Prepare for your 1 on 1

matrix

Version 2014.01.10.01

Manager Steps to Success

Matrix enables you to have clear, direct, and accurate 1 on 1 meetings.

How do I prepare for my meeting?

Matrix provides you with all of the information necessary, for a successful 1 on 1 meeting with your salespeople. The majority of this information is available on the *AE Scorecard* page.

Specifically, your "go to" area of the *AE Scorecard* page is the *Sales Outlook* pod, located at the top of the screen. It is a good place to see your salesperson's past, present, and future revenue.

It can help you answer some of the following questions:

- Where is your salesperson's revenue coming from?
- Where is he or she expected to finish this month/quarter?
- Is your salesperson close to meeting his or her budget this month/quarter?
- What is his or her top account this month? This quarter? This year?
- What recent activities have been completed?
- Which accounts have not been contacted in the last 90 days?

Your action: Prior to your meeting, familiarize yourself with this page. In doing so, it will allow you to have a clear, direct, and accurate conversation with your salesperson.

Best practice: If you have a laptop or tablet with internet access, bring it to your meeting.

See past or future data, based on the selected time frame.

See if your AE is making budget.

Add or remove data..

Select a toggle button to change the time frame.

Select a toggle to look at your AE's business by Account, Outlet, Revenue Type, or Category.

Click a column header to re-sort the data.

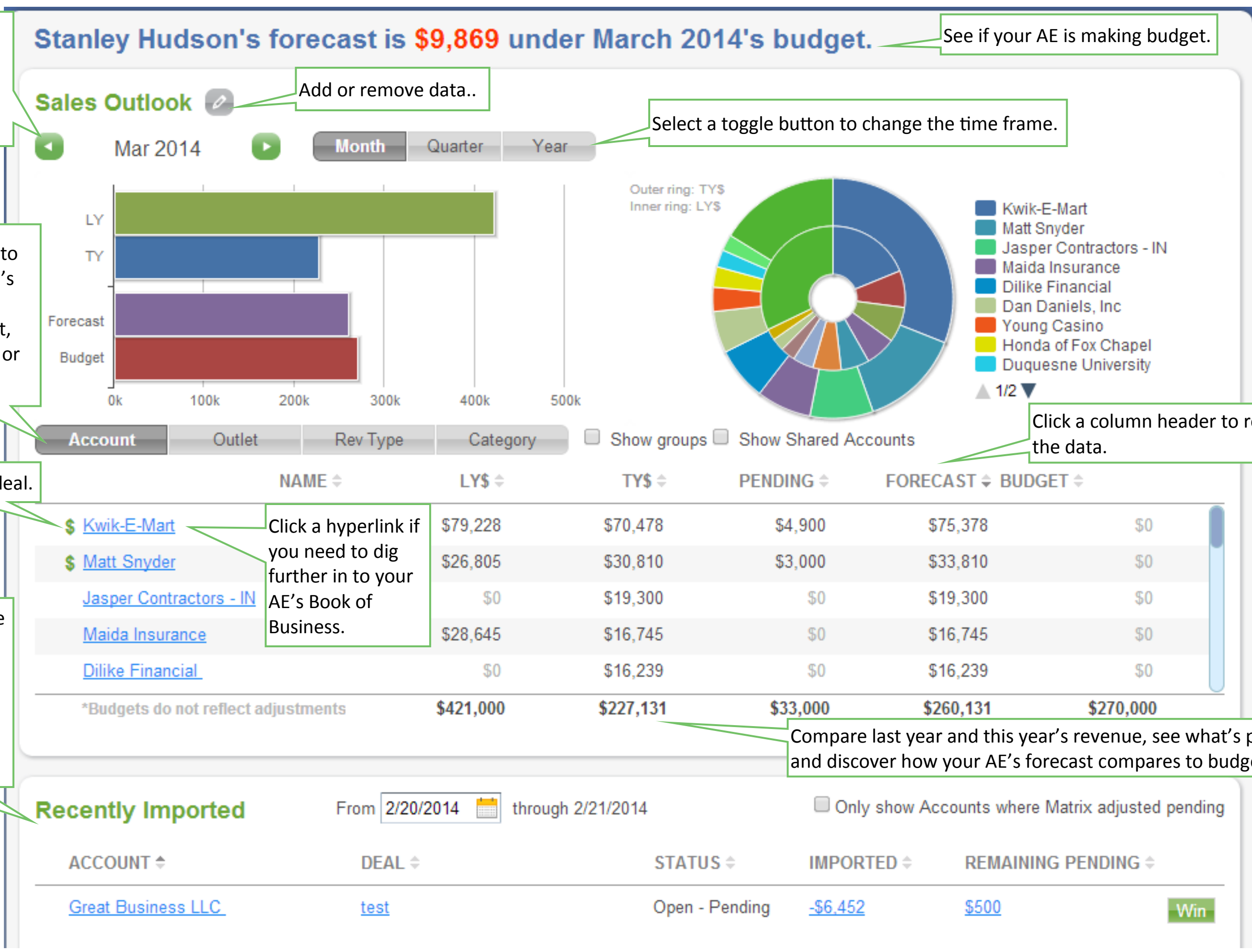
Quickly edit a deal.

Click a hyperlink if you need to dig further in to your AE's Book of Business.

See accounts that have been affected by the most recent import.

A "!" symbol will alert you to records that need attention.

Compare last year and this year's revenue, see what's pending, and discover how your AE's forecast compares to budget.



Manager Steps to Success

The AE Scorecard also provides valuable salesperson information, such as upcoming activities, sales history, and Quiet Accounts.

Activities +

Last Week | This Week | Next Week

See all of your salesperson's recently scheduled activities. Toggle between Last Week, This Week, and Next Week.

Incomplete | Complete

See all of your salesperson's recently completed activities too.

DUE DATE	CONTACT	ACCOUNT	SUBJECT
Tomorrow @ 11:30am	Pamela Scott	Courtney's Candy Shop	Client Luncheon
In 2 days @ 5:30pm	Bob Smith	Moran's Furniture	Follow up w/ Bob Smith
In 4 days @ 9:00am	Erica Creany	Honda of Fox Chapel	Close the deal

I want to see Monthly **revenue from** Gregorian Net

Provides a high level overview of a salesperson's revenue. "Multi Yr Trend" displays the AE's total revenue for all available years. "Yr-Yr Detail" displays data from all available years, by Outlet.

Multi Yr Trend | Yr - Yr Detail

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
2014	$236,886	$195,362	$227,131	$276,829	$163,026	$48,900	$29,672	$13,505	$3,855	$2,570	$0	$2,290	$1,200,026
2013	$229,928	$255,450	$421,000	$471,345	$280,372	$278,662	$273,643	$343,997	$250,601	$310,676	$264,821	$234,224	$3,614,720
2012	$234,447	$243,761	$277,816	$456,743	$289,040	$306,704	$281,429	$306,770	$245,687	$336,105	$225,575	$203,066	$3,407,143
2011	$346,136	$388,382	$433,967	$436,526	$315,969	$218,741	$390,622	$322,940	$249,695	$278,278	$190,648	$222,200	$3,794,104
2010	$183,894	$265,022	$373,550	$523,847	$259,935	$259,968	$354,290	$387,614	$307,449	$261,803	$318,670	$274,439	$3,770,481
2009	$0	$0	$0	$0	$0	$300,481	$274,704	$283,537	$324,549	$371,549	$231,175	$168,649	$1,954,644
Total	1,231.3	1,348.0	1,733.5	2,165.3	1,308.3	1,413.5	1,604.4	1,658.4	1,381.8	1,561.0	1,230.9	1,104.9	17,741.1

Quiet Accounts

ACCOUNT	LAST ACTIVITY
Finis Valorum	September 07, 2011
Cafe de Paris	September 08, 2011
Boone Camping Supplies	September 21, 2011
Movie Theater	September 28, 2011
Neidermeyer & Associates, I	September 29, 2011
Laurel Run Dental	October 05, 2011

Lists accounts that your AE has contacted in the past, but has neither contacted within the last 90 days, nor are scheduled to contact in the future.

Notes +

DJ Cavanaugh (mgr) Stan needs to develop new business by next week or else! ~19 months ago

DJ Cavanaugh (mgr) Discuss Steelers Promo. ~20 months ago

Ron Burgundy Meeting was productive 6/18/12. ~21 months ago

Juan Valdez Need to focus on new business!!! ~22 months ago

Ron Burgundy Goal for Q1 is to increase revenue on ...com ~26 months ago

Displays notes about a salesperson. This is a great place to keep useful reminders or additional information about the 1 on 1, such as goals or focus areas. These notes are only available in a Manager's view of the AE Scorecard; they will not be visible to the salesperson on his or her Bird's Eye View.