

Adjusting the Sales Success Plan

Target release	Summer 2013
Theme	
Document status	DRAFT
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Developers	Valery Dvornichenko
QA	Anna Mozgo

Goals

- Give the Sales Rep and the Sales Manager a single page to view their progress against an established plan and to determine what corrective actions to take in order to get back on plan if they have deviated.

Background and strategic fit

Assumptions

- A user should not be able to edit his/her own plan. The plan, once created, can only be adjusted by the person above the User in the hierarchy.

Requirements

#	User Story Title	User Story Description	Priority	Notes	Date of latest Note	Issue
1	Ability to Adjust the Plan	<ul style="list-style-type: none">On click of "Adjust Plan" button, display the plan details right in the Metrics Review section, as shown in the attached screen shot, by default.				<div>COAC-28 - Adjust a Plan: Ability to Adjust the Plan COMPLETE</div>

Filter Results

☒ Naren Somisetty needs to add technical notes

Create a New Issue

2	Save Adjustments to the Primary Plan	<ul style="list-style-type: none"> Light box with the following message should show up: <p>" Are you sure to update the Current Plan with your adjustments?"</p> <p>On Click of Save should update the current Success plan with the adjustments.</p> <ul style="list-style-type: none"> Do NOT allow to save the adjustments to primary plan, if the Adjusted Annual Sales Objective' is different from the Plan Annual Sales Objective. <p>Alert the user with the following light box message:</p> <p>"Adjusted Annual Sales Objective should be same as the Plan Sales Objective. Please adjust other metrics using the Sliders to adjust the Annual Sales Objective."</p> <ul style="list-style-type: none"> Seller should NOT be able save the adjustments, but should be able to make the adjustments and see the impact. <p>Only Seller's coach should be able to SAVE the adjustments.</p>				<div> COAC-27 - Adjust a Plan: Save Adjustments to the Primary Plan COMPLETE </div> <div> COAC-39 - Adjust a Plan: Sellers should not save the adjustments, only Coaches can do this. COMPLETE </div>
3	Ability to Adjust the Metrics (Pinning and Sliders)	<ul style="list-style-type: none"> In the Adjust plan, User would like to view the impact on specific metric, due to changes in other metric values. 				<div> COAC-52 - Ability to Adjust the Metrics (Pinning and Sliders) COMPLETE </div> <div> COAC-37 - Adjust a Plan: Create 'Adjusted' column in the table COMPLETE </div>

User should NOT be allowed to edit any fields in the Adjusted column manually, values can be changed using the slide bars only. User would select the Metric for which impact needs to be analyzed, by selecting the radio button in the "Pin" column.
Ex: To see the impact on Annual Sales Objective due to changes in other metrics, user would pin the "Annual Sales Objective" row.

When the value of specific metric is being changed using the Slide bar, the pinned metric should be evaluated and value and corresponding position should be adjusted accordingly.

Ex: Annual Sales Objective row is pinned and Average Value is changed using Slide bar, then Annual Sales Objective needs to be evaluated based on the new Average Value (and the rest of the Metric fields). Adjusted "Annual Sales Objective" value and the slide bar position reflects the newly evaluated value.

		<ul style="list-style-type: none"> Sliders should allow to adjust the following Metrics <ul style="list-style-type: none"> Annual Sales Objective Average Value Closing Ratio Proposal Ratio New Opportunities per Period When a specific slider is PINNED, that slider should be locked and rest of the sliders allow to modify the corresponding Metric PINNED metric should be evaluated real-time, while other metrics are being adjusted using the respective sliders (use the original definition of each of these metrics defined in the "Create Success Plan" Page) 			
4	"Adjust Success Plan" details should be displayed in "Metrics Review" Section	<p>Adjust Plan details should be displayed in the "Metrics Review" section as mentioned in the first screenshot below.</p> <p>No need for separate VF page for Adjust Success plan</p>	<p>Marina Kryuchko Andrey Bosak Jan a Kodel</p> <p>Please note the changes in the screen flow for "Adjust Success Plan".</p>	<div> <div>COAC-28 -</div> <div>Adjust a Plan: Ability to Adjust the Plan</div> <div>COMPLETE</div> </div>	

5	Show bar charts for Predicted and Adjusted values	<p>Total bar length for these two bars should be MAX of Predicted Sales and Adjusted Sales. Bar Length exceeds the goal, if either of the Predicted and Adjusted Sales > Plan Sales.</p> <p>In both Predicted and Adjusted bars, Goal should be marked based on the Plan Sales.</p> <p>Predicted Horizontal Bar: The ratio at the end of the bar = Predicted Sales/ Plan Sales. End of the Yellow bar should reflect the Predicted Sales Value. Mark the Actual Sales based on the Actual Sales.</p> <p>Adjusted Horizontal Bar: The ratio at the end of the bar = Adjusted Sales/ Plan Sales. End of the Green bar should reflect the Adjusted Sales Value. Mark the Actual Sales based on the Actual Sales value.</p>				<p>COAC-30 - Adjust a Plan: Show bar charts for Predicted and Adjusted values COMPLETE</p>
6	Adjust a Plan: Show 'Peer Average' Metrics	Peer Average Over last 12 Months from Actual Metrics. This is same as C OAC-19 (Peer Average while creating new plan)				<p>COAC-36 - Adjust a Plan: Show 'Peer Average' Metrics COMPLETE</p>
7	Adjust a Plan: Show the Latest Actuals data in Actual Column	Show the Latest entry from "Actual metrics" for the Seller.		This Metric is used in the 'People Section' as well.		<p>COAC-34 - Adjust a Plan: Show the Latest Actuals data in Actual Column COMPLETE</p>
8	Adjust a Plan: Show the Primary Plan Metrics in "Plan" Column	Show the Active Primary Plan Metrics in the Plan Column				<p>COAC-31 - Adjust a Plan: Show the Primary Plan Metrics in "Plan" Column COMPLETE</p>

9	Adjust a Plan: Show the 'Predicted Metrics' for the whole Year	<p>Show the Predicted Metrics for the whole year, by extrapolation of Actual Sales as of now.</p> <p>All the Metrics will be same as the metrics in the 'Actual' Column, except the following.</p> <p>1. # of Periods: Same as the # of Periods from Plan 2. Annual Sales Objective: This is extrapolation of the Actual sales for the Year, based on the Actual Sales per period as of Now. Ex: As of March 31st (i.e 3 Periods in the Year) Actual Sales are \$100,000. So, at this rate, the predicted sales for the year would be \$400,000 (i.e at this rate, during the rest of the year, we can have sales of \$300,000 more, so total sales would be \$100,000+\$300,000 = \$400,000). This is same as the Predicted Metrics in the 'People Section' (COAC-53).</p>				<div>COAC-35 - Adjust a Plan: Show the 'Predicted Metrics' for the whole Year <div>COMPLETE</div></div>
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10	Adjust Plan: Capture the comments	<p>System should allow to capture the comments while adjusting the plan.</p> <p>While editing blank text area shows up. On save, concatenate the current comments with the existing comments.</p> <p>Newly added comments should show first and the existing comments should be appended at the bottom.</p> <p>Here is the format of the text stored in the Comments field:</p> <p>Added by <Coach Name> on <Today's date></p> <p>Closing Ratio needs to be improved.</p> <p>Added by <Coach Name> on 07/15/2013</p> <p><Here are the comments Added on 07/15/2013></p> <p>Added by <Coach Name> on 04/15/2013</p> <p><Here are the comments Added on 04/15/2013></p> <p>Put the comments field, just below the Predicted and Adjusted bars.</p>		<p>Marina Kryuchko Please note this requirement. JIRA issue will be created once the technical issues are resolved.</p> <p>Andrey Bosak</p>		
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User interaction and design

Bob Sanders
Help & Training
AXIOM Sales Performance Mgmt

Home
Accounts
Contacts
Opportunities
Account Plans
Success Plans
My Training
+

Show FeedFollow

Bob Sanders

Role
Central Region Sales
Coach
Mike DaCoach

Annual Sales Objective
\$1,200,000
Predicted Sales
\$750,000

Year To Date
New Opportunities
9 created - 20 expected
Closed Won
3 wins - 7 expected
Sales vs Target
\$300,000/\$450,000 77%

Metrics Review
Period Review
Adjust the Plan
Coach

Insert Plan Name Here!
CancelSave

Item	Plan	Actual	Predicted	Peer Average	Adjusted	Pin	
Annual Sales Objective	\$1,200,000	\$250,000	\$750,000	\$975,000	\$1,223,438		<div> <div></div> <div></div> <div></div> </div>
Periods	12	3	9	9	9		
\$ per Period	\$100,000	\$83,333	\$83,333	\$103,125	\$135,938		
Average Value	\$25,000	\$27,777	\$27,778	\$25,000	\$25,000		<div> <div></div> <div></div> <div></div> </div>
Closes per Period	4	3	3	4.125	5.44		<div> <div></div> <div></div> <div></div> </div>
Closing Ratio	25%	20%	20%	25%	25%		<div> <div></div> <div></div> <div></div> </div>
Proposals per Period	16	15	15	16.5	21.75		
Proposal Ratio	75%	75%	75%	75%	75%		<div> <div></div> <div></div> <div></div> </div>
New Opportunities per Period	21.33	20	20	22	29		<div> <div></div> <div></div> <div></div> </div>

Actual: \$250,000

Predicted

Adjusted

\$750,000 / \$1,200,000

\$750,000 / \$1,200,000

Goal: \$1,200,000

Questions

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

Question	Outcome
<p>Ed McAdoo</p> <p>Do we need to store multiple Adjustments to the Successplan with some notes associated with the adjustments? I have created "Core Metrics" as child Object to "Success Plan" to support this based on our earlier design discussion with Appiphony.</p> <p>During the last conversation you mentioned that we dont need to have this feature. Before i remove that object, i would like to get confirmation from you.</p>	<p>No need to store multiple adjustments. So no need for Core Metrics object.</p>
<p>Ed McAdoo</p> <p>Note on Adjustment and Prior Adjustments:</p> <p>Is this one Text field with the running notes on multiple adjustments, each note separated with Timestamp?</p> <p>Ex:</p> <p>Naren Somisetty 06/27/13 1:00 PM</p> <p><Adjustment Notes entered on 06/27 here></p> <p>Naren Somisetty 05/25/13 1:00 PM</p> <p><Adjustment Notes entered on 05/25 here></p>	<p>New Field "Adjustment Notes" is used to store the notes on multiple adjustments. This field stores the free text as entered by the user.</p>

<p>Naren Somisetty</p> <p>Please provide list of formulas to count on Predicted values in the table.</p>	<p># of Periods Left = Total Periods in the year - # of Periods passed in the current year</p> <p>Annual Sales Objective = (Current Sales in the year so far/ # of Periods passed) * # of periods left.</p> <p>Based on these two values, rest of the metrics will be evaluated by following the formulas defined in the tabe in Creating the Sales Success Plan page.</p>
<p>Naren Somisetty</p> <p>Please provide list of formulas to count on Adjusted values in the table.</p>	<p>Formulas for this are same as the one defined in the table in Creating the Sales Success Plan .</p> <p>In this case, based on the values for the rest of the fields, unknown field value will be evaluated following the same formulas.</p>
<p>Naren Somisetty</p> <p>Is COAC-22 issue still actual? It looks like it's crossed out in the requirements table below.</p> <p>If it is still actual, do we need to add a Success Plan Name to the Success Plan Creation? Will the user enter the name himself or it will be auto-generated (for example "{Seller Name} {Start Date} {isActive} {isSecondary}")? Value entered or generated for this field will be displayed on the Success Plan Adjustment page.</p>	<p>COAC-22 is No longer needed.</p>
<p>Naren Somisetty</p> <p>As we understand the Success Plan Adjustment Page will not be a separate page, but it will be a component of the Success Plan page. Is this decision final and won't change?</p>	<p>Yes. Decision is final.</p>
<p>Naren Somisetty</p> <p>As we know you would like the Seller to whom this plan is assigned and users below him in the hierarchy not to be able to adjust the plan. Does it mean that they will not be able to Edit it or they will not be able to even View it?</p>	<p>Seller should NOT be able save the adjustments, but should be able to make the adjustments and see the impact.</p> <p>Only Seller's coach should be able to SAVE the adjustments.</p>

Not Doing