Using the Sales Success Plan Dashboard

Target release	Summer 2013
Theme	
Document status	DRAFT
Document owner	Ed McAdoo
Designer	@George Kenessey
Developers	
QA	

Goals

Background and strategic fit

Assumptions

Requirements

#	User Story Title	User Story Description	Priority	Notes
1	Display Chatter Profile info of related Seller	The page should display the chatter profile photo of the related Seller		In the 1st box you will see: • Chatter profile photo • Seller name • Annual Sales Objective from the Success Plan
2	Display Role Hierarchy info	The page in box 2 should display info from the Role Hierarchy as well as Plan start and end dates.		• Can we change the background color of an Inactive plan?

Filter Results

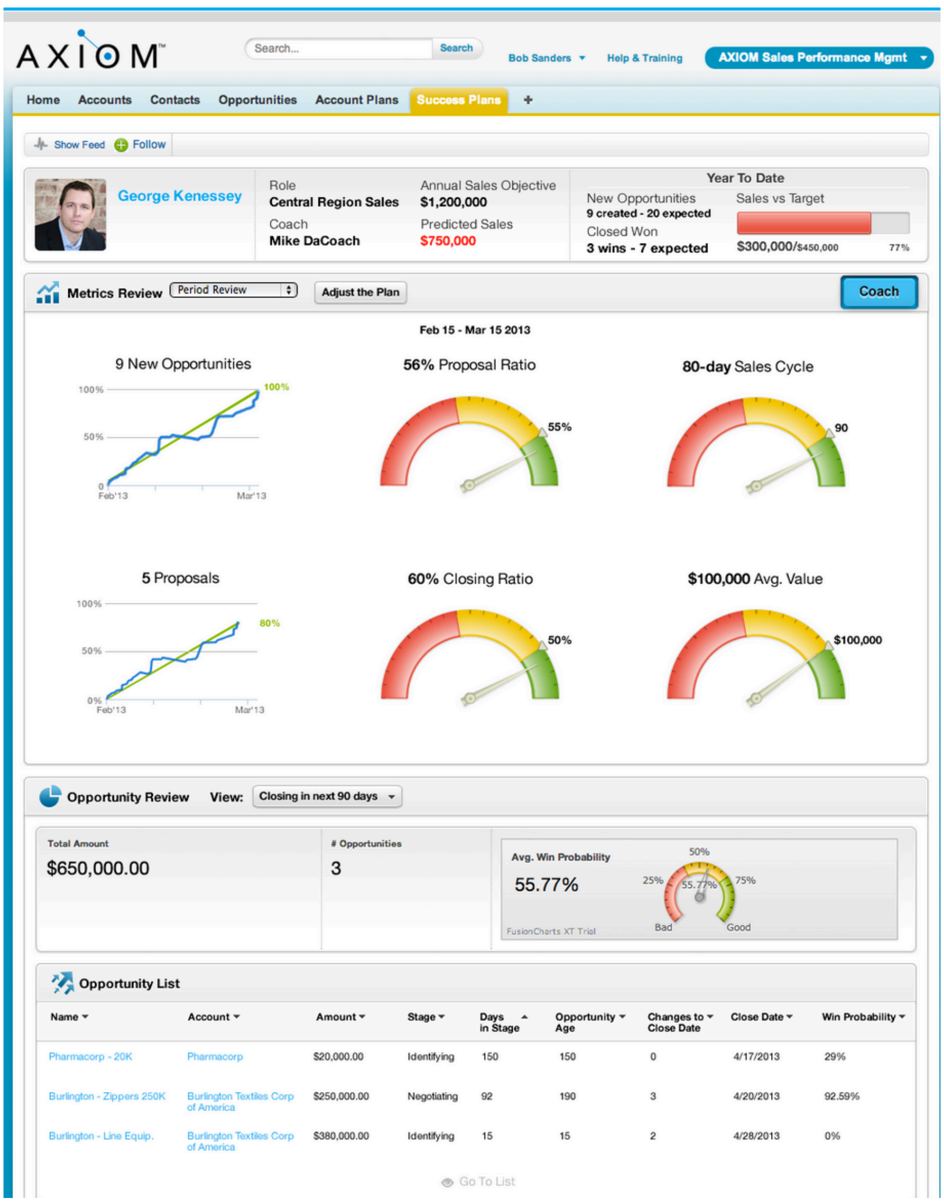
- [ ] Type task here and @mention a user to assign them the task

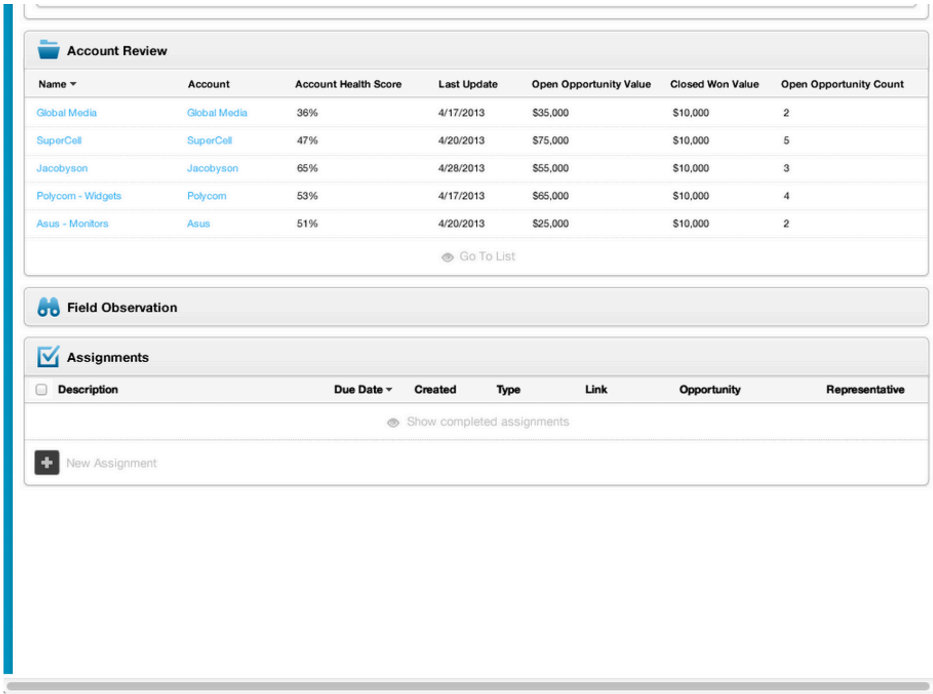
Create a New Issue

3	Display Year to Date progress against the plan metrics	The page in box 3 should display the following: 1. The number of actual closed-won opp's vs the number that should have been closed-won 2. The actual number of new opp's created vs the number that should have been Created. 3. Display a horizontal bar chart of closed won value vs the value where they should be at this time. The bar char will be red if the value is less than where it should be and green if it is higher than what it should be.		1. Closed-Won Expected = Sales(#) per period for this Success plan * Number of Periods passed 2. New Opportunities Expected = New Opps per period for this Success plan * Number of Periods passed. 3. **COAC-129** - Display Year to Date progress against the plan metrics **COMPLETE**
4	Display a button so the Seller or Manager can launch a page to Adjust the Plan	Pressing this button should take the user to the Adjust the Success Plan page.		The image below shows a drop down arrow on the right side of the Adjust button, this arrow is not needed.
5	Press a button to view current period gauges	In the Metrics Review box display a Button to load the 6 gauges and to display the metrics of the current period. By Default the gauges should display the "Current Period" data and the "View Current Button" should be highlighted.		
6	Press a button to view historic periods and trendlines	In the Metrics Review box display a series of buttons to load the 6 historic trendline charts. The user should have to choose from 1 of 4 buttons, 4, 8, 12, 24. Depending on which button they press the historic trendline charts will be rendered to reflect that number of periods. If the Period Type = "Quarterly", display only 4 and 8. We have to display the historic data for 2 Years Max.		See the child page for additional detail on this sub process.

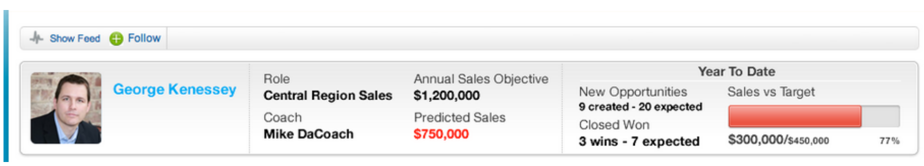
7	Display the gauges with the current period data	Logic to retrieve the data: 1. Get the daily metrics data of this seller from "Actual Metrics" object for the Current Period. 2. Find the Average of each metric from the above data set. While presenting the data for the current period		
8				
9				
10				
11				

User interaction and design

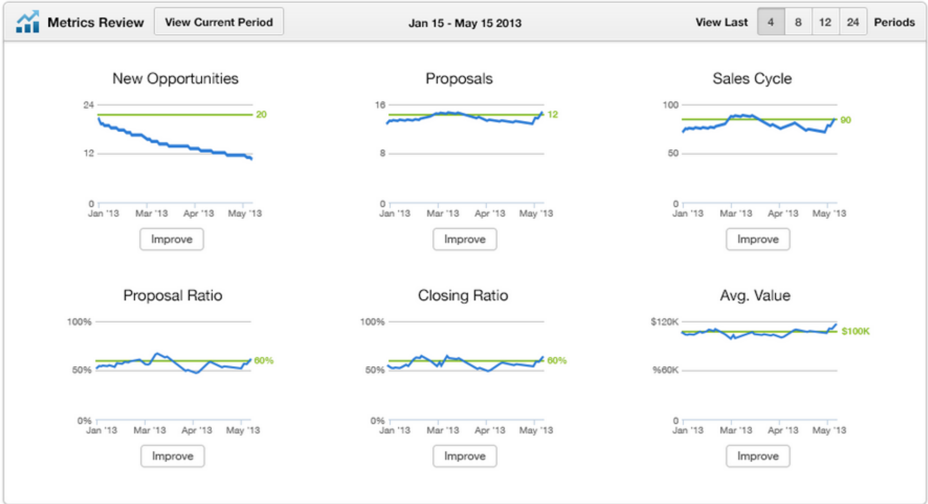




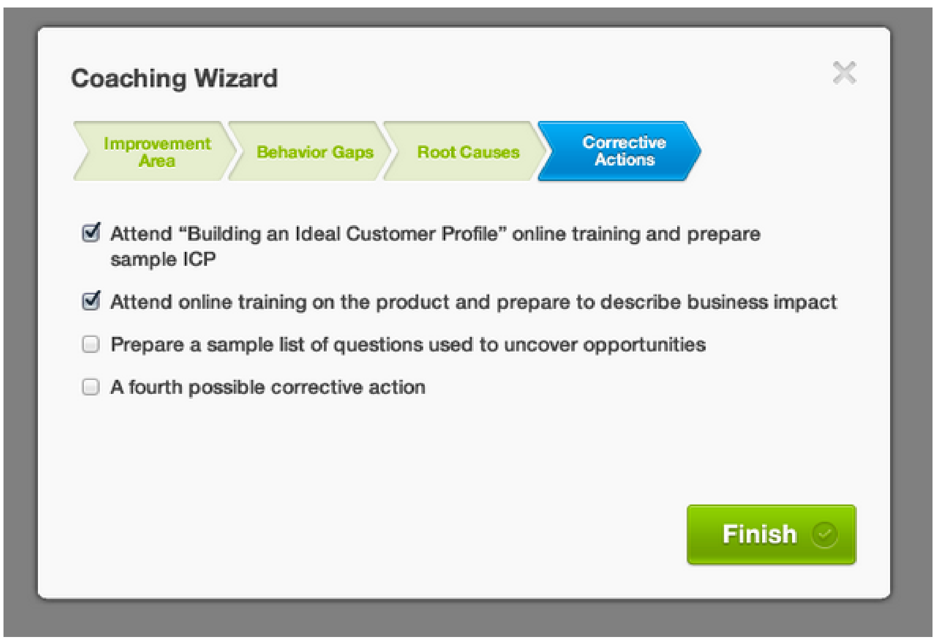
Name	Account	Account Health Score	Last Update	Open Opportunity Value	Closed Won Value	Open Opportunity Count
Global Media	Global Media	36%	4/17/2013	$35,000	$10,000	2
SuperCell	SuperCell	47%	4/20/2013	$75,000	$10,000	5
Jacobyson	Jacobyson	65%	4/28/2013	$55,000	$10,000	3
Polycom - Widgets	Polycom	53%	4/17/2013	$65,000	$10,000	4
Asus - Monitors	Asus	51%	4/20/2013	$25,000	$10,000	2

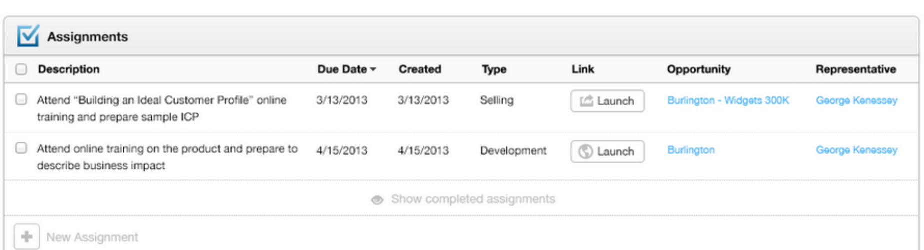


The version showing George Kenessey is the correct display. The version showing David Director is incorrect and should not be considered, except for the manner in which it display aggregated values from the rolled up Success plans. Team should be displaying the Role from the role hierarchy and Coach is the Manager that seller reports to as identified in the role hierarchy. Annual Sales Objective is carried forward from the Success Plan. Closed is a count of the number of Closed Won opportunities YTD versus the number from the plan where he should be YTD. Same applies to New Opportunities. Example - Success Plan states that he should be creating 4 New Opportunities per month and it is now March 31 and he has created 10 New Opportunities, in that instance the header would display 10/12. Example continued, If the Success Plan states that he should be Closing (Won) 2 opportunities per month and it is now June 30 he should have Closed (Won) 12. His actual is only 9 Closed (Won) so the header should display next to Closed (Won) 9/12.

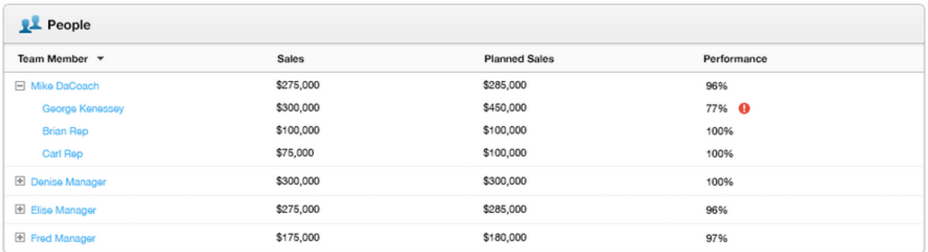


When the User selects one of the values 4, 8, 12, 24 then the application will display the charts shown above and the data will be limited to the number of Periods that was selected. A Period for this Seller is defined on the Success Plan. If the Seller has 12 Periods in his plan then a Period equals a Month. So if the User selects 4 then 4 Months of data would be displayed in this chart. If the user has 52 Periods in his Success Plan then a Period is equal to a week so if the user selects 12 then this chart will display 12 weeks worth of weekly data.





Assignments are Derived from the Coaching Wizard.



People

Team Member	Sales	Planned Sales	Performance
Mike DaCoach	$275,000	$285,000	96%
George Kenessey	$300,000	$450,000	77%
Brian Rep	$100,000	$100,000	100%
Carl Rep	$75,000	$100,000	100%
Denise Manager	$300,000	$300,000	100%
Elise Manager	$275,000	$285,000	96%
Fred Manager	$175,000	$180,000	97%

People are derived from the Role Hierarchy of the Organization. If the User is a Manager then the People Section will be added to his display and anyone underneath him in the Role Hierarchy will be added to the section. Sales indicates YTD Closed Won amounts for Sellers and the aggregated value of subordinates for a Manager. Planned Sales should be renamed to Open Pipeline and display the amount of Open Opportunities from the sellers pipeline that have a Close Date in the current year (year is based on the company year setting). Performance is the ratio of YTD Closed Won value versus where that Seller should be according to his Success Plan. Example if the Success Plan says that he should have Closed Won $100,000 per month and we are at June 30 then he should be at $600,000 YTD so we need to compare his actual to that number. If his actual is $450,000 Closed Won and his Plan called for $600,000 then his performance is 75%

Questions

Below is a list of questions to be addressed as a result of this requirements document:

Question	Outcome
Ed McAdoo Req#3: I think the metrics for "Closed" should consider "Closed-Won". Please confirm this and also the notes for that.	
Ed McAdoo Req#5: Is the logic to evaluate the data for gauges correct	
In the screenshot please provide exact logic on which data is displayed in every section. See the Manager screenshot of David Director, it is slightly different than a seller view like that of seller George Kenessey. • Representative -	

Not Doing