



Unified Strategic Planning Workflow: Design Guide

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Status: Approved for Implementation

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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)

Integrated Sales Methodologies

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

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 〇〇〇 No methodology - pure data selection

Step 2: PORTFOLIO & HEALTH SNAPSHOT 〇〇〇 Gap Selling: Current State -> Gap -> Future State analysis 〇〇〇 Value-Velocity Matrix: Quadrant assignment (Accelerate/Rescue/Cultivate/Stabilise) 〇〇〇 Momentum Intelligence: Rate of change tracking

Step 3: RELATIONSHIPS & OPPORTUNITIES 〇〇〇 MEDDPICC: 8-criteria opportunity qualification 〇〇〇 Voss Techniques: Labeling, mirroring, calibrated questions 〇〇〇 Checkpoint Recording: Track "That's Right" moments, Black Swan discoveries 〇〇〇 Hero Journey Tracking: Client transformation stage

Step 4: RISKS & ACTIONS 〇〇〇 Gap Selling: Quantify cost of inaction 〇〇〇 Accusation Audit: Pre-empt objections (Voss) 〇〇〇 StoryBrand SB7: Problem -> Guide -> Plan -> Success narrative 〇〇〇 Recovery Stories: Wortmann Story Matrix for at-risk clients

Step 5: REVIEW & COLLABORATE 〇〇〇 Next Best Conversation: AI-generated talk tracks 〇〇〇 Value Realisation Ledger: Proof points for reference selling 〇〇〇 Story Matrix: Curated success stories by situation ""



Element	Description	Score Range
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MEDDPICC Scoring (Opportunity Qualification)

Element	Description	Score Range
Metrics	Quantified business impact	1-5
Economic Buyer	Decision-maker identified and engaged	1-5
Decision Criteria	Understanding of evaluation factors	1-5
Decision Process	Timeline and approval workflow	1-5
Paper Process	Procurement/legal requirements	1-5
Identify Pain	Documented business pain points	1-5
Champion	Internal advocate with power and influence	1-5
Competition	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)

- Y **"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 = Σ (Opportunity Value x 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] 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."
Suggestions: "Barwon Health mentioned 'reporting gaps' in NPS - potential \$50K Analytics upsell" "GHA renewal in 90 days - no expansion opportunity logged" ChaSen
""



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
NPS & Sentiment	
'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
Support & Operations	
'nps_responses'	Pain points -> opportunity themes, detractor recovery actions
'nps_topic_classifications'	Categorised feedback -> product recommendations
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
'ch Aspen_conversations'	Past AI advice per client -> continuity
'ch Aspen_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

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
<input checked="" type="checkbox"/> Medium	Opportunity identified, engagement gap	Collapsed, yellow dot
<input type="checkbox"/> 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



Mechanism	Implementation
Daily digest	Batch low-priority insights into morning summary email
Snooze	“Remind me in 7 days” for non-urgent items
Dismiss with learning	“Not relevant” trains ChaSen to reduce similar suggestions
Quiet hours	No push notifications outside work hours
Smart grouping	“3 clients need QBR scheduling” instead of 3 separate alerts
Threshold tuning	User can adjust sensitivity (“Show me only critical items”)

Visual Hierarchy: Calm by Default

Action-Oriented, Not Information-Oriented

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: [View Source](#)



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



Next-Level Collaboration Features

Async Handoffs (CAM ↔ CSE)

Structured handoff workflow when ownership transitions:

"" **Hand-off Request** From: Anu Pradhan (CAM) -> To: Tracey Bland (CSE) Handoff Summary (AI-generated):
- Barwon Health renewal due Mar 15 - Key risk: CFO engagement (MEDDPICC E: 2/5)
- Suggested action: QBR before renewal CAM Notes: "Need CSE to run technical discovery. CFO prefers ROI focus." [Accept Handoff] [Request Clarification] [Decline]" ""

Shared Playbooks & Templates

Playbook	Trigger	Auto-Actions
Renewal Kickoff	90 days before renewal	Create meeting, pre-fill deck, assign owner
Churn Recovery	Health drops below 40	Alert CAM, generate Accusation Audit, suggest Story Matrix
Expansion Discovery	Positive NPS + high engagement	Create opportunity, suggest products, draft outreach
QBR Preparation	30 days before QBR	Generate slides, pull metrics, schedule prep call

Team Dashboard View

"" Team Planning Overview FY26 Q1 Territory Coverage Tracey Bland: \$2.1M / \$2.5M (84%) Anu Pradhan: \$1.8M / \$2.0M (90%) Team Total: \$3.9M / \$4.5M (87%) Plans Requiring Attention 3 plans overdue for review 5 plans awaiting approval 2 plans with unresolved comments [View All Plans] [Export Team Report] [Schedule Team Review]" ""

Review Scheduling & Reminders



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:

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

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

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 CAS-
CADE, 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 sta-
tus = '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:

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

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

Approver UI



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: □□□□□ 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:



Data Sources

Static Product Assets (from 'product_catalog'):

Field	Content	Used For
'competitive_analysis'	'[{{ competitor, our_advantage }}]'	Battlecard positioning statements
'objection_handling'	'[{{ objection, response }}]'	Pre-built objection responses
'value_propositions'	'[{{ title, description }}]'	Differentiation points
'target_triggers'	'string[]'	When to use this product competitively

Live Intelligence Sources (web + internal):

Source	Data Captured	Update Frequency
News RSS	Competitor announcements, wins, product launches, outages	Hourly
AusTender	Contract awards, government deal wins	Daily
Competitor Press Releases	Official announcements, partnerships	Daily
LinkedIn Company Pages	Headcount trends, new hires, job postings	Weekly
LinkedIn People	Executive movements, champion job changes	Weekly
Job Postings	Product direction hints (hiring signals)	Weekly
Glassdoor	Employee sentiment, internal issues	Monthly
Financial Filings	Revenue, strategy from earnings calls	Quarterly



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:

” Competitive Intelligence [-] COMPETITORS AT THIS ACCOUNT [Oracle Logo] Oracle Health Threat: 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**:

"" Oracle Health 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 BATTLE-CARD (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); CREATE
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
  CompetitorCard.tsx # Single competitor summary  CompetitorDossier.tsx # Full com-
  petitor profile modal  CompetitiveRiskCard.tsx # Risk card with competitor context  Intel-
  Feed.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 DEFAULT 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 / *opportunities_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. Framework 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 DEFAULT ‘[]’, – 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

```
BEGIN PERFORM pg_notify('plan_updates', json_build_object('plan_id', NEW.id, 'updated_by', NEW.primary_owner, 'updated_at',
```

```
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 CASCADE, 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, resolved_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', 'approved' details JSONB, created_at TIMESTAMPTZ DEFAULT NOW());"



UI/UX Specifications

1. Horizontal Stepper (PatternFly-style)

"" [1. Context] 待機中 [2. Portfolio] 待機中 [3. Relationships] 待機中 [4. Risks] 待機中 [5. Review] 待機中
Current Pending Pending Pending Pending ""

2. Plan Type Toggle (Top of Page)

'''tsx

```
<button className={planType === 'territory' ? 'bg-white shadow' : ''}> □ Territory Overview <button className={planType === 'account' ? 'bg-white shadow' : ''}> □ Account Deep-Dive
```

111

3. AI Assistant Panel (*Gainsight Copilot-style*)

4. Collaboration Presence Indicator

111

```
{activeEditors.map(editor => (
  <Avatar key={editor.name} className="ring-2 ring-white" />
))}
```

{activeEditors.length} collaborators active

111

Groundbreaking UI/UX Features

Revolutionary Wizard Experience



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



Device Category	Resolution	CSS Width	Layout Approach
16" Laptop	1728x1117 (scaled)	1536-1728px	2-column + overlay panels
14" Laptop	1512x982 (scaled)	1280-1535px	2-column, compact
iPad Pro/Air	1024-1279px	1024-1279px	Touch-optimised 2-column
iPad Mini	768-1023px	768-1023px	Single column, bottom nav
Phone (Pro Max/Galaxy Note)	428-767px	428-767px	Mobile stack, bottom sheets
Phone (Standard)	320-427px	320-427px	Compact mobile

5K ULTRA-WIDE (5120PX)

- “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

SCALED ULTRA-WIDE (3360x1418 / 3328x1404)

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

14"/16" LAPTOP FEATURES

- **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.



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

Predictive Simulation Engine

Feature	Description
“What If” Modelling	“What happens if we lose Barwon Health?” -> ARR impact, coverage drop, cascading risks visualised as decision tree.
Monte Carlo Forecasting	10,000 simulations -> “73% probability of hitting quota. 90% confidence range: \$2.1M - \$2.8M.”
Optimal Path Recommendation	“To hit \$3M: Close Barwon EMR (highest MEDDPICC), accelerate GHA Analytics, add 2 whitespace opportunities. 68% success probability.”

Multi-Agent AI Orchestra

- **Scout:** Monitors news, tenders, LinkedIn for intel
 - **Analyst:** Crunches numbers, spots trends, validates forecasts
 - **Coach:** Suggests Voss/Gap Selling techniques contextually
 - **Scribe:** Auto-generates summaries, executive briefs, handoff notes
 - **Guardian:** Ensures privacy compliance, audit trails

Generative Strategy

Feature	Description
Auto-Generate Plan Draft	One click: "Generate Q2 plan for my territory." Complete first draft from data.
Competitive War Room	"Build battlecard for Oracle Health" -> weaknesses, our strengths, displacement playbook, pricing intel.



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.



Experimental Features - High Risk, Massive Payoff

WARNING: Innovation Tier: These features represent cutting-edge capabilities that push beyond current industry standards. They require significant R&D investment but offer transformational competitive advantages.

Digital Twin Simulation

Create AI-powered simulations of client organisations for practice, prediction, and strategy testing.

CLIENT ORGANISATION DIGITAL TWIN

AI creates a simulated version of the client organisation based on:

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

Use Cases: "" 『 』
□□ Digital Twin: Barwon Health □ 『 』
□□□ Simulated Stakeholders: □ 『 』 Sarah Chen (CFO) - Risk-averse, data-driven, budget-focused
□ 『 』 David Wong (CIO) - Innovation champion, politically savvy □ 『 』 James Miller (CEO) - Big-picture thinker, legacy concerns □ 『 』 [Run Simulation: "Propose 15% price increase"] □ 『 』 Predicted Response: □ 『 』 - Sarah: "Need ROI justification. Will push back on timing." □ 『 』 - David: "Open if tied to new capabilities. Ally potential." □ 『 』 - James: "Concerned about board optics. Needs industry context." □ 『 』 Recommended Approach: Lead with David, build coalition, present □ 『 』 to Sarah with ROI model, escalate to James only if needed. □ 『 』
""



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: HANOFF (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



OPTIMAL TIMING PREDICTION

AI analyses stakeholder behaviour patterns to predict ideal engagement windows:

"" ... Optimal Timing: Sarah Chen (CFO, Barwon Health) ... Email Response Patterns: Peak responsiveness: Tuesday 10:00-11:30 AEST Secondary window: Thursday 14:00-15:30 AEST Avoid: Monday mornings (backlog clearing) Avoid: Friday afternoons (early sign-off pattern) Meeting Engagement Patterns: Most engaged: Mid-week, pre-lunch slots Decision-making: More likely to commit in PM meetings Attention span: Drops after 45 minutes in video calls Calendar Intelligence: Board meetings: Last Thursday of month (avoid week before) Budget cycle: Reviews in March, September (pitch before) Holiday patterns: Usually offline last 2 weeks December [Schedule Proposal Delivery] -> Suggested: Tue 10 Feb, 10:15 AEST ... ""

BIOMETRIC FEEDBACK INTEGRATION

Integration with wearables (Apple Watch, Fitbit, Garmin) for real-time physiological insights:

Signal	Detection	Intervention
Elevated heart rate	Stress during call	"Take a breath. Pause before responding."
Voice stress analysis	Tension in your voice	"Your tone is rising. Try lowering pitch."
Client voice analysis	Uncertainty detected	"They sound hesitant. Probe with 'What concerns you most?'"
Fatigue patterns	HRV indicating tiredness	"Cognitive performance declining. Consider rescheduling complex discussion."
Optimal state detected	In flow state	"You're performing well. Good time for difficult conversations."

Privacy Controls:

- All biometric data processed on-device only
- No biometric data stored or transmitted
- User can disable at any time
- Coaching suggestions are optional



COGNITIVE LOAD MONITORING

Track mental capacity to optimise performance:

"" "Cognitive Load Monitor" Today's Cognitive Budget: 52% remaining Activities Logged: 09:00-10:30 Complex negotiation (Barwon) -25% 10:30-11:00 Admin/email -5% 11:00-12:00 Discovery call (new prospect) -12% 12:00-13:00 Lunch break +8% (recovery) Upcoming: 14:00 Territory review with manager Est: -15% 15:30 Proposal presentation (WA Health) Est: -20% WARNING: Warning: WA Health presentation is high-stakes. Current trajectory: 17% cognitive capacity remaining. Suggestion: Reschedule to tomorrow AM or take 30-min break. ""

Network Intelligence

INDUSTRY MOVEMENT TRACKING

Track key stakeholders across company changes:

"" "Industry Movement Alert" Sarah Chen has changed roles Previous: CFO, Barwon Health (Your Champion - 3 years) New: CEO, Metro Health (Not currently Altera client) Effective: 1 March 2026 Implications: Barwon Health: Champion risk - identify successor Metro Health: Warm introduction opportunity Suggested Actions: 1. Schedule farewell/congratulations call with Sarah 2. Ask Sarah for introduction to her successor at Barwon 3. Discuss Altera opportunities at Metro Health 4. Add Metro Health to prospecting pipeline [Create Actions] [Schedule Call] [Add to Pipeline] ""

Tracking Sources:

- LinkedIn profile changes (with consent)
- News announcements
- Company press releases
- Industry publication mentions
- Conference speaker lists



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 GHA ASA Health WA DOH Data Data Data Data Local Local Local Local Model Model Model Model Model Aggregate Only model weights shared, Patterns never raw data (No Data) 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:

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:

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:

```
'''  
Presentation Generator  
Template: [Quarterly Business Review ▾] Quarterly Business Review (QBR)  
Executive Briefing  
Renewal Proposal  
Product Demo Deck  
Implementation Kickoff  
Annual Review  
Client: [Barwon Health ▾]  
Period: [Q3 FY26 ▾]  
Branding:  
Altera Corporate  
Co-branded with Client Logo  
Include Sections:  
Relationship Summary & Health Score  
Support Performance & SLA Metrics  
NPS Trends & Feedback Themes  
Product Usage & Adoption  
Achievements & Value Delivered  
Roadmap & Upcoming Releases  
Recommendations & Next Steps  
Competitive Positioning (if relevant)  
Expansion Opportunities  
[Generate Preview] [Download PPTX] [Open 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



Section	Contents	Update Frequency
Training Resources	Self-service guides, videos, documentation	Ongoing
Communication Tools	Schedule meetings, submit tickets, feedback	Always available

What Customers DON'T See:

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

Performance Transparency

REAL-TIME NPS CORRELATION

Show CSEs exactly how their actions correlate with NPS outcomes:

"" 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 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** **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." **Your Forecast**: #3 (88% accuracy) **Overall Summary**: Your forecast is strong, with high accuracy across all categories. Keep up the good work! **Next Steps**: Review the accuracy breakdown for forecast deals to identify areas for improvement. **Final Note**: Your performance is excellent, and you're setting a great example for the team. Well done!"

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



DEAL GENOME MAPPING

Every won and lost deal has a unique “genome”—a fingerprint of 200+ attributes that AI analyses to predict outcomes and prescribe interventions.

” Deal Genome Analysis: Barwon EMR Upgrade (\$180K) Deal Genome Match Analysis (vs 847 historical deals): Similar Deals Found: 23 Won: 14 (61%) Lost: 9 (39%) Avg Deal Size: \$165K Genome Fingerprint: Attribute This Deal Won Avg Lost Avg Risk Days in Discovery 45 28 52 WARNING: Stakeholders engaged 3 5 2 WARNING: Exec sponsor access No 78% Yes 23% Yes MEDDPICC score 28 32 24 Y Competitor mentioned Yes 45% 67% WARNING: Champion strength 4/5 4.2 2.8 Y Meeting frequency Bi-weekly Weekly Monthly WARNING: Decision timeline 90 days 75 days 120 days Y WARNING: PATTERN ALERT: 89% similarity to 4 deals you lost Common Failure Point: Stakeholder engagement dropped in month 2 Your Current Status: Day 38, engagement declining last 2 weeks Prescribed Interventions: 1. Request executive sponsor meeting this week (highest impact) 2. Expand stakeholder map—identify 2 more influencers 3. Increase meeting cadence to weekly 4. Develop competitive counter-positioning Predicted Outcome (current trajectory): 42% win probability Predicted Outcome (with interventions): 68% win probability ”

Genome Attributes Tracked (200+):

Category	Example Attributes
Timing	Days in each stage, time since last meeting, decision timeline
Engagement	Meeting frequency, email response time, stakeholder count
Qualification	MEDDPICC scores, champion strength, economic buyer access
Competitive	Competitors mentioned, displacement vs greenfield, incumbent strength
Financial	Deal size, discount requested, payment terms
Relationship	Prior relationship length, NPS history, support satisfaction
Behavioural	Response patterns, meeting attendance, document downloads
External	Industry trends, budget cycles, regulatory changes



COMPETITOR MOVE PREDICTION

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

"" Oracle has been observed increasing its presence in the Western Australian Health sector. Competitive Threat Prediction: 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 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:

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) 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:

"" ...
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:



HAPTIC PIPELINE

Apple Watch tactile notifications for ambient awareness:

AI-Human Hybrid Operations



MEETING CO-HOST

AI joins video calls as a disclosed assistant:

"" Meeting Co-Host: Active Meeting: Barwon Health QBR | Participants: 5 | Duration: 47 min Sidebar (Visible only to you): Meeting Objectives (Auto-detected from agenda) Review Q3 performance metrics Discuss FY27 priorities Address support concerns Confirm renewal timeline Live Notes (Auto-generated) [10:03] Sarah: Pleased with uptime improvements [10:07] David: Concerned about reporting performance [10:12] Sarah: Budget confirmed for mobile rollout [10:18] ACTION: Send reporting optimisation proposal by Fri [10:23] COMMITMENT: David to schedule technical review Real-time Suggestions WARNING: David's tone shifted negative on reporting topic. Suggested response: "I hear your frustration, David. Help me understand the specific scenarios causing issues." Fact Check: Sarah mentioned "15% improvement" Actual data: 18% improvement. Opportunity to reinforce. Knowledge Base: "What's our roadmap for reporting?" Answer ready: "Q2 release includes 3 reporting enhancements" Action Items Captured [You] Send reporting optimisation proposal - Due: Friday [David] Schedule technical review - Due: Next week [Sarah] Confirm mobile rollout budget allocation - Due: EOW [Confirm & Create Actions] Post-Meeting (Auto-generated): - Meeting summary email draft ready - Action items created in system - Calendar invites drafted for follow-ups - CRM notes updated ""

Co-Host Capabilities:

Function	How It Works	Human Oversight
Note-Taking	Transcribes and summarises in real-time	Review before distribution
Action Capture	Detects commitments and deadlines	Confirm before creating
Sentiment Analysis	Monitors tone and flags concerns	Private notification only



Function	How It Works	Human Oversight
Fact Checking	Compares statements to data	Private sidebar display
Knowledge Assist	Answers questions from knowledge base	Human decides to share
Time Management	Tracks agenda progress	Private alerts
Follow-up Drafts	Prepares summary email	Human reviews and sends

Disclosure: Meeting invites include: "Note: AI meeting assistant will be present to assist with note-taking. No recording without separate consent."

PARALLEL DEAL PROCESSING

AI works on multiple deals simultaneously while human focuses on one:

Parallel Processing Rules:



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:

””” Chapter 1: The Strong Start “”” July opened with momentum. Three renewals closed in the first 2 weeks, 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:



NATURAL LANGUAGE QUERIES ON CHARTS

Ask questions directly on any visualisation:

"" Pipeline Trend Ask a question \$3M \$2M \$1M Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Your Question: "Why did pipeline jump in March?" ChaSen Analysis: "The March spike (+\$800K) was driven by 3 factors: 1. Barwon EMR Upgrade added (\$250K) - Triggered by Q2 budget approval mentioned in Feb QBR 2. WA Health Analytics (\$350K) - Tender response submitted, moved from prospect to qualified 3. GHA Mobile expansion (\$200K) - NPS feedback about mobile access led to discovery call on March 8 All three originated from existing client signals—strong indicator that your listening activities are generating leads." [Ask Follow-up] [Show These Deals] [Export Analysis]" ""

COMPARATIVE OVERLAYS

Overlay any metric against any other to discover correlations:

"" Metric Overlay Analysis Primary Metric: [NPS Score ▼] Overlay With: [Support Ticket Volume ▼] 100 NPS Tickets 80 60 40 20 Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Correlation Analysis: Correlation Coefficient: -0.78 (Strong Negative) Lag Analysis: Ticket spikes precede NPS drops by ~3 weeks Insight: "When support tickets exceed 15/month, NPS drops an average of 12 points within 3 weeks. Consider proactive outreach when ticket volume exceeds 10/month to prevent NPS decline." [Save as Alert Rule] [Add More Metrics] [Export Correlation]" ""

Advanced Visualisation Types



SANKEY FLOW DIAGRAMS

Visualise how revenue flows through your business:

"" Revenue
Flow Analysis - FY26 SOURCES PRODUCTS SEGMENTS OUTCOMES Renewals Renewed \$2.8M \$3.1M Re-
newals Renewed 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:

The figure is a heatmap titled "Portolio Health Heatmap - FY26". The y-axis lists locations: Barwon, GHA, SA Health, WA Health, and Metro. The x-axis shows months from Jul to Apr. A legend indicates color coding: green for >80 (Healthy), yellow for 60-80 (Watch), and red for <60 (Risk). A pattern detection section highlights WA Health's decline from 58 to 40 over 8 months and a dip in Dec. Another section notes a sudden drop in Barwon Aug (-24 points) and provides links for details, export, and threshold settings.

	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 Stakeholder Network Analysis Report

James CEO (Influence: 4/5) reports to Sarah (David, Emma, CFO, CIO, COO) [CHAMPION] [SKEPTIC] [NEUTRAL] [UNKNOWN]

Strong connection to Tom, Lisa, Mark (Finance Mgr, IT Director, Ops Manager) [SUPPORTER] [BLOCKER]

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:
 - Ask Sarah to introduce you to Emma
 - Address Lisa's concerns directly (schedule 1:1)
 - 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:

ANIMATED FORECAST SCENARIOS

Watch different scenarios play out:

” Forecast Scenario Animator Scenario: [Best Case ▾] Speed: [Normal ▾] [▶ Play] [⏸ Pause] \$4M Best: \$3.8M \$3M Likely: \$3.2M \$2M \$1M 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:

OPPORTUNITY SCORING BREAKDOWN

Understand why deals are scored the way they are:

Opportunity Score Breakdown: Barwon EMR Upgrade
Overall Win Probability: 68% Score Components:
MEDDPICC 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 MEDDPICC]
...



Predictive Trend Visualisations

CONFIDENCE CONE FORECASTS

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

"" 2026 Barwon Health Score Forecast: Barwon Health Health Score Forecast: Barwon Health 100 90% conf 90 80 Best: 82 70 Likely: 71 60 Worst: 58 50 40 30 Now +2w +4w +6w +8w +10w +12w Actual Forecast Confidence Interpretation: Narrow cone (now to +4w): High confidence, stable signals Widening cone (+4w to +8w): Renewal outcome uncertain Wide cone (+8w to +12w): Multiple scenarios possible Key Uncertainty Drivers: 1. Renewal decision (Feb 28) - binary outcome affects trajectory 2. New CIO starting (Mar 15) - relationship unknown 3. Support improvement 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 Jan Feb Mar Apr
Recent NPS Responses - Barwon Health 10 9 8 7 6 5 4 3 WARNING: 2 ANOMALY 1 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



LEADING INDICATOR ALERTS

Surface predictive relationships before outcomes occur:

Leading Indicator Relationships Tracked:

Leading Indicator	Lagging Outcome	Typical Lag	Correlation
Support ticket volume	NPS score	2-3 weeks	-0.72
Meeting frequency drop	Health score decline	4-6 weeks	-0.65
Email response time increase	Relationship decay	2-4 weeks	-0.58
Champion engagement drop	Deal stall	1-2 weeks	-0.81
Competitor mentions	Churn risk	8-12 weeks	+0.67
Executive access gained	Deal advancement	1-2 weeks	+0.74
Product usage decline	Renewal risk	6-8 weeks	-0.69

Collaborative Visualisation Features



SHARED CURSORS

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

"" "Terri-tory 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 <60 <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



ANNOTATION THREADS

Start discussions attached to specific data points:

Score Timeline - Barwon Health
100 80 60 30 40 20 05 Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Thread on March Dip (5 comments) [Resolved Y] Michael T. (Mar 16): "Why did we drop 25 points in one month? @Sarah can you check if there were support issues?" Sarah T. (Mar 16): "Yes - major outage on Mar 12-14. 3 days downtime. Client escalated to exec level." Michael T. (Mar 17): "Got it. I've scheduled a recovery meeting for Mar 22. Adding this context as annotation." Jennifer W. (Mar 18): "FYI - similar issue at GHA last quarter. Recovery took 6 weeks. Here's what worked: [link to playbook]" Michael T. (Apr 5): "Marking resolved - health back to 72 after recovery plan. Thanks team!" Thread on June Plateau (3 comments) [Active] Click to expand... [+ New Thread] [Show All Threads] [Filter: Active Only]

""

Annotation Thread Features:

Feature	Description
Point Attachment	Threads attached to specific data points, persist over time
@Mentions	Tag teammates to notify them
Status Tracking	Mark threads as Active, Investigating, Resolved
Link Sharing	Share direct link to specific thread
Search	Find threads by keyword, author, or status
Export	Include thread context when exporting charts



PRES

Transform any dashboard into a guided presentation:

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:



Template	Use Case	Auto-Generated Content
QBR Deck	Client quarterly review	Health trend, support metrics, achievements, roadmap
Territory Review	Manager 1:1	Pipeline status, forecast, wins/losses, risks
Executive Summary	Leadership update	Key metrics, trends, highlights, asks
Deal Review	Opportunity deep-dive	MEDDPICC, stakeholders, timeline, risks
Win Story	Team celebration	Journey, challenges overcome, impact

Immersive & Temporal Visualisations

TIME-LAPSE REPLAY

Watch your territory evolve over time in fast-forward—spot patterns invisible in static views:

” Time-
Lapse Replay: FY26 Territory Evolution ▶ 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 (synced 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 fade 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]

Time-Lapse Features:



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:

” 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 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:

"" 12% of clients are healthy (70-79) vs 10% last quarter. 8% are at-risk (50-59) vs 6% last quarter. 4% are flagged (90+). 80-89, 70-79, 60-69, 50-59 are the main Health Score Range. 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: 5] ""

Auto-Insight Categories:

Category	Icon	Description	Example
Positive Trend	↗	Something improving	"Win rate up 12% vs last quarter"
Concern	WARNING:	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% 38% Churn Rate 4% 7%
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 MEDDPICC 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:

"" "Barwon Health Wins Healthcare Innovation Award" Client News Sentiment Stream [Live] Filter: [All Clients ▾] [All Sentiment ▾] [Last 7 Days ▾] Sentiment Overview (Last 7 Days): Positive: 18 Neutral: 12 Negative: 4 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] 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] 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/ □□□ strategic/ □□□ new/ □□□ □□□ page.tsx # New unified planning page □□□ [id]/ □□□ □□□ page.tsx # Edit existing plan □□□ □□□ page.tsx # Plans list/dashboard □□□ territory/ # (Legacy - redirect to strategic) □□□ account/ # (Legacy - redirect to strategic) □□□ components/planning/ □□□ unified/ □□□ PlanTypeToggle.tsx □□□ StepWizard.tsx □□□ ContextStep.tsx □□□ PortfolioStep.tsx □□□ RelationshipsStep.tsx □□□ RisksActionsStep.tsx □□□ ReviewStep.tsx □□□ CollaborationPanel.tsx □□□ PresenceIndicator.tsx □□□ AllInsightsPanel.tsx □□□ shared/ □□□ MEDDPICCScoreing.tsx □□□ RiskAssessment.tsx □□□ ActionPlanEditor.tsx □□□ ClientSelector.tsx □□□ StakeholderMap.tsx □□□ pipeline/ # Pipeline & Forecasting □□□ OpportunityForm.tsx # Add/Edit opportunity modal □□□ OpportunityCard.tsx # Single opportunity display □□□ PipelineTable.tsx # Sortable opportunity list □□□ ForecastSummary.tsx # Target/Committed/Forecast/Gap □□□ CoverageGauge.tsx # Visual coverage ratio □□□ ForecastBands.tsx # Best/Likely/Worst chart □□□ WhatIfModeller.tsx # Scenario modelling □□□ PipelineSuggestions.tsx # Chosen opportunity suggestions □□□ methodology/ # Sales methodology components □□□ MethodologyCoach.tsx # A.C.T.I.O.N. Framework guidance □□□ MethodologyQuestionnaire.tsx □□□ CheckpointRecorder.tsx # Voss milestone tracking □□□ HeroJourneyTracker.tsx # StoryBrand client transformation □□□ ValueVelocityMatrix.tsx # Quadrant visualisation □□□ NextBestConversation.tsx # AI-generated talk tracks □□□ AIPrePopulation.tsx # Auto-fill from client data □□□ QuestionnaireSection.tsx □□□ approval/ # Approval workflow components □□□ SubmitForApprovalModal.tsx # Submission modal with pre-flight checks □□□ ApproverDashboard.tsx # Pending approvals list □□□ ChangeLogPanel.tsx # View changes during review □□□ ChangeLogEntry.tsx # Single change display □□□ TeamStatusBoard.tsx # Team visibility view □□□ ApprovalNotifications.tsx # Notification preferences □□□ index.ts □□□ hooks/ □□□ useStrategicPlan.ts □□□ usePlanPresence.ts □□□ usePlanComments.ts □□□ usePlanApproval.ts # Approval workflow state & actions □□□ usePlanChangeLog.ts # Change tracking during review □□□ usePlanAI.ts □□□ lib/ □□□ planning/ □□□ types.ts □□□ validation.ts □□□ calculations.ts □□□ unified-sales-methodology.ts # A.C.T.I.O.N. Framework types & logic □□□ app/api/planning/ □□□ strategic/ □□□ route.ts # GET/POST plans □□□ [id]/ □□□ route.ts # GET/PUT/DELETE plan □□□ comments/route.ts □□□ presence/route.ts □□□ ai/route.ts □□□ submit/route.ts # POST submit for approval □□□ approve/route.ts # POST approve plan □□□ withdraw/route.ts # POST withdraw from review □□□ changes/route.ts # GET change log for plan □□□ shared/ □□□ portfolio/route.ts □□□ targets/route.ts □□□ forecast/route.ts # Forecast calculation & history □□□ opportunities/ □□□ route.ts # GET/POST opportunities □□□ [id]/route.ts # GET/PUT/DELETE single opportunity □□□ suggest/route.ts # AI opportunity suggestions □□□ what-if/route.ts # Scenario modelling □□□ app/api/chosen/ □□□ 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