MATRIX IN YOUR WORK DAY

For Sales Managers

Matrix can be "Mission Control" for your sales operations, if your AEs are consistently leveraging its capabilities. Follow these practices to incorporate Matrix into your work day.

DAILY

1. Check **ALERTS** ***.** Take action or plan action as needed. Don't forget to celebrate too!

2. Review the **BIRD'S EYE VIEW** for a quick look at the revenue picture. If needed, dig deeper with **REPORTS** and **SALES INTELLIGENCE***.

3. Review the **STREET LEVEL** page for *Recently Added Prospects* or to Approve/Reject Leads.

WEEKLY

1. Managing Account Executive Performance

   a. **REVIEWING YOUR TEAM'S ACTIVITIES** can provide great coachable data.

   b. Use the Activity **LIST** & **CALENDAR** to note upcoming meetings you'd like to attend as well as overdue items needing action.

   c. Review the **DEALS LIST**. Note large deals, deals closing soon & overdue deals.

   d. Use the **AE SCORECARD** in One-on-Ones to get a quick glance at performance. Use Notes to keep track of action items. Review the **KPI DASHBOARDS*** to see how AEs are performing against expectations.

2. Managing Revenue

   a. Check the Pipeline from the **BUDGET ANALYSIS DASHBOARD***.

   b. When your official forecast is due, adjust it up or down with the **FORECAST ADJUSTMENT** prospect.

   c. Review churn account and account pacing behind by utilizing **ALERTS*** or **REPORTS**.

   d. Identify upsell/cross-sell opportunities with **ALERTS*** or **SALES COVERAGE***.

MONTHLY

1. Review the **ACCOUNT LIST**.

   a. Check for duplicates; merge, and rename accounts using **LOCALIZED ACCOUNT MAINTENANCE**.

   b. Ensure AE account lists are accurate utilizing **REASSIGNMENT**, and **IMPORT** prospects when needed.

   c. Identify Contacts or Accounts that you'd like to target via **LIST BUILDER***

2. Identify accounts without an open Deal $.

QUARTERLY/ANNUALLY

1. Enter **BUDGETS**.

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* items indicate features available in Matrix Premium.

Contact Success Management Success@MatrixforMedia.com to turbo charge your work day with Matrix Premium!