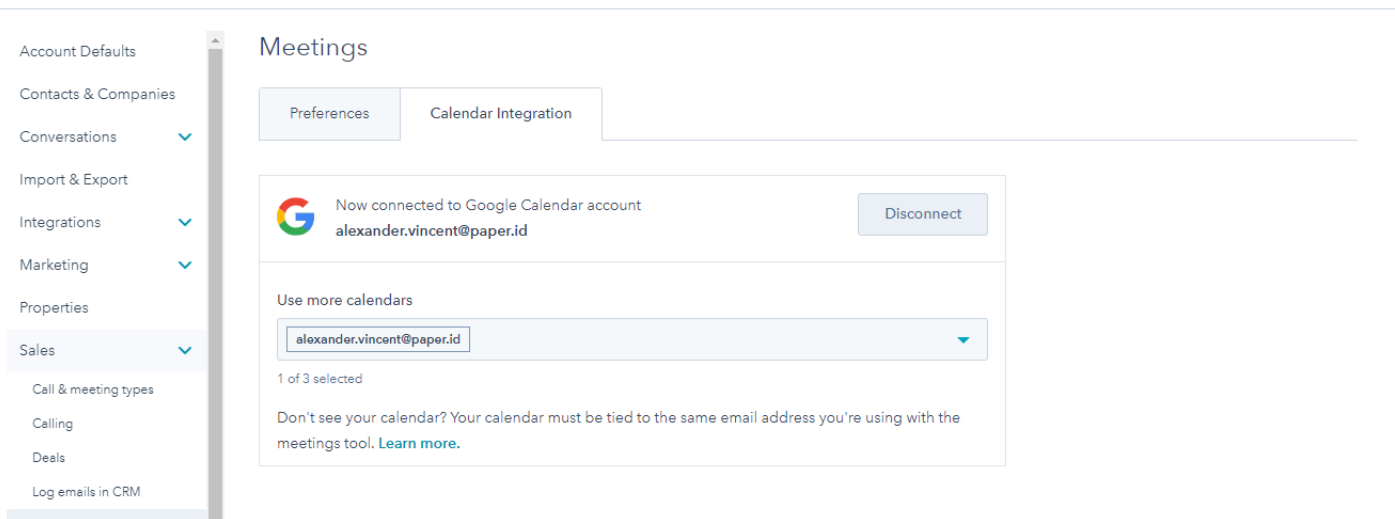
Analisa Kompetitor dengan Paper.id

Description	POS	Accurate	Jurnal	Paper.id
Online Basis	Yes	Yes	Yes	Yes
Pricing	250.000/ Month	2,4 Mio/ Year	600.000/Month	Start From 50.000/Month
Digital Payment	No	No	Yes	Yes
Financing	No	No	No	Yes
Competitive Advantage	Realtime cash transaction.	Online and Offline	Enterprise module, Bank Reconcillation.	Freemium Basis

How to Assign Your Meeting

- Integrate your Hubspot with Google Calendar**

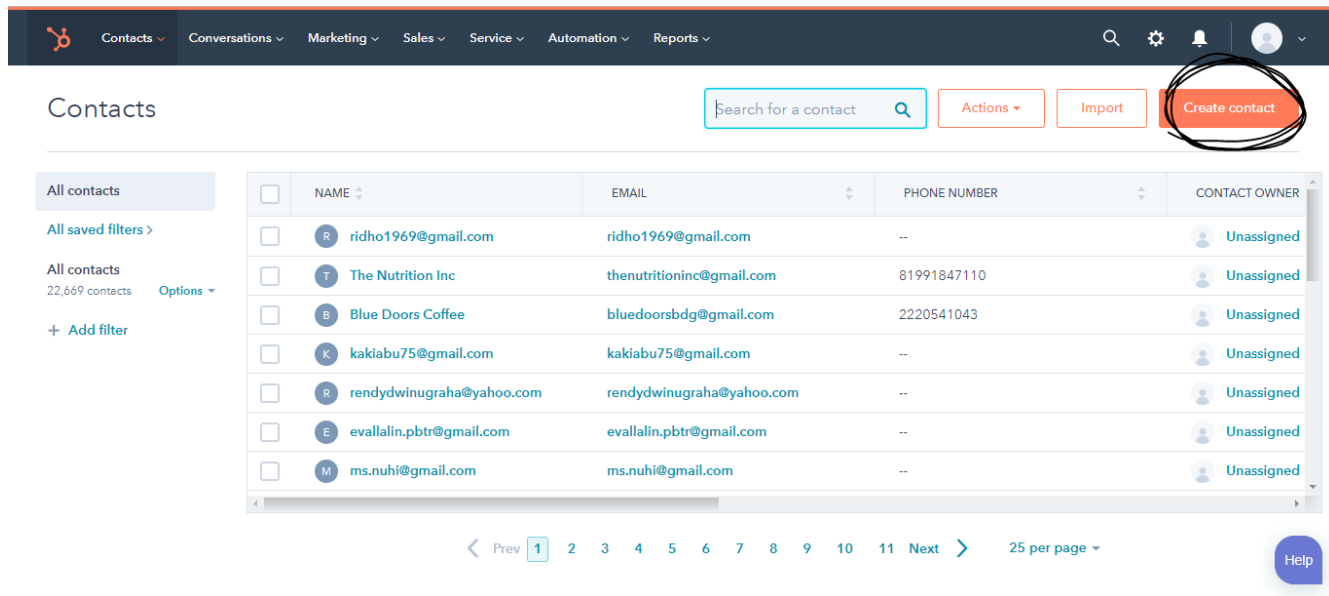
Settings



The screenshot displays the HubSpot Meetings settings interface. On the left is a sidebar menu with categories: Account Defaults, Contacts & Companies, Conversations, Import & Export, Integrations, Marketing, Properties, Sales, and a scroll indicator. The 'Sales' category is expanded, showing sub-items: Call & meeting types, Calling, Deals, and Log emails in CRM. The main content area is titled 'Meetings' and has two tabs: 'Preferences' and 'Calendar Integration'. The 'Calendar Integration' tab is active, showing a Google logo and the text 'Now connected to Google Calendar account alexander.vincent@paper.id', with a 'Disconnect' button. Below this is a section 'Use more calendars' with a dropdown menu showing 'alexander.vincent@paper.id' and a downward arrow. Under the dropdown, it says '1 of 3 selected'. At the bottom of this section, a note states: 'Don't see your calendar? Your calendar must be tied to the same email address you're using with the meetings tool. [Learn more.](#)'

How to Assign Your Meeting (2)

- Create contact from your hubspot



The screenshot shows the HubSpot interface with the 'Contacts' tab selected. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. A search bar and several action buttons are visible. The 'Create contact' button is circled in red. Below the navigation bar, the 'Contacts' section displays a table of contacts. The table has columns for NAME, EMAIL, PHONE NUMBER, and CONTACT OWNER. The first contact is 'ridho1969@gmail.com' with an 'Unassigned' status. The second contact is 'The Nutrition Inc' with an 'Unassigned' status. The third contact is 'Blue Doors Coffee' with an 'Unassigned' status. The fourth contact is 'kakiabu75@gmail.com' with an 'Unassigned' status. The fifth contact is 'rendydwingraha@yahoo.com' with an 'Unassigned' status. The sixth contact is 'evallalin.pbtr@gmail.com' with an 'Unassigned' status. The seventh contact is 'ms.nuhi@gmail.com' with an 'Unassigned' status. The table is paginated with 25 contacts per page.

Contacts

Search for a contact

Actions

Import

Create contact

	NAME	EMAIL	PHONE NUMBER	CONTACT OWNER
<input type="checkbox"/>	ridho1969@gmail.com	ridho1969@gmail.com	--	Unassigned
<input type="checkbox"/>	The Nutrition Inc	thenutritioninc@gmail.com	81991847110	Unassigned
<input type="checkbox"/>	Blue Doors Coffee	bluedoorsbdg@gmail.com	2220541043	Unassigned
<input type="checkbox"/>	kakiabu75@gmail.com	kakiabu75@gmail.com	--	Unassigned
<input type="checkbox"/>	rendydwingraha@yahoo.com	rendydwingraha@yahoo.com	--	Unassigned
<input type="checkbox"/>	evallalin.pbtr@gmail.com	evallalin.pbtr@gmail.com	--	Unassigned
<input type="checkbox"/>	ms.nuhi@gmail.com	ms.nuhi@gmail.com	--	Unassigned

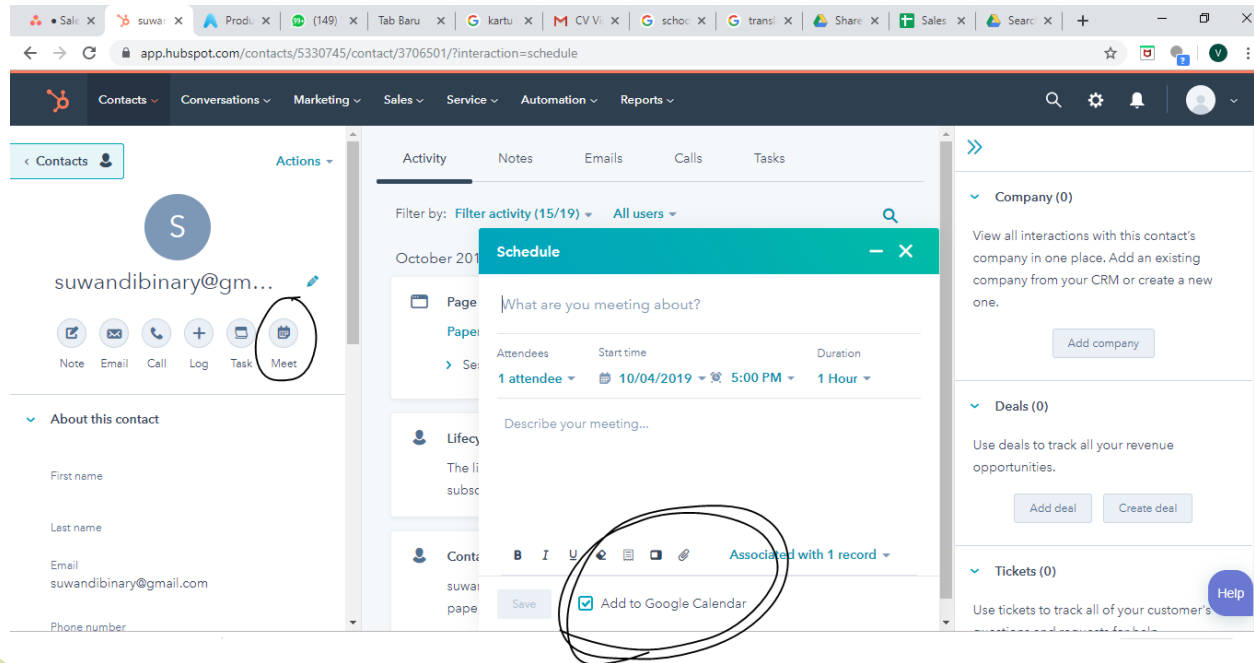
Prev 1 2 3 4 5 6 7 8 9 10 11 Next

25 per page

Help

How to Set Up Your Meeting

- Your hubspot will be connected to your google calendar everytime you set meeting from hubspot.



Trial Package

- Terms and Condition for Trial Package:
 - Fill NPS survey generated by system if user have criteria :
 1. Login with minimum twice a week.
 2. Do the activity of sending invoice.
- User can request manual to AE, and AE will follow up marketing to send NPS by manual (just give email to marketing).



Meeting tools

Demo Product	Setup Akun/ Training	First Pitching
Sales deck	www.paper.id / Apps	Sales deck
www.paper.id / Apps	User Guide	www.paper.id/Pricing

* notes :

1. Depends on behavior of users, if user has try our feature or not and sign up to paper.id or not.
2. Try to make more efficient time management to arrange many meetings in a day.

Flow Meeting (Demo Produk, Training User)

Demo Produk	Training User
1. Prepare Sales Deck	1. Simulate product in paper.id web browser or apps.
2. Simulate product in paper.id web browser or apps.	2. Ask the flow of business.
3. Ask about the clarity of product use	3. Give input related about the business that they've started.

Another Task

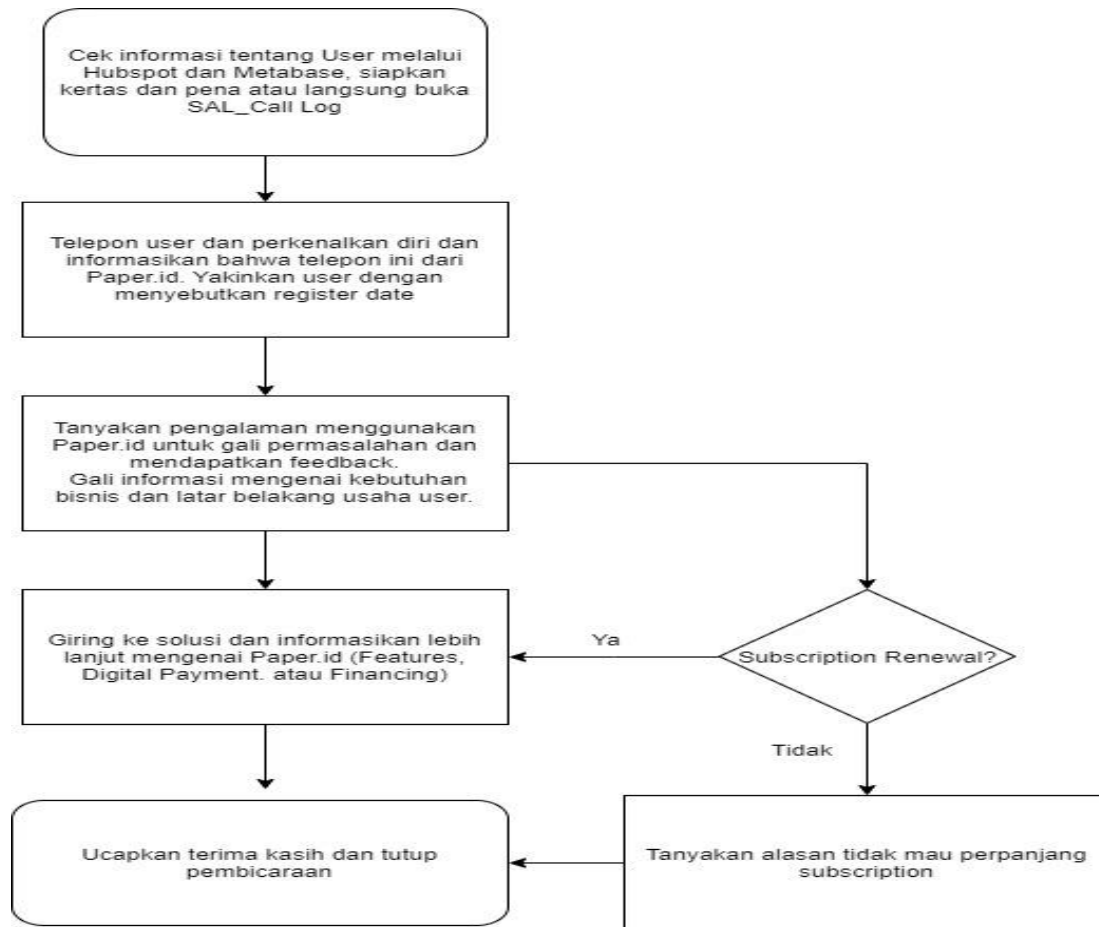
Name	Folder/Link
Most Wanted Feature (from Product Division)	https://drive.google.com/open?id=1sGJ8mfPejIMkaiNLqIS1UBG-gSztDurhoyZ_njfWvGs
Churn Subs User Calculation	https://drive.google.com/open?id=1Gq0a-ytsZOko1DNMxMM2-NNebO4rdSuR
Weekly report	https://drive.google.com/open?id=1gBKXdJRbHFHe05IRVAWldc_5obplcn31iP6OBMkEX1s

Must to Do:

- Users Subscription : 20 users/ Month.
- Call Duration 5-10 minutes depends on the user, make sure your explanation has clear and easy to understand by user.
- Effectively starting time to call 10.00 AM – 17.30 AM
- 1 meeting : 7 success call
- Call component:
 - Hubspot
 - Subscription end date
 - Retention call
 - Etc



Flow Call User in General



Information Check Before Call User

Company Data Check



SALES



This question is written in SQL.

Company name

USAHA BERKAH JA' x

User name

AAAAAAAAAAAAAAAA x

User email

AAAAAAAAAAAAAAAA x

Company email

AAAAAAAAAAAAAAAA x

VISUALIZATION



Table v



Refresh

Company ID	Company Name	Company Email	Company Phone	User Name	User Phone
93b63900-c300-11e9-bf66-ebbf5f4e0a27	Usaha Berkah J...	meristashela@gmail.com	083870044564	Merista S...	81318339483

Showing general information about company ID ,Company and etc. Can be useful for your information before call user.



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User Data

User Data



This question is written in SQL.

Company email

kamu@email.com



OPEN EDITOR



VISUALIZATION

Table



Refresh

Showing 1 row

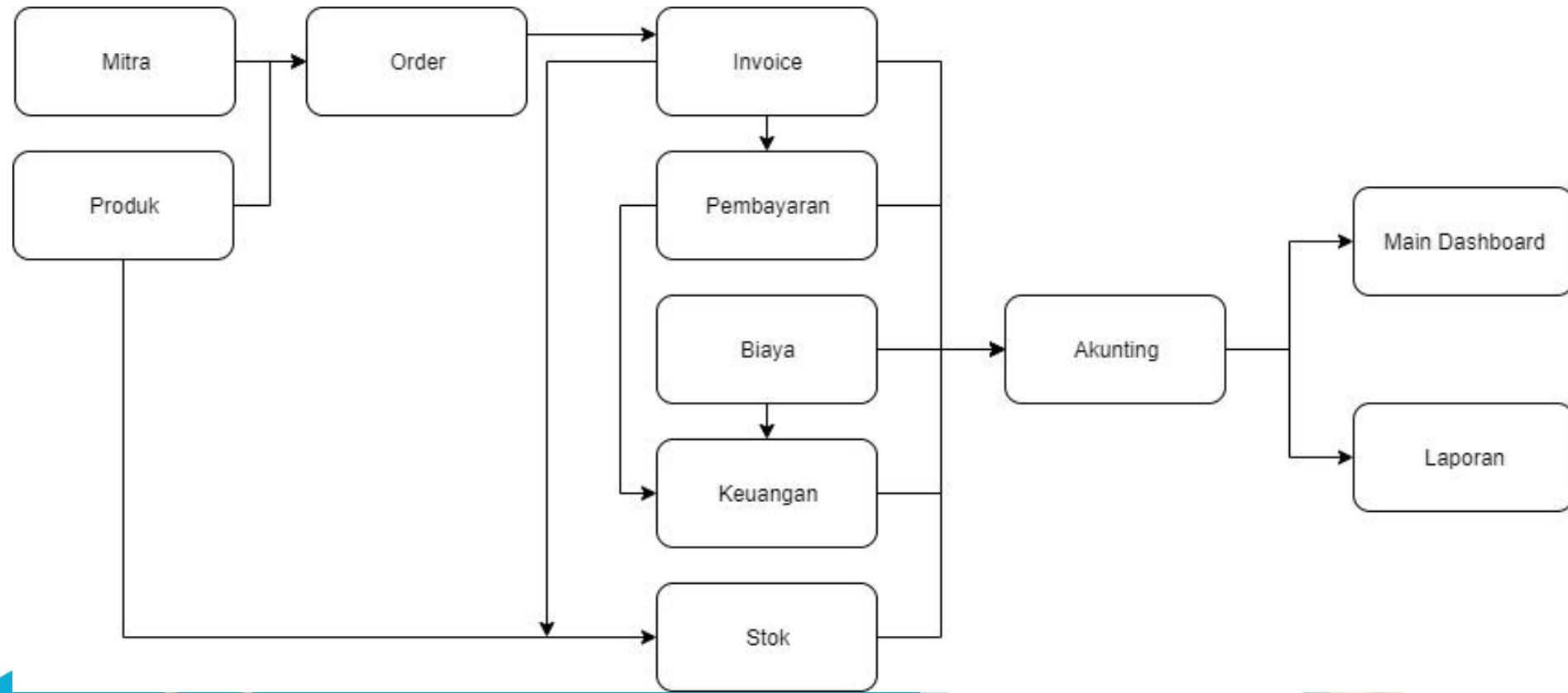


Last Login	Company ID	Company Name	Company Email	Company Phone	Company Created
Monday, September 2, 2019 12:00 AM	92e48e20-2952-11e9-a9c4-43e71699e0ae	CV cahaya utama	kamu@email.com	081xxxxxxxxxxx	Tuesday, February 5, 2019 2:30 PM

Detailed information about user last login and last login and activity for selected user and when they've started using paper.id

Note : Crosscheck with hubspot and SAL_Call log for get further information about user subs and if they've called before.

Interaction with Paper.id Dashboard Module

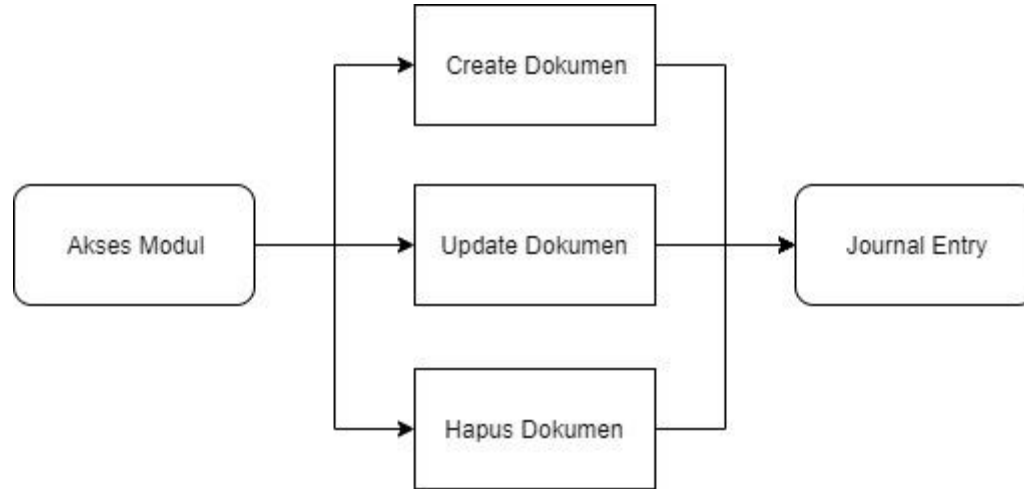


Explanation

- Mitra akan terkait dengan Order, Invoice, dan Laporan.
- Produk berkaitan dengan Order, Invoice, Stok, dan Laporan.
- Order bisa diproses menjadi Invoice.
- Invoice berkaitan dengan Pembayaran, Akunting, dan Stok.
- Pembayaran berkaitan dengan Keuangan dan Akunting.
- Biaya berkaitan dengan Keuangan dan Akunting.
- Keuangan berkaitan dengan Akunting.
- Stok berkaitan dengan Invoice, Produk, dan Akunting.
- Seluruh modul yang ada jika digabung akan menghasilkan output yang dapat dilihat di Main Dashboard dan Laporan.



Document Flow to Journal Entry



Explanation

- The module that we access will generate a document and automatically print the journal entry.
- Changes in the document will have implications for the journal entry as well.
- Likewise, if a document is deleted, the journal entry is also deleted, followed by adjustments, for example when we delete a sales invoice, the revenue transactions and business receivables are also lost. Another example is if we delete receipts from payment receipts, cash / bank journal entries that had already been increased and accounts receivable that were reduced will be deleted.



Interaction Module and Document with Accounting System

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