Prepare for your 1 on 1

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.

Manager Steps to Success

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

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

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

Select a toggle button to change the time frame.

Click a column header to re-sort the data.

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

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

Quickly edit a deal.

See if your AE is making budget.

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

$9,869 under March 2014’s budget.

Stanley Hudson’s forecast

<table>
<thead>
<tr>
<th>Account</th>
<th>Outlet</th>
<th>Revenue Type</th>
<th>Category</th>
<th>SHOW GROUPS</th>
<th>SHOW SHARED ACCOUNTS</th>
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</thead>
<tbody>
<tr>
<td>Kwik-E-Mart</td>
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<td>Matt Snyder</td>
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<td>Jasper Contractors - IN</td>
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<td>Macea Insurance</td>
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<tr>
<td>Dikke Financial</td>
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Recently Imported

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<tr>
<th>ACCOUNT</th>
<th>DEAL</th>
<th>STATUS</th>
<th>IMPORTED</th>
<th>REMAINING PENDING</th>
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<tbody>
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<td>Great Business LLC</td>
<td>test</td>
<td>Open - Pending</td>
<td>$500</td>
<td>$500</td>
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</tbody>
</table>
Prepare for your 1 on 1 (Cont’d)

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

- **Activities**: Displays 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.

- **I want to see**: 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**: 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.