



Unified Strategic Planning Workflow: Design Guide

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Executive Summary

Current State: Two separate workflows (Territory Planning + Account Planning) with significant data overlap but different owners (CSE vs CAM)

Recommended State: Single “Strategic Planning” workflow with role-based views and collaborative ownership

Key Industry Insights (2025-2026)

Trend	Source	Implication
Unified Territory Management	Salesforce, Persistent	Single source of truth for all planning data
AI-First Planning	Gainsight Copilot, ChurnZero Consult	Auto-generate plans from customer data
Outcome Metrics > Activity Metrics	2026 CS Planning Guide	Focus on value realisation, not health scores
Real-time Collaboration	Totango, Figma model	Presence indicators, live editing, shared portals
Revenue Engineering	Industry shift	CS as growth driver, not support function



Recommended Unified Workflow Structure

5 Steps (Consolidated from 7 + 5 = 12 combined)

” UNIFIED STRATEGIC PLANNING WORKFLOW UNIFIED

Step 1: CONTEXT & SELECTION CSE/CAM selects (role auto-detected from login) Territory auto-loaded based on assignment Client selection (single for Account Plan, all for Territory) Plan Type toggle: “Territory Overview” | “Account Deep-Dive” ChaSen: “Based on your portfolio, I recommend focusing on [Client] - here’s why...” (priority suggestion)

Step 2: PORTFOLIO & TARGETS [Territory View] Multi-client portfolio grid with targets [Account View] Single client snapshot + account target Auto-populated: ARR, NPS, Health, Segment, Support SLA Sales Targets: FY quota, current coverage, gap to target Pipeline Summary: Total pipeline value, weighted forecast ChaSen: Auto-suggest target allocations based on segment, historical performance, and growth potential

Step 3: PIPELINE & OPPORTUNITIES Opportunity Management: Add/Edit/Remove opportunities Per opportunity: Value, Stage, Probability, Close Date MEDDPICC scoring per opportunity (8 criteria) Dynamic Forecast: Updates instantly when opportunities change Coverage Calculator: Pipeline / Gap = Coverage ratio Stakeholder mapping linked to opportunities ChaSen: Auto-suggest opportunities from NPS themes, meeting notes, product gaps; pre-fill MEDDPICC from data

Step 4: RISKS & ACTIONS Risk assessment (portfolio-level OR account-level) Revenue-at-risk calculations linked to opportunities Action plan with owners, dates, priorities What-if modelling: “If we lose [Opp], forecast drops to...” ChaSen: Predictive churn indicators, auto-generate actions with Voss scripts, suggest recovery stories from Story Matrix

Step 5: REVIEW & FORECAST Summary: Target vs Forecast vs Committed Forecast confidence bands (best/likely/worst case) Real-time collaboration: CAM + CSE co-editing Comments & approvals workflow Export: PDF, Excel forecast model, Success Snapshot ChaSen: Generate executive summary, highlight gaps, suggest Next Best Actions to close coverage gap

”

Integrated Sales Methodologies

The unified workflow incorporates five proven sales methodologies through the **A.C.T.I.O.N. Framework(TM)**:

The A.C.T.I.O.N. Framework(TM)



Stage	Name	Methodology	Application in Workflow
A	Assess	Gap Selling (Keenan)	Step 2: Portfolio & Health Snapshot
C	Connect	Never Split the Difference (Voss)	Step 3: Relationships - Tactical empathy with stakeholders
T	Transform	Building a StoryBrand (Miller)	Step 4: Risks - Position client as hero, Altera as guide
I	Identify	Black Swans (Voss)	Step 3: Uncover hidden motivators
O	Orchestrate	What's Your Story (Wortmann)	Step 5: Reference selling with Story Matrix
N	Navigate	Calibrated Questions (Voss)	All steps: Guide to "That's Right" moments

Methodology Integration by Step

''' Step 1: CONTEXT & SELECTION □□□ No methodology - pure data selection

Step 2: PORTFOLIO & HEALTH SNAPSHOT □□□ Gap Selling: Current State -> Gap -> Future State analysis □□□ Value-Velocity Matrix: Quadrant assignment (Accelerate/Rescue/Cultivate/Stabilise) □□□ Momentum Intelligence: Rate of change tracking

Step 3: RELATIONSHIPS & OPPORTUNITIES □□□ MEDDPICC: 8-criteria opportunity qualification □□□ Voss Techniques: Labeling, mirroring, calibrated questions □□□ Checkpoint Recording: Track "That's Right" moments, Black Swan discoveries □□□ Hero Journey Tracking: Client transformation stage

Step 4: RISKS & ACTIONS □□□ Gap Selling: Quantify cost of inaction □□□ Accusation Audit: Pre-empt objections (Voss) □□□ StoryBrand SB7: Problem -> Guide -> Plan -> Success narrative □□□ Recovery Stories: Wortmann Story Matrix for at-risk clients

Step 5: REVIEW & COLLABORATE □□□ Next Best Conversation: AI-generated talk tracks □□□ Value Realisation Ledger: Proof points for reference selling □□□ Story Matrix: Curated success stories by situation '''



Element	Description	Score Range
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MEDDPICC Scoring (Opportunity Qualification)

Element	Description	Score Range
M etrics	Quantified business impact	1-5
E conomic Buyer	Decision-maker identified and engaged	1-5
D ecision Criteria	Understanding of evaluation factors	1-5
D ecision Process	Timeline and approval workflow	1-5
P aper Process	Procurement/legal requirements	1-5
I dentify Pain	Documented business pain points	1-5
C hampion	Internal advocate with power and influence	1-5
C ompetition	Competitive landscape awareness	1-5

Hero Journey Stages (Client Transformation)

Stage	Client Mindset	Altera's Role
Ordinary World	"Things are fine as they are"	Plant seeds of awareness
Call to Adventure	"Something needs to change"	Clarify problem, quantify gap
Meeting the Guide	"These people understand us"	Demonstrate empathy AND authority
Crossing Threshold	"Let's do this"	Provide clear plan, early wins
Tests & Allies	"This is harder than expected"	Support through challenges
Approach	"We're going to make it"	Maintain momentum
Ordeal	"This is the test"	Exceptional support
Reward	"We made the right choice"	Document ROI, plan expansion
Return (Advocate)	"I want to share our success"	Nurture advocacy



Conversation Checkpoints (Voss Milestones)

- **“That’s Right” Moment** - Client confirms deep understanding
- **Black Swan Discovery** - Hidden motivator uncovered
- **Effective Label** - “It seems like...” acknowledged
- **Calibrated Question** - “How/What” question advanced conversation
- **Mirror Success** - Repetition prompted elaboration
- **Accusation Audit** - Preempted objection successfully
- **Gap Quantified** - Current->Future gap with numbers
- **Value Delivered** - Proof point documented
- **Story Resonated** - Reference story connected

Sales Targets & Pipeline Management

Target Structure

” Territory Target (FY26) Quota: \$X (assigned by leadership) Committed: \$Y (signed contracts, renewals confirmed) Forecast: \$Z (weighted pipeline) Gap: Quota - Committed - Forecast Coverage: Pipeline / Gap (target: 3x)

Account Target (per client) ARR Target: Based on segment & growth potential Current ARR: From BURC data Expansion Target: ARR Target - Current ARR Pipeline: Opportunities for this account ”

Opportunity Management

Each opportunity includes:

Field	Description	Source
Name	Opportunity title	User input / AI suggested
Value	Deal size in \$	User input / AI estimated
Stage	Discovery -> Qualified -> Proposal -> Negotiation -> Closed	User input
Probability	Win likelihood % (auto-calculated from stage + MEDDPICC)	Calculated
Close Date	Expected close	User input
MEDDPICC Score	8-criteria qualification (0-40)	User input / AI pre-filled
Linked Client	Associated account	User selection



Field	Description	Source
Linked Stakeholders	Key contacts for this deal	User selection
Products	Products/solutions in scope	User selection

Dynamic Forecast Calculation

''' Weighted Forecast = $\sum (\text{Opportunity Value} \times \text{Probability})$

When user adds/removes/edits opportunity: 1. Recalculate weighted forecast 2. Update coverage ratio 3. Show delta: "Forecast changed by +X/-X" 4. Update forecast bands (best/likely/worst) '''

Forecast Confidence Bands

Scenario	Calculation
Best Case	Committed + All Pipeline at 100%
Likely Case	Committed + Weighted Forecast
Worst Case	Committed only
Stretch	Best Case + AI-identified whitespace

Pipeline UI Mockup

''' Pipeline & Forecast [+ Add Opportunity] Pipeline Target: \$2.5M Committed: \$1.2M Forecast: \$800K Gap: \$500K Coverage: 2.4x Barwon Health - EMR Upgrade \$250,000 Stage: Proposal Close: Mar 2026 MED-DPICC: 28/40 65% "Strong champion identified. Missing: Paper Process clarity" WA Health - Analytics Module \$180,000 Stage: Discovery Close: Jun 2026 MED-DPICC: 18/40 30% "Needs Economic Buyer access. Suggest QBR to engage CFO." ChaSen Suggestions: "Barwon Health mentioned 'reporting gaps' in NPS - potential \$50K Analytics upsell" "GHA renewal in 90 days - no expansion opportunity logged" '''



ChaSen AI Integration (Per Step)

ChaSen AI reduces cognitive burden by auto-suggesting responses at every step:

Step 1: Context & Selection

Trigger	ChaSen Response
User opens planning	"Based on your portfolio, I recommend focusing on [Client] - they have a renewal in 45 days and declining NPS. Want me to start their account plan?"
User selects territory	"Your territory has 3 clients at risk and \$500K in pipeline gap. Here's a priority order..."

Step 2: Portfolio & Targets

Trigger	ChaSen Response
Target entry	"Based on [Client]'s segment (Giant) and 15% YoY growth, I suggest a target of \$X. Similar clients average \$Y."
Gap identified	"You need \$500K to hit quota. Here are 3 expansion opportunities I've identified from meeting notes and NPS feedback..."
Coverage low	"Coverage is 1.8x (target: 3x). Consider adding these whitespace opportunities: [list]"

Step 3: Pipeline & Opportunities

Trigger	ChaSen Response
Add opportunity	Auto-fill fields: Value (from similar deals), Stage, MEDDPICC scores (from existing data)
MEDDPICC low score	"Economic Buyer score is 1/5. I found a CFO mention in meeting notes - want me to add them as a stakeholder?"
Opportunity stalled	"This deal has been in Proposal for 45 days. Common blockers at this stage: [list]. Suggested action: [Voss technique]"
Missing pipeline	"No opportunities for [Client] despite \$50K expansion target. Their recent NPS mentioned 'mobile access' - matches our Mobile App product."



Trigger	ChaSen Response
News trigger	"□ Barwon Health announced \$5M IT modernisation project yesterday. Suggested opportunity: EMR Upgrade (\$200K)."
Tender match	"□ WA Health tender matches our Analytics product. Deadline: 15 Feb. Add to pipeline?"
Deal health warning	"WARNING: Deal health dropped to 45/100 - no meeting in 21 days, champion hasn't responded to 2 emails."
Competitor mention	"□ Competitor 'Epic' mentioned in last meeting transcript. Suggested response: [competitive positioning]"

Step 4: Risks & Actions

Trigger	ChaSen Response
Risk identified	Auto-generate Accusation Audit: "The worst they might think is... I imagine you're feeling..."
Action needed	"For this risk, I suggest: [Action] using [Voss/Gap/StoryBrand technique]. Here's a script: '...'"
Revenue at risk	"If [Opportunity] is lost, forecast drops to \$X (below quota by \$Y). Mitigation: [actions]"
Churn prediction	"Based on declining health trend, [Client] has 35% churn probability. Similar clients were saved by: [Story Matrix match]"
Champion risk	"□ Your champion Sarah hasn't attended last 3 meetings. Suggest: Multi-thread to backup contact [name]."
Support escalation	"WARNING: 5 P1 tickets in 30 days. Support health dropped to 42%. Suggest: Executive escalation call."
Contract cliff	"□ Renewal in 60 days, but no renewal conversation logged. Auto-created action: Schedule renewal kickoff."
Stakeholder change	"□ News: CFO at [Client] stepping down. Risk: Economic Buyer relationship. Suggest: Identify successor."
AR aging risk	"□ \$45K overdue >90 days. Financial risk flagged. Suggest: Involve finance team."

Step 5: Review & Forecast



Trigger	ChaSen Response
Plan review	Auto-generate executive summary: "Territory has \$X committed, \$Y forecast, with primary risks at [clients]. Key actions: [top 3]"
Coverage gap	"To close the \$500K gap, prioritise: 1) [Opp A] - highest MEDDPICC, 2) [Opp B] - fastest close date"
Export	"I've highlighted 3 areas that need attention before leadership review: [list]"

AI Pre-Population Sources

ChaSen auto-populates from ALL available data sources:

Data Source	Used For
Meetings & Engagement	
'unified_meetings'	Opportunity discovery, stakeholder sentiment, action items, meeting effectiveness
'unified_meetings.topics'	Topic extraction -> product matching -> opportunity suggestion
'unified_meetings.risks'	Auto-populate risk register from meeting-detected risks
'unified_meetings.decisions'	Commitment tracking, deal advancement signals
NPS & Sentiment	
'nps_responses'	Pain points -> opportunity themes, detractor recovery actions
'nps_topic_classifications'	Categorised feedback -> product recommendations
Support & Operations	
'support_sla_metrics'	SLA%, CSAT, backlog -> risk scoring
'support_case_details'	Ticket volume, resolution times -> support health trend
Financials	
'burc_annual_financials'	ARR, targets, churn, revenue vs target



Data Source	Used For
'burc_attrition_risk'	Churn probability scoring -> risk alerts
'burc_contracts'	Renewal dates, contract terms -> renewal pipeline
'aging_accounts'	AR aging -> financial risk, collection actions
Stakeholders	
'stakeholder_relationships'	MEDDPICC Economic Buyer/Champion, influence scoring
'stakeholder_influences'	Political dynamics, relationship strength
News & Tenders	
'news_articles' + 'news_article_clients'	Client news -> opportunity/risk triggers
'tender_opportunities'	Government tenders -> pipeline opportunities
'news_stakeholder_mentions'	Stakeholder movements, leadership changes
Product & Whitespace	
'product_catalog'	Product matching for opportunities
Stack gap analysis	Whitespace -> expansion opportunity suggestions
Operating Rhythm	
'segmentation_events'	Compliance tracking -> engagement actions
'segmentation_compliance_scores'	Engagement health -> relationship scoring
Historical & Learning	
'client_health_history'	Trend analysis, momentum scoring
'meddpicc_scores'	Historical scoring patterns
'actions'	Overdue action -> risk escalation
'chasen_conversations'	Past AI advice per client -> continuity
'chasen_feedback'	What worked -> refine suggestions



Cutting-Edge AI Features (Inspired by Industry Leaders)

Revenue Intelligence (Gong/Clari-inspired)

Feature	Description	Data Sources
Deal Health Score	AI-scored 0-100 deal likelihood based on engagement signals, not just stage	'unified_meetings', 'stakeholder_relationships', 'meddpicc_scores', email activity
Stalled Deal Detection	Alert when deal hasn't progressed in X days with suggested unblock actions	Opportunity stage history, meeting frequency
Win/Loss Prediction	ML model predicting win probability with explanation ("Missing CFO engagement")	Historical won/lost deals, MEDDPICC patterns
Talk Ratio Analysis	Meeting effectiveness based on client vs CSE talk time from transcripts	'unified_meetings.transcript'
Competitive Displacement Alerts	Detect when competitor is mentioned in meetings/NPS	'unified_meetings.topics', 'nps_responses.feedback'

Buyer Engagement Intelligence (People.ai/6sense-inspired)

Feature	Description	Data Sources
Buyer Engagement Score	Aggregate engagement across all contacts at an account	Meeting attendance, email opens, NPS responses
Multi-Threading Score	Are we engaging multiple stakeholders or single-threaded?	'stakeholder_relationships', meeting attendees
Champion Risk Detection	Alert when champion goes quiet or leaves	Meeting patterns, news mentions, LinkedIn changes
Buying Committee Mapping	Auto-detect decision-making unit from meeting attendees	'unified_meetings.attendees', stakeholder data
Intent Signals	Detect buying intent from news, tenders, meeting topics	'news_articles', 'tender_opportunities', 'unified_meetings.topics'

Predictive Analytics (Gainsight/ChurnZero-inspired)



Feature	Description	Data Sources
Churn Prediction Model	30/60/90 day churn probability with contributing factors	'burc_attrition_risk', health trends, support metrics
Expansion Propensity	Which clients most likely to expand based on patterns	Usage signals, NPS, health trajectory
Renewal Forecast	Predicted renewal outcome with confidence bands	Contract dates, health, engagement, competitive signals
Revenue Impact Modelling	If [client] churns, portfolio ARR drops by \$X	'burc_annual_financials', pipeline
Next Best Action (NBA)	ML-ranked actions by predicted impact on health/revenue	Historical action effectiveness, current state

Conversation Intelligence (Chorus/Gong-inspired)

Feature	Description	Data Sources
Key Moment Detection	Auto-flag commitments, objections, pricing discussions	'unified_meetings.transcript'
Sentiment Trajectory	Track sentiment across meetings - improving or declining?	'unified_meetings.sentiment_*
Competitor Mention Tracking	When/how competitors are mentioned in conversations	Meeting transcripts, NPS feedback
Action Item Extraction	Auto-generate actions from meeting transcripts	'unified_meetings.next_steps', AI analysis
Talk Track Effectiveness	Which scripts/approaches lead to positive outcomes?	Meeting sentiment + deal progression correlation



Feature	Description	Data Sources
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Proactive Intelligence (Novel)

Feature	Description	Data Sources
News-Triggered Alerts	"Barwon Health announced digital transformation - schedule discovery call"	'news_articles', AI scoring
Tender Opportunity Matching	"WA Health tender matches our EMR - deadline in 30 days"	'tender_opportunities'
Stakeholder Movement Alerts	"CFO at Gippsland changed - relationship reset needed"	News, LinkedIn, meeting attendance gaps
Meeting Gap Detection	"No meeting with [client] in 45 days - risk of relationship decay"	'unified_meetings', segment requirements
Contract Cliff Alerts	"5 renewals in Q2 worth \$2.1M - start engagement now"	'burc_contracts'
Cross-Sell Triggers	"Client mentioned 'mobile' 3x in meetings - matches Mobile App product"	Meeting topics, 'product_catalog'

AI-Powered Automation (Gainsight Copilot-inspired)

Feature	Description	Trigger
Auto-Generate QBR Deck	Create QBR slides from last quarter's data	30 days before QBR
Draft Renewal Proposal	Pre-fill renewal document with ARR, value delivered, expansion options	90 days before renewal
Risk Mitigation Playbook	Auto-suggest playbook based on risk type	When health drops below threshold
Meeting Prep Brief	1-page summary before client meetings with recent context	24 hours before meeting
Executive Summary Generator	Leadership-ready summary of territory/account status	On demand or weekly
Action Email Drafts	Pre-written email for each action item with Voss techniques	When action created



Implementation Priority

Phase	Features	Complexity
Phase 4a	Deal Health Score, Stalled Deal Detection, Churn Prediction	Medium
Phase 4b	News/Tender Alerts, Meeting Gap Detection, Contract Cliffs	Medium
Phase 4c	Win/Loss Prediction, Multi-Threading Score, Buying Committee	High
Phase 5	Talk Ratio Analysis, Conversation Intelligence, Auto-Decks	High (requires transcript processing)

UX Cohesion: Preventing Information Overload

Core Principle: Progressive Disclosure

Users see **summary first**, details on demand. Never dump all data at once.

""
GLANCEABLE (Always Visible) 3 key metrics: Target | Forecast | Gap 1 priority alert (most urgent) Overall plan health: (3/5 steps complete)
LAYER 2: SUMMARY (Collapsed by Default) Top 3 opportunities by value Top 3 risks by severity ChaSen's #1 recommended action
LAYER 3: DETAIL (Click to Expand) Full opportunity list with MEDDPICC Complete risk register with mitigation plans All AI suggestions with evidence
LAYER 4: DEEP DIVE (Separate Panel/Modal) Full data tables Historical trends Supporting evidence from source systems
""

Smart Prioritisation: AI-Ranked Importance

ChaSen ranks ALL insights by urgency x impact, shows only top items:

Priority	Criteria	Display
Critical	Revenue at risk, churn imminent, deadline <7 days	Always visible, red badge
High	Deal stalled, health declining, renewal <30 days	Visible in summary, orange



Priority	Criteria	Display
Medium	Opportunity identified, engagement gap	Collapsed, yellow dot
Low	FYI, general suggestions	Hidden until requested

Rule: Maximum 3 critical/high items visible at once. Others queue in “More insights” drawer.

Context-Aware Surfacing

Show insights ONLY when relevant to the current step:

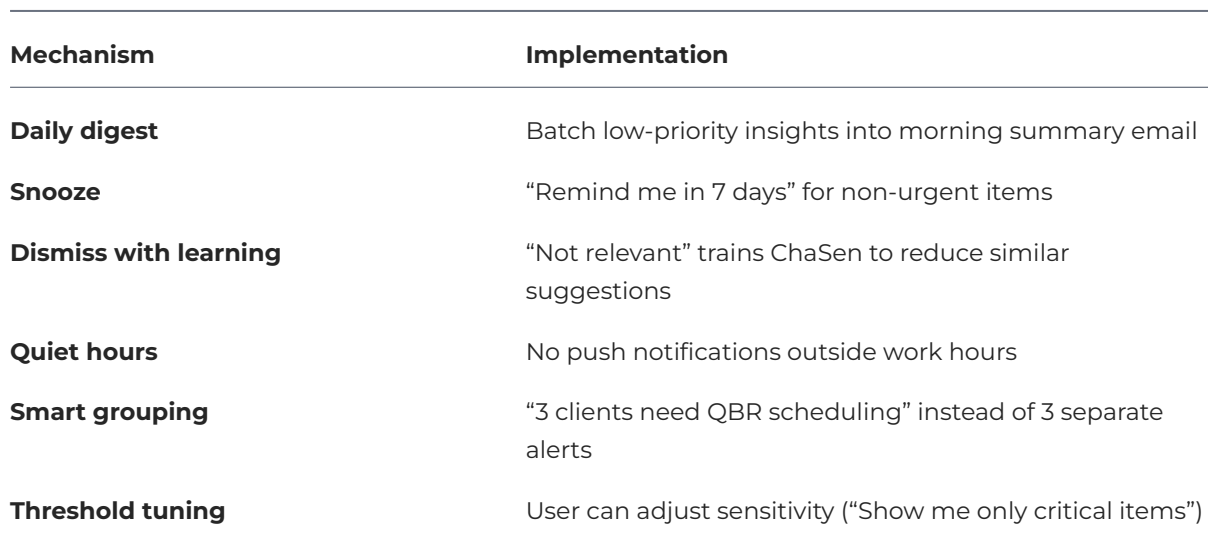
Step	Visible Insights	Hidden Until Relevant
1. Context	Priority client suggestions	Everything else
2. Targets	Coverage gaps, target suggestions	Opportunity details, risks
3. Pipeline	Opportunity suggestions, deal health, news/tenders	Risk details
4. Risks	Risk alerts, churn predictions, mitigation actions	Opportunity details
5. Review	Executive summary, forecast bands, approval blockers	Granular details

ChaSen AI Panel: Single Point of Intelligence

Instead of scattered alerts, ONE collapsible AI panel per step:

” ChaSen Insights (3) [-] URGENT: Barwon Health renewal in 28 days - no meeting scheduled [Schedule Meeting] [Dismiss] [Snooze 7 days] Opportunity: WA Health tender matches Analytics (\$180K) [Add to Pipeline] [View Tender] [Not Relevant] Suggestion: MEDDPICC score could improve with CFO access [Show Me How] [Already Done] [Later] 12 more insights available [View All ->]

Notification Fatigue Prevention



```
'''
Clean metrics bar (no alerts unless critical)
Target: $2.5M Forecast: $2.1M Coverage: 2.4x
MAIN: Current step content (focused workspace)
[Step content here - opportunities, risks, etc.] No distracting badges or
alerts in the main workspace
SIDEBAR: ChaSen panel (collapsible, right side) Insights (3)
<- Badge shows count, panel collapses ...
'''
```

Every insight **MUST** have a clear action button:

N Information Dump	📌 Actionable Insight
“Client health is 42/100”	“Health dropped 15pts. [View Causes] [Create Recovery Plan] ”
“Tender available for WA Health”	“Tender matches Analytics. [Add to Pipeline] [View Details] ”
“Champion hasn’t responded”	“Champion silent 14 days. [Draft Follow-up] [Try Another Contact] ”



Personalisation: User Control

Users can configure their experience:

''' ☐ ChaSen Preferences ☐ Alert Sensitivity: [Less] ☐ [More] ☐ Show me: ☐ Revenue alerts ☐ Churn predictions ☐ News & tender matches ☐ Meeting suggestions (disabled) ☐ MEDDPICC coaching ☐ Notification style: ☐ Real-time ☐ Daily digest ☐ Weekly ☐ AI assistance level: ☐ Minimal ☐ Balanced ☐ Proactive ☐ '''

Cognitive Load Limits

Element	Maximum	Rationale	Override
Visible alerts	3	Miller's Law: 7+/-2 chunks, leave room for content	"View all insights" drawer
Suggested actions per step	5	Decision fatigue prevention	"More suggestions" expandable
Pipeline opportunities shown	10	Scrolling discouraged, pagination available	"Show All" button expands full table
Metrics in header	4	Glanceable dashboard	Click metric for breakdown
Steps in wizard	5	Already at cognitive limit	N/A

Pipeline "Show All" Implementation: ''' ☐ Pipeline & Forecast [+ Add Opportunity] ☐ Showing 10 of 24 opportunities [☐ Show All] ☐ [Opportunity cards 1-10...] ☐ [Show All 24 Opportunities] ☐ [Export to Excel] ''' - Clicking "Show All" expands to full scrollable table view - Table view includes sorting by: Value, Stage, Close Date, MEDDPICC Score - Filtering by: Stage, Client, Products, Date Range - Bulk actions: Update stage, Assign owner, Delete selected



Empty States: Guide, Don't Overwhelm

When no data exists, provide ONE clear next step:

''' No opportunities yet ChaSen found 2 potential opportunities from recent meetings. [Review Suggestions] or [Add Manually]

Summary: UX Principles

1. **Show 3, hide 100** - Surface top priorities, details on demand
2. **Context-aware** - Right insight, right step, right time
3. **Single AI panel** - One place for all intelligence
4. **Always actionable** - Every insight has a button
5. **User control** - Sensitivity sliders, not binary switches
6. **Calm by default** - Alerts are exceptions, not the norm
7. **Learn from feedback** - Dismissed items inform future ranking

Role-Based Views (Same Data, Different Perspectives)

Element	CSE View	CAM View
Default Mode	Territory Overview	Account Deep-Dive
Portfolio	All assigned clients	Clients they oversee
Metrics Focus	Pipeline, Coverage, ACV	Health, NPS, Engagement
Stakeholders	Summary per client	Detailed relationship map
Opportunities	Multi-client pipeline	Single-account deals
Actions	Execution-focused	Strategic-focused
Collaboration	Tags CAM for review	Tags CSE for execution

Collaborative Features (Following Figma/Notion Model)



Real-Time Collaboration

''' Anu Pradhan is viewing Step 3 Tracey Bland is editing Stakeholder Map [Avatar] [Avatar] 2 collaborators active '''

In-Context Comments

''' Comment on "Barwon Health - Risk: Contract review" @Tracey - Can you schedule exec meeting before renewal? - Anu, 2 hours ago Done, meeting set for Feb 15 - Tracey, 1 hour ago '''

Existing Collaboration Features Summary

Feature	Description	Implementation
Real-time Presence	See who's viewing/editing the plan	Supabase Realtime + 'plan_presence' table
In-Context Comments	Threaded comments on any element	'plan_comments' table with entity linking
@Mentions	Tag team members for attention	Notification system integration
Activity Log	Full audit trail of changes	'plan_activity_log' table
Approval Workflow	Submit -> Review -> Approve states	'status' field with workflow triggers
Version History	Track all edits over time	JSONB 'activity_log' column



Event	Auto-Reminder	Suggested Prep
Plan Review Due	7 days before, 1 day before	ChaSen generates “changes since last review” summary
Approval Pending	Daily until resolved	Highlight blockers, suggest resolution
Comment Unresolved	3 days after posting	Escalate to plan owner
Handoff Pending	2 days, then escalate	Notify manager if unacknowledged

Operating Rhythm Alignment

CS Operating Rhythm Events (Existing)

From ‘segmentation_events’ table:

Event	Month	Description
APAC Compass / Annual Account Planning	January	Full year planning and target setting
Q1 Account Plan Update	~April	First quarterly refresh
Q2 Account Plans (updated)	~July	Mid-year update
2H Account Plan Review	~July/August	Half-year strategic review
Q4 Account Plan Update	~October	Final quarterly refresh before year-end



Auto-Triggered Plan Reviews

Strategic Planning automatically integrates with Operating Rhythm:

''' **Operating Rhythm: Automatic Plan Scheduling** ChaSen pre-populates: Prior year performance, renewals, pipeline carried forward, health trends Auto-creates draft plans for all accounts in territory **Deadline: Submit by Jan 31** **QUARTERLY: Q1/Q2/Q4 Updates** ChaSen generates: Delta since last review - Pipeline changes (+X/-Y) - Health movements (▲3 improved, ▼2 declined) - New risks/opportunities identified **User task: Review AI summary, update as needed** **Target: 15 min per account (vs 45 min fresh start)** **2H REVIEW: Mid-Year Strategic Check** ChaSen generates: H1 performance report - Target vs Actual (by client) - Win/loss analysis - Forecast accuracy assessment **Suggested: Adjust H2 targets if >10% variance** **Team review meeting auto-scheduled** '''

ChaSen “Changes Since Last Review” (Minimal User Effort)

When a review is due, ChaSen auto-generates a summary requiring minimal user input:

''' **ChaSen:**
Q2 Account Plan Review - Barwon Health
CHANGES SINCE Q1 REVIEW (Apr 15, 2026)
PIPELINE Won: EMR Upgrade (\$250K) - Closed May 2 Added: Analytics Module (\$180K) - Discovery stage Slipped: Mobile App (\$90K) - Moved from Q2 to Q3 **Net Change: +\$160K pipeline**
HEALTH & ENGAGEMENT Health Score: 72 -> 78 (+6) NPS: +32 -> +45 (+13) Meetings: 4 (vs 3 in Q1) Support: 2 P1 tickets (resolved) **RISKS** Resolved: CFO engagement (met twice, strong relationship) New: IT Director retiring in Aug (succession planning) Unchanged: Integration concerns (needs technical session) **AI RECOMMENDATIONS** Celebrate EMR win in next QBR (Story Matrix match ready) Accelerate Analytics opportunity (high MEDDPICC: 32/40) Schedule succession intro meeting before Aug
Looks good - no changes needed [Approve & Submit] Make edits [Edit Plan] Add comments [Add Notes] '''

Effort Reduction: Annual vs Quarterly



Review Type	Without ChaSen	With ChaSen	User Action
Annual Planning	2-3 hours/account	45 min/account	Review AI draft, validate targets, add strategy
Quarterly Update	45 min/account	10-15 min/account	Review delta summary, confirm or edit
2H Strategic Review	1-2 hours/account	30 min/account	Review H1 performance, adjust H2 forecast

Key Principle: ChaSen does the data gathering; user provides judgement and strategy.

Auto-Scheduling Database Schema

```
''sql – Plan review schedule (auto-created from Operating Rhythm) CREATE TABLE plan_review_schedule ( id UUID PRIMARY KEY DEFAULT gen_random_uuid(), plan_id UUID REFERENCES strategic_plans(id) ON DELETE CASCADE, review_type TEXT CHECK (review_type IN ('annual', 'quarterly', '2h_review')), fiscal_year INTEGER NOT NULL, quarter TEXT, – 'Q1', 'Q2', 'Q3', 'Q4', '2H' due_date DATE NOT NULL, reminder_sent_at TIMESTAMPTZ, status TEXT DEFAULT 'pending' CHECK (status IN ('pending', 'in_progress', 'completed', 'skipped')), completed_at TIMESTAMPTZ, completed_by TEXT, ai_summary JSONB, – ChaSen-generated delta summary created_at TIMESTAMPTZ DEFAULT NOW() );
```

```
– Link to Operating Rhythm events CREATE TABLE plan_rhythm_links ( id UUID PRIMARY KEY DEFAULT gen_random_uuid(), plan_id UUID REFERENCES strategic_plans(id) ON DELETE CASCADE, event_id UUID REFERENCES segmentation_events(id), event_name TEXT, event_date DATE, auto_created BOOLEAN DEFAULT TRUE, created_at TIMESTAMPTZ DEFAULT NOW() );
```

```
– Indexes CREATE INDEX idx_plan_review_due ON plan_review_schedule(due_date) WHERE status = 'pending'; CREATE INDEX idx_plan_review_plan ON plan_review_schedule(plan_id); ''
```

Implementation: Rhythm Integration

```
''' Phase 3 Addition: Operating Rhythm Integration - [ ] Create 'plan_review_schedule' table - [ ] Build review scheduling service (auto-creates reviews from 'segmentation_events') - [ ] Implement ChaSen "delta since last review" generator - [ ] Add review reminder notifications (7 days, 1 day before) - [ ] Build one-click "Approve & Submit" for quick reviews - [ ] Create team calendar view showing all upcoming reviews - [ ] Add "Skip with reason" for non-applicable reviews '''
```



Plan Approval Workflow

Design Principles

Aspect	Decision	Rationale
Approver model	Single approver (manager), auto-assigned	Clear accountability, simple chain
Feedback loop	Collaborative editing — no rejection state	Removes friction, faster iteration
Transparency	Team-visible status & comments	Everyone informed, not overwhelmed
Flexibility	Strict assignment only	Maintains accountability
Deadlines	Reminder-based, no hard enforcement	Low friction, trust-based

Workflow States & Transitions

"" draft -> in_review -> approved -> archived ↑ ↓ □□□□□□ (collaborative edits, no rejection state) ""

State Definitions:

State	Description	Who can edit
Draft	Work in progress, not visible to approvers	Owner + collaborators
In Review	Submitted for approval, both parties can refine	Owner + approver (tracked)
Approved	Official plan, locked for edits	No one (clone for changes)
Archived	Historical record, hidden from active views	No one

Transition Rules:

From	To	Who can trigger
draft	in_review	Plan owner (submits)
in_review	draft	Plan owner (withdraws)
in_review	approved	Assigned approver only



From	To	Who can trigger
approved	archived	System (next FY) or owner

Collaborative Editing During Review

When a plan is “in review”, both submitter and approver can edit with full change tracking:

'''
Plan:
Barwon Health FY26 Status: In Review
Pipeline Target: \$500,000
Edited by Sarah Chen (Manager) - 2 hours ago
Changed from \$450,000 -> \$500,000
“Aligned with regional target increase”
[View All Changes (3)] [Approve Plan]
'''

Change tracking includes:

- Who edited, when
- Field-level diff (old -> new value)
- Optional comment explaining the change
- Grouped by editing session (not every keystroke)

Conflict handling:

- Real-time presence shows who's viewing/editing
- Last-write-wins for simultaneous edits
- Trust-based collaboration (no formal locking)

Team Visibility

'''
Team
Plans FY26 Q1
Tracey Bland
Barwon Health
Approved Sarah Chen, Jan 28
WA Health
In Review Awaiting Sarah Chen
Gippsland Health
Draft Not submitted
'''

Visibility Matrix:



Role	Can see	Can edit	Can approve
Plan owner	Everything	Always (draft), tracked (in review)	No
Assigned approver	Everything	Tracked edits (in review only)	Yes
Team members	Status, approver, comments	No	No
Other managers	Status only	No	No

Submission UI

''' Submit Plan for Approval Completion: 100% (all steps complete) Approver: Sarah Chen (Manager) [Auto-assigned] Note to approver (optional): Increased pipeline target based on Q4 momentum. See step 3. WARNING: ChaSen flagged 1 item to review before submitting: MEDDPICC score below 20 for "Analytics Module" opportunity [Cancel] [Submit for Approval] '''

Approver UI

''' Pending Approval Barwon Health FY26 — submitted by Tracey Bland, 2 days ago "Increased pipeline target based on Q4 momentum. See step 3." [View Full Plan] [View Changes Since Last Approval] [Approve Plan Y] '''



Event	Recipient	Timing
-------	-----------	--------

Notifications

Event	Recipient	Timing
Plan submitted	Submitter	Immediate confirmation
New plan awaiting approval	Approver	Immediate
Reminder: plans awaiting approval	Approver	Weekly digest
Plan approved	Submitter	Immediate
Edit made during review	Other party	Real-time (if online) or next visit

Approval Workflow Schema

""sql – Additional columns for strategic_plans table ALTER TABLE strategic_plans ADD COLUMN IF NOT EXISTS approver TEXT, – Assigned approver (manager name) approver_role TEXT, – ‘manager’, for future flexibility submission_note TEXT, – Note from submitter approval_note TEXT; – Note from approver (if any)

– Change tracking for collaborative editing CREATE TABLE plan_change_log (id UUID PRIMARY KEY DEFAULT gen_random_uuid(), plan_id UUID REFERENCES strategic_plans(id) ON DELETE CASCADE, user_name TEXT NOT NULL, user_role TEXT, – ‘owner’ or ‘approver’ field_path TEXT NOT NULL, – e.g., ‘targets_data.quota’ old_value JSONB, new_value JSONB, change_note TEXT, – Optional explanation created_at TIMESTAMPTZ DEFAULT NOW());

CREATE INDEX idx_plan_changes ON plan_change_log(plan_id, created_at DESC);

– Activity log actions for approval workflow: – ‘submitted’ — plan submitted for approval – ‘approved’ — plan approved – ‘withdrawn’ — plan withdrawn from review – ‘edited_in_review’ — changes made during review ""

Implementation: Approval Workflow

"" Phase 3 Addition: Approval Workflow - [] Add approval columns to strategic_plans table - [] Create plan_change_log table for edit tracking - [] Build submission modal with ChaSen pre-flight checks - [] Build approver dashboard (pending approvals list) - [] Implement collaborative editing with change tracking - [] Add approval/withdrawal actions with activity logging - [] Build



team visibility view (status board) - [] Implement notification system (immediate + digest) '''

Competitive Intelligence Integration

Overview

Comprehensive competitive intelligence embedded throughout account plans, combining **static product assets** with **live market intelligence**.

Intelligence Types: 1. **Competitor Presence Tracking** — Which competitors are active at each client 2. **Win/Loss Intelligence** — Patterns from competitive deals 3. **Market Movement Alerts** — Real-time news on competitor activity 4. **Competitive Positioning Playbooks** — Pre-built responses and battlecards

Two-Layer Intelligence Model

Layer	Source	Content	Update Frequency
Static Assets	'product_catalog' table	Battlecards, objection handling, positioning statements	Manual (product team)
Live Intelligence	Web sources, internal data	News, tenders, hiring signals, meeting mentions	Hourly to weekly

Static Assets (from 'product_catalog'): '''typescript // Already exists in product_catalog table
competitive_analysis: Array<{ competitor: string; our_advantage: string }> objection_handling:
Array<{ objection: string; response: string }>'''

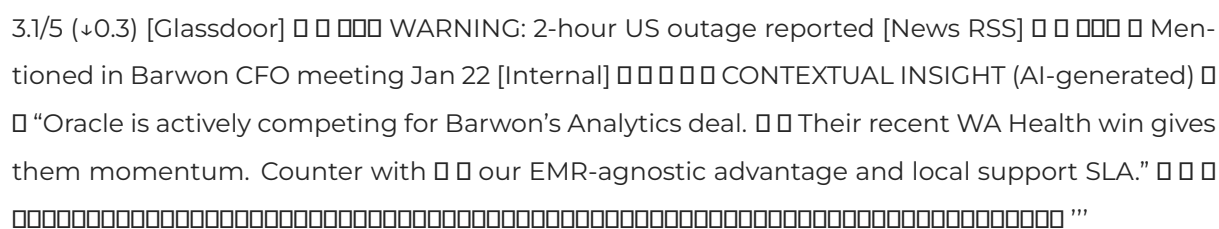
How they combine in the UI: '''

vs Oracle Health

BATTLECARD (from product_catalog — static)

When competing on Analytics: "Oracle Analytics requires Cerner backend. Ours works with any EMR — client can keep Epic and add our analytics layer." Objection: "Oracle is the industry standard" Response: "For US maybe. In APAC, local support and faster implementation win. See St Vincent's case study."

LIVE INTEL (from web sources — dynamic) Won WA Health tender (\$2M) - 3 days ago [AusTender] Hiring 15 APAC sales roles [LinkedIn Jobs] Glassdoor rating:



Static Product Assets (from 'product_catalog'):

Live Intelligence Sources (web + internal):

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Source	Data Captured	Update Frequency
Meeting Mentions	Competitor references in 'unified_meetings'	Real-time
NPS Feedback	Competitor mentions in 'nps_responses'	Per survey
Win/Loss Records	Historical outcomes from 'competitive_outcomes'	On recording

Embedded Competitive Context (Per Step)

Step 2: Portfolio & Targets Competitive Landscape: Epic (Incumbent - Ambulatory) Threat: Medium Oracle Health (Evaluating) Threat: High Recent: "Oracle Health shortlisted for radiology" - 3 days ago

Step 3: Pipeline & Opportunities Competition on this deal: Oracle Health Analytics — actively bidding Last mention: CFO meeting Jan 15 ("comparing Oracle pricing") Our win rate vs Oracle Analytics: 3-1 (75%) [View Battlecard] [See Similar Wins]

Step 4: Risks & Actions RISK: Competitive Displacement Severity: High Evidence: Mentioned in 3 meetings (Jan 8, 15, 22) - CFO requested Oracle pricing comparison - Oracle won similar deal at WA Health last quarter ChaSen Suggested Actions: Schedule executive alignment meeting (Voss: Accusation Audit) Prepare ROI comparison using client's actual data Reference St Vincent's win story (similar situation)

Competitive Intelligence Panel

Collapsible panel available on every step:

COMPETITORS AT THIS ACCOUNT Oracle Health Threat: High Status: Actively Evaluating Products: Analytics, Radiology Last Activity: CFO meeting, Jan 22 Our Record vs Oracle: 3W - 1L (75%) [View Dossier] [Battlecard] [Similar Wins] RECENT INTEL (Last 30 days) Oracle wins \$2M deal at WA Health (competitor intel) Epic hiring 50 APAC developers (job posting signal) Cerner Glassdoor drops to 3.1 (employee sentiment) Oracle awarded Vic Health tender (government source) [View All Intel (12)]



'''

Competitor Dossier (Full View)

The dossier combines **static product assets** with **live intelligence**:

''' **Competitor Dossier: Oracle Health** **OVERVIEW** (from competitors table) **Headquarters:** Austin, TX **Employees:** ~30,000 **APAC Presence:** Yes **Key Products:** Oracle Health EHR, Cerner Millennium, Analytics **AT THIS ACCOUNT** (from account_competitors + live mentions) **Status:** Actively Evaluating **First detected:** Nov 2025 (meeting mention) **Products in play:** Analytics, Radiology **Key contact using them:** CFO (pricing comparison requested) **Threat level:** High **OUR TRACK RECORD** (from competitive_outcomes) **Overall:** 12W - 4L (75%) **Analytics deals:** 5W - 1L (83%) **Last win:** St Vincent's Analytics (\$200K) - Oct 2025 **Last loss:** WA Health Radiology (\$180K) - Dec 2025 **WHY WE WIN / LOSE** (from competitive_outcomes.win_reasons/loss_reasons) **WHY WE WIN** **WHY WE LOSE** **Local support team** **Price perception** **Integration flexibility** **Brand recognition** **Healthcare-specific focus** **Bundled deals** **Faster implementation** **BATTLECARD** (from product_catalog.competitive_analysis — STATIC) **vs Oracle Analytics:** "Their analytics requires Cerner backend. Ours works with any EMR. Client can keep Epic and add our analytics layer." **Objection:** "Oracle is the industry standard" **Response:** "In APAC, local support and faster implementation matter more. See St Vincent's case study." **LIVE MARKET INTEL** (from competitive_intel — DYNAMIC) **Won \$2M WA Health deal** (3 days ago) [AusTender] **Hiring APAC sales team** - 15 roles [LinkedIn Jobs] **Q3 earnings:** Healthcare up 12% YoY [Financial Filing] **WARNING:** Outage reported in US (2 hours, Jan 18) [News RSS] **Mentioned by Barwon CFO** (Jan 22) [Meeting Transcript] **CHASEN INSIGHT** (AI-generated from static + live) "Oracle is actively competing for Barwon's Analytics deal. Their recent WA Health win gives them momentum, but that deal was greenfield — Barwon already has Epic. Use our EMR-agnostic advantage (from battlecard) and reference the St Vincent's win. **Note:** Oracle's US outage is a fresh proof point for our local support SLA advantage." [Export Dossier] [Share with Team] [Add Note] [Edit Battlecard]

Data Source Mapping:



Section	Source	Type
Overview	'competitors' table	Static
At This Account	'account_competitors' + 'unified_meetings'	Mixed
Track Record	'competitive_outcomes'	Internal
Battlecard	'product_catalog.competitive_analysis'	Static
Live Intel	'competitive_intel' (news, tenders, LinkedIn, etc.)	Dynamic
ChaSen Insight	AI combining all sources	Generated

Competitive Intelligence Schema

'''sql – Global competitor registry CREATE TABLE competitors (id UUID PRIMARY KEY DEFAULT gen_random_uuid(), name TEXT NOT NULL UNIQUE, aliases TEXT[] DEFAULT '{}', website TEXT, hq_location TEXT, employee_count INTEGER, products TEXT[], strengths TEXT[], weaknesses TEXT[], logo_url TEXT, last_intel_update TIMESTAMPTZ, created_at TIMESTAMPTZ DEFAULT NOW());

– Per-account competitive presence CREATE TABLE account_competitors (id UUID PRIMARY KEY DEFAULT gen_random_uuid(), client_id UUID REFERENCES clients(id), competitor_id UUID REFERENCES competitors(id), status TEXT CHECK (status IN ('incumbent', 'evaluating', 'displaced', 'rumoured', 'unknown')), products_in_use TEXT[], contract_end_date DATE, threat_level TEXT CHECK (threat_level IN ('high', 'medium', 'low')), threat_rationale TEXT, first_detected_at TIMESTAMPTZ, last_activity_at TIMESTAMPTZ, source TEXT, notes TEXT, created_at TIMESTAMPTZ DEFAULT NOW(), updated_at TIMESTAMPTZ DEFAULT NOW(), UNIQUE(client_id, competitor_id));

– Win/loss tracking CREATE TABLE competitive_outcomes (id UUID PRIMARY KEY DEFAULT gen_random_uuid(), client_id UUID REFERENCES clients(id), competitor_id UUID REFERENCES competitors(id), outcome TEXT CHECK (outcome IN ('won', 'lost', 'no_decision', 'displaced')), outcome_date DATE, deal_value DECIMAL(12,2), products_involved TEXT[], win_reasons TEXT[], loss_reasons TEXT[], lessons_learned TEXT, source_opportunity_id UUID, recorded_by TEXT, created_at TIMESTAMPTZ DEFAULT NOW());

– Raw intelligence from sources CREATE TABLE competitive_intel (id UUID PRIMARY KEY DEFAULT gen_random_uuid(), competitor_id UUID REFERENCES competitors(id), client_id UUID REFERENCES clients(id), source_type TEXT CHECK (source_type IN ('news', 'tender', 'press_release', 'linkedin_company', 'linkedin_person', 'job_posting', 'glassdoor', 'financial_filing', 'meeting_mention', 'nps_mention', 'manual')), source_url TEXT, title TEXT, content TEXT, summary TEXT, intel_type TEXT CHECK (intel_type IN ('win', 'loss', 'product_launch', 'outage', 'leadership_change', 'partner-



```
ship', 'acquisition', 'hiring_signal', 'sentiment', 'general' )), relevance_score INTEGER, published_at  
TIMESTAMPTZ, captured_at TIMESTAMPTZ DEFAULT NOW(), reviewed BOOLEAN DEFAULT FALSE,  
reviewed_by TEXT );
```

```
CREATE INDEX idx_intel_competitor ON competitive_intel(competitor_id, captured_at DESC); CRE-  
ATE INDEX idx_intel_client ON competitive_intel(client_id, captured_at DESC); CREATE INDEX  
idx_account_competitors ON account_competitors(client_id); ""
```

File Structure

```
"" src/components/planning/competitive/ CompetitivePanel.tsx # Collapsible panel for all steps  
 CompetitiveCard.tsx # Single competitor summary CompetitiveDossier.tsx # Full com-  
petitor profile modal CompetitiveRiskCard.tsx # Risk card with competitor context IntelFeed.tsx # Recent intelligence stream  
BattlecardViewer.tsx # Positioning playbook display  
WinLossAnalysis.tsx # Track record visualisation
```

```
src/app/api/competitive/ Competitors/route.ts # CRUD for competitor registry account/[clientId]/route.ts  
# Competitors at specific account intel/route.ts # Intelligence feed outcomes/route.ts #  
Win/loss recording dossier/[competitorId]/route.ts # Full competitor dossier
```

```
src/lib/competitive-intelligence/ news-enricher.ts # Tag news with competitor mentions tender-analyzer.ts # Extract competitor wins from tenders  
linkedin-fetcher.ts # Company/people  
tracking glassdoor-fetcher.ts # Employee sentiment job-posting-analyzer.ts # Hiring sig-  
nals ""
```

Implementation: Competitive Intelligence

```
"" Phase 5: Competitive Intelligence (2-3 weeks) - [ ] Create competitor registry tables - [ ] Build  
CompetitivePanel component (collapsible, all steps) - [ ] Implement CompetitorDossier modal  
with full profile - [ ] Add competitor tagging to existing news intelligence - [ ] Build win/loss  
recording UI in opportunities - [ ] Create battlecard management system - [ ] Integrate com-  
petitor mentions from meeting transcripts - [ ] Add threat level indicators to account summaries  
- [ ] Build competitive risk auto-detection for Step 4 ""
```



Data Model

Unified 'strategic_plans' Table Schema

```
'"sql CREATE TABLE strategic_plans ( id UUID PRIMARY KEY DEFAULT gen_random_uuid(), plan_type
TEXT CHECK (plan_type IN ('territory', 'account', 'hybrid')), fiscal_year INTEGER NOT NULL DE-
FAULT 2026,
```

– Ownership (collaborative) primary_owner TEXT NOT NULL, – CSE or CAM name primary_owner_role
TEXT, – 'CSE' or 'CAM' collaborators TEXT[] DEFAULT '{}', – Array of team members

– Context territory TEXT, – Region/territory name client_id UUID, – For account plans client_name
TEXT, – For account plans

– Unified data (JSONB) portfolio_data JSONB DEFAULT '{}', – Clients in scope snapshot_data JSONB
DEFAULT '{}', – Health metrics stakeholders_data JSONB DEFAULT '{}', – Relationship mapping
risks_data JSONB DEFAULT '{}', – Risk assessment actions_data JSONB DEFAULT '{}', – Action plans
value_data JSONB DEFAULT '{}', – Outcomes & value realisation

– Sales Targets & Pipeline (JSONB) targets_data JSONB DEFAULT '{}', – Quota, committed, gap,
coverage / targets_data schema: { "quota": 2500000, "committed": 1200000, "gap": 500000,
"coverage_ratio": 2.4, "target_coverage": 3.0, "by_client": [{ "client_id": "uuid", "arr_target": 500000,
"current_arr": 400000 }] } / opportunities_data JSONB DEFAULT '{}', – Pipeline opportunities / op-
portunities_data schema: [{ "id": "uuid", "name": "EMR Upgrade", "client_id": "uuid", "value":
250000, "stage": "proposal", "probability": 65, "close_date": "2026-03-15", "meddpicc_score": 28,
"meddpicc_details": { "M": 4, "E": 3, ... }, "products": ["product_uuid", "stakeholders": ["stakeholder_uuid",
"ai_suggestions": ["string"], "created_at": "timestamp", "updated_at": "timestamp" }] / forecast_data
JSONB DEFAULT '{}', – Calculated forecast snapshots / forecast_data schema: { "weighted_forecast":
800000, "best_case": 1500000, "likely_case": 1000000, "worst_case": 600000, "last_calculated":
"timestamp", "history": [{ "date": "2026-01-15", "forecast": 750000 }] } /

– Sales Methodology Data (JSONB) methodology_data JSONB DEFAULT '{}', – A.C.T.I.O.N. Frame-
work progress checkpoints_data JSONB DEFAULT '{}', – Voss conversation checkpoints hero_journey_data
JSONB DEFAULT '{}', – StoryBrand client transformation meddpicc_data JSONB DEFAULT '{}', –
MEDDPICC scores with evidence gap_analysis_data JSONB DEFAULT '{}', – Current->Future state
analysis story_matrix_data JSONB DEFAULT '{}', – Wortmann reference stories

– Collaboration comments JSONB DEFAULT '{}', – In-context comments activity_log JSONB DE-
FAULT '{}', – Edit history active_editors JSONB DEFAULT '{}', – Real-time presence

– Status status TEXT DEFAULT 'draft' CHECK (status IN ('draft', 'in_review', 'approved', 'archived')),
completion_percentage INTEGER DEFAULT 0, steps_completed JSONB DEFAULT '{}',



- Workflow submitted_at TIMESTAMPTZ, submitted_by TEXT, approved_by TEXT, approved_at TIMESTAMPTZ,

- Timestamps created_at TIMESTAMPTZ DEFAULT NOW(), updated_at TIMESTAMPTZ DEFAULT NOW(),

- Constraints CONSTRAINT valid_plan_type CHECK ((plan_type = 'territory' AND client_id IS NULL) OR (plan_type = 'account' AND client_id IS NOT NULL) OR (plan_type = 'hybrid'));

- Indexes for performance CREATE INDEX idx_strategic_plans_owner ON strategic_plans(primary_owner); CREATE INDEX idx_strategic_plans_type ON strategic_plans(plan_type); CREATE INDEX idx_strategic_plans_fiscal ON strategic_plans(fiscal_year); CREATE INDEX idx_strategic_plans_status ON strategic_plans(status); CREATE INDEX idx_strategic_plans_client ON strategic_plans(client_id) WHERE client_id IS NOT NULL;

- Real-time subscriptions trigger CREATE OR REPLACE FUNCTION notify_plan_update() RETURNS TRIGGER AS

```
BEGINPERFORMpg_notify('plan_updates', json_build_object('plan_id', NEW.id, 'updated_by', NEW.primary_owner, 'updated_at', N
```

```
LANGUAGE plpgsql;
```

```
CREATE TRIGGER strategic_plans_notify AFTER UPDATE ON strategic_plans FOR EACH ROW EXECUTE FUNCTION notify_plan_update();
```

Supporting Tables

```
""sql – Plan comments for collaboration CREATE TABLE plan_comments ( id UUID PRIMARY KEY
DEFAULT gen_random_uuid(), plan_id UUID REFERENCES strategic_plans(id) ON DELETE CAS-
CADE, parent_id UUID REFERENCES plan_comments(id), – For threading author TEXT NOT NULL,
content TEXT NOT NULL, entity_type TEXT, – 'risk', 'opportunity', 'action', 'stakeholder' entity_id
TEXT, – Reference to specific item resolved BOOLEAN DEFAULT FALSE, resolved_by TEXT, re-
solved_at TIMESTAMPTZ, created_at TIMESTAMPTZ DEFAULT NOW(), updated_at TIMESTAMPTZ
DEFAULT NOW() );
```

- Real-time presence tracking CREATE TABLE plan_presence (id UUID PRIMARY KEY DEFAULT gen_random_uuid(), plan_id UUID REFERENCES strategic_plans(id) ON DELETE CASCADE, user_name TEXT NOT NULL, user_role TEXT, current_step TEXT, last_active TIMESTAMPTZ DEFAULT NOW(), UNIQUE(plan_id, user_name));

- Activity log for audit trail CREATE TABLE plan_activity_log (id UUID PRIMARY KEY DEFAULT gen_random_uuid(), plan_id UUID REFERENCES strategic_plans(id) ON DELETE CASCADE, user_name TEXT NOT NULL, action TEXT NOT NULL, – 'created', 'updated', 'commented', 'submitted', 'ap- proved' details JSONB, created_at TIMESTAMPTZ DEFAULT NOW());



SPATIAL NAVIGATION WITH CONTEXT PERSISTENCE

Instead of a traditional linear stepper, a **spatial/orbital interface** where all 5 steps exist as interconnected nodes visible simultaneously. This mirrors how strategists actually think—hopping between context and actions, not linearly.

Feature	Description
Minimap Navigation	Persistent mini-view showing all steps as connected nodes. Click any node to jump directly. Current position pulses. Incomplete sections show warning indicators.
Split-Screen Continuity	When editing Step 4 (Risks), pin Step 2 (Portfolio) data to a sidebar. No more “let me go back to check that figure.”
Semantic Breadcrumbs	Instead of “Step 1 -> Step 2”, show: “Barwon Health -> \$2.5M Target -> 3 Opportunities -> 2 Risks”. Users see their story, not just position.
Gesture-Based Transitions	Swipe between steps on touch devices. Keyboard shortcuts (Ctrl+1-5) for power users. Transitions animate data relationships.
Smart Step Skipping	If ChaSen detects no risks worth documenting, allow skipping: “No risks detected. Skip to Review?”



Feature	Description
---------	-------------

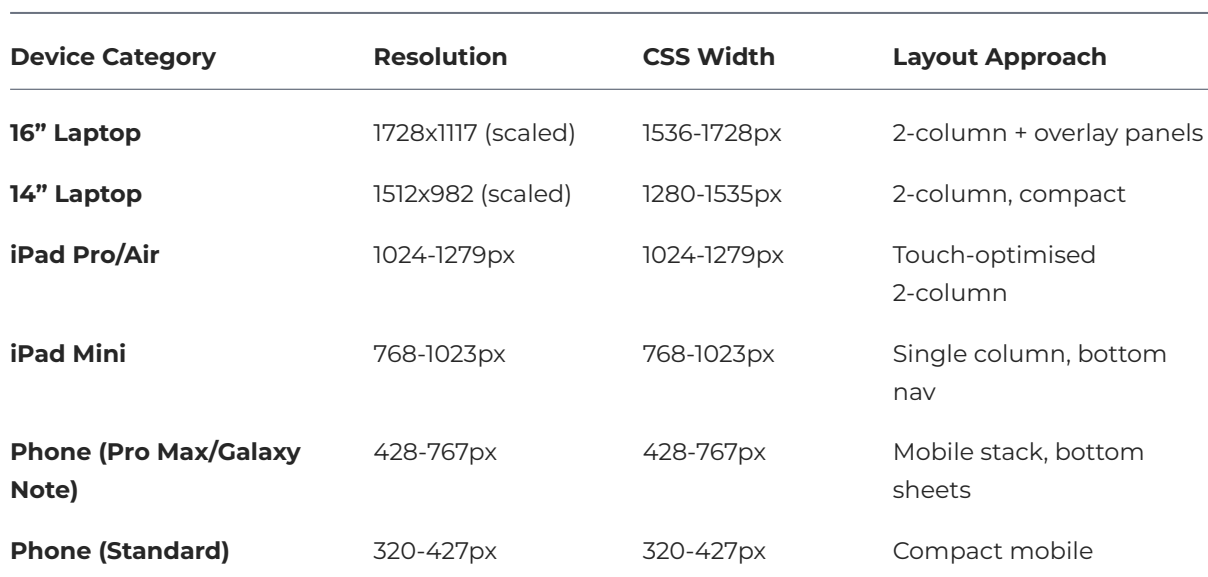
IMMERSIVE INTERACTIONS

Feature	Description
Live Data Pulse	Numbers that update in real-time pulse briefly when they change. When you add an opportunity, watch the coverage bar animate upward.
Drag-to-Prioritise	Drag opportunities vertically to reorder by priority. Drag risks to reorder severity. Physical interaction creates ownership.
Inline Expansion	Click any metric to expand context without leaving the step. Click "\$2.5M ARR" and see the breakdown inline.
Progress Celebration	Subtle confetti on step completion. More substantial celebration on plan submission. Gamification without being childish.
Undo Timeline	Timeline scrubber at bottom showing all changes in session. Drag backward to undo multiple steps at once.
Keyboard-First Design	Every action achievable without mouse. Tab navigation with visible focus rings. Shortcuts displayed on hover.
Reduced Motion Mode	Respects 'prefers-reduced-motion'. All animations become instant transitions.

Responsive Design - Complete Device Matrix

BREAKPOINT STRATEGY

Device Category	Resolution	CSS Width	Layout Approach
5K Ultra-wide	5120x2160	5120px	5-panel workspace, mission control view
Super Ultra-wide	3440x1440	3440px	4-panel with generous spacing
Scaled Ultra-wide	3360x1418, 3328x1404	~3350px	4-panel workspace, comfortable density
Standard Ultra-wide	2560x1080/1440	2560px	3-column + floating panels
Wide Monitor	1920x1080/1200	1920px	3-column layout



- “Mission Control”

- **Multi-Plan View:** Display 3 client plans side-by-side for territory reviews
- **Persistent Dashboards:** Pin live charts while working on plan details

- **Picture-in-Picture:** Drag any chart into floating PiP window
- **Zen Mode:** Double-click main content to expand full-width, hiding sidebars

- **Adaptive Sidebar:** ChaSen collapses to floating button on 14". Stays pinned on 16" if preferred
- **Keyboard-Centric:** 'Cmd+K' command palette, 'Cmd+1-5' steps, 'Cmd+N' new opportunity
- **Trackpad Gestures:** Two-finger swipe between steps, pinch to zoom visualisations



MOBILE FEATURES (IPHONE/ANDROID)

- **Bottom Navigation Bar:** 5 steps as persistent bottom nav, thumb-reachable
- **Sheet-Based Interactions:** Adding opportunity opens bottom sheet, dismissed with swipe-down
- **Card Stacks:** Swipeable opportunity cards—swipe right to prioritise, left to archive
- **Collapsible Sections:** Start collapsed with summary, tap to expand

TABLET FEATURES (IPAD)

- **Split View Support:** Works in 50/50 or 70/30 split alongside email/calendar
- **Apple Pencil:** Handwritten notes that convert to text, sketch stakeholder maps
- **Landscape/Portrait:** Automatic layout adaptation

CROSS-DEVICE FEATURES

- **Layout Memory:** System remembers preferred layout per device
- **State Sync:** Start on desktop, continue on iPad, finish on phone via Supabase Realtime
- **Offline Mode:** Cache current plan for offline editing, sync with conflict resolution

ChaSen AI Integration - Advanced Features

From Reactive to Proactive Intelligence

Feature	Description
Ambient Intelligence	ChaSen watches cursor/scroll position. Hovering over low MEDDPICC score? Surfaces suggestions without prompt.
Predictive Field Population	As you type “Barwon EMR...”, auto-suggests Value, Close Date, Products. Accept with Tab.
Confidence Indicators	Every suggestion shows confidence: “87% confidence based on 4 similar deals” vs “42% confidence—limited data”
“Why This?” Explainability	Click any suggestion to see full reasoning chain. Complete transparency.
Learning from Dismissals	When dismissing suggestions, optional feedback improves future recommendations.

Multi-Modal Interaction



Feature	Description
Voice Input	Tap-and-hold to dictate: “Add a risk for Barwon Health—CFO retiring next quarter.”
Screenshot Intelligence	Paste competitor pricing screenshot. ChaSen extracts and adds to competitive intelligence.
Document Ingestion	Drag PDF (RFP, contract). ChaSen extracts requirements -> opportunities, names -> stakeholders, dates -> timeline.

Contextual Conversation Threading

Feature	Description
Per-Entity Chat	Each opportunity, risk, stakeholder has its own ChaSen thread with preserved context.
Cross-Reference Detection	Mention “Sarah” in a risk, ChaSen links: “Is this Sarah Chen, CFO at Barwon Health?”
Meeting Prep Mode	“Prep me for tomorrow’s Barwon QBR” -> talking points, NPS themes, open actions, Voss techniques.

Proactive Nudges

Feature	Description
Timing-Aware	“You have a Barwon meeting in 2 hours—their support health dropped yesterday. Want talking points?”
Threshold Alerts	Set personal thresholds: “Alert when NPS < +20” or “Notify when coverage < 2.5x”
Weekly Digest	Monday briefing: renewals approaching, stalled opportunities, suggested priorities.



Deal Autopsy

Post-loss analysis: contributing factors, comparison to successful deals, lessons learned.

Natural Language Actions

"" User: "Move the Barwon EMR close date to April" ChaSen: Y Updated close date to April 2026

User: "Why is WA Health health score dropping?" ChaSen: Support tickets up 40% (5 P1s), NPS mentioned 'response times', no CSE meeting in 45 days. Suggested: Schedule support review call.

User: "Show me all stalled deals across my territory" ChaSen: [Displays filtered view of 4 opportunities stalled >30 days] ""

Temporal Intelligence

Feature	Description
Time-Travel View	"Show me this plan 90 days ago." Compare past vs present, see what changed.
Future State Projection	"Show me this territory in 6 months if trends continue." Animated timeline.
Pattern Recognition	"Deals stalling in Proposal >30 days have 23% win rate vs 67% for <14 days. Barwon at day 28. Recommend intervention."

Real-Time Meeting Intelligence

Feature	Description
Live Call Co-Pilot	During Teams/Zoom, private sidebar shows: sentiment analysis, suggested responses, live fact-checking.
Talk Ratio Monitor	Live indicator of you vs client talk time. Alert when exceeding 60%.
Commitment Tracker	Detects verbal commitments: "Client said 'review by Friday.' Capture as action?"

Relationship Graph Intelligence



Feature	Description
Influence Network Mapping	AI-generated org chart showing who influences whom based on meeting patterns.
Relationship Decay Alerts	"Your relationship with Barwon CIO is cooling: No 1:1 in 60 days, excluded from meetings."
Six Degrees Connection	"Warm introduction path to new CEO identified through 2 intermediaries."
Political Risk Mapping	Detect internal politics: "Sarah and David have opposing views. Separate alignment sessions suggested."

Autonomous Agent Actions

Feature	Description
Auto-Draft Communications	"Draft follow-up email to Sarah" -> Generated in your historical tone and style.
Calendar Intelligence	"Find time for Barwon QBR" -> Checks calendars, suggests optimal slots, drafts invite.
Auto-Escalation Triggers	Rules-based: "If Giant client health < 40, auto-notify manager with briefing."
Delegated Research	"Research Barwon's strategic initiatives" -> ChaSen compiles briefing asynchronously.

Emotional & Behavioural Intelligence

Feature	Description
Sentiment Trajectory	Track emotional tone across touchpoints: enthusiastic -> frustrated -> disengaged.
Communication Style Matching	"Sarah prefers data-heavy formal. David likes brief casual. Tailoring accordingly."
Stress Detection	Detect when stakeholders are under pressure from communication pattern changes.

Gamification & Motivation



Badge	Criteria
Pipeline Pro	Maintained 3x coverage for 90 days
Relationship Builder	Multi-threaded across 5+ stakeholders
Fortune Teller	80% forecast accuracy over 4 quarters
Comeback Kid	Rescued 3 at-risk accounts
Methodology Master	Applied all 6 A.C.T.I.O.N. stages in single deal

- **Streak Tracking:** “12 consecutive weeks of plan updates. Keep the streak!”
- **Progress Celebrations:** Deal closure celebrated with quota progress update

Collaborative Intelligence

Feature	Description
Team Pattern Learning	“CSEs who log notes within 24 hours have 34% higher health scores. You’re averaging 3.2 days.”
Cross-Territory Insights	“Sarah in ANZ closed similar deal with this tactic. Connect with Sarah?” (Opt-in sharing)
Institutional Memory	When CSE leaves, ChaSen preserves all context. New CSE gets “Everything about Barwon in 5 minutes.”

Privacy-Preserving Intelligence

Feature	Description
On-Device Processing	Sensitive calculations run locally. Client names never leave device.
Explainable Audit Trail	Every AI decision logged with full reasoning chain. Compliance-friendly.
Consent-Based Intelligence	Clients opt into shared insights programs for improved recommendations.



Digital Twin Simulation

CLIENT ORGANISATION DIGITAL TWIN

- Historical meeting transcripts and communication patterns
- Stakeholder personality profiles from interaction data
- Industry benchmarks and typical decision-making patterns
- Known organisational structure and politics

111



DEAL NEGOTIATION SANDBOX

Practice difficult conversations before real meetings:

Scenario	Simulation
Pricing Objection	"Simulate Sarah pushing back on 10% increase"
Competitive Threat	"Simulate David mentioning Oracle evaluation"
Executive Escalation	"Simulate presenting renewal risk to James"
Multi-Stakeholder	"Simulate joint meeting with conflicting priorities"

Feedback Provided:

- Talk ratio analysis (did you listen enough?)
- Voss technique usage (did you mirror, label, use calibrated questions?)
- Missed opportunities (where could you have probed deeper?)
- Alternative approaches (here's how a top performer would handle this)

TERRITORY DIGITAL TWIN

Simulate entire territory 12 months forward under different strategies:

''' Strategy A: Focus 80% on Giant clients ████ Projected ARR: \$4.2M (+18%) ████ Risk: 3 Medium clients likely to churn from neglect ████ Confidence: 72%

Strategy B: Balanced distribution ████ Projected ARR: \$3.8M (+12%) ████ Risk: Giant clients may feel under-served ████ Confidence: 81%

Strategy C: Aggressive expansion focus ████ Projected ARR: \$4.8M (+28%) ████ Risk: Existing client health drops, higher churn ████ Confidence: 54%

ChaSen Recommendation: Strategy A with mitigation—automate Medium client touchpoints to maintain baseline engagement. '''

Autonomous Prospecting

ChaSen identifies, qualifies, and nurtures prospects autonomously.



WHITESPACE IDENTIFICATION ENGINE

'''
Autonomous
Prospecting Pipeline
Stage 1: IDENTIFY (Fully Autonomous)
Scan news for healthcare IT initiatives
Monitor tender portals for relevant RFPs
Analyse NPS/meeting data for expansion signals
Cross-reference product gaps with client needs
Stage 2: QUALIFY (Fully Autonomous)
Score opportunity against ICP (Ideal Customer Profile)
Estimate deal size from similar wins
Assess timing based on budget cycles
Identify entry point stakeholders
Stage 3: OUTREACH (Autonomous with Templates)
Generate personalised email/LinkedIn message
Send via approved channels (CSE CC'd)
Follow up based on engagement signals
Book discovery call when interest detected
Stage 4: HANDOFF (Human Takes Over)
CSE joins discovery call with full context briefing
All autonomous activity logged and visible
Qualification notes and suggested approach provided
'''

AUTONOMOUS ACTIONS AVAILABLE

Action	Trigger	Human Oversight
Send initial outreach	Qualified prospect identified	Template approval, CC on all
Follow-up email (1)	No response in 5 days	Auto-send, CSE notified
Follow-up email (2)	No response in 12 days	Auto-send, CSE notified
Book discovery call	Positive response detected	CSE confirms availability
Add to nurture sequence	Not ready to engage	Auto-enrol, quarterly review
Create opportunity	Discovery call completed	CSE reviews and approves

Predictive Neuroscience Features



PREDICTIVE INDUSTRY TRENDS

Aggregate signals across all clients to predict market movements:

” ANZ Health-care IT Trend Forecast (FY27) Based on: 47 client meetings, 23 tender analyses, 156 news items Emerging Priorities: Trend Confidence Timing Mobile-first patient engagement 87% Q1-Q2 FY27 AI-assisted clinical documentation 76% Q2-Q3 FY27 Interoperability compliance push 91% Q1 FY27 Cybersecurity infrastructure upgrade 82% Ongoing Cloud migration acceleration 68% Q3-Q4 FY27 Budget Indicators: 67% of clients mentioned increased IT budgets for FY27 Average expected increase: 12-18% Primary driver: Government digital health incentives Competitive Landscape Shifts: Oracle Health: Aggressive pricing in public sector Epic: Expanding ANZ presence, hired 3 local executives Cerner: Reduced activity, possible market exit signals Recommended Portfolio Positioning: “Prioritise mobile health and interoperability messaging. Develop AI documentation story for Q2. Prepare competitive response to Oracle’s public sector push.”

Privacy-First AI Innovation

FEDERATED LEARNING ACROSS CLIENTS

AI improves from patterns across all Altera clients without any data leaving client environments:

” Federated Learning Architecture Barwon GHSA WA DOH Data Data Data Data Local Local Local Local Model Model Model Model Aggregate Only model weights shared, Patterns never raw data (No Data) Improved Global Model Learnings (examples): - “Deals with 3+ stakeholder touchpoints close 2.3x faster” - “MEDDPICC score >30 correlates with 78% win rate” - “Renewals engaged 90+ days out have 94% retention” Privacy Guarantee: No client names, deal values, or identifying information ever leaves the local environment.”



SYNTHETIC TRAINING DATA

Generate realistic but entirely fictional scenarios for CSE training:

Training Module	Synthetic Scenario
New CSE Onboarding	"Synthetic Hospital A" - Behaves like a typical Giant client with complex stakeholder dynamics
Difficult Negotiations	AI-generated CFO persona trained to push back on pricing
Competitive Displacement	Simulated scenario where Oracle is incumbent
Crisis Management	Synthetic support escalation with angry CIO
Executive Engagement	Practice board presentation with synthetic C-suite

Benefits:

- New hires practice on realistic scenarios without risking real relationships
- Mistakes are learning opportunities, not career risks
- Scenarios can be customised to specific skill gaps
- No real client data exposed during training

Generative Content Engine



AI-GENERATED PROPOSALS, TENDERS & RFIs

One-click generation of complete business documents:

” Document Generator Document Type: [Proposal ▼] Proposal (Sales) Tender Response RFI Response Statement of Work Business Case Executive Summary Client: [Barwon Health ▼] Opportunity: [EMR Upgrade - \$180K ▼] [Generate Document] ”

Generated Proposal Structure: 1. **Executive Summary** - Auto-generated from opportunity data and client context 2. **Understanding Your Needs** - Pulled from NPS themes, meeting notes, pain points 3. **Proposed Solution** - Matched products with benefits mapped to stated needs 4. **Implementation Approach** - Based on similar successful implementations 5. **Investment Summary** - Pricing with ROI calculations 6. **Case Studies** - Auto-selected relevant references from Story Matrix 7. **Why Altera** - Competitive positioning based on known competitors 8. **Terms & Conditions** - Standard terms with client-specific modifications 9. **Appendices** - Technical specifications, team bios, certifications

Tender/RFI Response Features:

- Auto-parse tender documents to extract requirements
- Map requirements to Altera capabilities with compliance matrix
- Flag gaps requiring attention or partner involvement
- Generate pricing schedules from product catalog
- Include mandatory certifications and compliance statements
- Format to tender submission requirements



PERSONALISED VIDEO & VOICEMAIL MESSAGES

AI generates personalised multimedia communications:

'''
Personalised Message Generator
Message Type: [Video Message ▼] Video Message (1-2 min) Voicemail Drop (30-60 sec) Audio Message (for email embed)
Purpose: [Renewal Reminder ▼] Renewal Reminder QBR Invitation Thank You / Congratulations Check-in New Feature Announcement Custom Script
Recipients: Sarah Chen (Barwon Health) - Renewal in 45 days David Wong (GHA) - Renewal in 52 days James Miller (WA Health) - Renewal in 60 days
Select all 12 upcoming renewals
Voice: [Your Recorded Voice ▼] Avatar: [Your Approved Likeness ▼] [Preview Sample] [Generate All] [Send for Review]
'''

How It Works: 1. CSE records 5-minute voice sample and approves AI likeness (one-time setup)
2. AI generates personalised script for each recipient using their context 3. Video/audio rendered with natural speech patterns and expressions 4. CSE reviews and approves before sending 5. Delivery tracked with engagement analytics

Personalisation Elements:

- Recipient's name and title
- Specific renewal date and contract details
- Recent interaction references ("Great catching up at the QBR last month")
- Relevant achievements ("Congratulations on the go-live")
- Next steps specific to their situation



DYNAMIC PRESENTATION GENERATION

One-click QBR and presentation decks with Altera branding:

” I want to generate a presentation for my client, Barwon Health, for the Q3 FY26 period. I want to use the Quarterly Business Review (QBR) template. I want to include sections for Relationship Summary & Health Score, Support Performance & SLA Metrics, NPS Trends & Feedback Themes, Product Usage & Adoption, Achievements & Value Delivered, Roadmap & Upcoming Releases, Recommendations & Next Steps, and Competitive Positioning (if relevant). I want to include expansion opportunities. I want to generate a preview, download the PPTX, and open it in Google Slides. ”

Generated QBR Deck Contents: 1. **Title Slide** - Altera branding, client logo, meeting date, attendees 2. **Agenda** - Auto-generated from selected sections 3. **Relationship Summary** - Health score, key contacts, engagement timeline 4. **Support Performance** - SLA %, ticket trends, CSAT, response times (charts) 5. **NPS Analysis** - Score trend, promoter/detractor breakdown, key themes 6. **Value Delivered** - Achievements, ROI metrics, success stories 7. **Product Roadmap** - Relevant upcoming features for their stack 8. **Recommendations** - AI-suggested improvements, expansion opportunities 9. **Action Items** - Open actions, agreed next steps with owners 10. **Appendix** - Detailed data tables, technical metrics

Speaker Notes Auto-Generated:

- Talking points for each slide
- Anticipated questions and answers
- Transition phrases between sections
- Risk areas to address proactively

Customer-Visible Planning



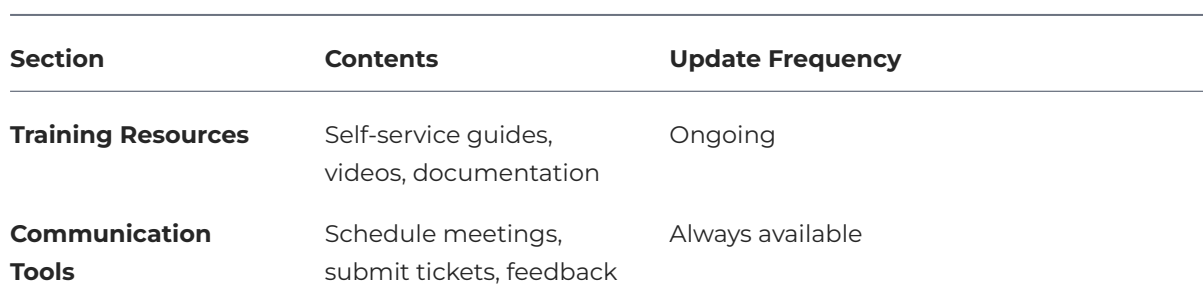
TRANSPARENT ACCOUNT PLANS

Clients can access a read-only view of their strategic plan:

""
Customer Portal: Barwon Health
Strategic Partnership View
Your Altera Team: CSE: Michael Thompson (michael.t@altera.com) CAM: Jennifer Wu (jennifer.w@altera.com) Support Lead: David Park (david.p@altera.com)
Shared Objectives (FY26)
1. Achieve 98% system uptime (Current: 97.2%)
2. Complete mobile rollout to 500 clinicians (Progress: 340)
3. Reduce average ticket resolution to <4 hours (Current: 5.2)
4. Launch patient portal integration (Status: In Planning)
Partnership Health
Overall Health Score: 72/100 (Good)
NPS: +34 (Last survey: Nov 2025)
Support SLA: 94% (Target: 95%)
Engagement: 12 meetings in last 90 days
Upcoming Activities
QBR Meeting: 15 Feb 2026, 10:00 AEST
Mobile Training Session: 22 Feb 2026
Renewal Discussion: March 2026
Reports & Resources
[Monthly Support Summary - January 2026]
[NPS Detailed Report - Q4 2025]
[System Performance Dashboard]
[Product Roadmap - Healthcare Suite]
[Training Resources Library]
[Submit Feature Request]
Direct Communication
[Schedule Meeting with Your CSE]
[Submit Support Ticket]
[Provide Feedback]
""

Customer Portal Features:

Section	Contents	Update Frequency
Shared Objectives	Mutually agreed goals with progress tracking	Real-time
Partnership Health	Health score, NPS, SLA—transparent metrics	Daily
Activity Calendar	Upcoming meetings, training, milestones	Real-time
Support Dashboard	Open tickets, SLA performance, CSAT	Real-time
Reports Library	Monthly summaries, NPS reports, usage analytics	Monthly
Product Roadmap	Relevant upcoming features for their products	Quarterly



- Internal health score calculations
- Revenue and commercial details
- Risk assessments and churn predictions
- Internal notes and strategy discussions
- Competitive intelligence
- Pricing and negotiation notes

REAL-TIME NPS CORRELATION

"""
 Your NPS Impact Analysis
 Based on your last 12 months of client interactions:
 Action NPS When Done NPS When Not
 Email response <4 hours +45 avg +28 avg
 Monthly check-in calls +52 avg +31 avg
 QBR within 2 weeks of schedule +48 avg +35 avg
 Meeting notes shared same-day +44 avg +38 avg
 Proactive issue notification +56 avg +29 avg
 Your Patterns:
 Average email response: 6.2 hours (Target: <4 hours) WARNING:
 Check-in frequency: 85% of clients monthly Y
 QBR punctuality: 70% on-time (Target: 90%) WARNING:
 Same-day meeting notes: 45% (Target: 80%) WARNING:
 Estimated NPS Impact of Improvements:
 "If you improved email response to <4 hours, your portfolio NPS would likely increase from +38 to +45 (+7 points)"
 Suggested Focus: Email response time (highest impact opportunity)
 """



OPEN BOOK FORECASTING

Public forecast accuracy tracking within the organisation:

” Forecast Accuracy Leaderboard - ANZ Region

Ranking (Last 4 Quarters)	Rank	CSE/CAM	Accuracy	Trend	Methodology
1	Sarah Thompson	94%	↑ (+3%)	Conservative	
2	Michael Chen	91%	- > (0%)	Balanced	
3	Jennifer Wu	88%	↑ (+5%)	Conservative	
4	David Park	85%	↓ (-2%)	Aggressive	
5	Emma Wilson	82%	↑ (+8%)	Balanced	

Your Performance: #3 (88% accuracy)

Accuracy Breakdown:

- Committed deals: 98% accurate (high confidence)
- Forecast deals: 82% accurate (room for improvement)
- Upside deals: 65% accurate (typically over-optimistic)

Insight: “You tend to over-estimate close dates by 3 weeks on average. Deals you mark for Q1 often close in Q2.”

Calibration Suggestion: “Add 3 weeks to your estimated close dates, or use ‘Likely Q2’ instead of ‘Commit Q1’ for uncertain.”

”

Benefits of Open Book Forecasting:

- Creates accountability for realistic forecasting
- Rewards accuracy over optimism
- Enables peer learning from high performers
- Identifies coaching opportunities
- Improves overall forecast reliability for leadership

Moonshot Features - Transformational Innovation

■ **Innovation Tier: Moonshot** - These features represent 3-5 year horizon capabilities that could fundamentally transform how strategic planning and customer success operates. High investment, potentially industry-defining outcomes.

Predictive Deal Intelligence



COMPETITOR MOVE PREDICTION

AI predicts competitor actions before they happen based on observable signals:

” Oracle Health targeting WA Health
Competitive Threat Prediction
WARNING: HIGH PROBABILITY: Oracle Health targeting WA Health
Confidence: 78%
Predicted Timeframe: Within 6 months
Evidence Signals: Hiring: 3 ANZ sales reps with public sector experience (Q4)
Job Postings: “Public Health Account Executive - Perth” (Dec)
News: Oracle exec quoted on “ANZ public sector focus” (Nov)
LinkedIn: 2 Oracle reps connected with WA Health employees
Events: Oracle sponsoring WA Health IT conference (Feb)
Tender: Oracle pre-qualified for WA Government panel (Oct)
Historical Pattern Match: “Oracle entered VIC market in 2024 with identical signal pattern. They won 2 of 5 targeted accounts within 8 months.”
Pre-emptive Actions Recommended:
1. Schedule executive relationship meeting with WA Health CIO
2. Accelerate roadmap discussion for Q2 features they've requested
3. Propose multi-year renewal with incentive (lock in before RFP)
4. Prepare competitive battlecard specific to WA Health context
5. Identify internal champion to alert us to competitive meetings
[Create Pre-emptive Action Plan] [Set Monitoring Alert]
”

Competitor Signals Monitored:

Signal Type	Source	Predictive Value
Hiring Patterns	LinkedIn, job boards	High - indicates expansion plans
Job Postings	Seek, LinkedIn, company sites	High - reveals target markets
Executive Statements	News, earnings calls, conferences	Medium - strategic intent
Event Sponsorship	Industry conferences, client events	Medium - relationship building
Social Connections	LinkedIn connections to your clients	High - active prospecting
Tender Activity	Government panels, RFP responses	High - committed pursuit



Signal Type	Source	Predictive Value
Product Launches	Press releases, analyst reports	Medium - capability gaps closing
Pricing Moves	Win/loss feedback, market intel	High - competitive pressure

ECONOMIC INDICATOR INTEGRATION

Connect macroeconomic signals to account-level strategy:

''' Economic Intelligence Dashboard
ALERT: Federal Budget Announcement (12 May 2026)
Healthcare IT Impact Analysis:
Digital Health Fund: \$2.1B allocated (+15% vs prior year)
Cybersecurity Mandate: All health orgs must comply by FY28
Interoperability Standards: New requirements effective Jul 27
Regional Health Investment: \$450M for rural telehealth
Your Portfolio Impact:
Client Likely Impact
Opportunity Action Window
WA Health +\$500K budget EMR Upgrade 2 weeks
SA Health +\$800K budget Analytics 2 weeks
Barwon Health +\$200K budget Mobile 4 weeks
GHA +\$150K budget Security 2 weeks
Metro Health Neutral Maintain N/A
Recommended Response: "Budget announcements create 2-4 week window of receptivity. Clients are reviewing priorities and allocating new funds. Proactive outreach to 4 high-impact clients recommended NOW."
[Generate Outreach Campaign] [Create Talking Points]
Other Active Indicators: RBA Interest Rate: 4.25% (stable) - No immediate impact
AUD/USD: 0.68 (-2% MTD) - Import cost pressure for HW deals
Healthcare Employment: +3.2% YoY - Capacity for new projects
Tech Sector Sentiment: Cautious optimism (Gartner Q1 report) '''

Economic Indicators Monitored:

Indicator	Source	Relevance
Federal/State Budgets	Treasury announcements	Direct funding for health IT
Interest Rates	RBA	Affects capital expenditure appetite



Indicator	Source	Relevance
Currency Rates	Forex markets	Import costs for hardware/licenses
Healthcare Workforce	ABS	Capacity to absorb new technology
Industry Sentiment	Gartner, Forrester	Overall spending outlook
Regulatory Changes	Government gazettes	Compliance-driven demand
Grant Programs	Business.gov.au	Funding opportunities for clients

Autonomous Relationship Maintenance

RELATIONSHIP AUTOPILOT

For stable, healthy accounts, ChaSen maintains relationships autonomously with human oversight:

” Relationship Autopilot: Metro Health (Health Score: 85) Autopilot Status: ACTIVE Y Mode: Maintenance (Low-touch healthy account) Human Intervention Required: No Autonomous Activities (Last 30 Days): Date Action Status Response 28 Jan Monthly check-in email Sent Y Replied 22 Jan Industry news share Sent Y Liked 15 Jan Product update notification Sent Y Opened 10 Jan NPS survey invitation Sent Y +42 NPS 05 Jan Happy New Year message Sent Y Replied Scheduled Activities (Next 30 Days): 05 Feb: Share relevant case study (auto-selected) 12 Feb: Monthly check-in email 18 Feb: Sarah’s work anniversary (5 years) - Card scheduled 28 Feb: QBR scheduling reminder Autopilot Rules Active: Y Monthly relationship touchpoint Y Share relevant industry news (max 2/month) Y Product update notifications Y Birthday/anniversary recognition Y NPS survey scheduling Y Escalate if health drops below 70 [Adjust Rules] [Take Manual Control] [View All Communications] ”

Autopilot Modes:



Mode	Health Score	Automation Level	Human Involvement
Maintenance	75+	Full automation	Monthly review only
Nurture	60-74	Partial automation	Bi-weekly review
Watch	50-59	Alerts only	Weekly engagement
Intervention	<50	Disabled	Full human control

Autopilot Can:

- Send templated check-in emails (pre-approved by CSE)
- Share relevant industry news and content
- Schedule routine meetings
- Send birthday/anniversary messages
- Distribute product updates
- Invite to NPS surveys
- Log all activities for audit

Autopilot Cannot:

- Discuss pricing or contracts
- Make commitments
- Handle complaints
- Engage in complex conversations
- Send without logging
- Override human instructions



PREDICTIVE GIFT & RECOGNITION

AI identifies meaningful recognition opportunities:

'''
Recognition Opportunities
Upcoming (Next 30 Days):
Sarah Chen - 10 Year Work Anniversary (18 Feb) Barwon Health | CFO | Your Champion
Relationship Value: High (Champion on \$450K pipeline) Personal Intel: Mentioned coffee 3x, runs marathons
Suggested Recognition: Option A: Premium coffee subscription (3 months) - \$150 Option B: Charity donation in her name (cancer) - \$200 Option C: Personalised thank you video + flowers - \$80
ChaSen Recommendation: Option A (matches interests) [Approve Option A] [Modify] [Skip] [Schedule Call Instead]
David Wong - Birthday (25 Feb) GHA | CIO | Economic Buyer
Relationship Value: Medium (renewal in 90 days) Personal Intel: Golf enthusiast, supports Carlton FC
Suggested Recognition: Option A: Personalised birthday message - \$0 Option B: Golf accessories gift - \$100
ChaSen Recommendation: Option A (standard relationship) [Send Message] [Upgrade Gift] [Skip]
'''

Recognition Triggers:

- Work anniversaries (5, 10, 15, 20 years)
- Birthdays
- Promotions
- Company awards
- Personal achievements mentioned in meetings
- Life events (if shared)

Gift Budget Guidelines:

Relationship Tier	Annual Budget	Approval
Champion/Exec Sponsor	\$500	Manager approval >\$200
Key Stakeholder	\$200	Self-approval
General Contact	\$50	Self-approval
Prospect	\$0	Message only



EVENT TRIGGER RESPONSE

Automated response drafts when clients appear in news:

'''
Event Trigger: Barwon Health
Event Detected: Healthcare Innovation Award Winner
Source: Australian Healthcare Week (3 Feb 2026)
Confidence: 98%
Article Summary: "Barwon Health recognised for digital transformation initiative, including EMR modernisation and patient portal deployment. CFO Sarah Chen accepted the award, citing 'exceptional vendor partnerships' as key to success."
Altera Mentions: "EMR modernisation" (our product referenced)
Draft Response (Ready for Review):
To: Sarah Chen sarah.chen@barwonhealth.org.au
Subject: Congratulations on the Healthcare Innovation Award!
Dear Sarah,
I just saw the wonderful news about Barwon Health winning the Healthcare Innovation Award—congratulations to you and the entire team! It's incredibly well-deserved recognition for the transformational work you've led over the past two years. It's been a privilege to partner with you on this journey, and we're proud to have played a small part in Barwon's success. Would love to catch up over coffee to celebrate and hear more about what's next. Let me know if you have time in the coming weeks.
Warm regards,
Michael
[Send Now] [Edit] [Schedule for Tomorrow AM] [Dismiss]
Additional Suggestions:
Share on LinkedIn with congratulations tag
Request case study participation
Add to reference customer list
'''

Event Types Monitored:

Event Type	Response Template	Urgency
Award/Recognition	Congratulations	Within 24 hours
Funding/Investment	Opportunity discussion	Within 48 hours
Leadership Change	Relationship maintenance	Within 24 hours
Expansion/Merger	Growth opportunity	Within 48 hours
Product Launch	Partnership discussion	Within 1 week
Negative News	Support outreach	Within 4 hours
Go-Live/Milestone	Celebration	Same day



Immersive & Ambient Experiences

SPATIAL AUDIO BRIEFINGS

Transform commute time into productive territory review with 3D audio:

''' Spatial Audio Briefing Mode: Commute Briefing (15 minutes) Device: AirPods Pro (Spatial Audio enabled) Audio Landscape: [High Priority] Barwon (Urgent) [At Risk] <-> [Healthy] GHA Metro SA Health [Low Priority] How It Works: - Clients positioned in 3D audio space based on priority/health - High priority = front and centre - At risk = left side - Healthy = right side Head Gestures (with AirPods motion detection): - Look LEFT: Hear more about at-risk accounts - Look RIGHT: Hear about healthy accounts - Look UP: Skip to next client - Nod DOWN: "Tell me more" about current client Voice Commands: - "Focus on Barwon" - Deep dive on specific client - "What's urgent?" - Jump to action items - "Skip" - Move to next client - "Remind me" - Create reminder for later Sample Briefing Script: "Good morning. Starting your territory briefing. [Front, urgent tone] Barwon Health needs attention— support health dropped to 45% yesterday with 3 P1 tickets. [Look left gesture detected] Diving deeper: The P1s relate to reporting module outages. Sarah Chen escalated to your manager this morning. Suggested action: Call Sarah before 10am to acknowledge. [Nod detected - creating reminder] Reminder set: Call Sarah Chen, 9:30am." '''

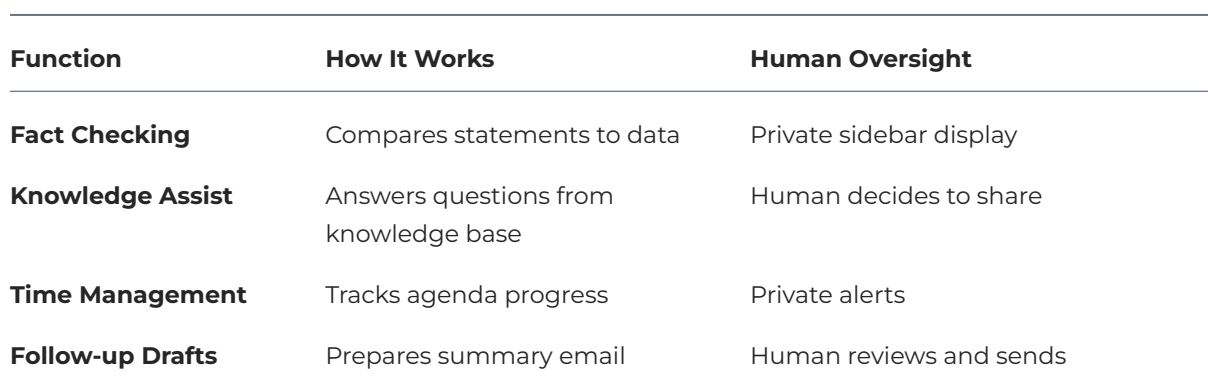


HAPTIC PIPELINE

Apple Watch tactile notifications for ambient awareness:

'''
Pipeline Configuration
Device: Apple Watch Series 9 Mode: Ambient Awareness (Non-intrusive)
Haptic Patterns:
Pattern Meaning Urgency
.. (2 quick) New opportunity added Low - FYI
... (3 quick) Deal stage advanced Low - Positive
 (1 long) Deal at risk High - Urgent
 · (short-long) Approaching quota
 Med - Positive
 (2 long) Client health drop >10pts
 High - Action
 (4 quick) Meeting starting in 5 min
 Med - Reminder
 · (long-short) NPS response received
 Low - FYI
 · (pattern) Competitor alert High - Intel
 Quiet Hours:
 7pm - 7am (weekdays), All day (weekends)
 Do Not Disturb: Respects system DND settings
 Glanceable Watch Face Complication:
 Pipeline
 \$2.1M | 2.4x Value & coverage at a glance
 ▲ \$50K today Change indicator
 Benefits:
 - Stay informed without looking at phone
 - Learn patterns—urgent feels different from positive
 - Peripheral awareness during meetings
 - No context switching required
'''

AI-Human Hybrid Operations



PARALLEL DEAL PROCESSING

" Paralel Processing Dashboard Your Focus: Barwon EMR Upgrade (Human-led negotiation) AI Processing in Background (10 deals): Deal AI Activity Status Review GHA Analytics Drafting proposal 85% Soon WA Health Mobile Researching stakeholders 60% SA Health Renewal Preparing QBR deck 100% Ready Metro Security Competitive analysis 45% Alpine Health EMR MEDDPICC assessment 100% Ready Peninsula Upgrade Pricing model 70% Eastern Health ROI calculation 100% Ready Northern Hosp Reference matching 90% Soon Western Health Risk assessment 55% Southern IMS Contract review 30% Ready for Review (3): SA Health Renewal: QBR deck complete [Review Now] Alpine Health: MEDDPICC assessment ready [Review Now] Eastern Health: ROI model complete [Review Now] Time Saved Today: ~4.5 hours Deals Advanced: 3 (pending your review) AI Work Queue (Upcoming): Draft 5 follow-up emails (queued) Research 3 new prospects (queued) Update 8 opportunity records (queued) Generate 2 competitive battlecards (queued) [Prioritise Queue] [Add Task] [Pause All]

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Task Type	AI Can Complete	Human Review Required
Research	Stakeholder profiles, competitive intel	Optional
Analysis	MEDDPICC assessment, ROI models	Required before use
Drafts	Proposals, emails, presentations	Required before send
Data Entry	CRM updates, meeting logs	Optional spot-check
Scheduling	Meeting requests, reminders	Approval before send
Strategy	Deal recommendations, next steps	Required discussion

Throughput Multiplier:

- Without AI: ~3 deals actively progressed per day
- With Parallel Processing: ~15 deals progressed per day (human reviews 3-5 AI outputs)

Data Visualisation - Next-Generation Features

Design Philosophy: Data visualisation should tell stories, enable exploration, and surface insights—not just display numbers. Every chart should answer “so what?” not just “what.”

Storytelling with Data



NARRATIVE DASHBOARDS

Dashboards that tell a story with context, not just display metrics:

” **Territory Story: Q3 FY26** Chapter 1: The Strong Start “July opened with momentum. Three renewals closed in the first week, pushing committed revenue to \$1.8M—ahead of plan.” [Animated chart showing July spike] Chapter 2: The Challenge “August brought headwinds. Barwon Health’s support issues triggered a health score drop from 72 to 48, putting \$450K renewal at risk. Portfolio average fell 8 points.” [Chart highlighting Barwon’s decline, with annotation] Chapter 3: The Recovery “Your QBR intervention on September 15 turned the tide. Support escalation resolved 5 P1 tickets. Health recovered to 71 by month end. Renewal confirmed October 3.” [Before/after slider showing health recovery] Chapter 4: The Outcome “Q3 closed at \$2.4M—104% of target. Key driver: Barwon not only renewed but expanded by \$80K. Your intervention directly contributed \$530K in protected + new revenue.” [Final summary visualisation with your impact highlighted] [◀ Previous Quarter] [Play Animation] [Next Quarter ▶] [Export as PDF] [Share with Manager] [Add to QBR Deck]

ANNOTATED TIMELINES

Every data point can carry context that persists for future viewers:

” **Barwon Health - Health Score Timeline** 100 90 80 70 60 50 40 30 Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Annotations (click any point to add): Mar 15: “System outage - 3 days downtime. Client escalated.” Added by: Michael T. | Impact: -15 points Jun 22: “New CIO started. Initial relationship building phase.” Added by: Michael T. | Impact: Neutral Sep 15: “QBR intervention. Support escalation resolved.” Added by: Michael T. | Impact: +23 points recovery [+ Add Annotation] [Show/Hide Annotations] [Export with Context]



BEFORE/AFTER COMPARISONS

Drag slider to visualise intervention impact:

"" [View Before/After Comparison](#) [Impact Comparison: Support Escalation Intervention](#) [Drag slider to compare before vs after:](#) [BEFORE](#) [AFTER](#) [BEFORE \(Aug 15\)](#) [AFTER \(Oct 15\)](#) [Support SLA: 45%](#) [Support SLA: 92%](#) [+47%](#) [Open P1 Tickets: 5](#) [Open P1 Tickets: 0](#) [-5](#) [CSAT Score: 2.1/5](#) [CSAT Score: 4.3/5](#) [+2.2](#) [Health Score: 48](#) [Health Score: 71](#) [+23](#) [NPS: +12](#) [NPS: +34](#) [+22](#) [Renewal Risk: HIGH](#) [Renewal Risk: LOW](#) [Y Mitigated](#) [Revenue Impact:](#) [At-risk revenue protected: \\$450,000](#) [Expansion unlocked: \\$80,000](#) [Total value of intervention: \\$530,000](#) [\[Add to Value Ledger\]](#) [\[Share as Success Story\]](#) [\[Export\]](#) ""

Interactive Exploration

DRILL-ANYWHERE ARCHITECTURE

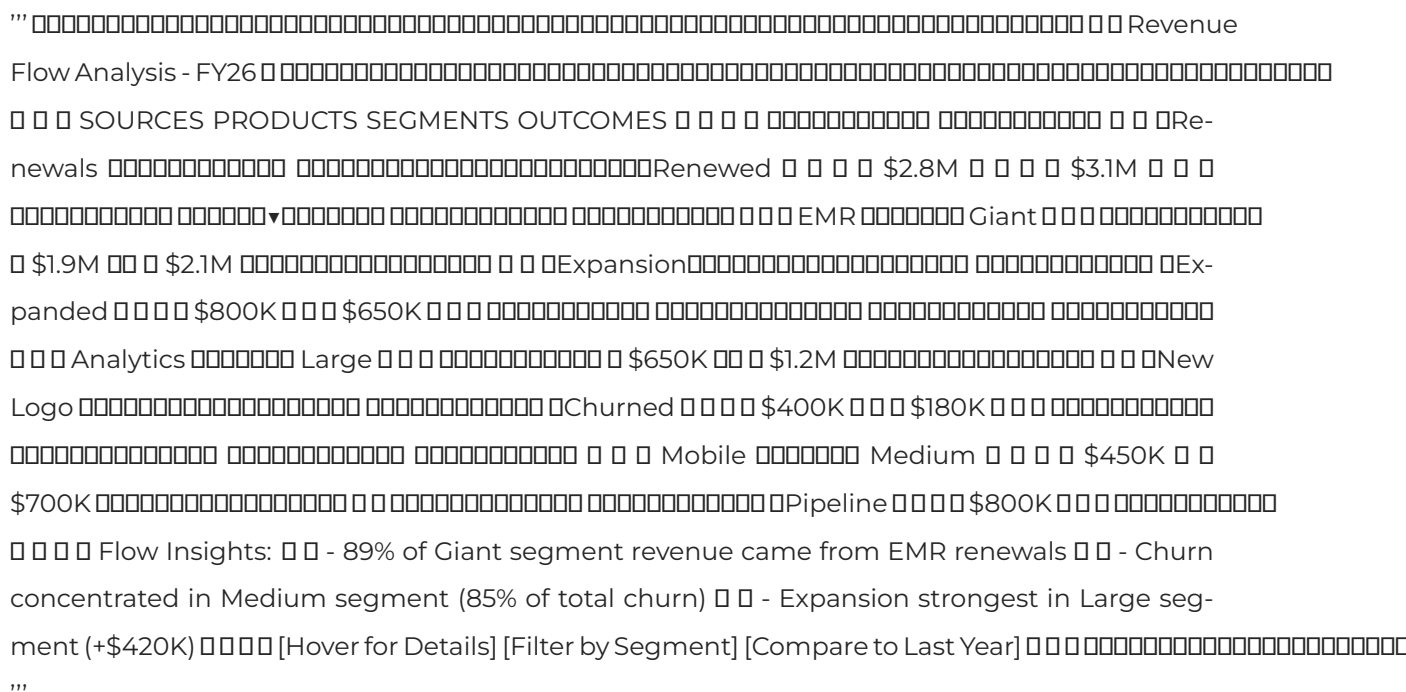
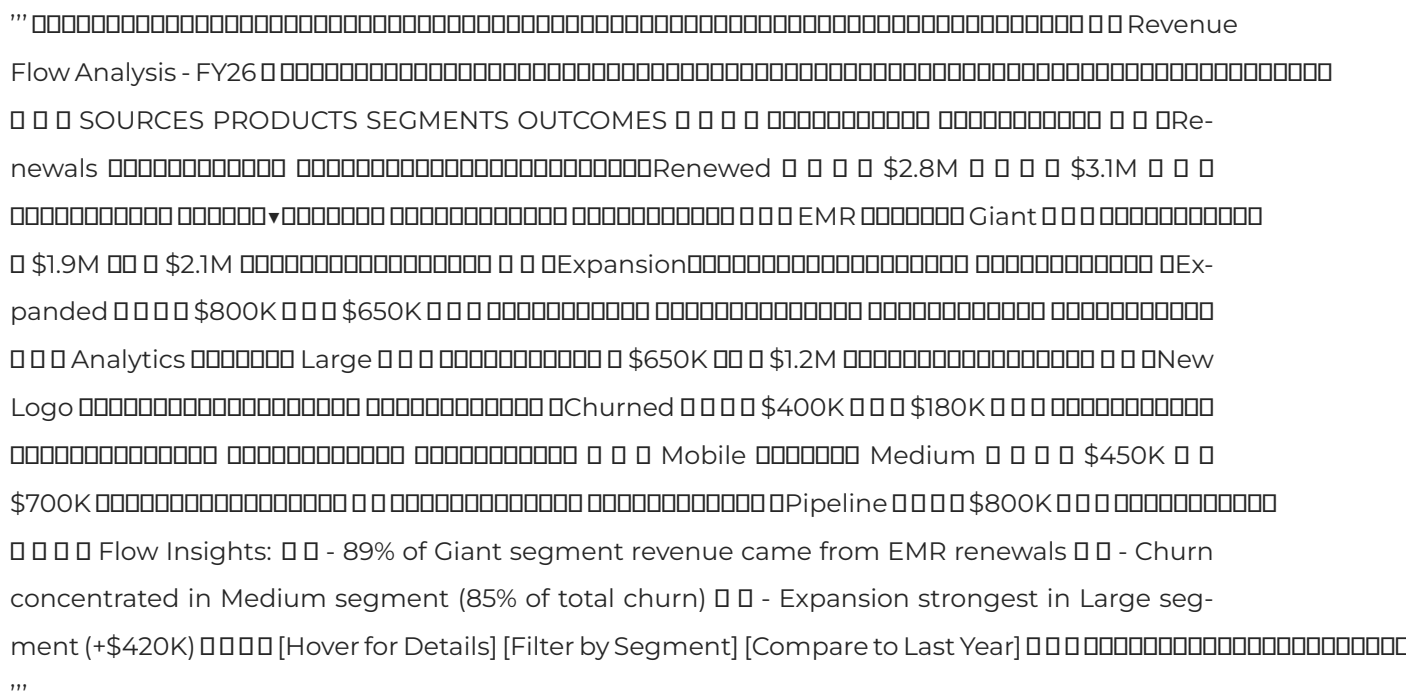
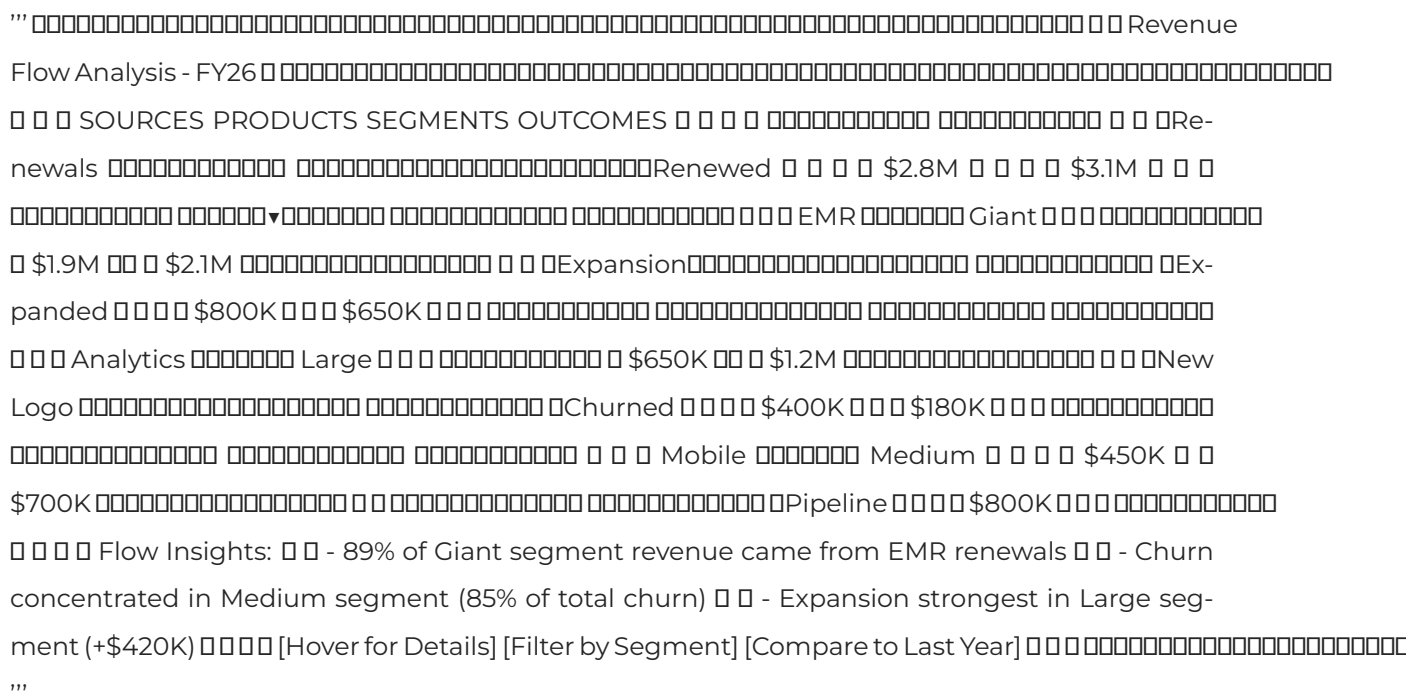
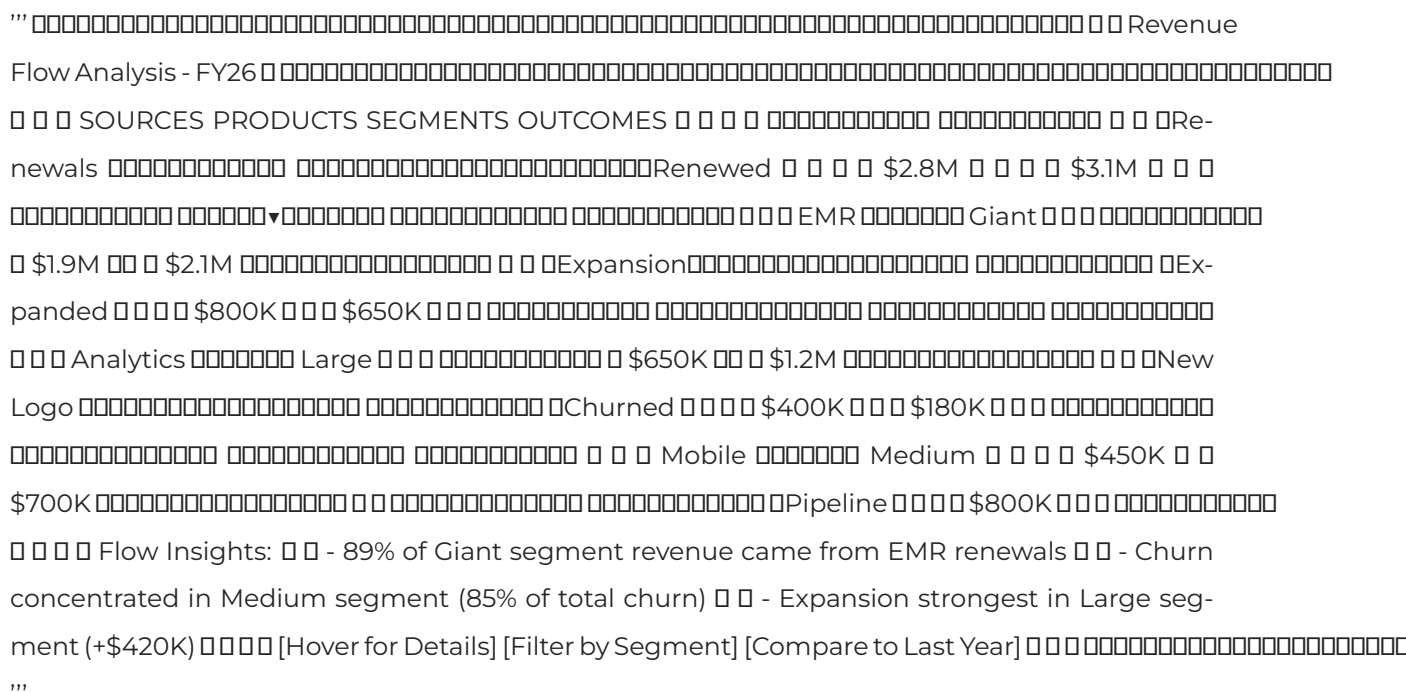
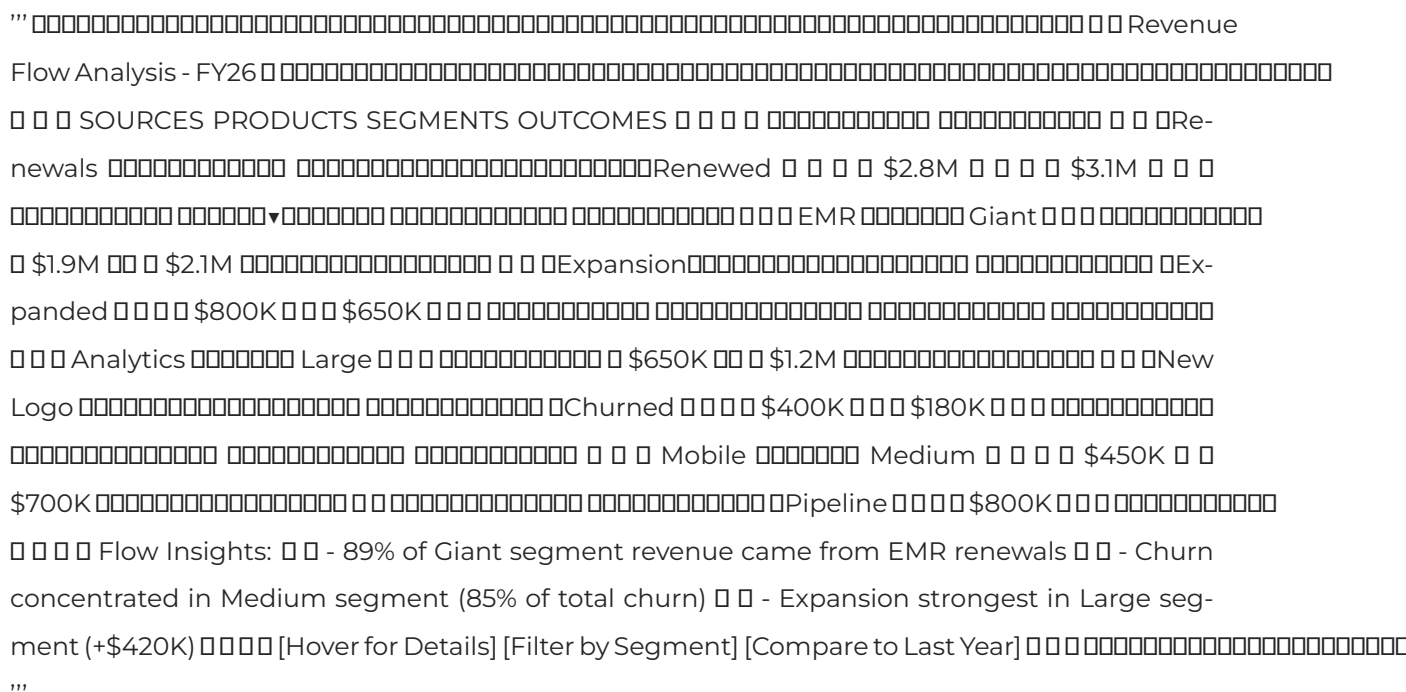
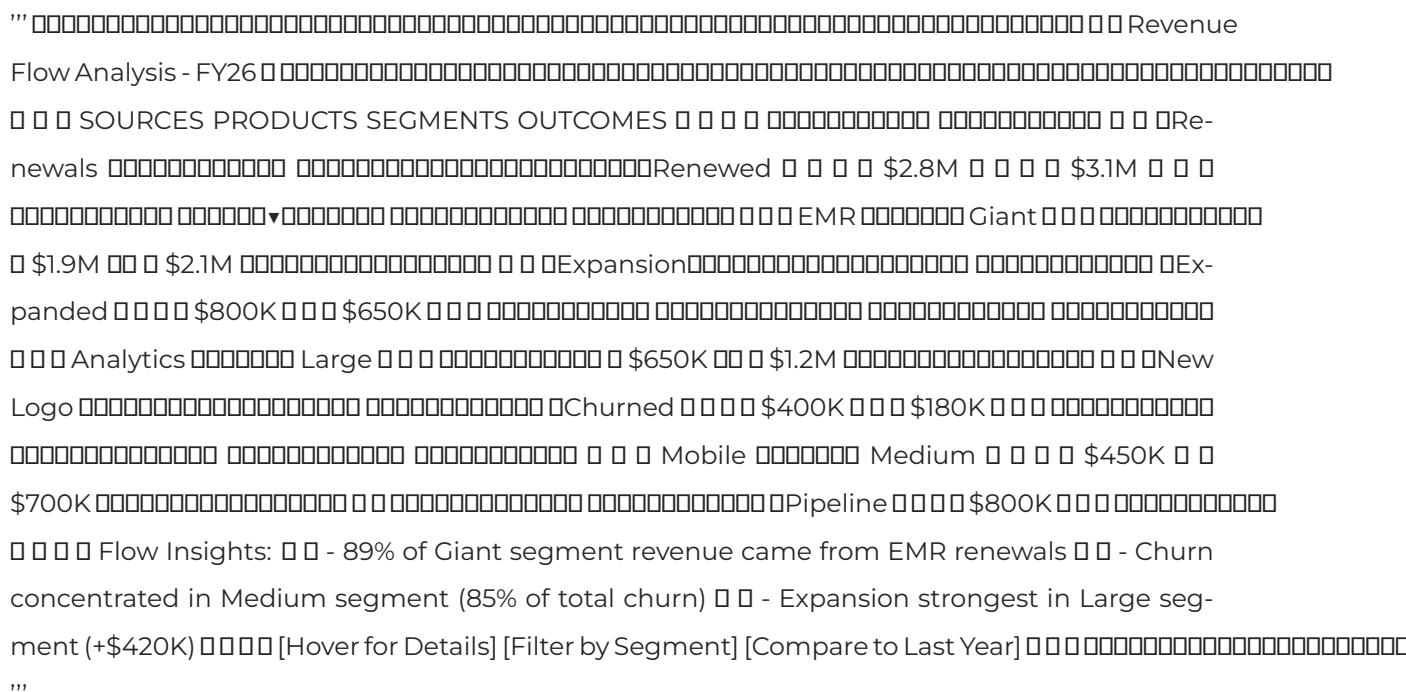
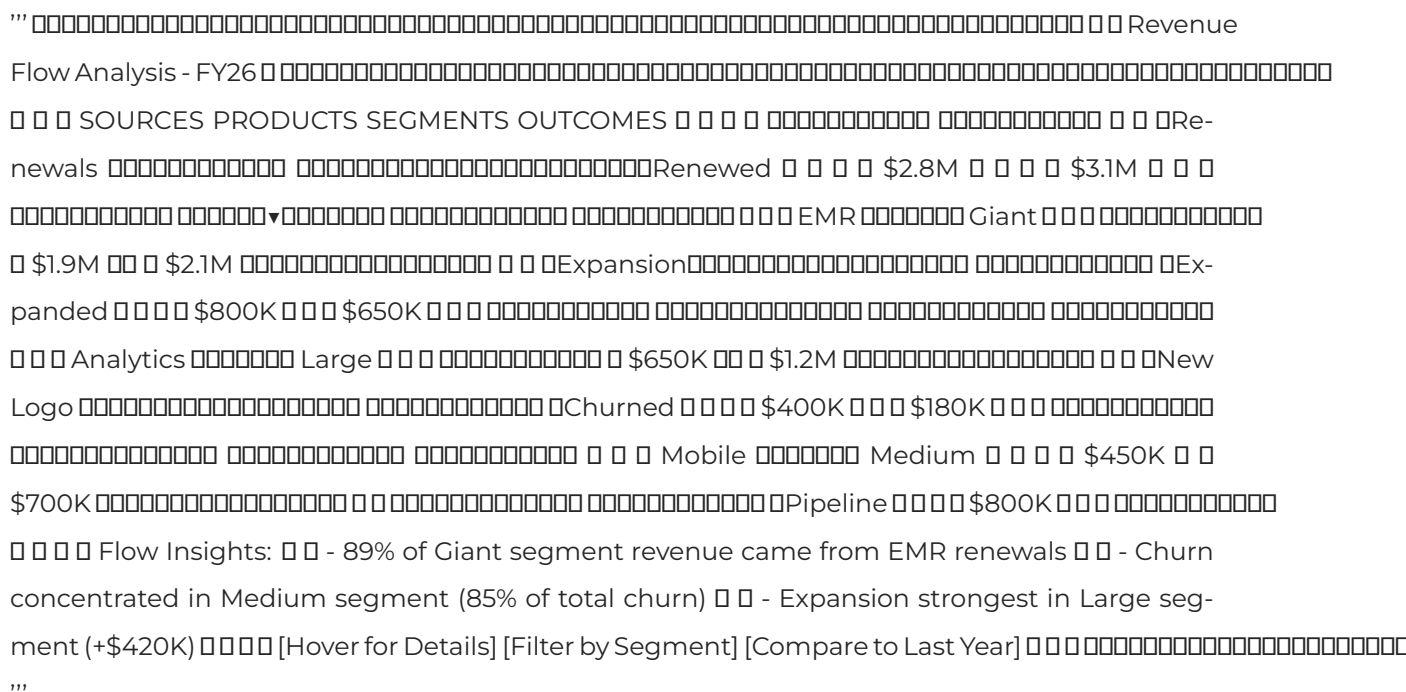
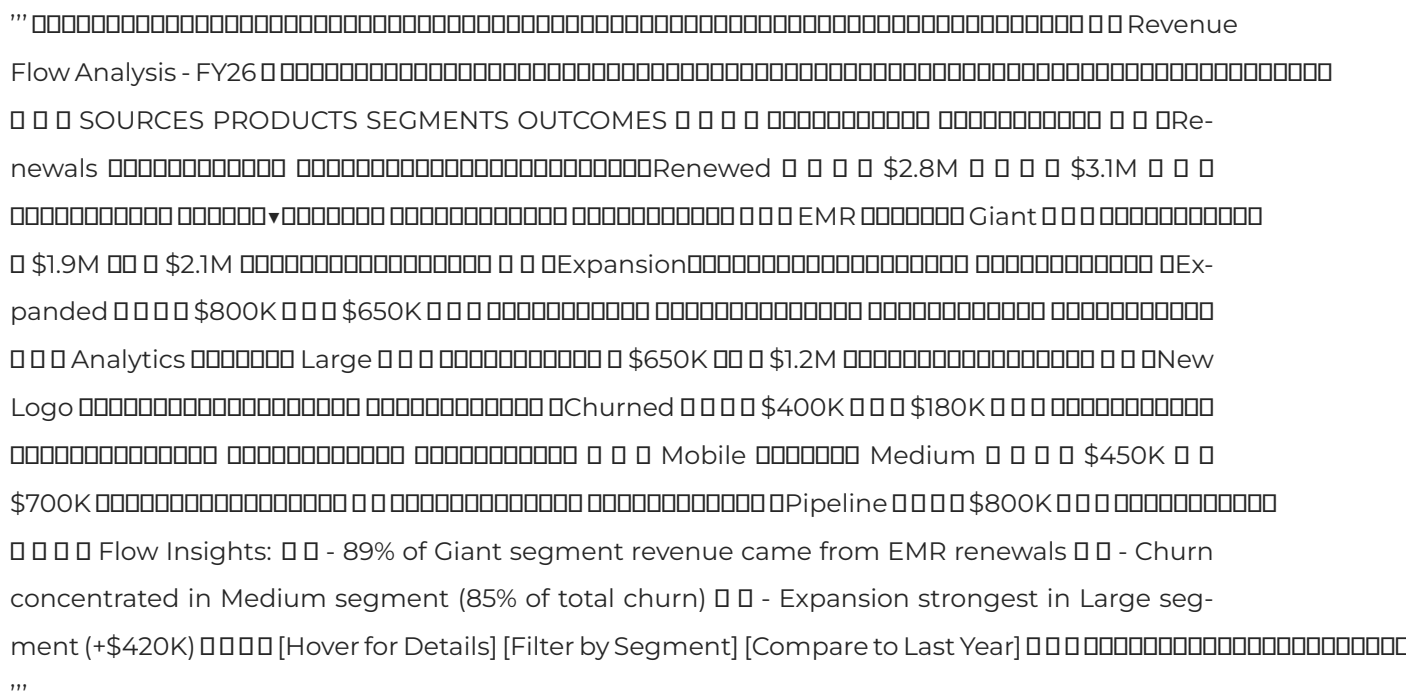
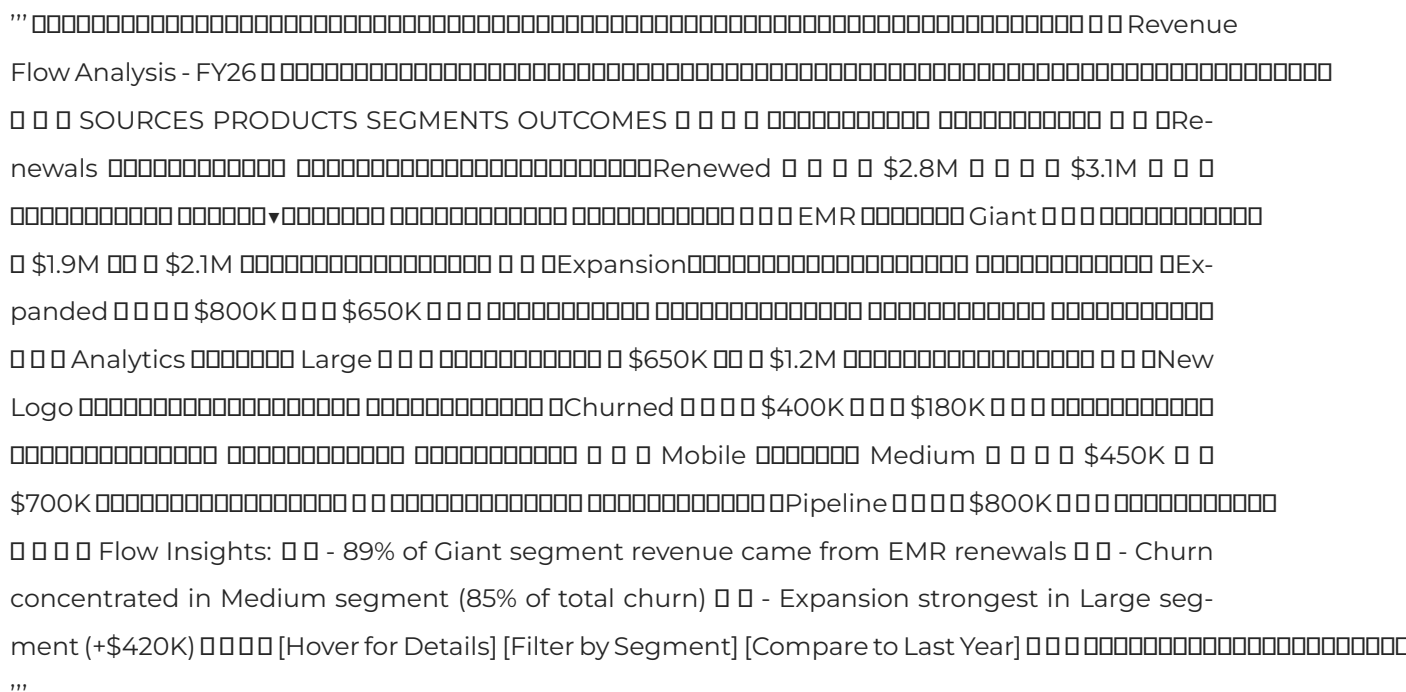
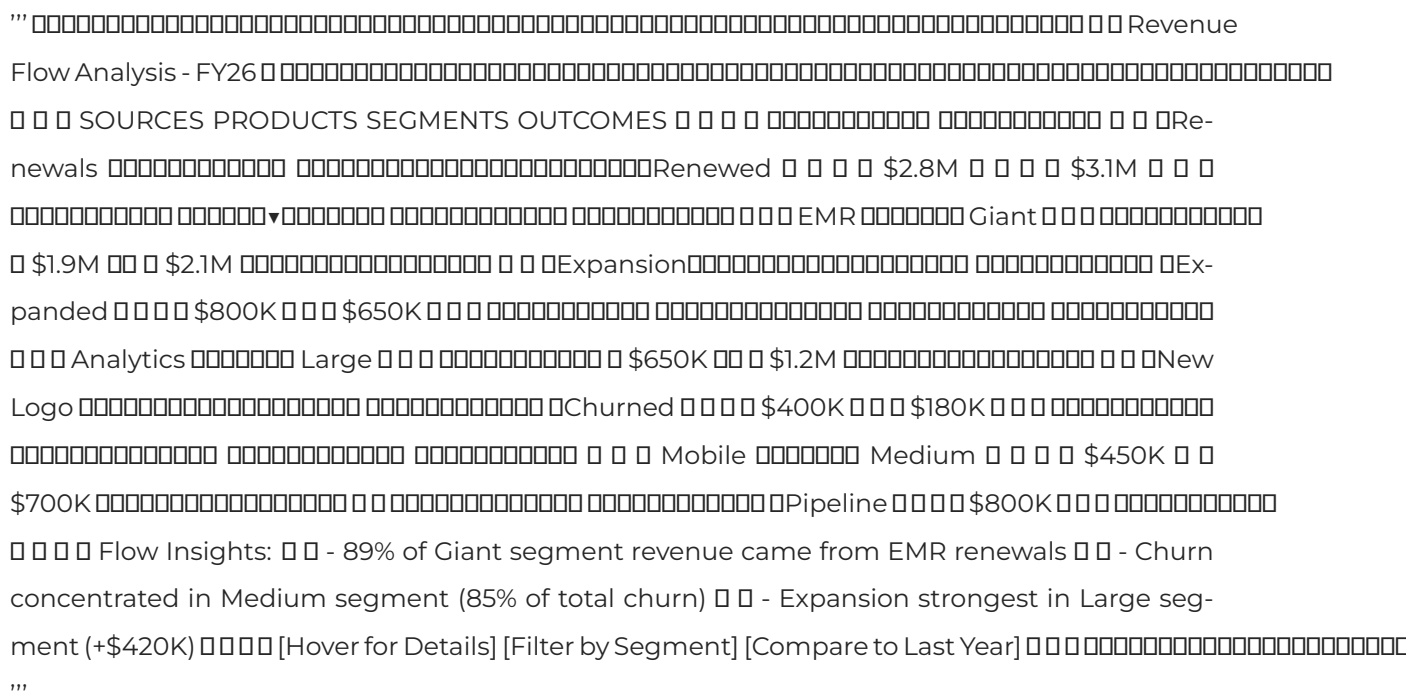
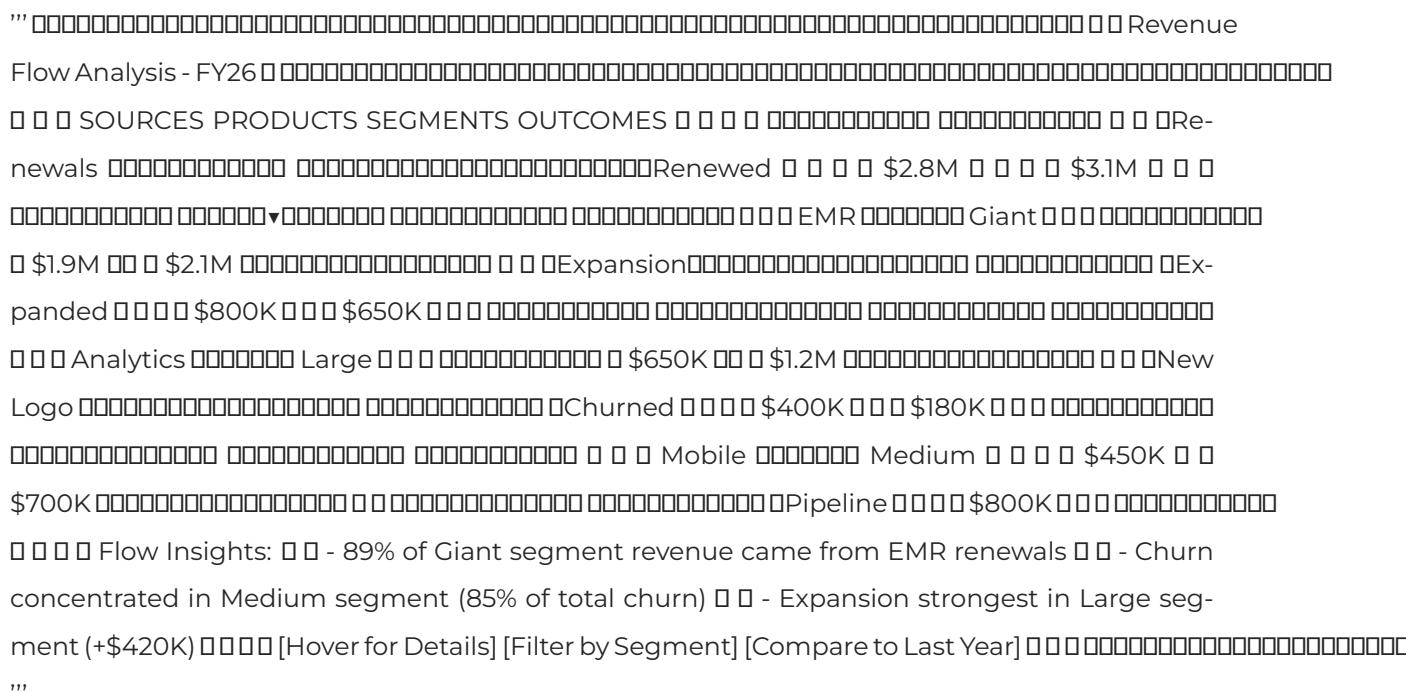
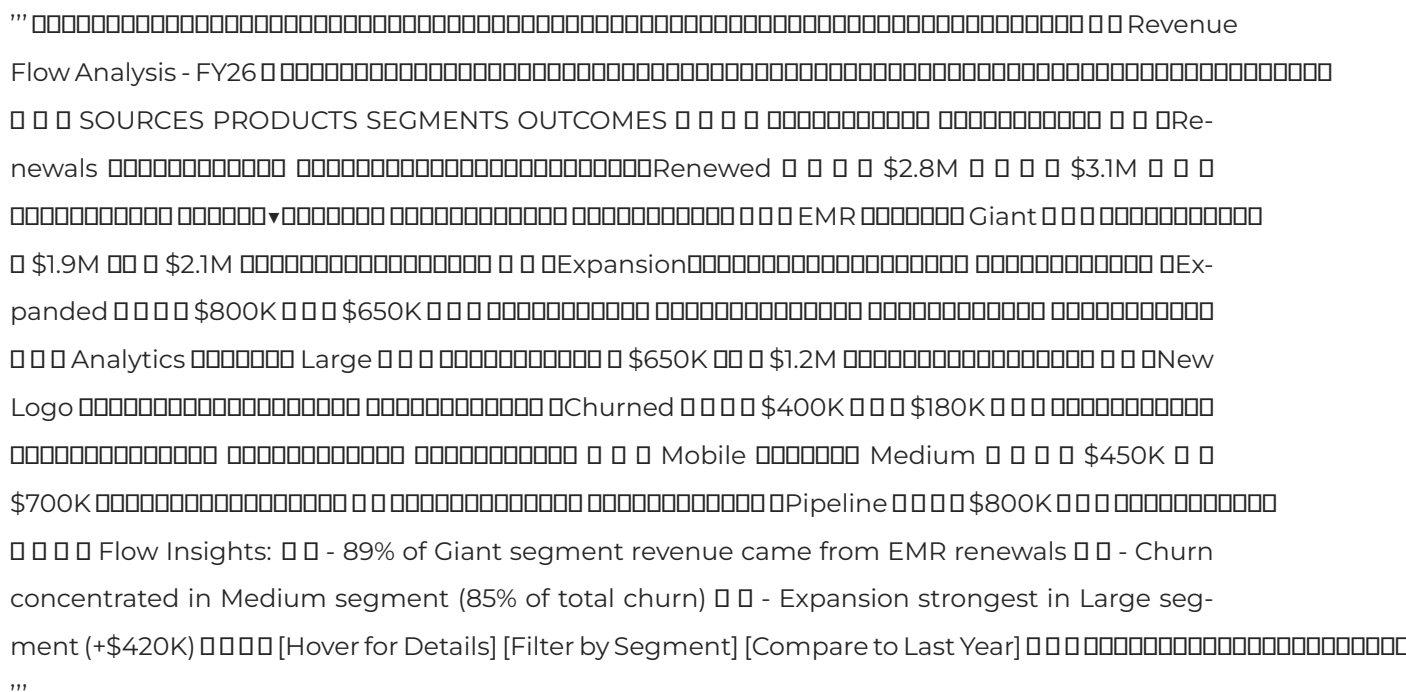
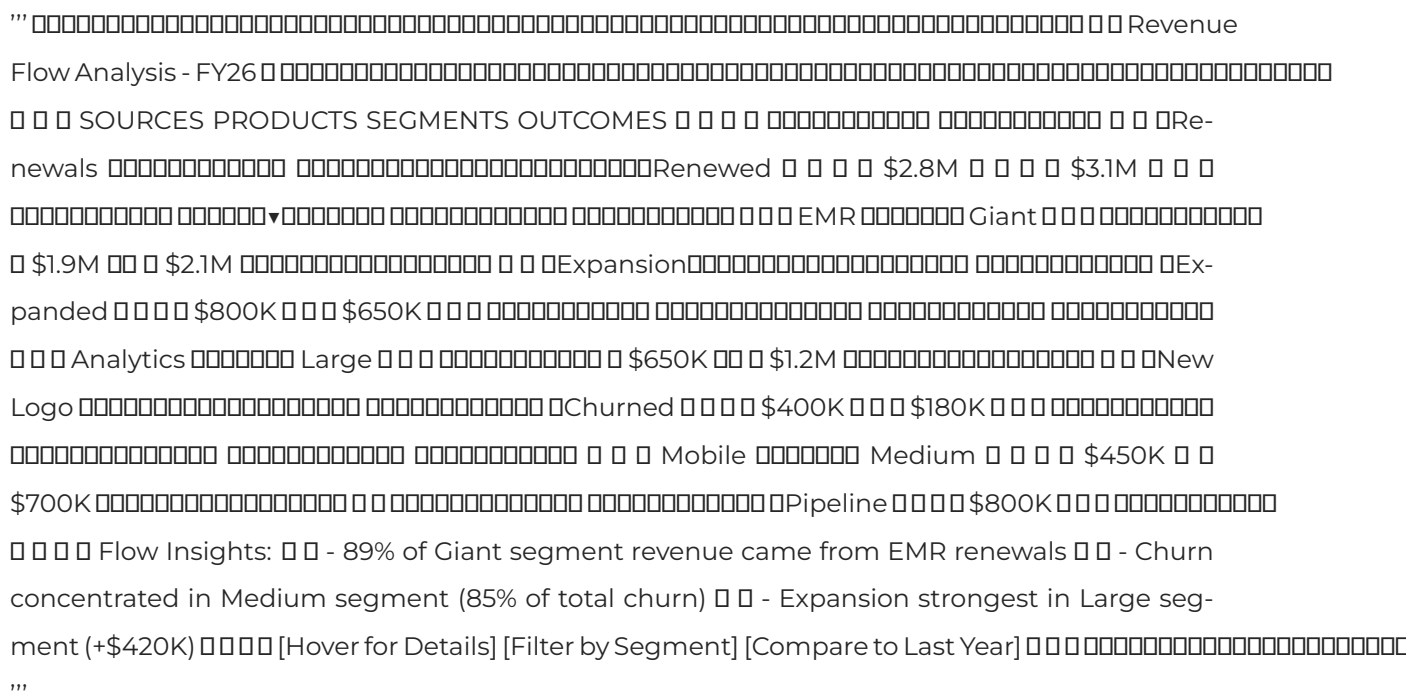
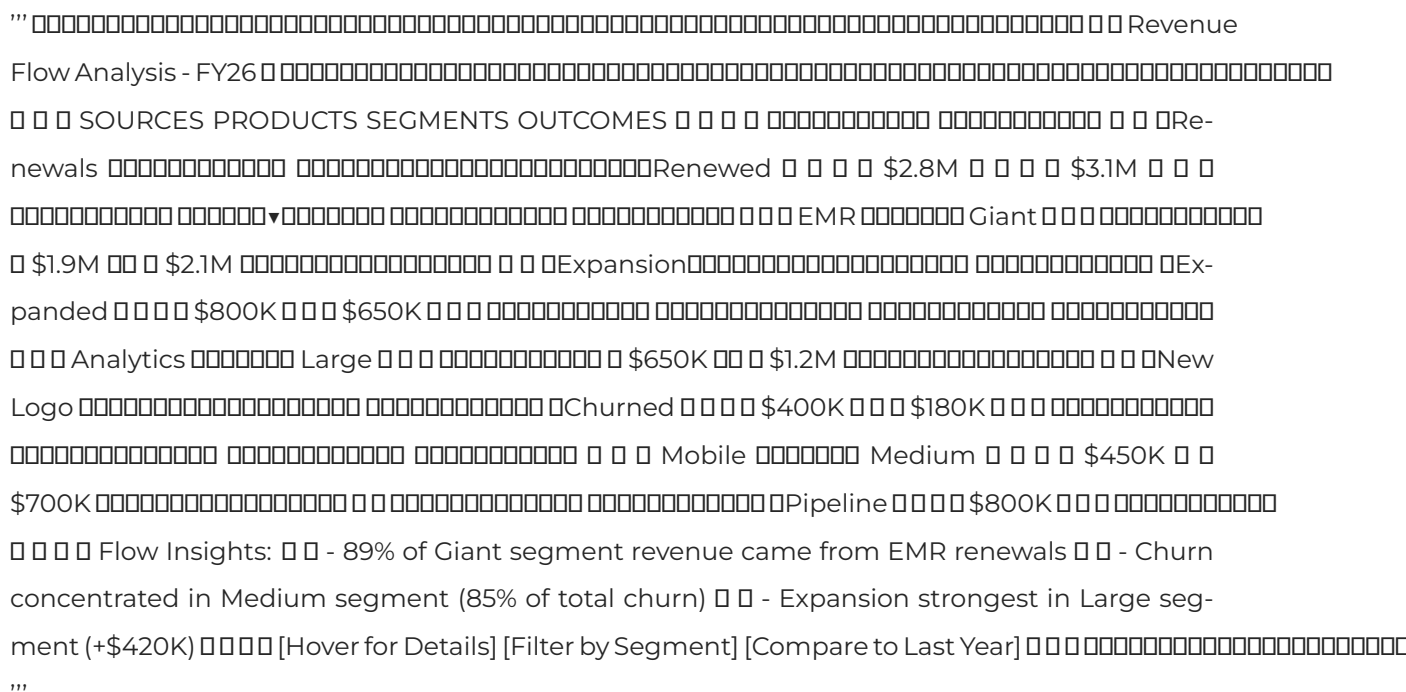
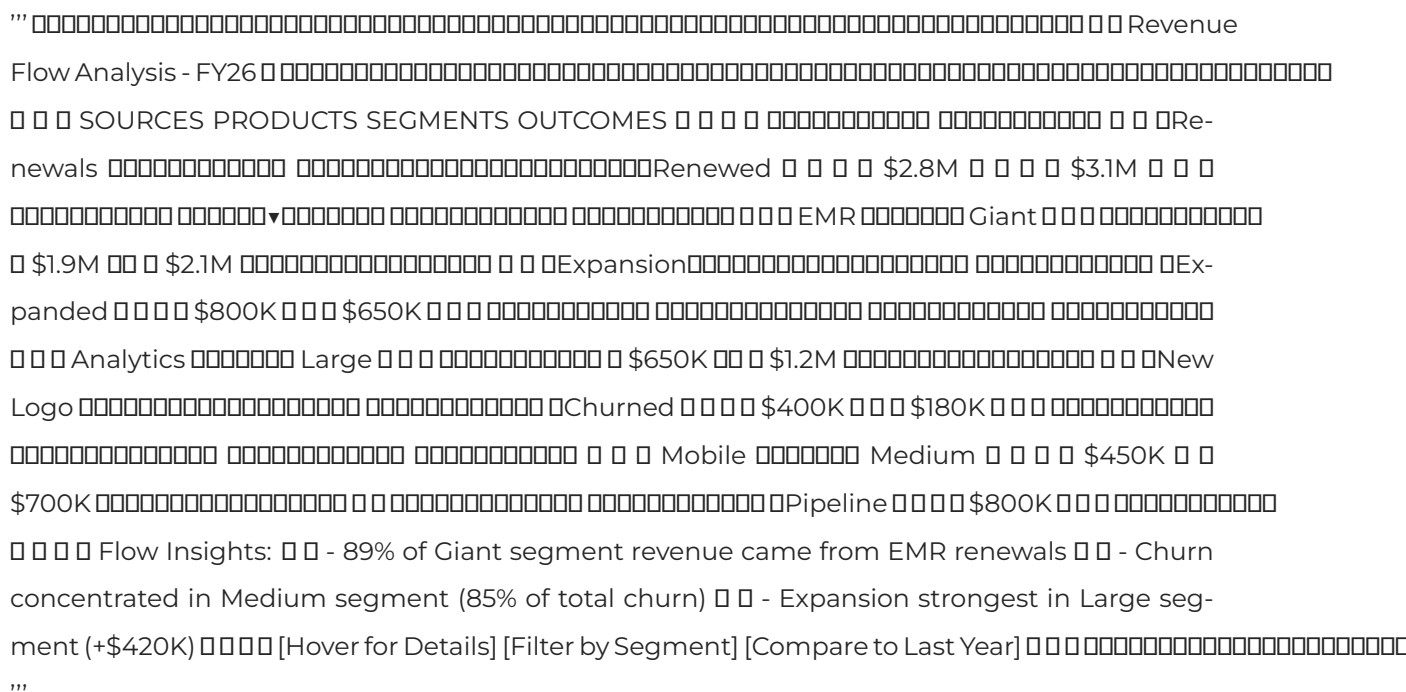
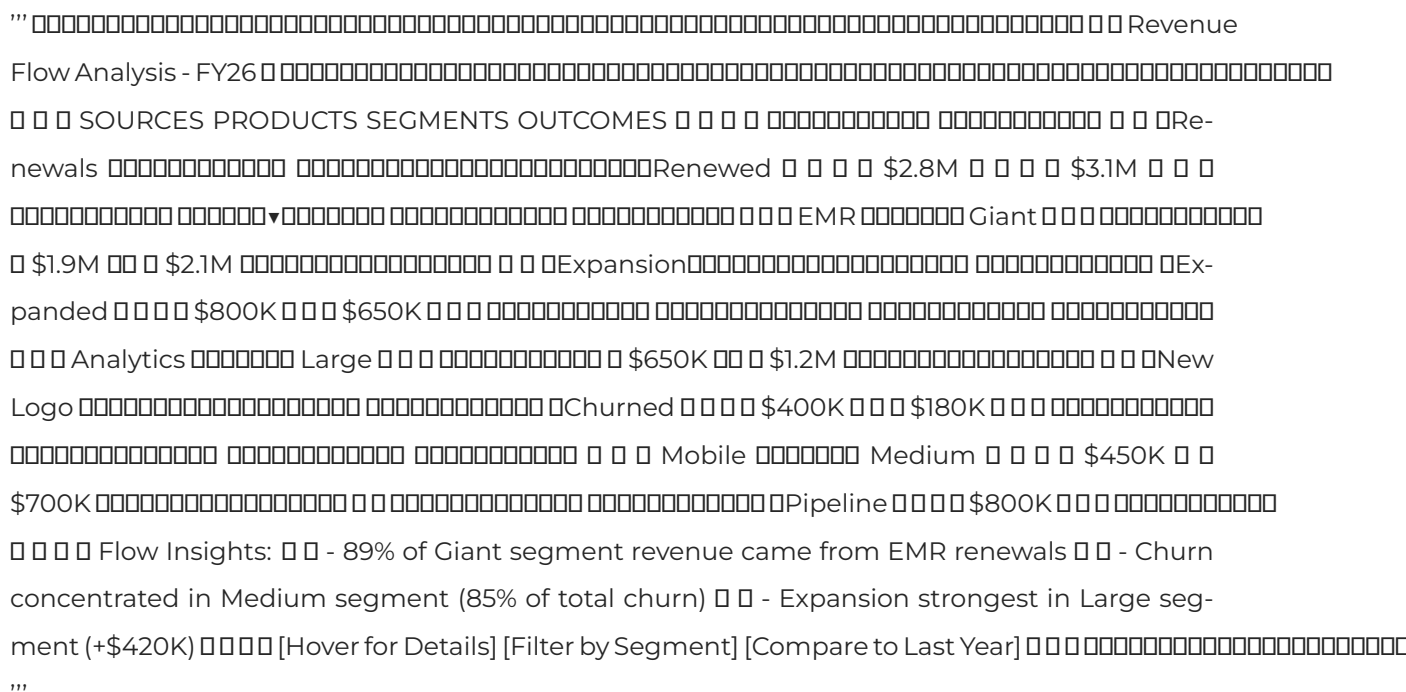
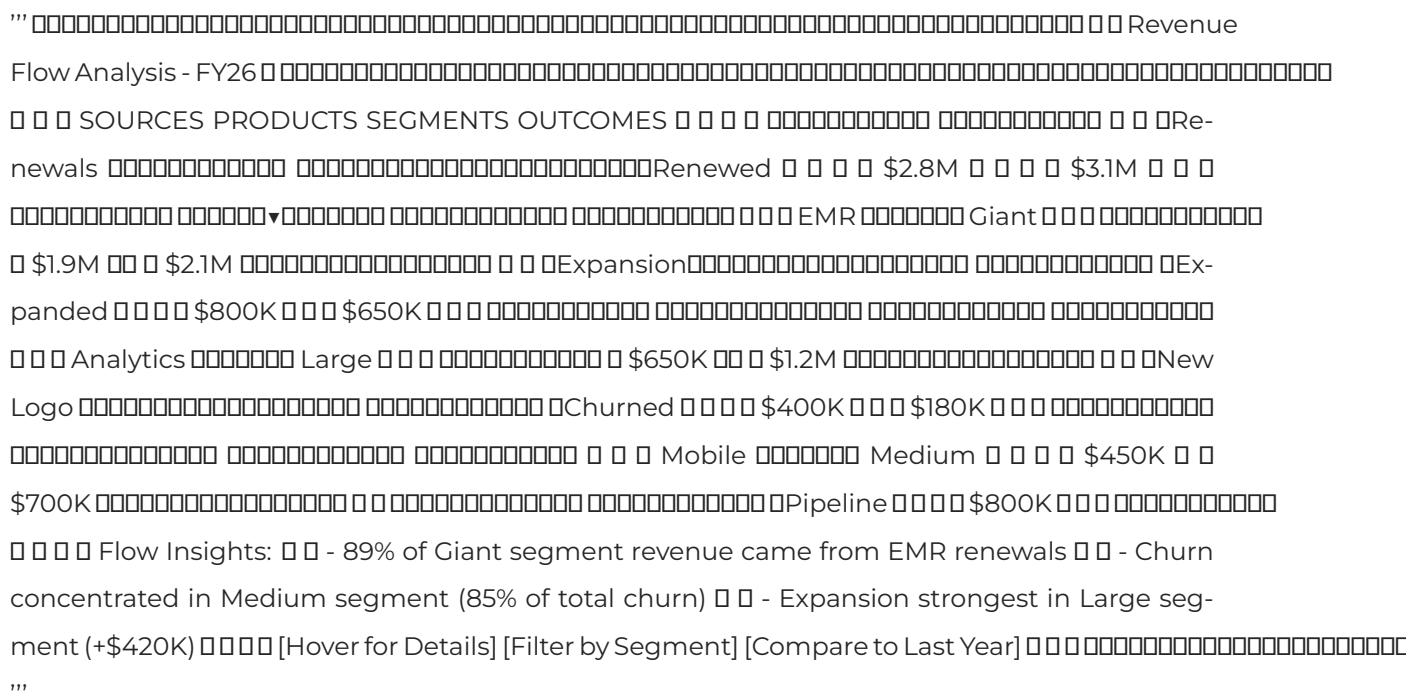
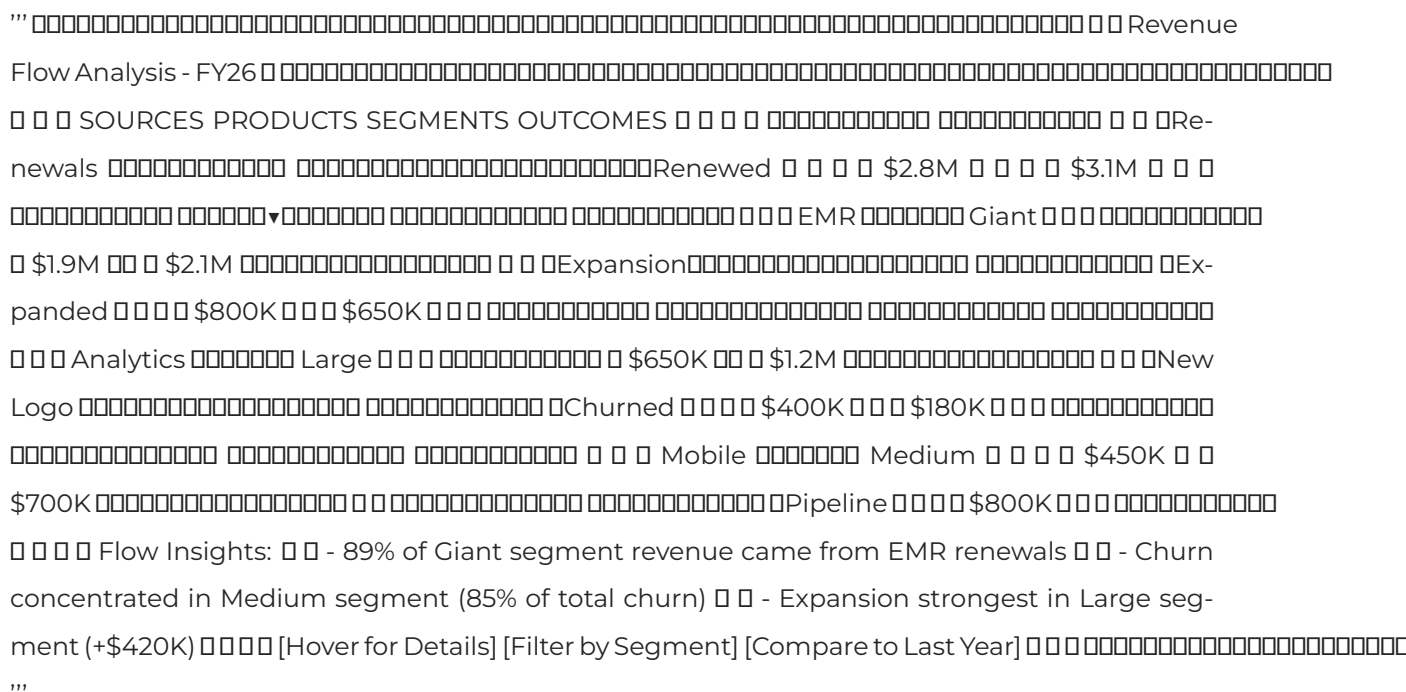
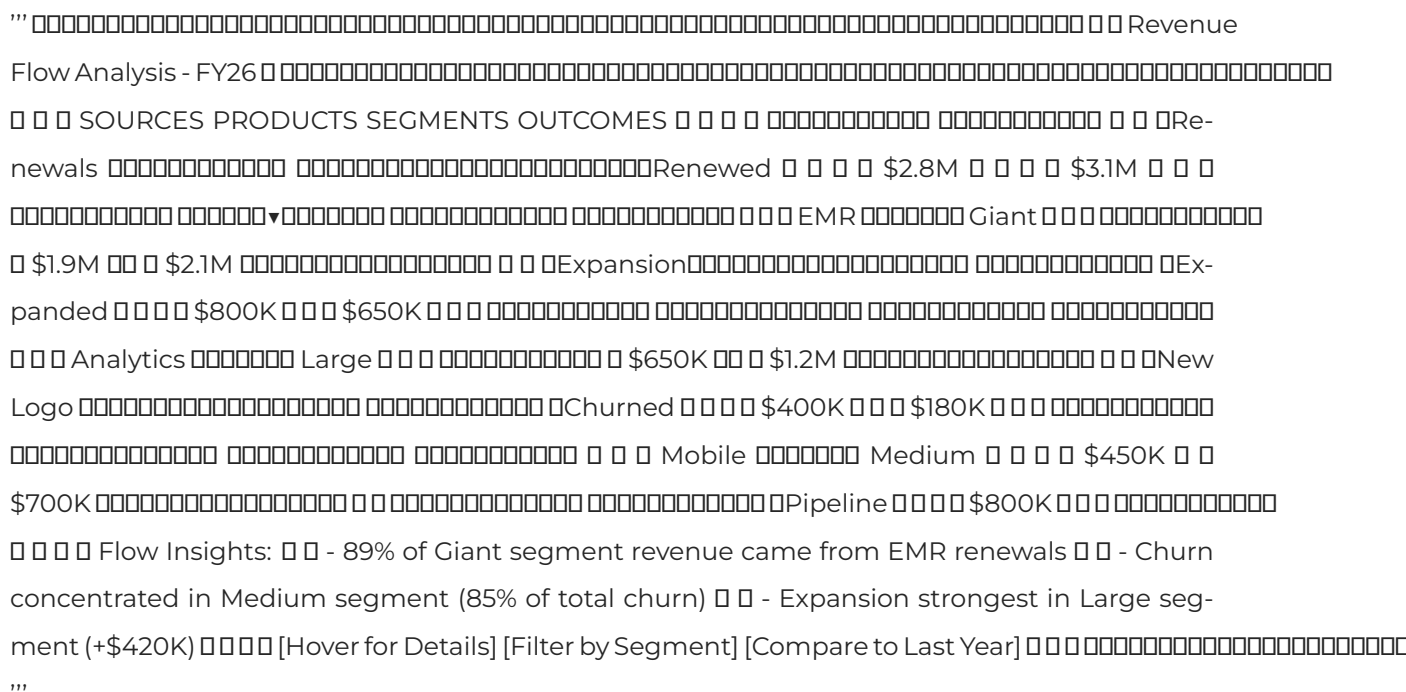
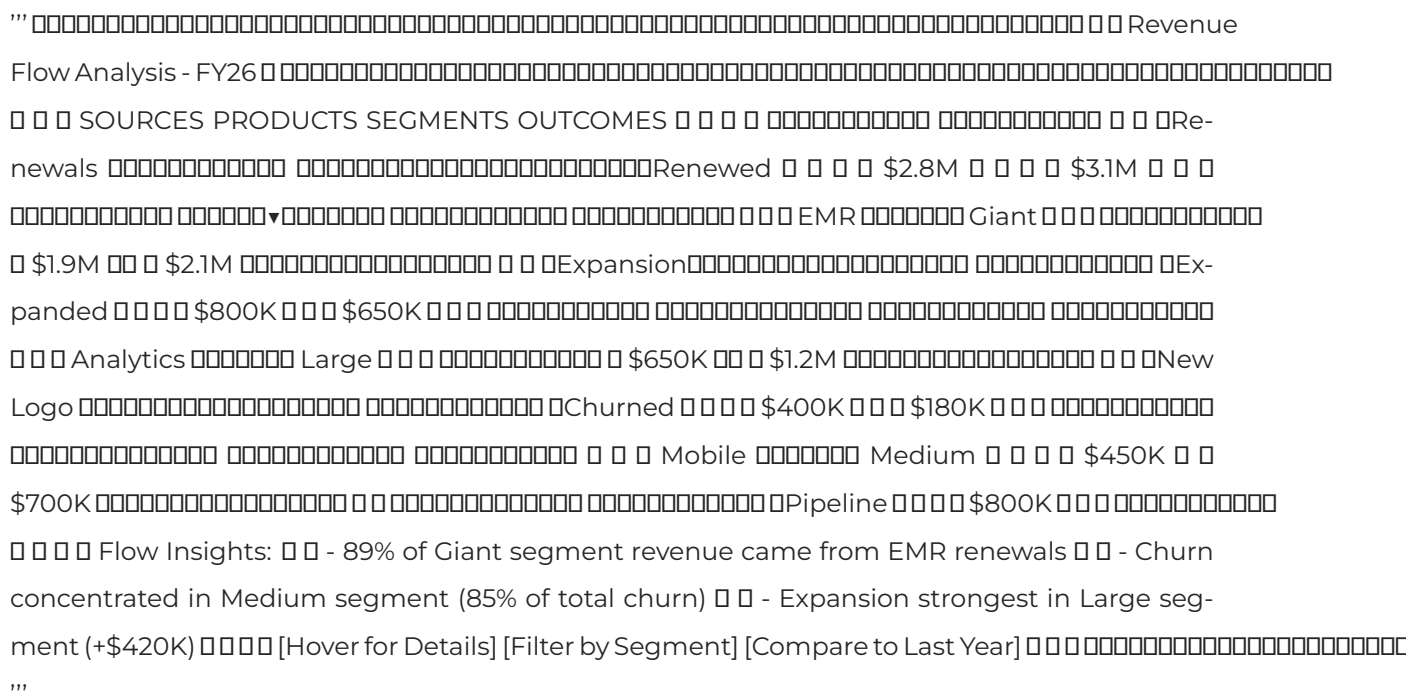
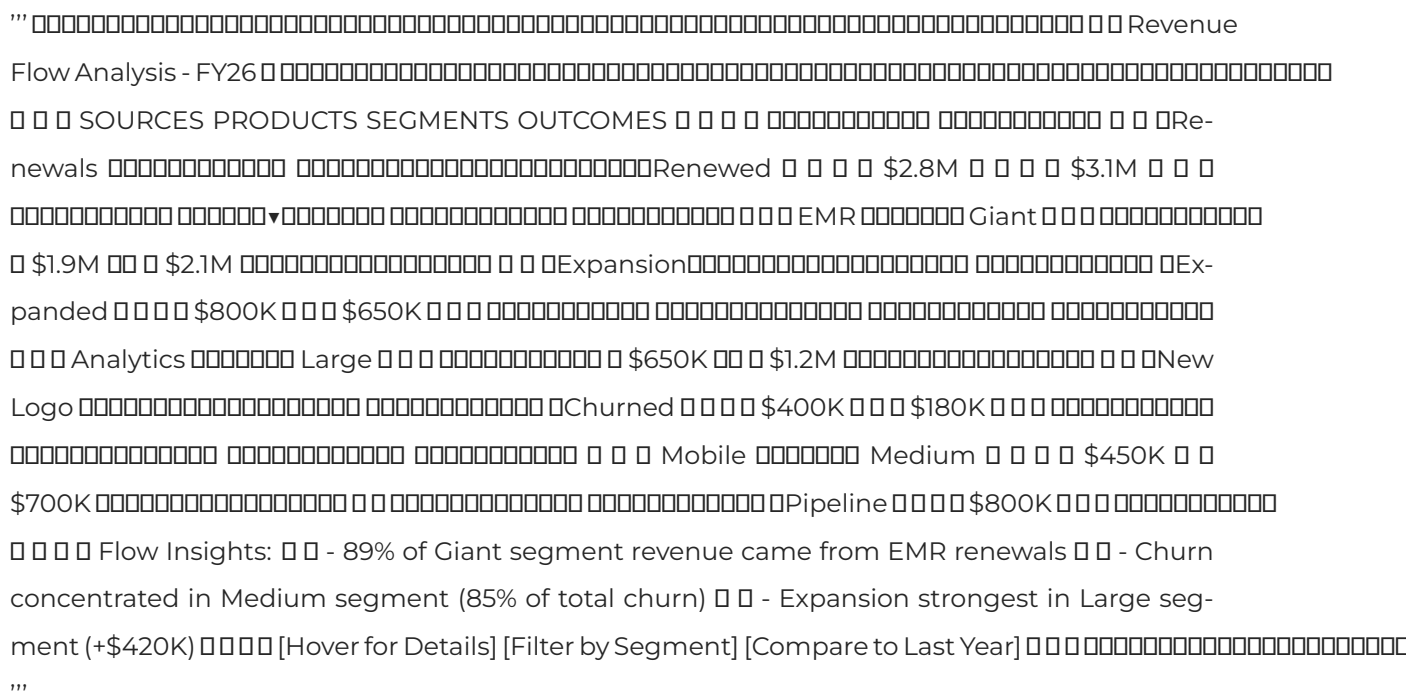
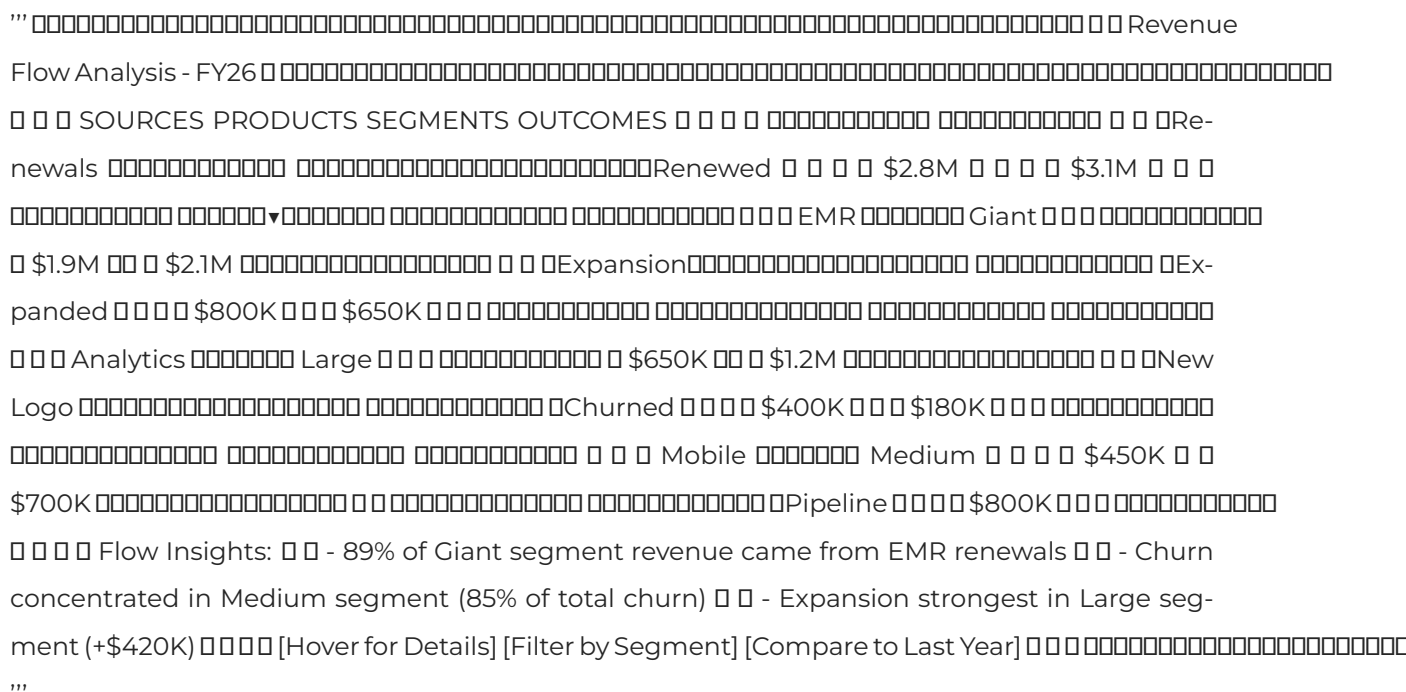
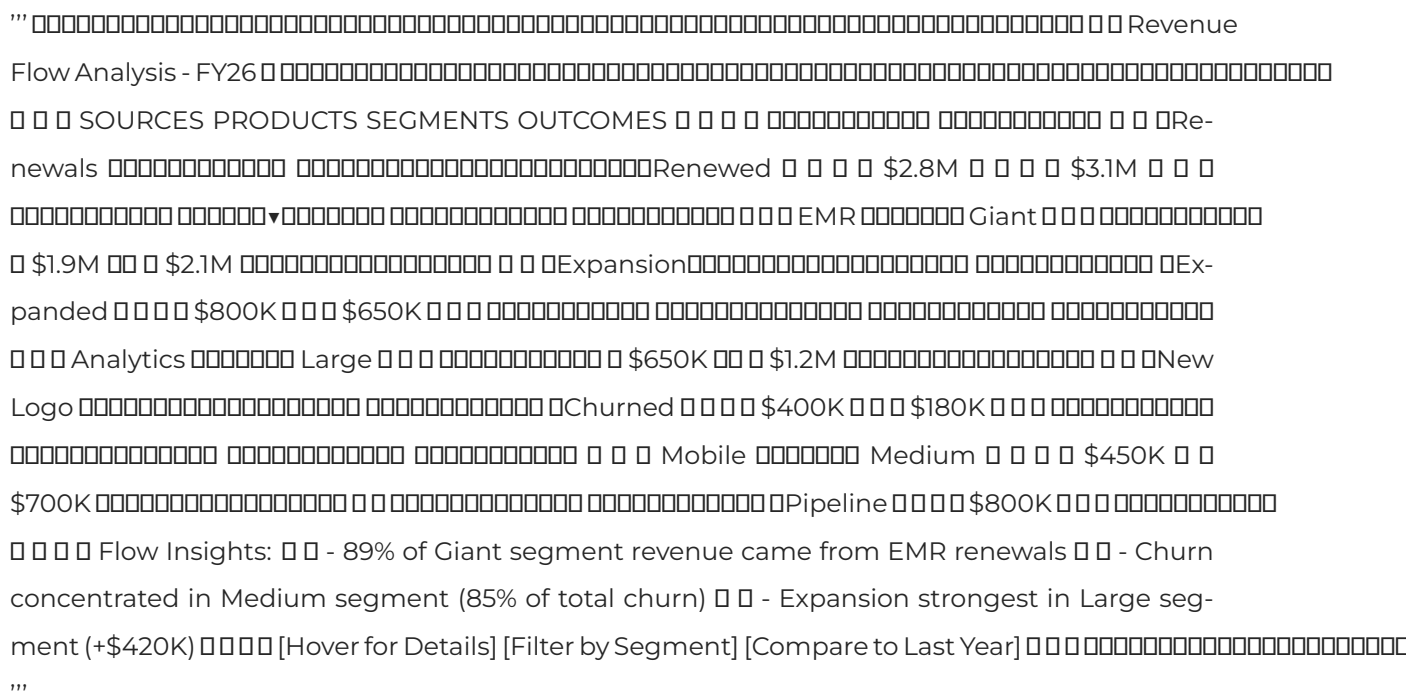
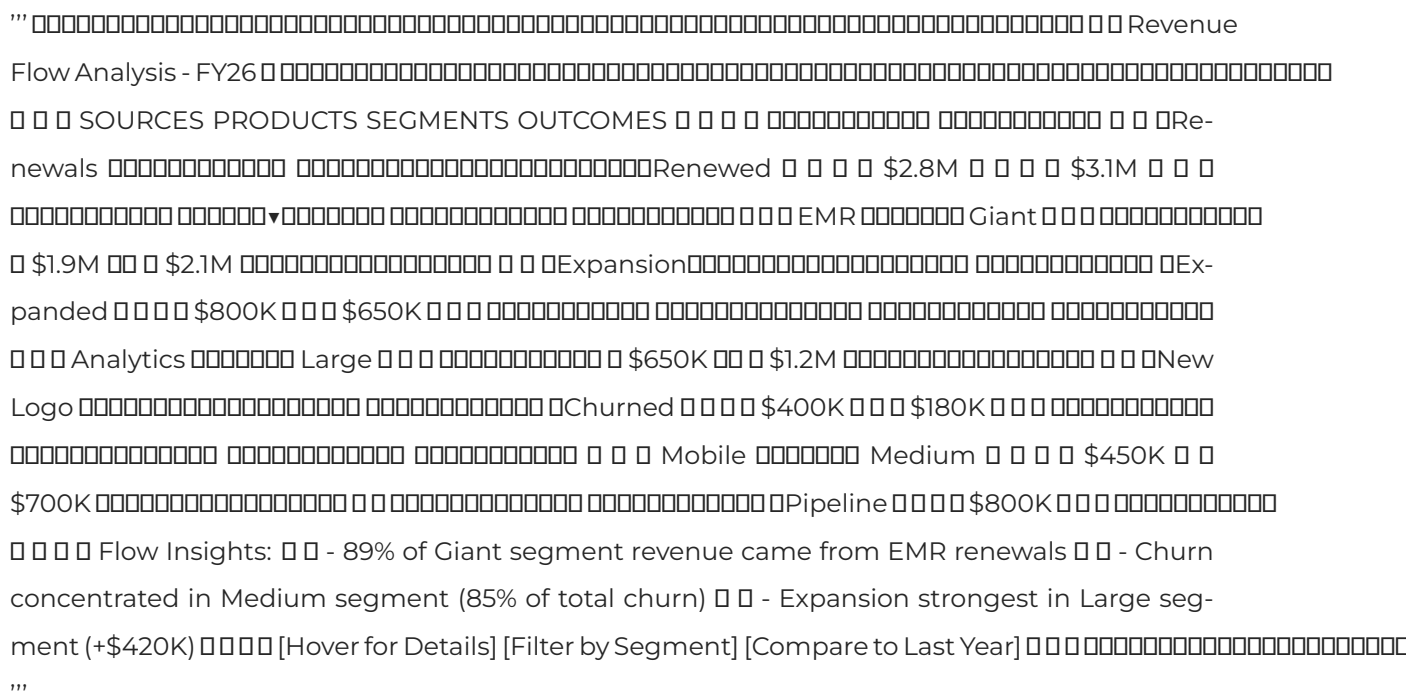
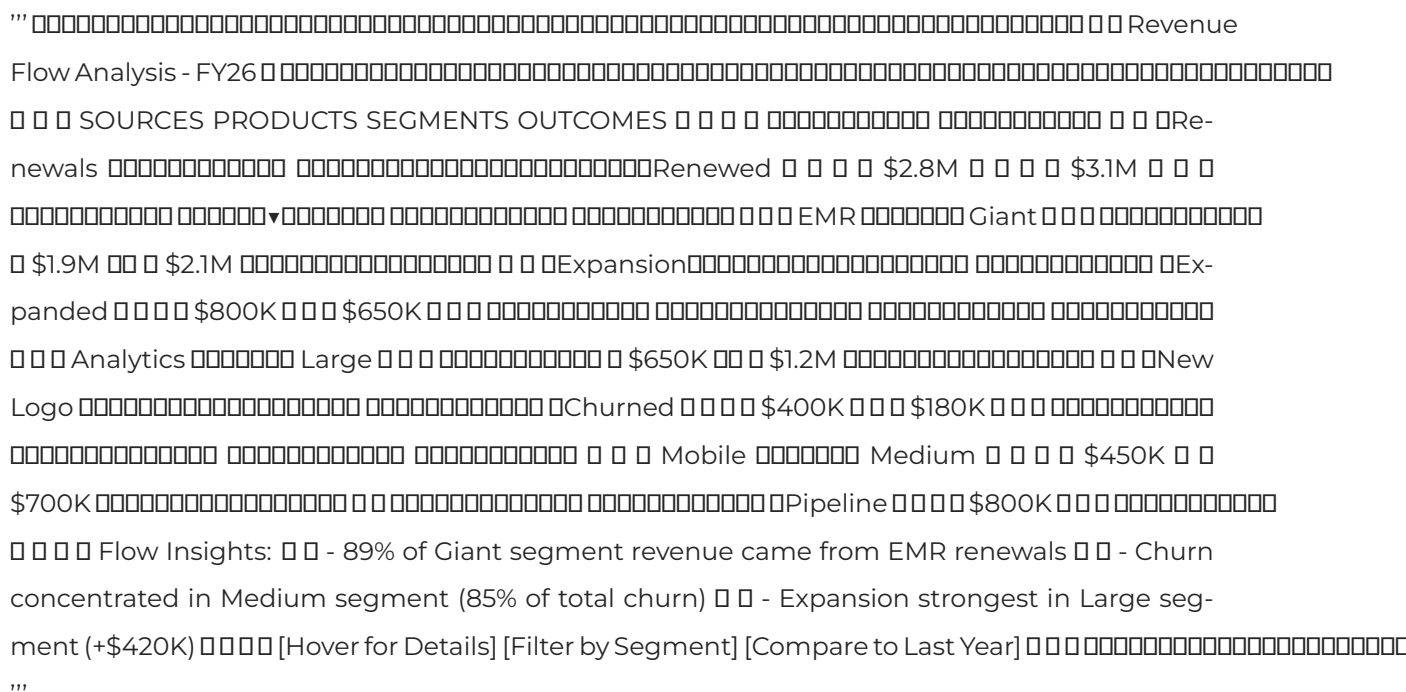
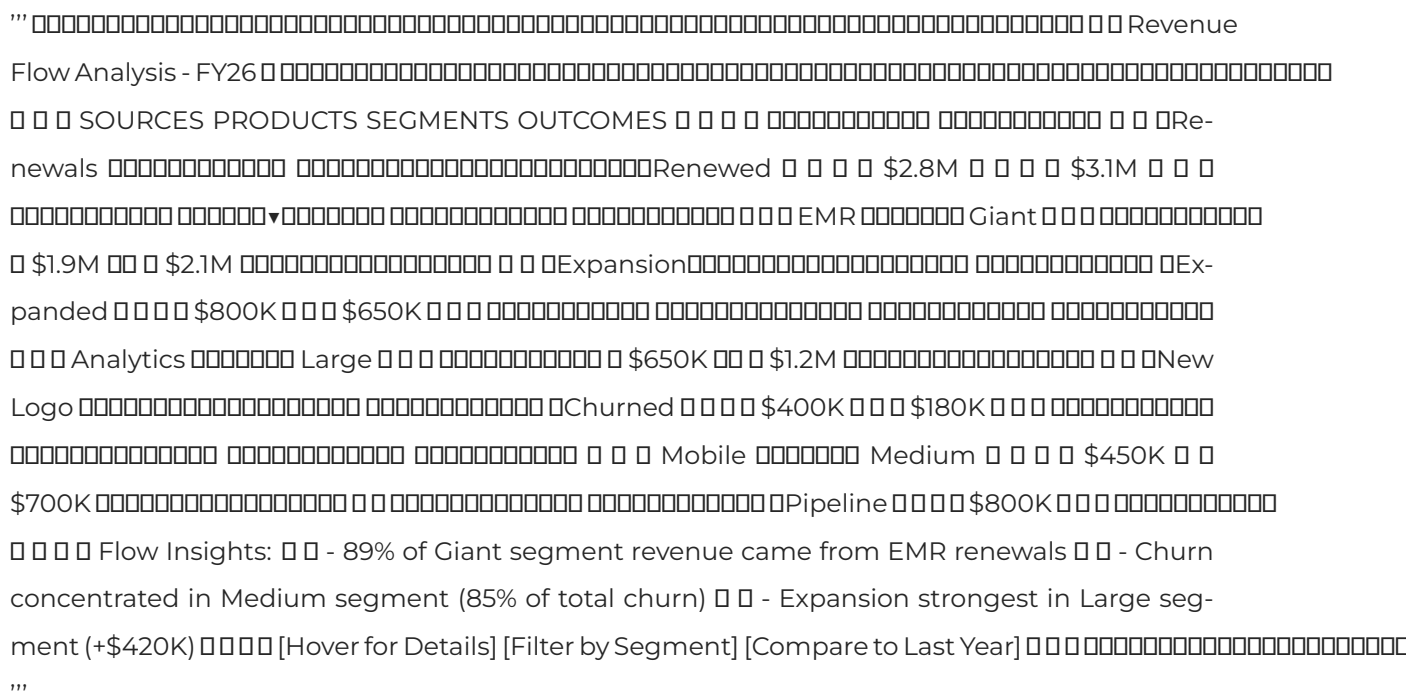
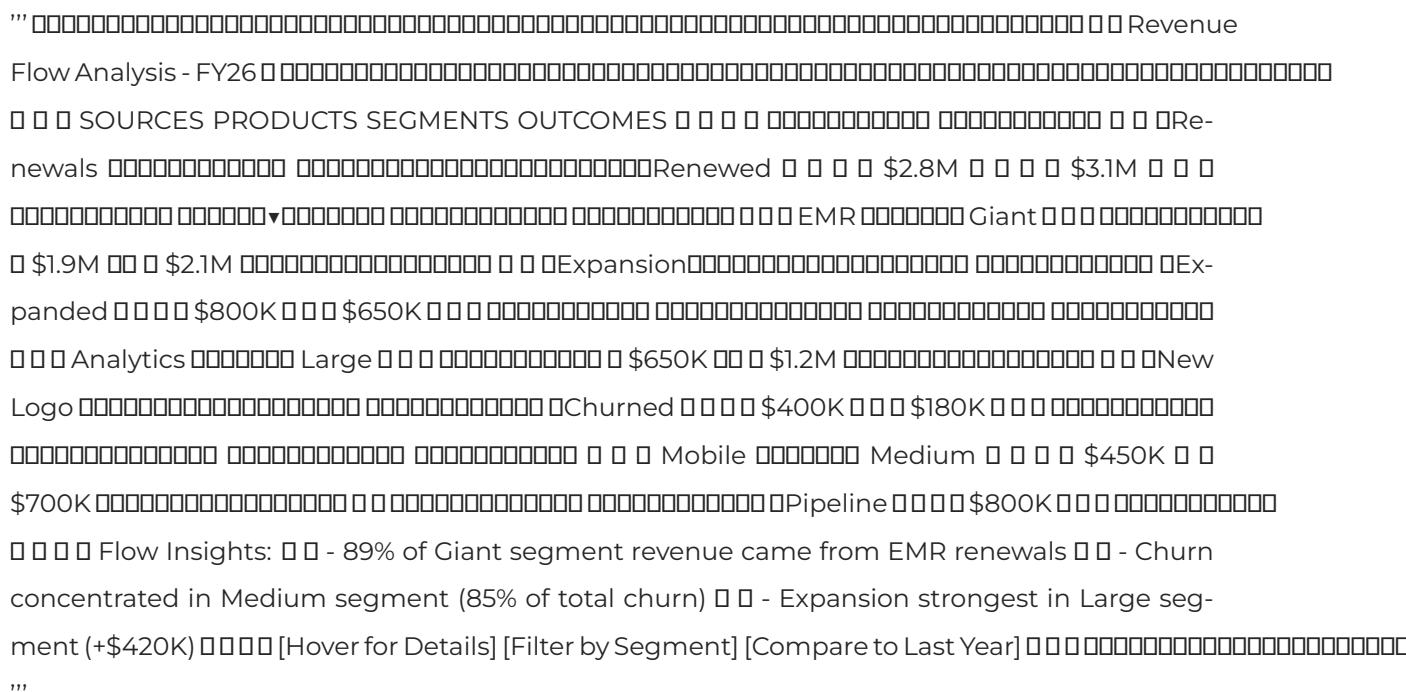
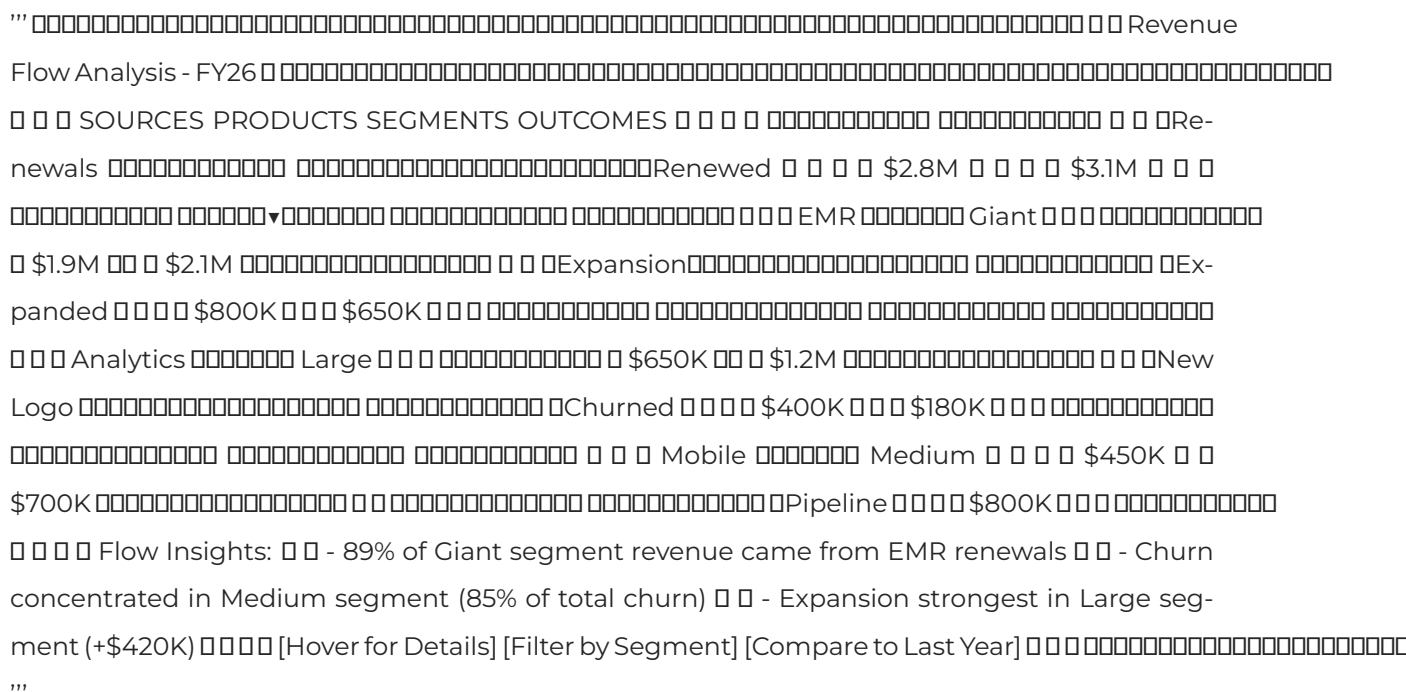
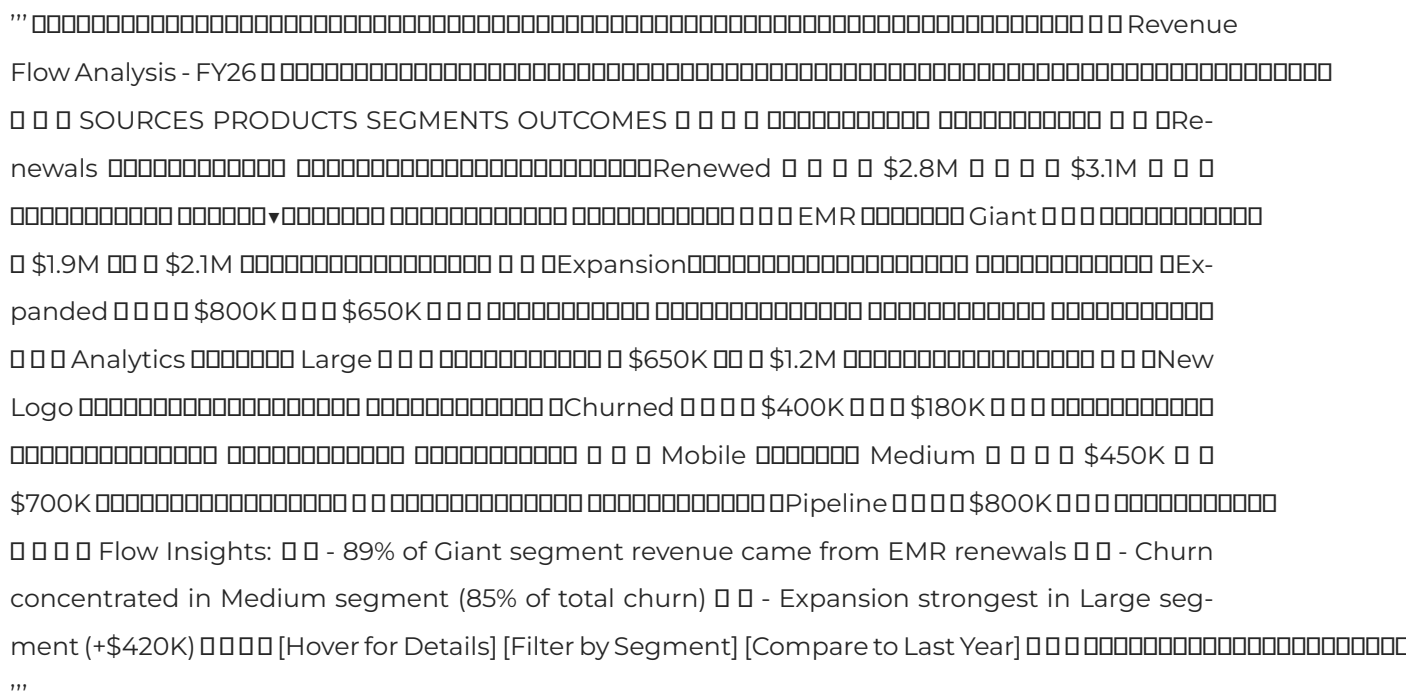
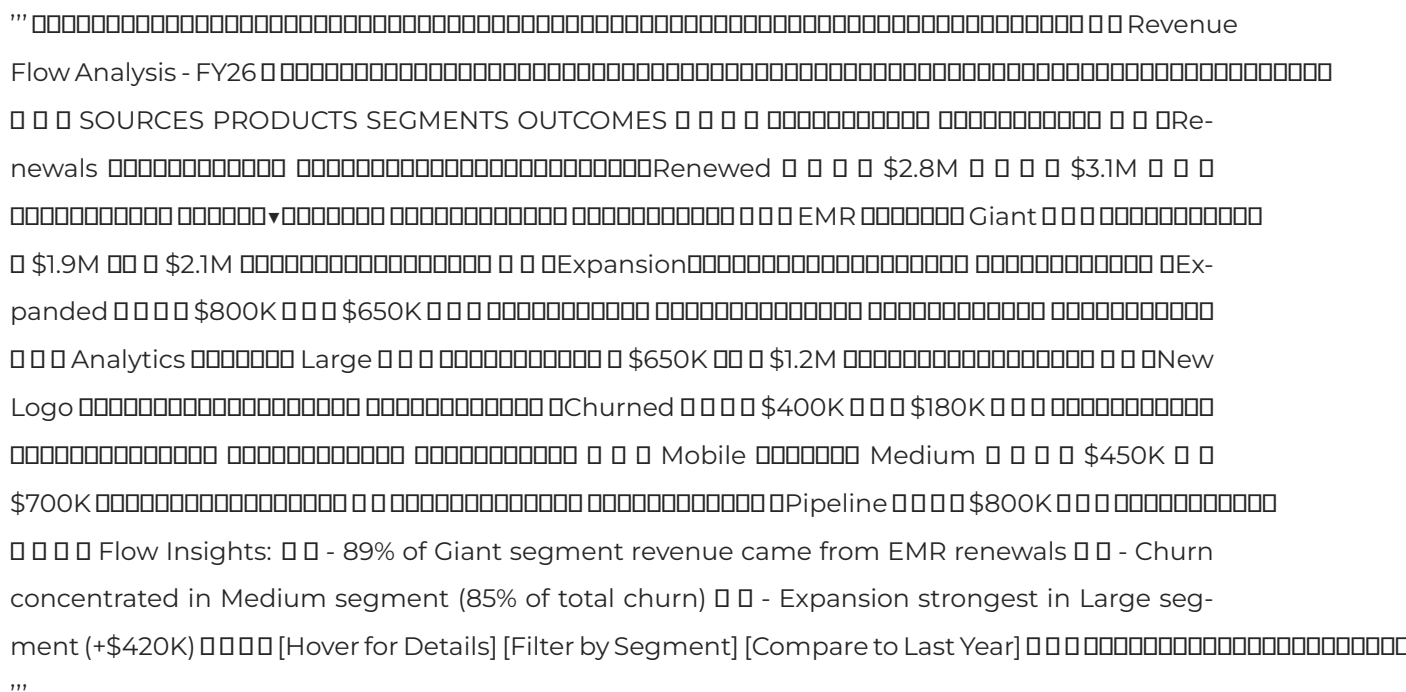
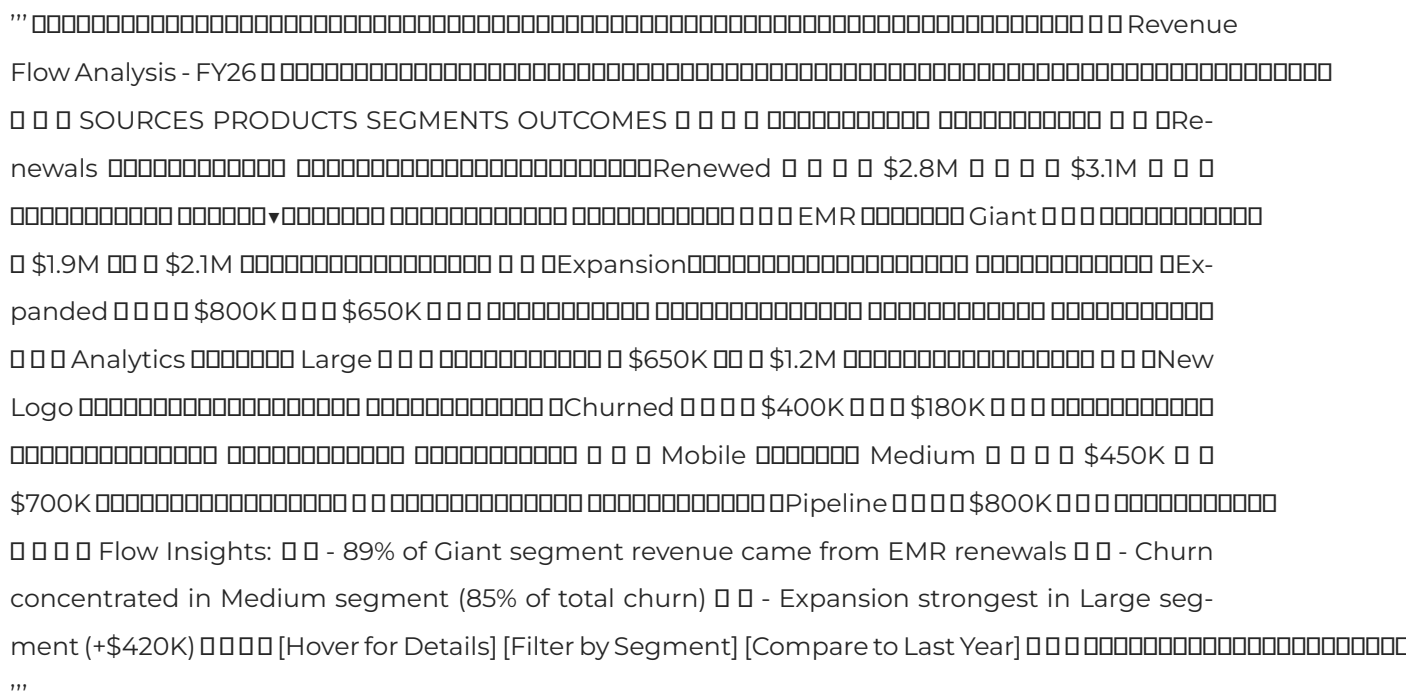
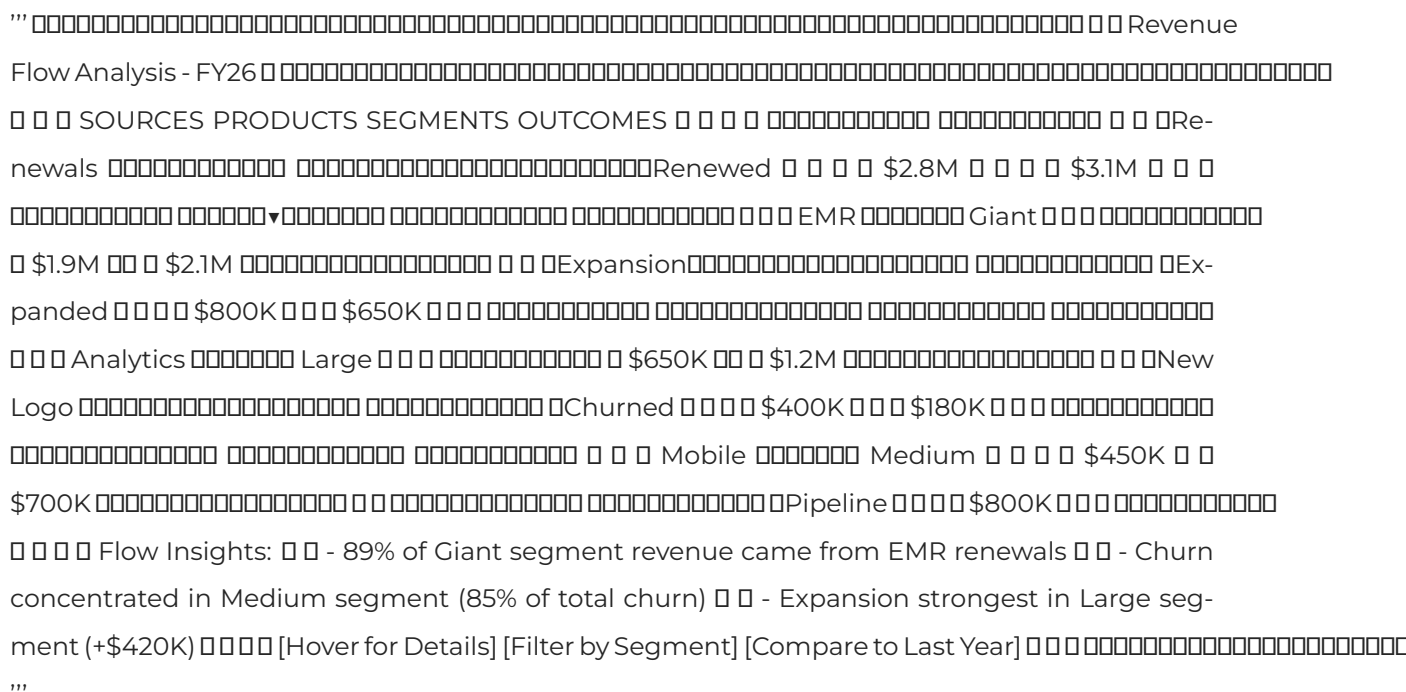
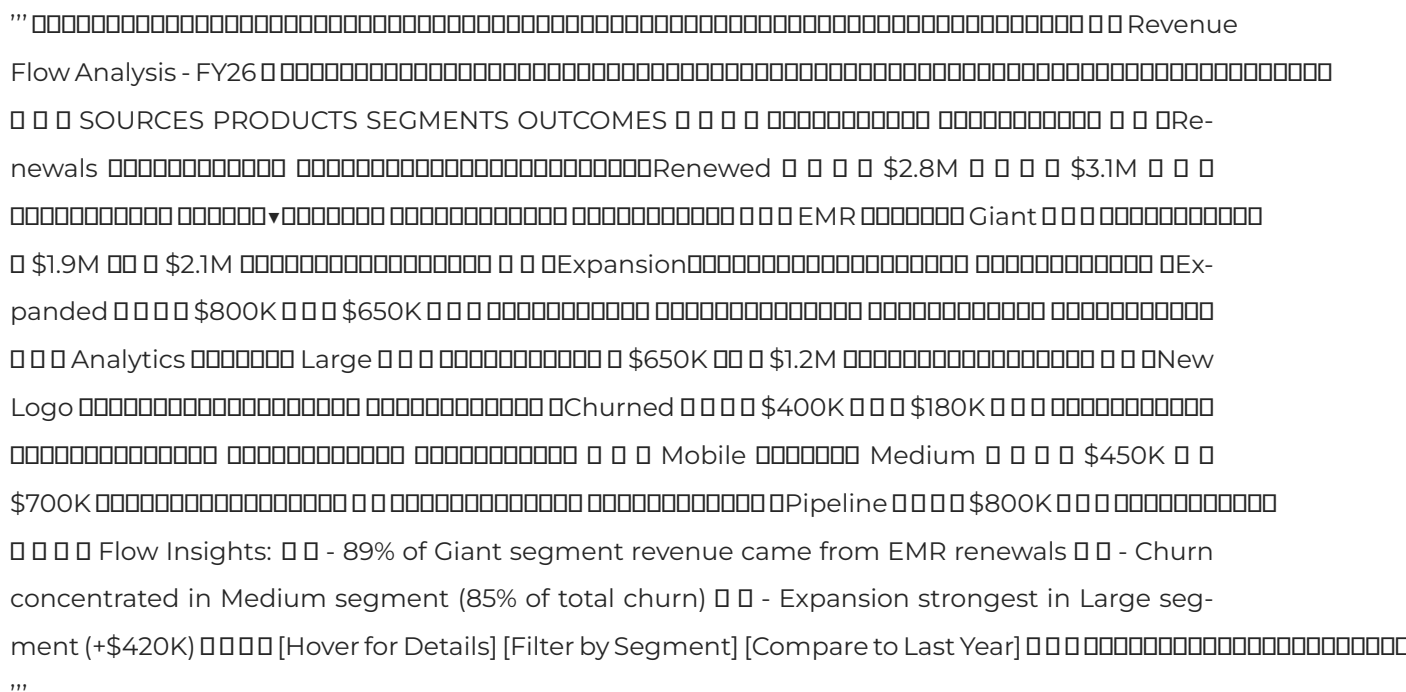
Click any number to explore deeper—infinite depth, instant navigation:

"" [Drill-Down Navigation](#) [Breadcrumbs: Territory > ARR > Barwon Health > EMR Suite > Sunrise](#) [Current View: Sunrise EMR Contract Details](#) [Drill Path Taken: \\$4.2M Territory ARR](#) [Barwon Health: \\$850K](#) [EMR Suite: \\$520K](#) [Sunrise EMR: \\$380K](#) [Sunrise Surgical: \\$90K](#) [Sunrise Ambulatory: \\$50K](#) [Analytics: \\$180K](#) [Mobile: \\$150K](#) [GHA: \\$620K](#) [SA Health: \\$1.2M](#) [\[12 more clients...\]](#) [Sunrise EMR Contract: \\$380,000/year](#) [Start Date: 1 Jul 2023](#) [Renewal Date: 30 Jun 2026 \(147 days\)](#) [Term: 3 years](#) [Auto-Renew: Yes \(90-day notice\)](#) [Price Escalation: 3% annually](#) [\[Back to EMR Suite\]](#) [\[View Contract PDF\]](#) [\[Renewal Actions\]](#) ""



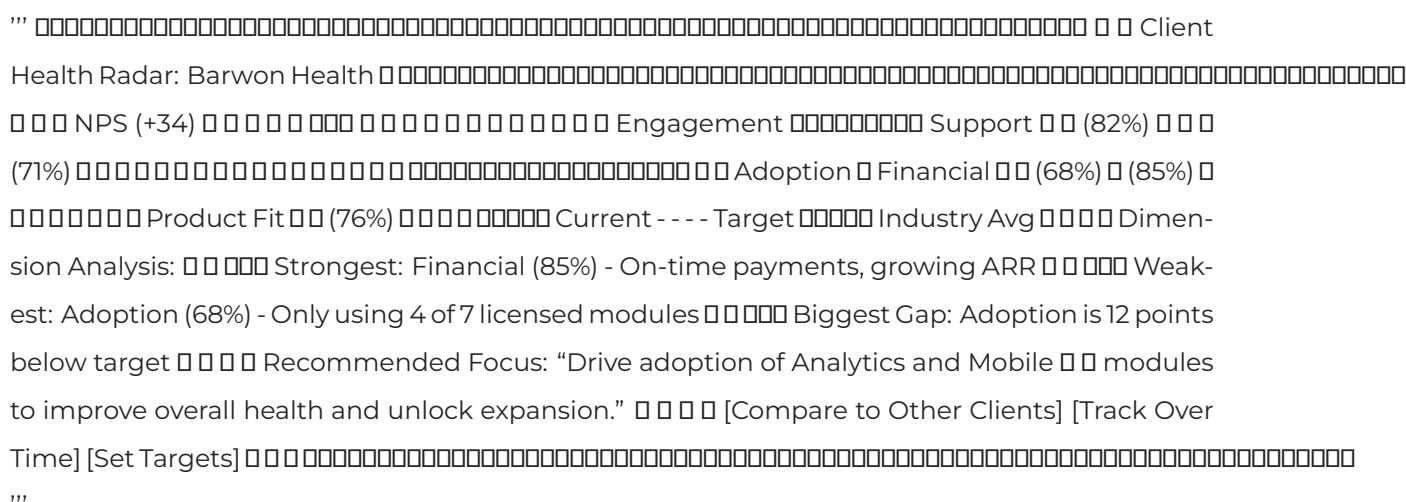
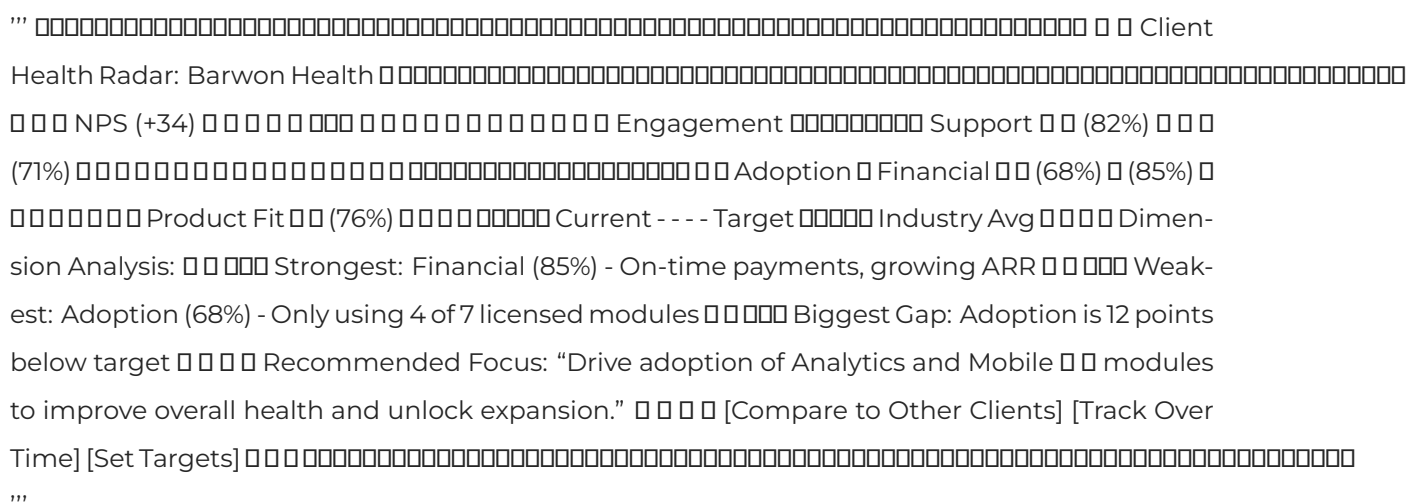
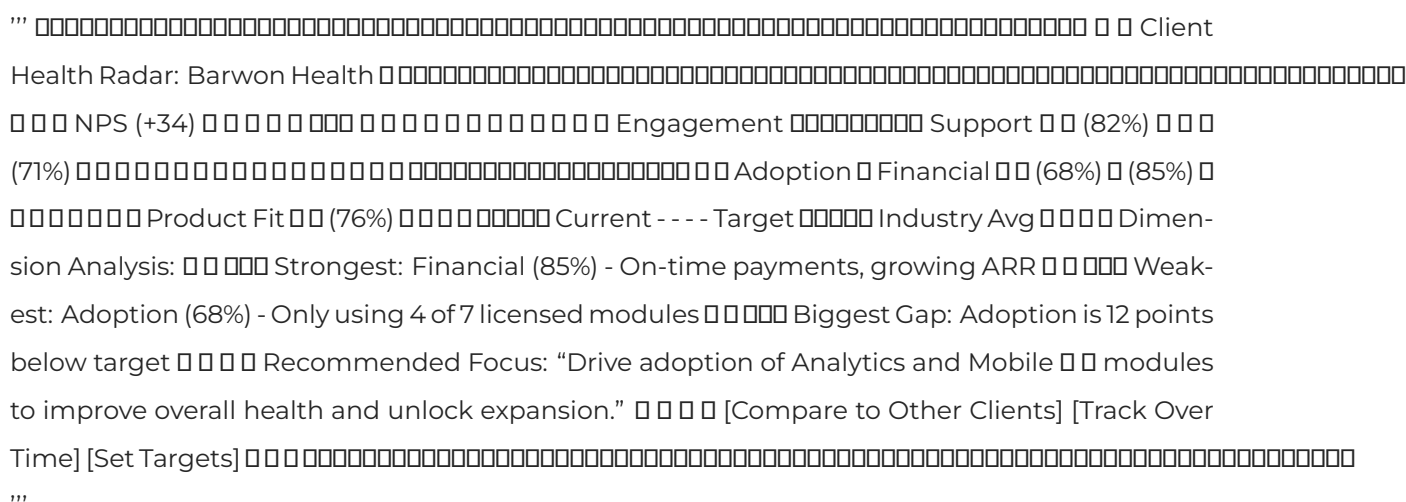
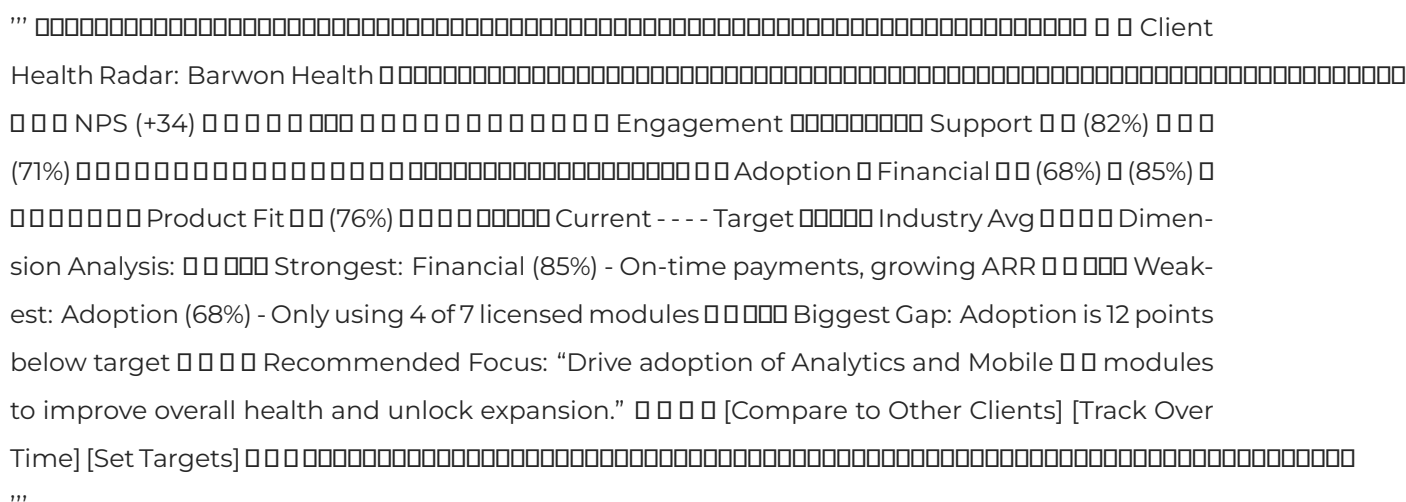
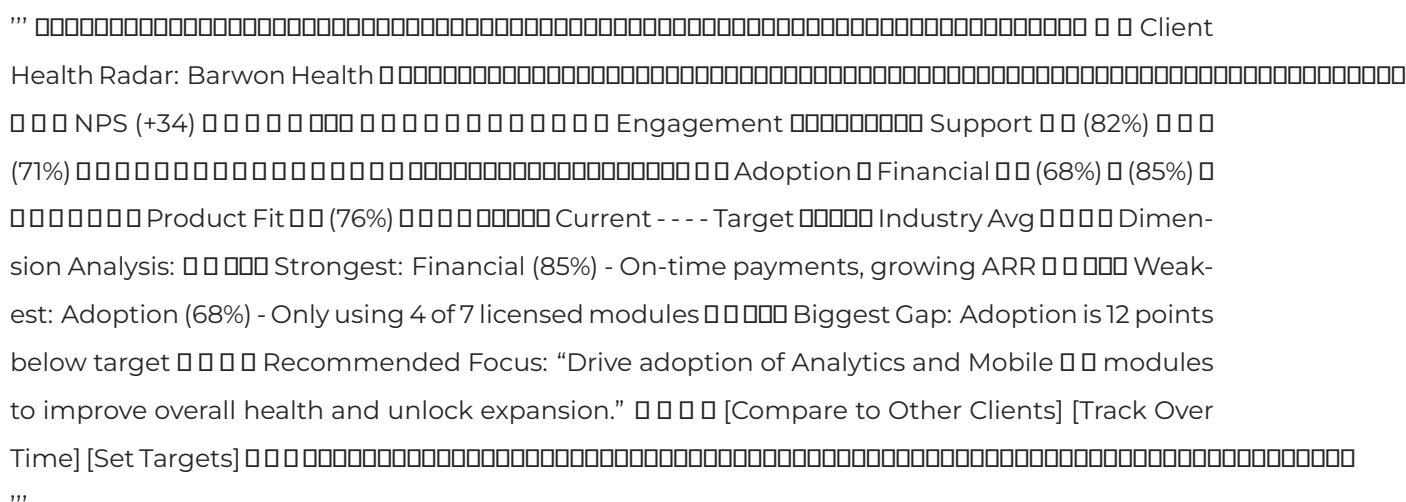
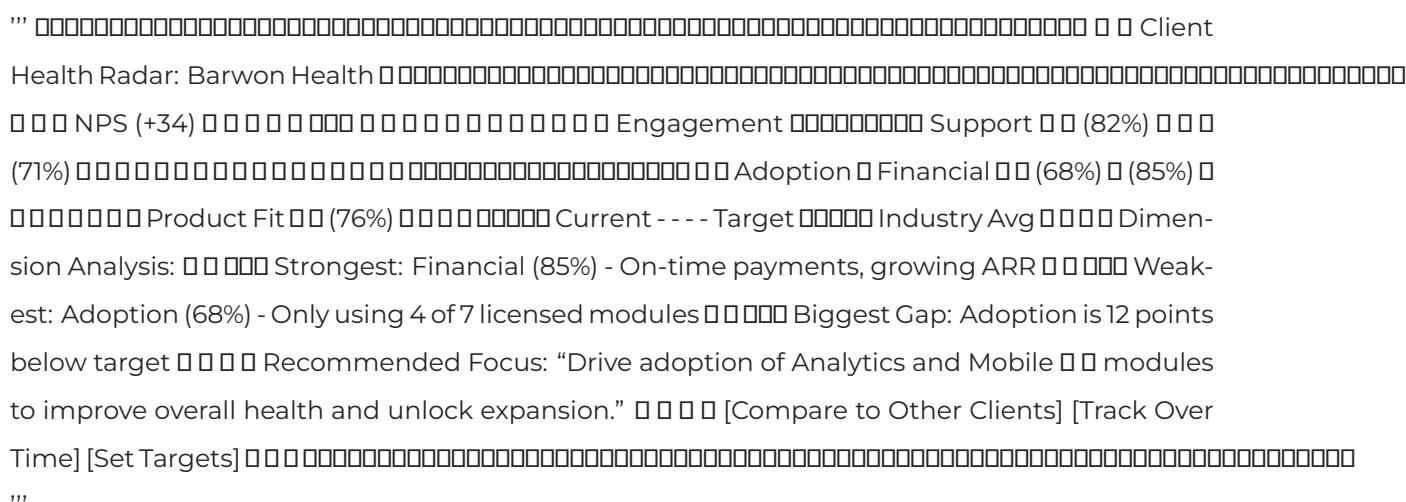
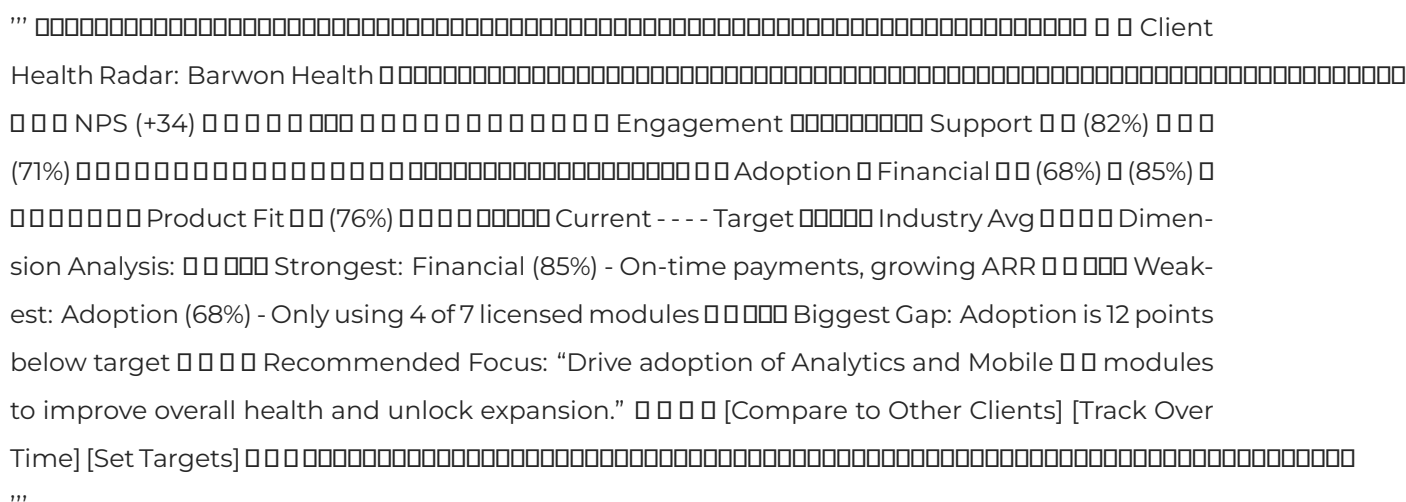
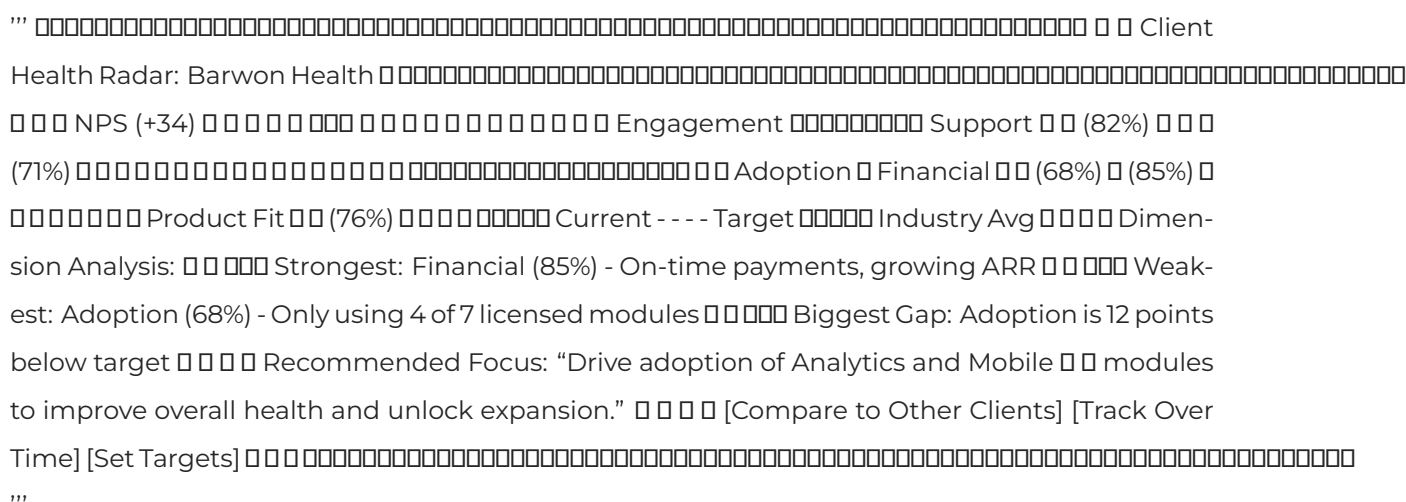
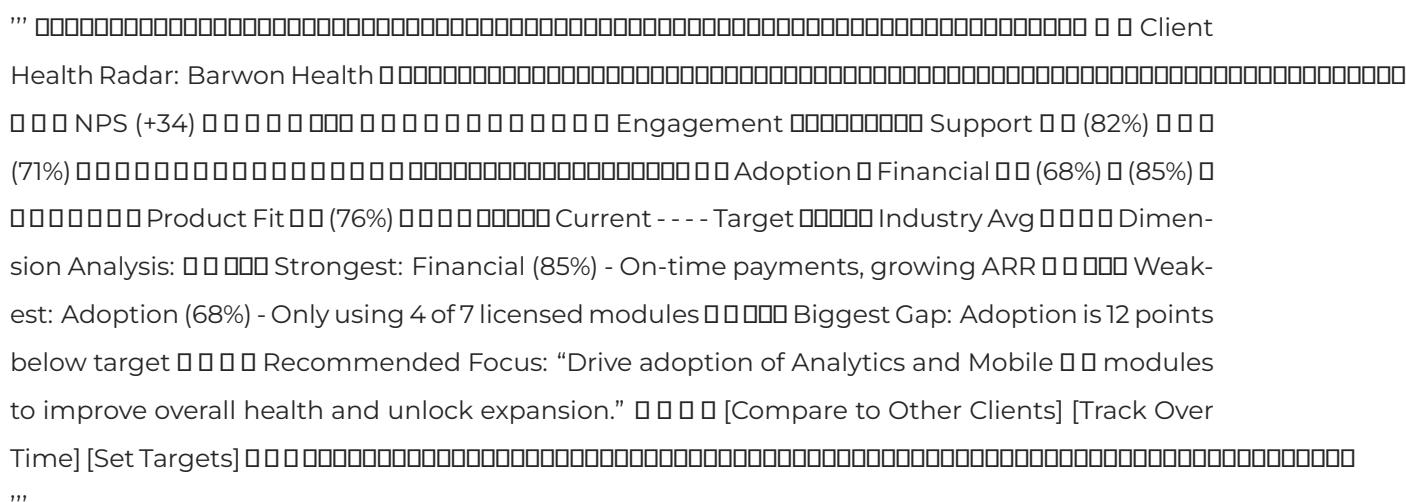
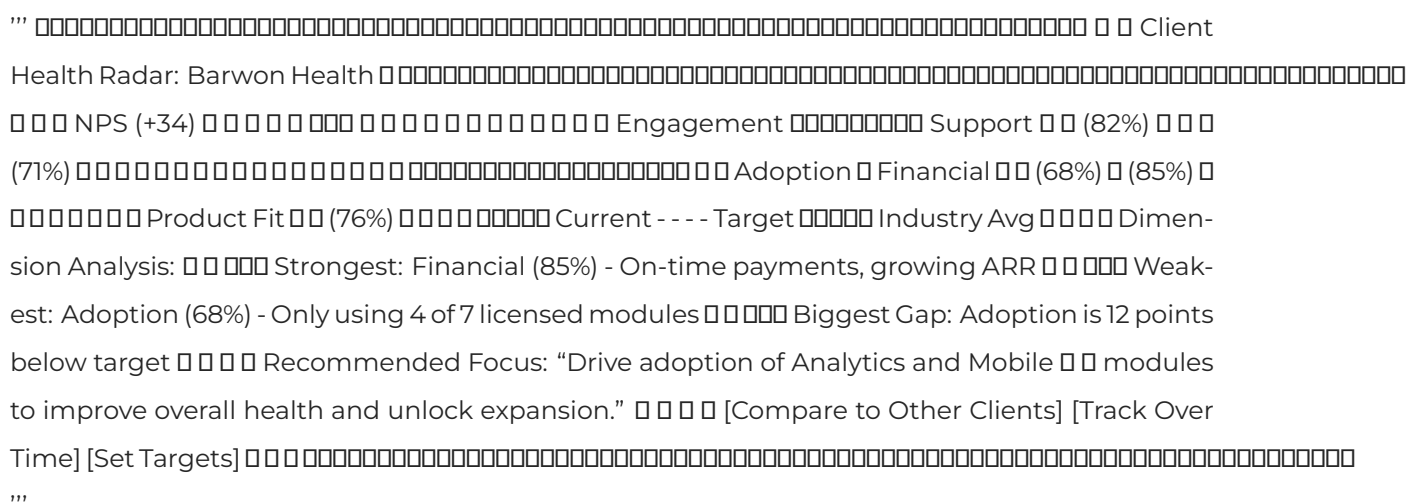
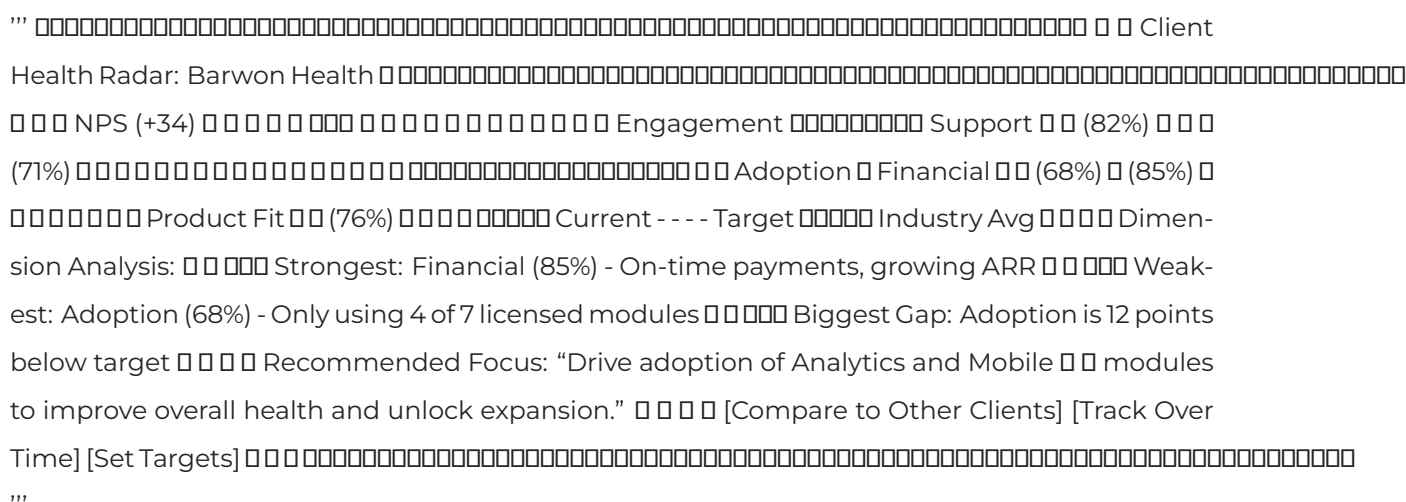
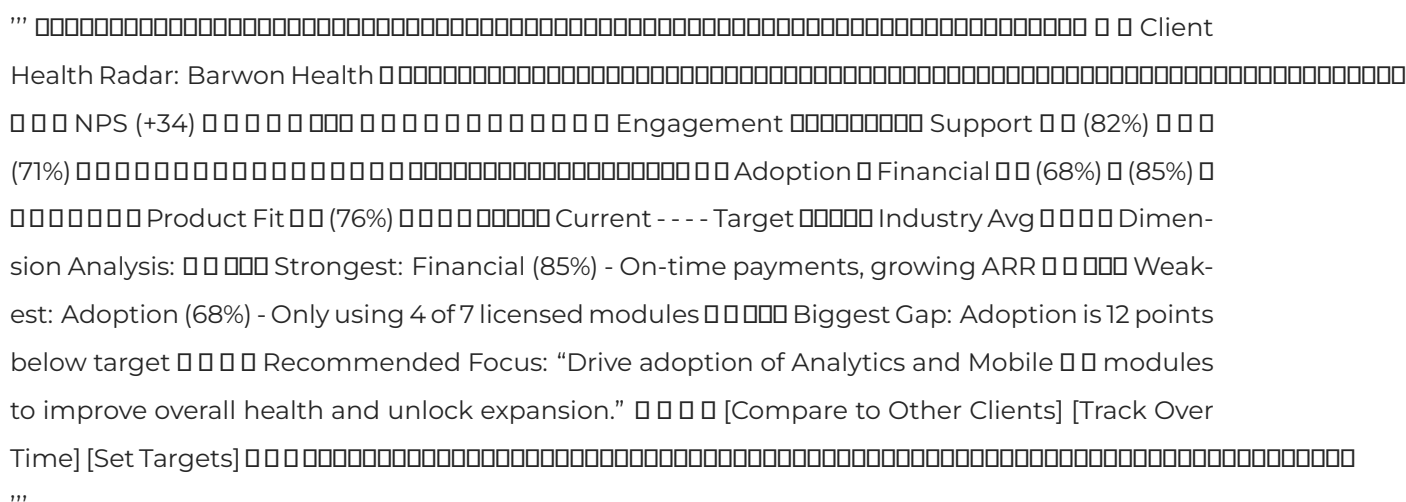
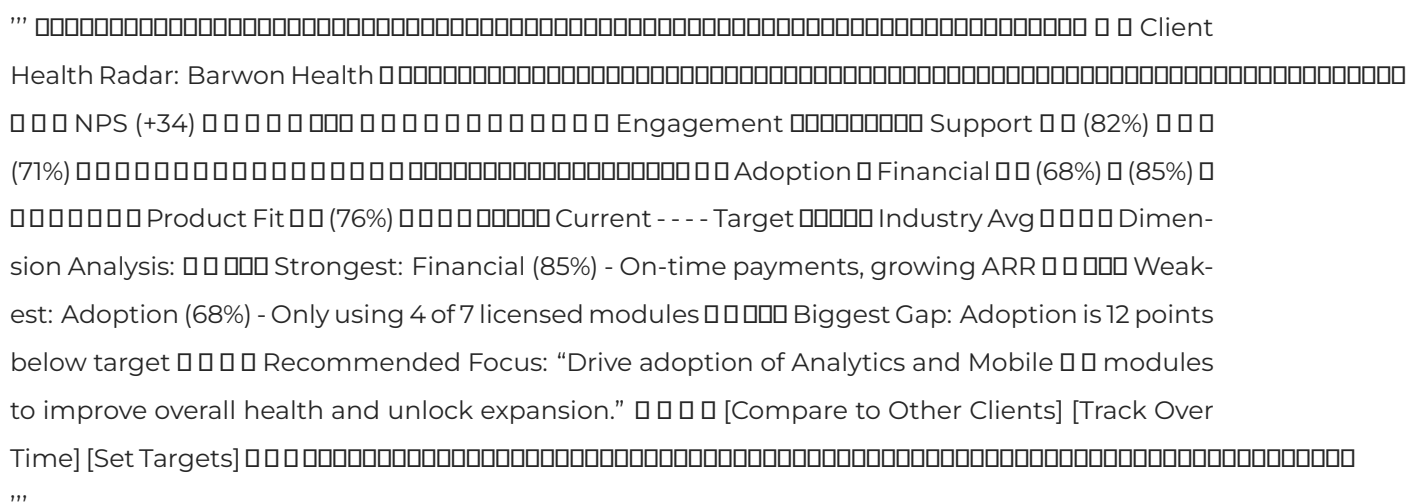
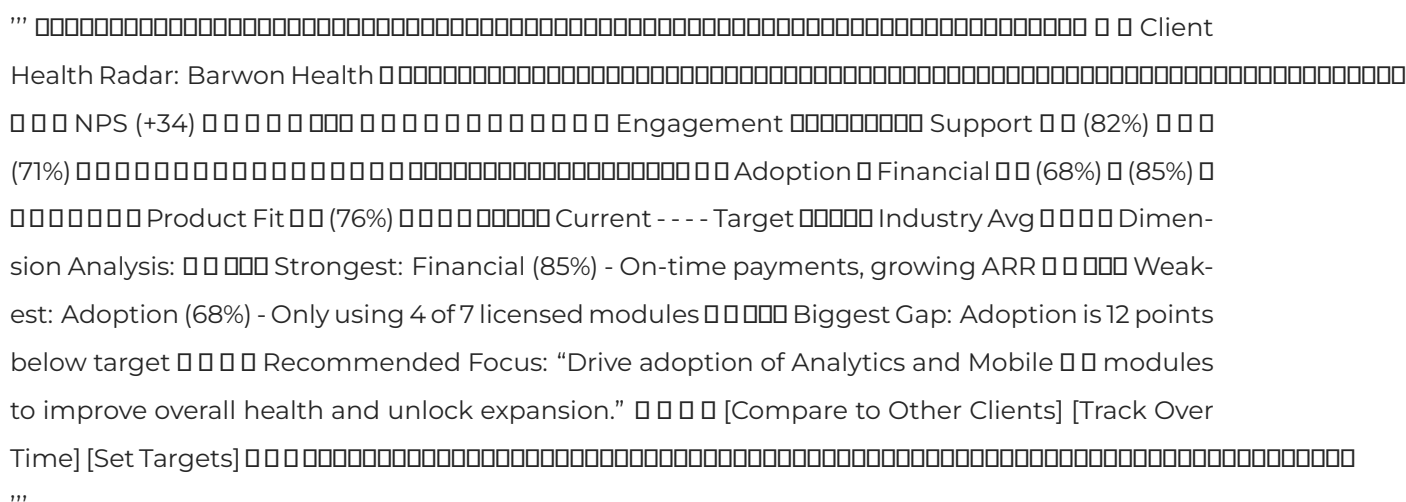
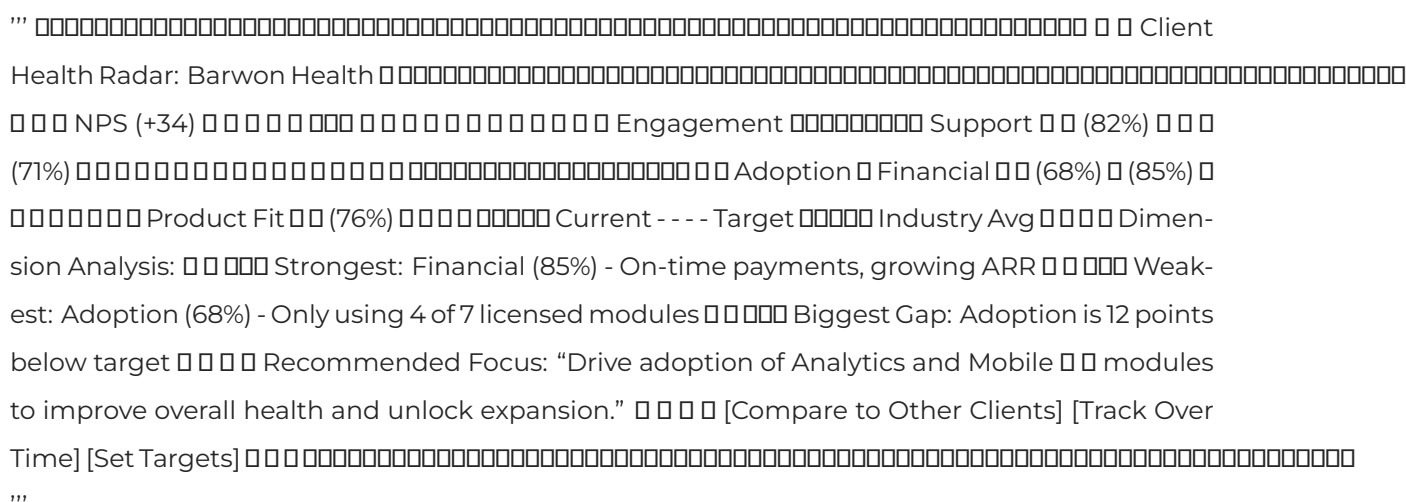
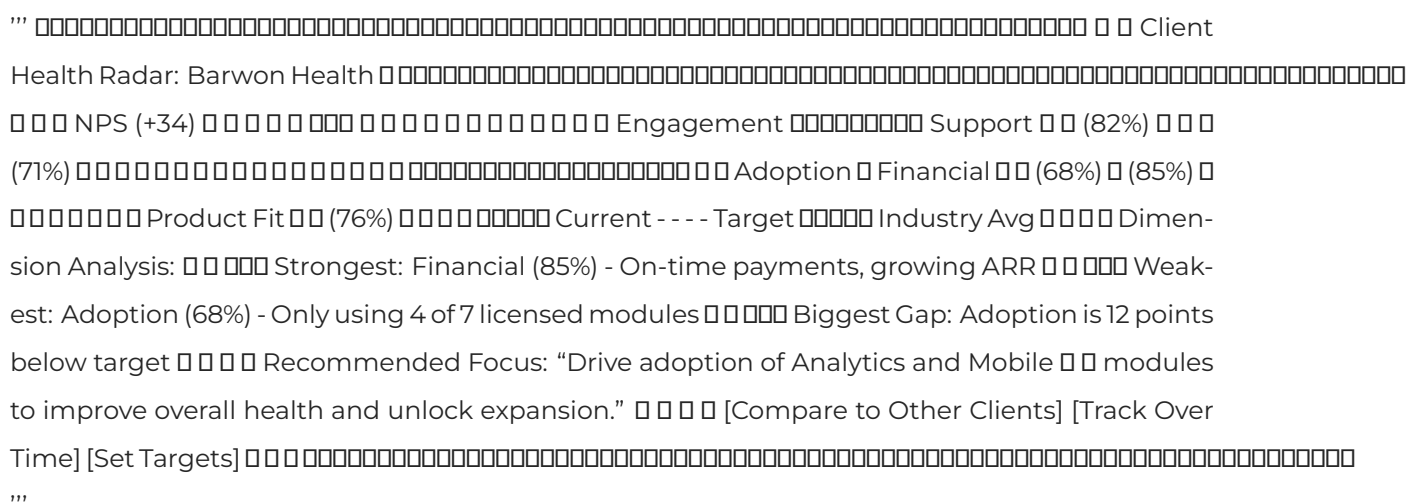
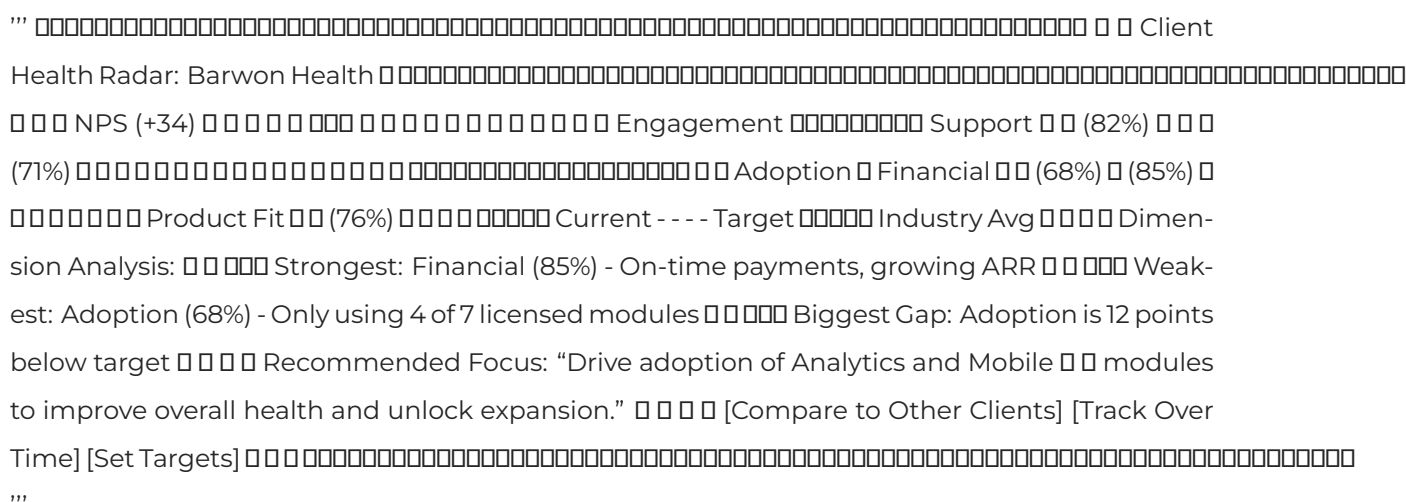
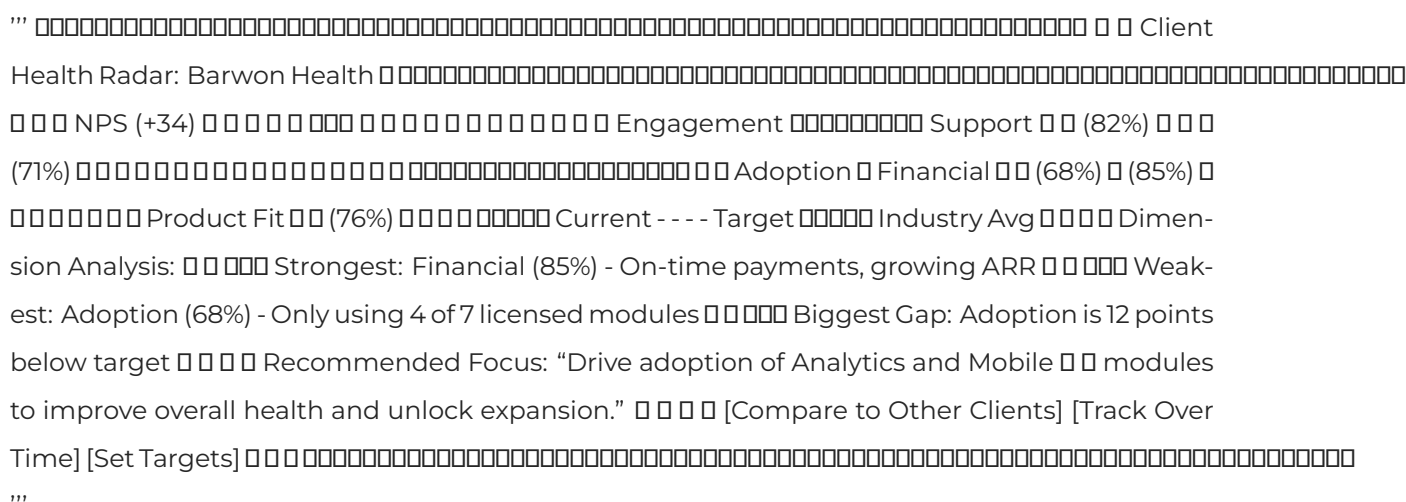
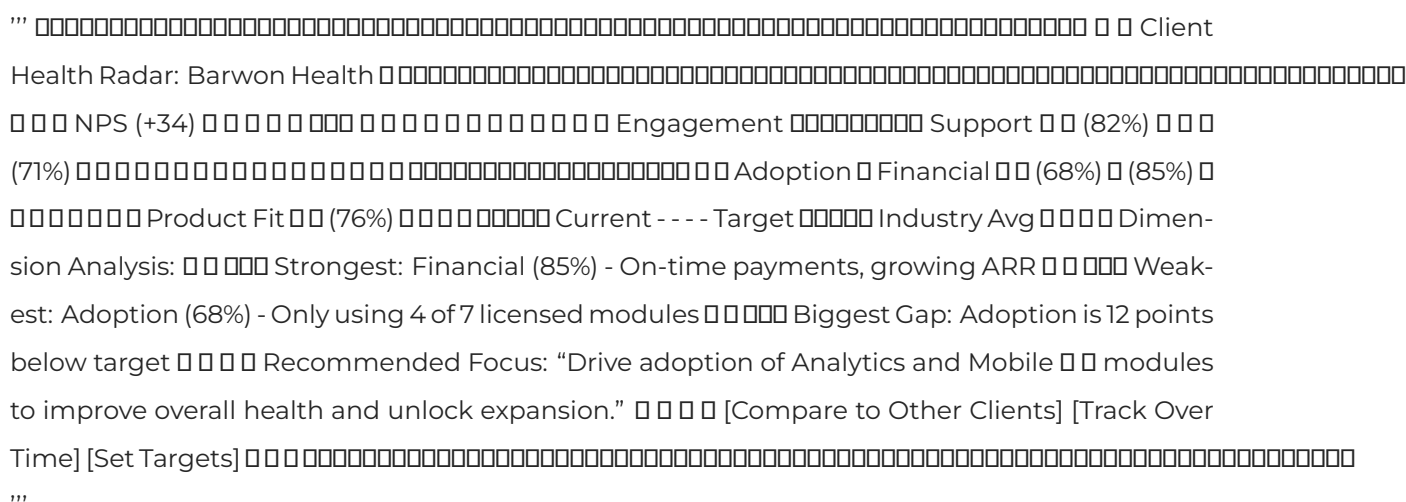
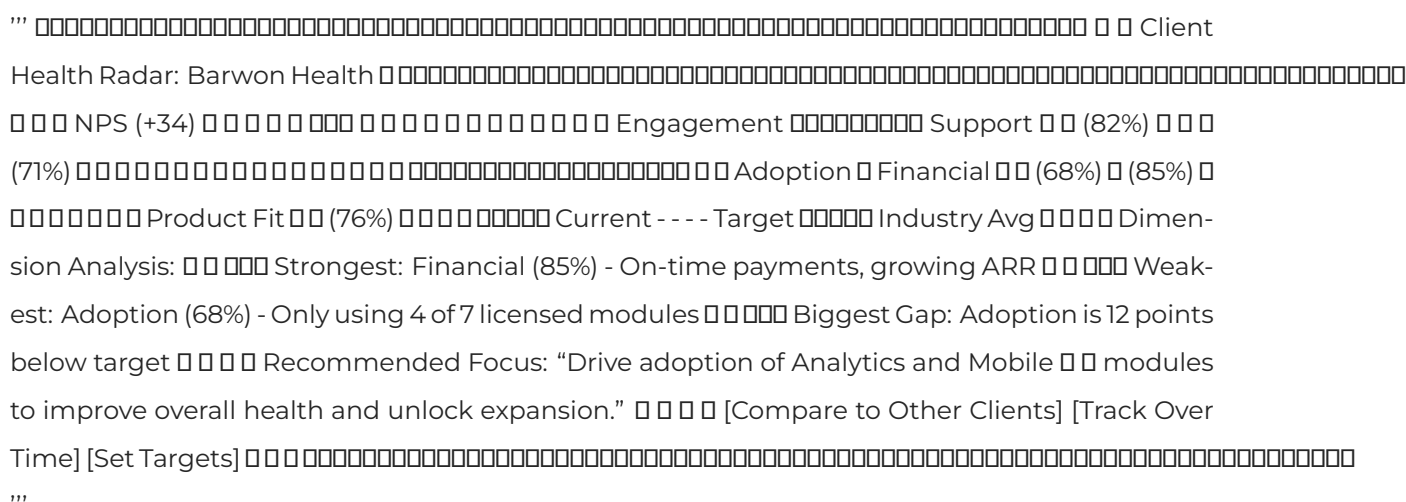
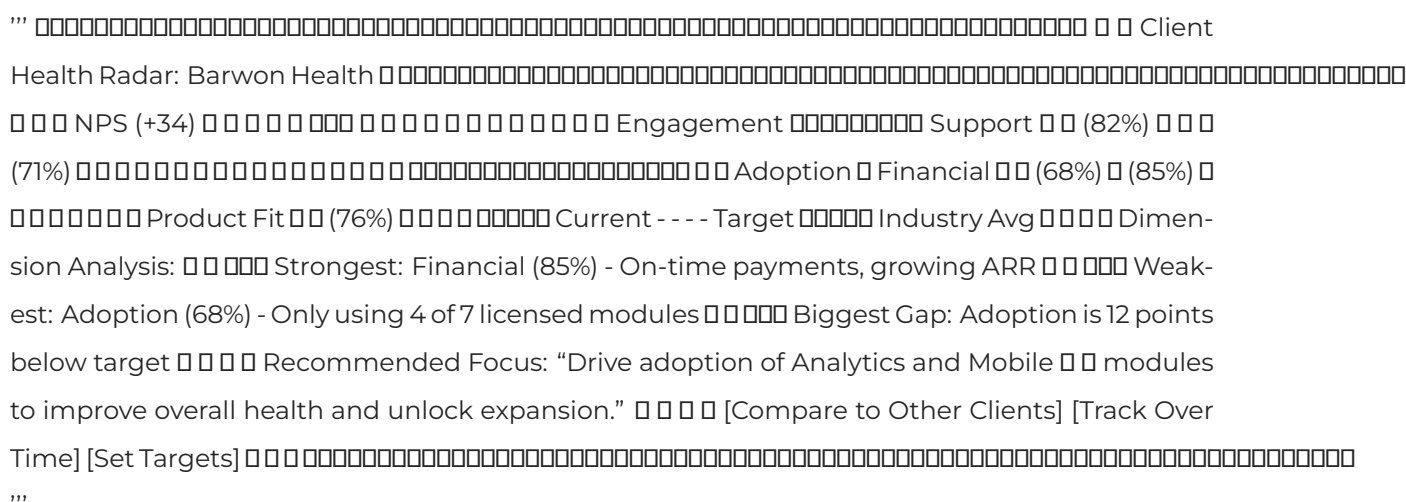
SANKEY FLOW DIAGRAMS

Visualise how revenue flows through your business:

'''  Revenue Flow Analysis - FY26  SOURCES PRODUCTS SEGMENTS OUTCOMES  Renewals  Renewed  \$2.8M  \$3.1M  EMR  Giant  \$1.9M  \$2.1M  Expansion  Expanded  \$800K  \$650K  Analytics  Large  \$650K  \$1.2M  New Logo  Churned  \$400K  \$180K  Mobile  Medium  \$450K  \$700K  Pipeline  \$800K  Flow Insights:  - 89% of Giant segment revenue came from EMR renewals  - Churn concentrated in Medium segment (85% of total churn)  - Expansion strongest in Large segment (+\$420K)  [Hover for Details] [Filter by Segment] [Compare to Last Year] '''

RADAR/SPIDER CHARTS FOR MULTI-DIMENSIONAL HEALTH

See all health dimensions at once:

'''  Client Health Radar: Barwon Health  NPS (+34)  Engagement  Support  (82%)  (71%)  Adoption  Financial  (68%)  (85%)  Product Fit  (76%)  Current - - - - Target  Industry Avg  Dimension Analysis:  Strongest: Financial (85%) - On-time payments, growing ARR  Weakest: Adoption (68%) - Only using 4 of 7 licensed modules  Biggest Gap: Adoption is 12 points below target  Recommended Focus: "Drive adoption of Analytics and Mobile  modules to improve overall health and unlock expansion."  [Compare to Other Clients] [Track Over Time] [Set Targets] '''



TEMPORAL HEAT MAPS

Spot patterns across clients and time:

''' Port-folio Health Heatmap - FY26

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Barwon	72	48	52	71	74	68	75	78	80	82
GHA	65	68	70	72	71	65	68	70	72	74
SA Health	85	86	84	82	80	75	78	80	82	84
WA Health	58	55	52	50	48	45	42	40	45	52
Metro	78	80	82	84	85	82	84	86	88	90

 Legend: >80 (Healthy) 60-80 (Watch) <60 (Risk) Pattern Detection: WARNING: WA Health: Declining for 8 consecutive months (58->40) WARNING: December Dip: 4 of 5 clients dropped in Dec (holiday effect?) Y Metro: Steady improvement trend (+12 points over period) WARNING: Barwon Aug: Sudden drop (-24 points) - investigate [Click Any Cell for Details] [Export] [Set Alert Thresholds] '''

NETWORK GRAPHS FOR RELATIONSHIPS

Visualise stakeholder dynamics:

''' Stakeholder Network: Barwon Health James CEO (Influence: 4/5) reports to Sarah David Emma CFO CIO COO [CHAMPION] [SKEPTIC] [NEUTRAL] [SUPPORTER] [BLOCKER] [UNKNOWN] Tom Lisa Mark Finance Mgr IT Director Ops Manager [SUPPORTER] [BLOCKER] [UNKNOWN] Legend: = Very High Influence [CHAMPION] = Strong supporter = Strong relationship [BLOCKER] = Active resistance - - - = Weak relationship [NEUTRAL] = No strong opinion Network Analysis: WARNING: Single-threaded: Only strong connection is through Sarah WARNING: Blocker present: Lisa (IT Director) has concerns Opportunity: Emma (COO) is neutral—potential ally if engaged Recommended Actions: 1. Ask Sarah to introduce you to Emma 2. Address Lisa's concerns directly (schedule 1:1) 3. Multi-thread: Build direct relationship with Tom [Expand Network] [Add Stakeholder] [Export Org Chart] '''



Real-Time & Animated Visualisations

LIVE PIPELINE WATERFALL

Watch pipeline changes in real-time:

''' [View Pipeline Waterfall](#) [View Pipeline](#)
Waterfall - Today's Changes [View Pipeline](#)

Category	Value
Yesterday	\$2.1M
Today	\$2.4M
Net Change	+\$300K (+14.3%)

Today's Activity Feed (Live):
14:32 Y Barwon EMR moved to Closed Won (+\$180K)
11:15 N Metro Security lost to competitor (-\$50K)
09:45 + SA Health Mobile added to pipeline (+\$250K)
08:30 -> GHA Analytics pushed to Q3 (-\$80K from Q2)
Net Change: +\$300K (+14.3%)
Coverage Impact: 2.1x -> 2.4x
[View Full History](#) [Set Change Alerts](#) [Celebrate Wins](#) '''

ANIMATED FORECAST SCENARIOS

Watch different scenarios play out:

''' [View Forecast Scenarios](#)
Forecast Scenario Animator
Scenario: [Best Case ▼] Speed: [Normal ▼] [▶ Play] [⏸ Pause] \$4M
Best: \$3.8M \$3M Likely: \$3.2M \$2M
Worst: \$2.4M \$0
Committed Q1 Q2 Q3 Q4 Q1 Q2 Q3 Q4 Q1
Now FY26 FY27
Scenario Assumptions (Best Case):
All committed deals close as expected (100%)
Forecast deals close at stage probability + 10%
Upside deals included at 50% probability
2 whitespace opportunities discovered (\$200K)
Key Swing Deals: Barwon EMR (\$250K) - Moves outcome by +/-8%
WA Health Analytics (\$350K) - Moves outcome by +/-11%
SA Health Renewal (\$450K) - Moves outcome by +/-14%
[Compare Scenarios](#) [Export Model](#) [Share with Manager](#) '''

Predictive & Prescriptive Visualisations



CHURN PROBABILITY DISTRIBUTION

See which clients are at risk and why:

''' **WARNING: Churn Risk Distribution - Portfolio View** **Churn Probability (%)** **LOW RISK** **HIGH RISK** **High Risk Clients (>50% churn probability):** **Client** **Prob** **ARR** **Top Risk Factors** **WA Health** **72%** **\$380K** **NPS -15, Support SLA 45%** **Alpine Hosp** **58%** **\$120K** **No meeting in 90 days** **Peninsula** **54%** **\$95K** **Champion left, no replacement** **Total ARR at Risk: \$595,000** **Recommended: Immediate outreach to WA Health (highest value risk)** **[View Mitigation Actions]** **[Export Risk Report]** **[Set Alerts]** '''

OPPORTUNITY SCORING BREAKDOWN

Understand why deals are scored the way they are:

''' **Opportunity Score Breakdown: Barwon EMR Upgrade** **Overall Win Probability: 68%** **Score Components:** **MEDDPIC Score (28/40)** **Metrics: 4/5** **Economic Buyer: 3/5** **Needs improvement** **Decision Criteria: 4/5** **Decision Process: 3/5** **Paper Process: 4/5** **Identify Pain: 5/5** **Champion: 4/5** **Competition: 1/5** **Critical gap** **Engagement Score (75/100)** **Meeting Frequency: 85%** **Response Time: 70%** **Stakeholder Coverage: 60%** **Needs improvement** **Content Engagement: 85%** **Historical Pattern Match (72%)** **Similar to 14 won deals (avg 78%)** **Similar to 6 lost deals (avg 35%)** **To Improve Win Probability:** **1. Competition gap: Research Oracle's position (+8% if addressed)** **2. Economic Buyer: Request CFO meeting (+5% if engaged)** **3. Stakeholder Coverage: Add 2 more contacts (+4% if expanded)** **Potential Score with Actions: 68% -> 85% (+17%)** **[Create Actions]** **[View Similar Deals]** **[Update MEDDPIC]** '''

Predictive Trend Visualisations

CONFIDENCE CONE FORECASTS

Instead of single trend lines, show expanding confidence cones that widen into the future—communicating uncertainty honestly:

"

Score Forecast: Barwon Health

0 0 100 0 0 0 90% conf 0 0 90 0 0 80 0 0

Best: 82 0 0 70 Likely: 71

0 0 60 Worst: 58 0 0 50 0 0

0 0 40 0 0 90% conf

0 0 30 Now +2w +4w
+6w +8w +10w +12w 0 0 Actual Forecast 0 0 Confidence In-

terpretation: Narrow cone (now to +4w): High confidence, stable signals Widening
cone (+4w to +8w): Renewal outcome uncertain Wide cone (+8w to +12w): Multiple sce-
narios possible Key Uncertainty Drivers:

1. Renewal decision (Feb 28) - binary outcome affects trajectory

2. New CIO starting (Mar 15) - relationship unknown

3. Support improve-ment initiative - results pending

[Narrow Range with Actions] [View Scenarios] [Set Alert at 60]

"

Confidence Cone Logic:

Timeframe	Cone Width	Confidence	Basis
0-2 weeks	+/-3 points	95%	Recent trajectory, no known events
2-4 weeks	+/-8 points	85%	Short-term momentum, minor uncertainty
4-8 weeks	+/-15 points	75%	Medium-term event-dependent
8-12 weeks	+/-25 points	60%	Long-term, multiple variables



ANOMALY HIGHLIGHTING

AI automatically highlights data points that deviate from expected patterns:

''' Anomaly Detection: NPS Responses Recent NPS Responses - Barwon Health 10 9 8 7 6 5 4 3 WARNING: 2 ANOMALY 1 0 Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec WARNING: ANOMALY DETECTED Response from: David Wong (CIO) Score: 3 (Detractor) Expected Range: 7-9 based on historical pattern Deviation: 3.2 standard deviations below client average Verbatim Feedback: "Extremely frustrated with reporting performance. Three months of complaints and no resolution. Considering alternatives." AI Analysis: - First detractor response from this client in 18 months - David is a key stakeholder (CIO, Economic Buyer on 2 deals) - "Considering alternatives" = competitive risk signal - Correlates with 5 support tickets on reporting this quarter Recommended Actions: 1. [URGENT] Schedule call with David within 24 hours 2. Escalate reporting issues to product team 3. Prepare recovery plan with specific timeline [Create Urgent Action] [View David's History] [Escalate to Manager]

Anomaly Detection Types:

Anomaly Type	Detection Method	Alert Level
Point Anomaly	>2 std dev from mean	Medium
Contextual Anomaly	Unusual for that stakeholder/time	High
Collective Anomaly	Pattern break across multiple signals	Critical
Trend Break	Sudden direction change	High
Missing Data	Expected input not received	Medium



SHARED CURSORS

When collaborating on dashboards in real-time, see where teammates are focusing:

'''
Territory Dashboard - Collaborative View
3 viewers: You, Sarah T., Michael C.
Revenue by Client Health Distribution
Barwon \$850K 90-100 4 SA Health 80-89 6
Sarah 70-79 4 GHA \$620K 60-69 3
WA Health \$380K Michael Metro \$350K <60 2
WARNING:
Pipeline Trend Activity Feed
Sarah is viewing "SA Health revenue"
You Michael is viewing "Health <60 clients"
Cursor Legend: Sarah T. (Manager) - Reviewing SA Health performance
Michael C. (CAM) - Examining at-risk clients
You - Analysing pipeline trend
[Start Screen Share]
[Open Chat] [Leave Collaborative Mode]
'''

Collaborative Features:

Feature	Description
Cursor Visibility	See teammate cursors with name labels in real-time
Focus Indicators	System announces when someone focuses on specific chart
Follow Mode	Click teammate's avatar to follow their view
Pointer Mode	Hold key to make your cursor visible to others for pointing
Private Mode	Toggle to hide your cursor from others



PRESENTATION MODE

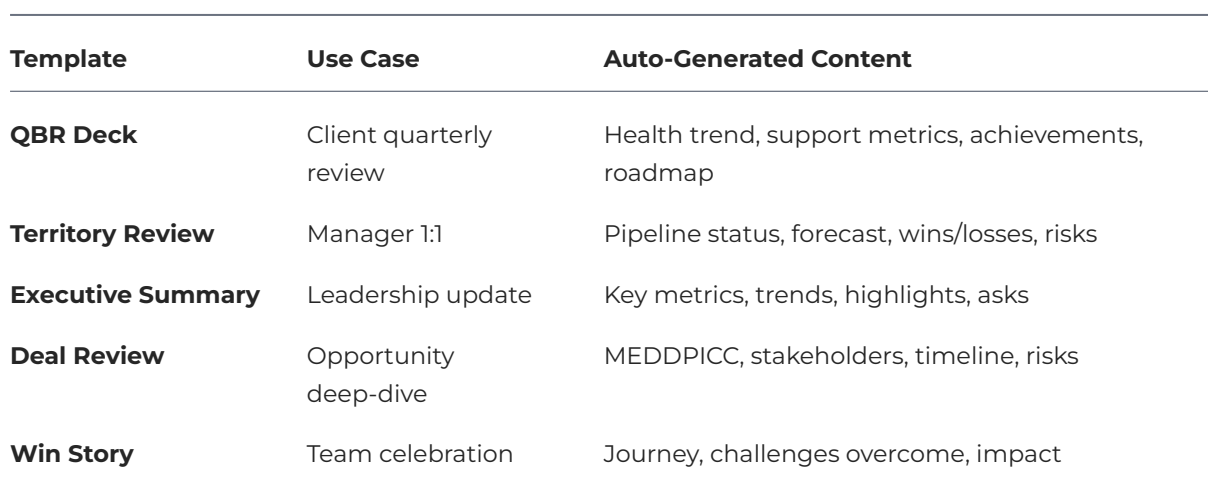
Transform any dashboard into a guided presentation:

'''
Presentation Mode: Q3 Territory Review Slide 3 of 8 ◀ ▶ [Exit Presentation]
Pipeline Growth \$2.8M \$2M \$1M <- FOCUS HIGHLIGHT Q1 Q2 Q3
Presenter Notes: "Pipeline grew 40% from Q1 to Q3. Key drivers: Barwon EMR upgrade (\$250K) - highlighted in yellow - Three new whitespace opportunities from NPS feedback - [CLICK] Let's drill into the Q3 spike..." Suggested talking time: 90 seconds
Animation Queue: 1. Y Fade in chart 2. Y Highlight Q1->Q3 growth line 3. [Click] Zoom to Q3 and show breakdown 4. [Click] Advance to next slide [◀ Previous] [▶ Next/Animate] [⏸ Pause] [🔗 Share Live Link]
'''

Presentation Mode Features:

Feature	Description
Auto-Slide Creation	AI suggests logical slide sequence from dashboard
Focus Highlights	Spotlight specific elements, dim others
Animated Transitions	Smooth animations between data states
Presenter Notes	AI-generated talking points for each slide
Timing Guides	Suggested duration per slide
Live Sharing	Attendees follow along in real-time via link
Q&A Mode	Pause to explore data based on audience questions
Recording	Record presentation with narration for async viewing
Export	Generate PowerPoint/PDF from presentation

Presentation Templates:



TIME-LAPSE REPLAY

"

Lapse Replay: FY26 Territory Evolution

[◀ ▶] PLAYING [▶▶] Speed: [2x ▼] Jul 2025 Jun 2026

Pipeline & Revenue - October 2025 \$3M Pipeline growing \$2M \$1M Committed (steady) \$0

Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May CURRENT Client Health Bubbles:

Metro SA Health GHA Barwon WA (85) (82) (68) (65) (48)

[Bubbles animate: size=ARR, color=health, position=time]

Events Timeline (syncd with playback): Jul 5: Metro renewed (+\$350K committed) Aug 12: WA Health support escalation (health -15) Sep 3: Barwon EMR opportunity added (+\$250K pipeline) Oct 15: GHA expansion closed (+\$180K committed) NOW Future events faded in as playback continues... Patterns Detected: WARNING: Q2 Dip: Health scores dropped across 4 clients in Dec-Jan (Possible cause: Holiday period reduced engagement) Y Recovery Pattern: Clients who received Jan QBRs recovered faster WARNING: WA Health: Continuous decline for 5 months—intervention needed [Pause at Key Moments] [Export as Video] [Share Replay Link]

"

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Feature	Description
Speed Control	0.5x, 1x, 2x, 5x, 10x playback speed
Scrubbing	Drag timeline to jump to any point
Event Markers	Key events highlighted on timeline
Pause Points	Auto-pause at significant changes
Split Screen	Compare two time periods side-by-side
Pattern Detection	AI highlights recurring patterns
Export	Save as video for presentations

AI-Generated Visualisations

NATURAL LANGUAGE TO CHART

Describe what you want to see—AI creates the perfect visualisation:

''' **ChaSen** Natural Language Visualisation **Ask anything about your data:** "Show me clients with declining NPS but increasing support tickets over the last 6 months" **ChaSen:** "I found 3 clients matching that pattern. Here's a scatter plot showing the correlation, with trend arrows." **NPS Change (6 months)** +20 +10 0 -10 -20 **CHA** **Barwon trend** -30 trend **WA Health** -40 trend **Support Ticket Change (%)** Bubble size = ARR at risk Arrow direction = trajectory over period **Quick Queries (click to run):** "Which deals have stalled longest?" "Compare my win rate to team average" "Show revenue concentration risk" "What's driving health score changes?" [Refine Query] [Save This Chart] [Schedule as Report] '''

Natural Language Capabilities:

Query Type	Example	Generated Visualisation
Comparison	"Compare Q1 vs Q2 performance"	Side-by-side bar charts



Query Type	Example	Generated Visualisation
Trend	"Show health score trends for at-risk clients"	Multi-line chart with annotations
Distribution	"How is ARR distributed across segments?"	Pie/donut or treemap
Correlation	"Is there a relationship between meeting frequency and NPS?"	Scatter plot with regression
Ranking	"Top 5 opportunities by MEDDPICC score"	Horizontal bar chart
Time Series	"Pipeline changes week over week"	Area chart with change indicators
Composition	"Break down revenue by product and client"	Stacked bar or Sankey



AUTO-INSIGHT GENERATION

Every chart automatically comes with AI-generated insights:

” Portfolio Health Distribution 12 10 8 6 4 2 0 Health Score Range 90+ 80-89 70-79 60-69 50-59 <50 AI-Generated Insights: 1. POSITIVE: “78% of your clients are in ‘healthy’ range (70+), up from 65% last quarter. Your QBR initiative is showing results.” 2. WARNING: CONCERN: “The 2 clients below 50 (WA Health, Alpine) represent \$500K ARR (12% of portfolio). Both have been declining for 3+ months.” 3. OPPORTUNITY: “Clients in the 70-79 range have highest expansion potential. Historical data shows 45% expand within 6 months when engaged with upsell conversations.” 4. PATTERN: “Your ‘healthy’ clients share common traits: monthly meetings, <48hr email response, NPS survey response rate >80%. Consider applying this playbook to at-risk clients.” [Deep Dive on Insight 2] [Create Action from Insight 3] [Dismiss] [Rate Insights: 0] ”

Auto-Insight Categories:

Category	Icon	Description	Example
Positive Trend	▲	Something improving	“Win rate up 12% vs last quarter”
Concern	⚠	Issue needing attention	“3 clients showing churn signals”
Opportunity	📈	Actionable growth potential	“Whitespace identified in 5 accounts”
Pattern	🔄	Recurring behaviour	“Deals with exec sponsor close 2x faster”
Anomaly	📉	Unexpected deviation	“This month’s pipeline drop is unusual”
Benchmark	📊	Comparison to peers/history	“Your NPS is 15 points above team avg”



COMPARATIVE BENCHMARKING

Understand your performance in context:

” Performance Benchmarking: Your Territory vs ANZ Average
Compare against: [ANZ Average ▼] Period: [FY26 YTD ▼]
Metric You ANZ Avg Diff Significance
Pipeline Coverage 2.8x 2.3x +0.5x Y Sig. better Win Rate 42% 38% +4% ~ Comparable
Avg Deal Size \$185K \$165K +\$20K Y Sig. better Sales Cycle 68 days 72 days -4 days ~ Comparable
Client Health Avg 74 71 +3 ~ Comparable NPS Average +38 +32 +6 Y Sig. better
Forecast Accuracy 88% 82% +6% Y Sig. better Churn Rate 4% 7% -3% Y Sig. better
Visual Comparison: Pipeline Coverage 2.8x (You) 2.3x (ANZ) Win Rate 42% (You) 38% (ANZ) Churn Rate 4% (You) 7% (ANZ)
Benchmark Analysis: “You’re outperforming ANZ average in 5 of 8 key metrics. Standout strengths: Pipeline coverage (+22%) and churn rate (43% lower than average). Opportunity area: Win rate is only slightly above average. Top performers achieve 48%+. Consider MEDDPIC discipline—your qualification scores average 24 vs 28 for top quartile.”
Compare to: [Top Performer] [Bottom Quartile] [Same Segment] [Historical Self] [Industry Benchmark] [Export Benchmark Report] [Set Improvement Goals] [Share]

Benchmarking Options:

Benchmark	Description	Use Case
Team Average	Average across your team	Daily performance tracking
Top Performer	Best performer in team	Aspirational target
Top Quartile	Top 25% performers	Realistic stretch goal
Same Segment	Others with similar portfolio mix	Fair comparison
Historical Self	Your own past performance	Personal improvement
Industry Benchmark	Published industry standards	External validation

Real-Time Data Streams



NEWS SENTIMENT STREAM

Live feed of news about your clients with sentiment analysis:

”” Client News Sentiment Stream [Live ☐] Filter: [All Clients ▼] [All Sentiment ▼] [Last 7 Days ▼] Sentiment Overview (Last 7 Days): Positive: 18 Neutral: 12 Negative: 40 POSITIVE 2 minutes ago Barwon Health Wins Healthcare Innovation Award Source: Australian Healthcare Week Relevance: 98% “Barwon Health has been recognised for outstanding digital transformation, including EMR modernisation...” Sentiment: Highly Positive (+0.92) Altera Mention: Yes (EMR referenced) Opportunity: Reference story, case study request [Draft Congratulations] [Add to Success Stories] [Share] NEUTRAL 45 minutes ago SA Health Announces New CIO Appointment Source: Government Gazette Relevance: 95% “Jennifer Walsh appointed as Chief Information Officer, effective March 1, 2026...” Sentiment: Neutral (0.12) Impact: Stakeholder change - relationship action needed Risk: Current CIO (David) was our champion [Research Jennifer Walsh] [Update Stakeholder Map] [Alert CSE] NEGATIVE 3 hours ago WA Health Faces Budget Cuts Amid State Review Source: The West Australian Relevance: 92% “WA Health to reduce operational spending by 8% following state treasury review. IT projects under scrutiny...” Sentiment: Negative (-0.67) Impact: Budget pressure - pipeline at risk Affected Pipeline: \$350K Analytics opportunity [Add Risk to Plan] [Prepare Value Justification] [Call Client] URGENT Yesterday WARNING: Competitor Alert: Oracle Health Wins Metro Hospital Contract Source: Oracle Press Release Relevance: 88% “Oracle Health announces 5-year contract with Metro Hospital for comprehensive EMR replacement...” Sentiment: Negative for Altera (-0.81) Impact: Competitive loss in your territory Learning: Metro was in early pipeline - what happened? [Log Competitive Loss] [Request Win/Loss Analysis] [Debrief] [Load More] [Set Alert Rules] [Export News Digest]

Sentiment Stream Features:



Feature	Description
Real-Time Updates	News appears within minutes of publication
Sentiment Scoring	-1.0 (very negative) to +1.0 (very positive)
Relevance Scoring	How relevant to your clients (0-100%)
Auto-Categorisation	Awards, Leadership, Financial, Competitive, etc.
Impact Assessment	AI evaluates business impact on your relationship
Action Suggestions	Recommended responses based on news type
Alert Rules	Custom notifications for specific triggers
Digest Mode	Daily/weekly email summary option

Sentiment Alert Thresholds:

Sentiment	Score Range	Alert Level	Auto-Action
Highly Positive	+0.7 to +1.0	Opportunity	Draft congratulations
Positive	+0.3 to +0.7	FYI	Add to digest
Neutral	-0.3 to +0.3	Monitor	Log only
Negative	-0.7 to -0.3	Attention	Alert CSE
Highly Negative	-1.0 to -0.7	Urgent	Alert CSE + Manager

Implementation Phases

Phase 1: Foundation (2-3 weeks)

- ☐ Create unified 'strategic_plans' database table
- ☐ Build shared component library:
- ☐ MEDDPICC scoring component (8 criteria with evidence fields)
- ☐ Risk assessment component (with Accusation Audit prompts)
- ☐ Action plan component (linked to methodology stages)
- ☐ Client selector component



- ☐ Checkpoint recorder component (Voss milestones)
- ☐ Hero Journey tracker component
- ☐ Implement plan type toggle with role-based defaults
- ☐ Create API routes for CRUD operations

Phase 2: Core Workflow (3-4 weeks)

- ☐ Build 5-step wizard with progressive disclosure
- ☐ Implement role-based views (same data, different UI)
- ☐ Add auto-population from existing data sources:
 - ☐ Client health summary
 - ☐ NPS scores
 - ☐ Support metrics
 - ☐ CSE/CAM targets from BURC
- ☐ **Pipeline & Opportunity Management:**
 - ☐ Add/Edit/Remove opportunity UI
 - ☐ Opportunity form: Value, Stage, Close Date, Products
 - ☐ MEDDPICC scoring inline per opportunity
 - ☐ Stakeholder linking per opportunity
 - ☐ Pipeline table/card views with sorting/filtering
- ☐ **Dynamic Forecasting:**
 - ☐ Real-time forecast recalculation on opportunity change
 - ☐ Coverage ratio calculator (Pipeline / Gap)
- ☐ Forecast confidence bands (best/likely/worst)
- ☐ What-if modelling ("If we lose X, forecast drops to...")
- ☐ Forecast history tracking
- ☐ Port existing Territory/Account logic to unified workflow



Phase 3: Collaboration & Operating Rhythm (3-4 weeks)

☐ **Core Collaboration:**

- ☐ Real-time presence indicators (Supabase Realtime)

☐ In-context commenting system

- ☐ Activity log and version history
- ☐ @mentions and notifications

☐ **Approval Workflow:**

- ☐ Add approval columns to 'strategic_plans' table
- ☐ Create 'plan_change_log' table for edit tracking
- ☐ Build submission modal with ChaSen pre-flight checks
- ☐ Build approver dashboard (pending approvals list)

☐ Implement collaborative editing with change tracking

- ☐ Add approval/withdrawal actions with activity logging
- ☐ Build team visibility view (status board)

☐ Implement notification system (immediate + weekly digest)

☐ **Next-Level Collaboration:**

- ☐ Async handoff workflow (CAM ↔ CSE with AI summary)

☐ Shared playbooks & templates library

- ☐ Team dashboard view (territory coverage, attention alerts)

☐ Review scheduling with auto-reminders

☐ **Operating Rhythm Integration:**

- ☐ Create 'plan_review_schedule' table
- ☐ Auto-create reviews from 'segmentation_events' calendar
- ☐ Implement ChaSen "delta since last review" generator
- ☐ Add review reminder notifications (7 days, 1 day before)

☐ Build one-click "Approve & Submit" for quick reviews

- ☐ Create team calendar view showing all upcoming reviews
- ☐ Add "Skip with reason" for non-applicable reviews



Phase 4: AI Enhancement (2-3 weeks)

- ☐ **ChaSen AI integration per step (reduce cognitive burden):**
 - ☐ Step 1: Priority client suggestion on load
 - ☐ Step 2: Target allocation suggestions based on segment/history
 - ☐ Step 3: Opportunity auto-discovery from NPS/meetings
 - ☐ Step 3: MEDDPICC auto-fill from existing data
 - ☐ Step 4: Risk auto-generation with Accusation Audit scripts
 - ☐ Step 5: Executive summary auto-generation
 - ☐ **Pipeline AI features:**
 - ☐ Opportunity suggestions from NPS themes and meeting notes
 - ☐ Value estimation from similar deals
 - ☐ Win probability refinement using MEDDPICC + engagement signals
 - ☐ Stalled deal detection with suggested actions
 - ☐ Whitespace identification per client
 - ☐ **Methodology coaching integration:**
 - ☐ MEDDPICC scoring suggestions with evidence
 - ☐ Gap Selling: Auto-generate current/future state analysis
 - ☐ Voss: Next Best Conversation scripts (opening, objection handling)
 - ☐ StoryBrand: Auto-generate SB7 narrative per client
 - ☐ Wortmann: Match relevant success stories from Story Matrix
 - ☐ Checkpoint prompts: Suggest which Voss milestone to target next
 - ☐ Hero Journey: AI recommendation for stage advancement actions
 - ☐ Predictive risk indicators
 - ☐ Auto-stakeholder detection from meeting transcripts
-



File Structure

```

''' src/ app/(dashboard)/planning/ 0000 strategic/ 0000 new/ 0000 page.tsx # New unified planning page 0000 [id]/ 0000 page.tsx # Edit existing plan 0000 page.tsx # Plans list/dashboard 0000 territory/ # (Legacy - redirect to strategic) 0000 account/ # (Legacy - redirect to strategic) 0000 components/planning/ 0000 unified/ 0000 PlanTypeToggle.tsx 0000 StepWizard.tsx 0000 ContextStep.tsx 0000 PortfolioStep.tsx 0000 RelationshipsStep.tsx 0000 RisksActionsStep.tsx 0000 ReviewStep.tsx 0000 CollaborationPanel.tsx 0000 PresenceIndicator.tsx 0000 AllInsightsPanel.tsx 0000 shared/ 0000 MEDDPICCScoreing.tsx 0000 RiskAssessment.tsx 0000 ActionPlanEditor.tsx 0000 ClientSelector.tsx 0000 StakeholderMap.tsx 0000 pipeline/ # Pipeline & Forecasting 0000 OpportunityForm.tsx # Add/Edit opportunity modal 0000 OpportunityCard.tsx # Single opportunity display 0000 PipelineTable.tsx # Sortable opportunity list 0000 ForecastSummary.tsx # Target/Committed/Forecast/Gap 0000 CoverageGauge.tsx # Visual coverage ratio 0000 ForecastBands.tsx # Best/Likely/Worst chart 0000 WhatIfModeller.tsx # Scenario modelling 0000 PipelineSuggestions.tsx # ChaSen opportunity suggestions 0000 methodology/ # Sales methodology components 0000 MethodologyCoach.tsx # A.C.T.I.O.N. Framework guidance 0000 MethodologyQuestionnaire.tsx 0000 CheckpointRecorder.tsx # Voss milestone tracking 0000 HeroJourneyTracker.tsx # StoryBrand client transformation 0000 ValueVelocityMatrix.tsx # Quadrant visualisation 0000 NextBestConversation.tsx # AI-generated talk tracks 0000 AIPrePopulation.tsx # Auto-fill from client data 0000 QuestionnaireSection.tsx 0000 approval/ # Approval workflow components 0000 SubmitForApprovalModal.tsx # Submission modal with pre-flight checks 0000 ApproverDashboard.tsx # Pending approvals list 0000 ChangeLogPanel.tsx # View changes during review 0000 ChangeLogEntry.tsx # Single change display 0000 TeamStatusBoard.tsx # Team visibility view 0000 ApprovalNotifications.tsx # Notification preferences 0000 index.ts 0000 hooks/ 0000 useStrategicPlan.ts 0000 usePlanPresence.ts 0000 usePlanComments.ts 0000 usePlanApproval.ts # Approval workflow state & actions 0000 usePlanChangeLog.ts # Change tracking during review 0000 usePlanAI.ts 0000 lib/ 0000 planning/ 0000 types.ts 0000 validation.ts 0000 calculations.ts 0000 unified-sales-methodology.ts # A.C.T.I.O.N. Framework types & logic 0000 app/api/planning/ 0000 strategic/ 0000 route.ts # GET/POST plans 0000 [id]/ 0000 route.ts # GET/PUT/DELETE plan 0000 comments/route.ts 0000 presence/route.ts 0000 ai/route.ts 0000 submit/route.ts # POST submit for approval 0000 approve/route.ts # POST approve plan 0000 withdraw/route.ts # POST withdraw from review 0000 changes/route.ts # GET change log for plan 0000 shared/ 0000 portfolio/route.ts 0000 targets/route.ts 0000 forecast/route.ts # Forecast calculation & history 0000 opportunities/ 0000 route.ts # GET/POST opportunities 0000 [id]/route.ts # GET/PUT/DELETE single opportunity 0000 suggest/route.ts # AI opportunity suggestions 0000 what-if/route.ts # Scenario modelling 0000 app/api/chasen/ 0000 methodology/route.ts # AI methodology coaching API '''

```



Success Metrics

Metric	Current	Target
Time to complete plan	~45 min	~20 min
Plans completed per quarter	TBD	+50%
CSE/CAM collaboration rate	Separate	100% shared
Data accuracy (auto-populated)	~60%	>90%
AI suggestion adoption	0%	>40%

Migration Strategy

1. **Keep existing pages functional** during development
 2. **Build unified workflow in '/planning/strategic/'**
 3. **Add "Try New Planning" banner** to existing pages
 4. **Collect feedback** from pilot users
 5. **Redirect legacy URLs** after validation
 6. **Archive old code** after 30 days of stable operation
-

References

Industry & Platform

- [Gainsight Success Planning](#)
- [ChurnZero AI Features](#)
- [Totango Outcome Success Plans](#)
- [PatternFly Wizard Guidelines](#)
- [2026 Customer Success Planning Guide](#)



Sales Methodologies (Integrated)

- **Gap Selling** - Keenan (2018)
- Problem-centric selling, current->future state analysis
- **Never Split the Difference** - Chris Voss (2016)
- Tactical empathy, calibrated questions, Black Swans
- **Building a StoryBrand** - Donald Miller (2017)
- SB7 Framework, hero's journey narrative
- **What's Your Story** - Craig Wortmann (2006)
- Story Matrix, reference selling
- **MEDDPICC** - Jack Napoli, Dick Dunkel - Opportunity qualification framework