



CPMs AE Training Customer Process Manager for Sales

December 2011



Accessing CPMs Version 6.1 SP2

Please use the following URL to log in (Please note: you will not need to VPN into this URL)

<https://sfa.pegasoft.com/sfaprd/PRServlet>

The login screen for PegaRULES Process Commander Version 6.1 SP2. It features the Pega logo at the top, followed by the product name and version. Below this are input fields for "User Name" and "Password", and a blue "LOG IN" button.

PegaRULES
Process Commander®
Version 6.1 SP2

User Name

Password

LOG IN

Dashboard- AE view

Tabs – available from Navigation Panel.



Forecast for AE: David Bliss , FY2011 in USD(000s)

Forecast Category	FQ1 FY2011	FQ2 FY2011	FQ3 FY2011	FQ4 FY2011	Grand Total
Closed	-	0.011	1.163	-	1.175
Commit	-	-	-	-	-
Upside	-	-	-	-	-
Stretch	-	-	-	0.800	0.800
Forecast 4Q Subtotals	-	0.011	1.163	0.800	1.975
Pipe Not Forecasted	-	-	-	-	-
Forecast 4Q Total	-	0.011	1.163	0.800	1.975

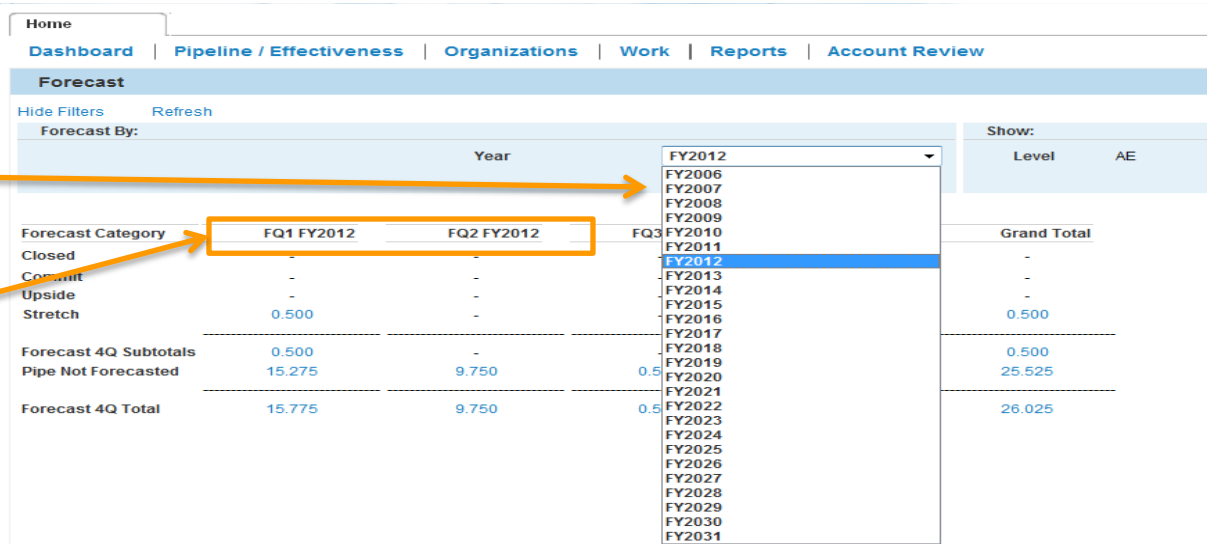
4 Quarter Pipeline Summary for AE

Drilldown of FQ2 FY2011 opportunities by Closed, Commit, Upside, Stretch, Pipe Not Forecasted stage(s) Page 1 of 1

ID Name	Forecast Level	Amount (USD)	Close	Stage	Forecast Category	Actions
O-10284 H	SC-TMG - Blue Mtn Labs Standard Edition Cloud	Owner: David Bliss				
AE	11,441	6/29/2011	Closed-Won	Closed		

Clicking on a forecast amount will open a Drilldown of the Opportunities, for that figure.

The "Show Filters" link, opens a "Year" dropdown menu. Which allows an AE the ability to change the Forecast year.



Dashboard– Manager view

[Home](#)

[Dashboard](#) | [Team Effectiveness](#) | [Pipeline / Effectiveness](#) | [Organizations](#) | [Work](#) | [Reports](#) | [Account Review](#)

Forecast

[Hide Filters](#) | [Refresh](#)

Forecast By:

☐ Sales Team

NA-INS-Bennett

Year

FY2011

☐ AE

Rick Bennett

☐ Industry

Select Value...

Show:

Level

Sales Manager

[Clear Filters](#) | [Apply Filters](#)

Forecast Category	FQ1 FY2011	FQ2 FY2011	FQ3 FY2011	FQ4 FY2011	Grand Total
Closed	0.111	0.110	-	-	0.221
Commit	-	0.150	-	10.800	10.950
Upside	-	0.620	0.865	16.727	18.212
Stretch	-	-	-	4.400	4.400
Forecast 4Q Subtotals	0.111	0.880	0.865	31.927	33.783
Pipe Not Forecasted	-	-	0.100	56.556	56.656
Forecast 4Q Total	0.111	0.880	0.965	88.483	90.439

The filters dropdown for managers, allows you to filter not only by year, but also by Sale Team, AE and Industry. This allows managers the option of viewing their whole team or individual AEs.

Dashboard



Home

O-9956

Dashboard

Pipeline Effectiveness

Organizations

Work

Reports

Account Review

Forecast

Show Filters

Refresh

AE Forecast for AE: Kelly Bailey , FY2011 in USD
(000s)

Forecast Category	FQ1 FY2011	FQ2 FY2011	FQ3 FY2011	FQ4 FY2011	Grand Total
Closed	0.111	-	-	-	0.111
Commit	-	-	-	8.250	8.250
Upside	-	-	0.415	9.120	9.535
Stretch	-	-	-	-	-
<hr/>					
Forecast 4Q Subtotals	0.111	-	0.415	17.370	17.896
Pipe Not Forecasted	-	-	-	1.000	1.000
<hr/>					
Forecast 4Q Total	0.111	-	0.415	18.370	18.896

Clicking on one of the sums on the Pipeline Summary will open a Drilldown showing the Opportunities that make up that sum.

Drilldown of FQ3 FY2011 opportunities by Upside stage(s)



Page 1

of 1



ID/Name	Forecast Level	Amount (USD)	Close	Stage	Forecast Category	Actions
O-9249 PRU CTM Cloud Owner: Kelly Bailey						
AE		15,000	9/29/2011	Decision	Upside	Update
Forecast Comments						
Additional Information						
O-9956 PRU - Annuities Commissions Owner: Kelly Bailey						
AE		400,000	9/27/2011	Analysis	Upside	Update
Forecast Comments						
Additional Information						

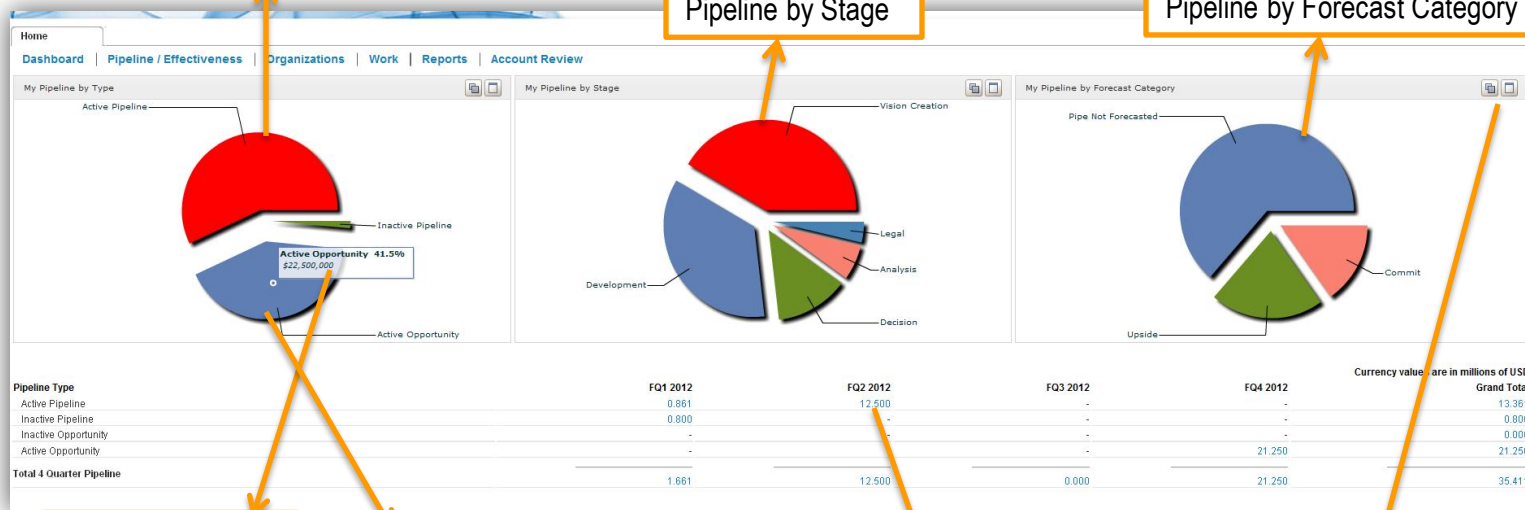
Clicking on one of the Opportunities in the Drilldown will open that Opportunity in a new tab.

Pipeline by Type

AE Pipeline/Effectiveness

Pipeline by Stage



Pipeline by Forecast Category



Hovering your Mouse over a section of the chart, gives you an overview of that section.

Clicking your Mouse on a section opens a report with the details, which can be exported to an Excel spreadsheet.

Clicking on one of the sums on the Pipeline Summary will open a report showing the Opportunities that make up that sum

By clicking on the icon  you get the data of the chart. Whereas clicking the  icon will maximize the chart.

My Pipeline by Type - Windows Internet Explorer

EXPORT TO EXCEL

ID	Organization	Account	Name	Amount	Close Date	Alliance Executive	Stage	AE Forecast	Pipeline Type	Products	Partner	License Type	Partner Role	Competitors	Next Step
O-9246	Prudential Financial	Individual Life	PRU GROUP LTC Claims	1,250,000	12/28/2011	Taffy Holliday	Vision Creation	Commit	Active Opportunity	Claims Workstation, PRPC	Cognizant	Perpetual	Partner Leveraged	Other	
O-9069	White Mountains Insurance Group Ltd.	OneBeacon Insurance	ONEBEACON	1,250,000	10/19/2012	Taffy Holliday	Vision Creation	Pipe Not Forecasted	Active Opportunity		Cappemini	Perpetual	Partner Leveraged		Update
O-10491	Prudential Financial	Financial Advisory	PRU-Smartpass		11/6/2012		Qualification	Pipe Not Forecasted	Active Opportunity						
O-10492	Hartford Financial Services Group	Life	HARTFORD-test		11/6/2012		Qualification	Pipe Not Forecasted	Active Opportunity						
O-10490	Prudential Financial	Corporate Technology Management	PRU	20,000,000	11/14/2012	Douglas Kim	Vision Creation	Pipe Not Forecasted	Active Opportunity	Adverse Event Case Processing Framework	BearingPoint		Partner Involved	Applan	
O-10504	Hartford Financial Services Group	Corporate	HARTFORD test		11/29/2012		Qualification	Pipe Not Forecasted	Active Opportunity						

My Opportunities By Pipeline Type - Windows Internet Explorer

EXPORT TO EXCEL

Criteria

Oppty Owner Is Equal: baill@pegasystems.com

Oppty Owner Name Is Equal: Active Pipeline

Stage Contains: "Analysis", "Decision", "Development"

Pipeline Type Is Equal: FY2012

Fiscal Quarter Is Equal: FQ2

Forecast Category Is Equal:

SEARCH

Displaying 3

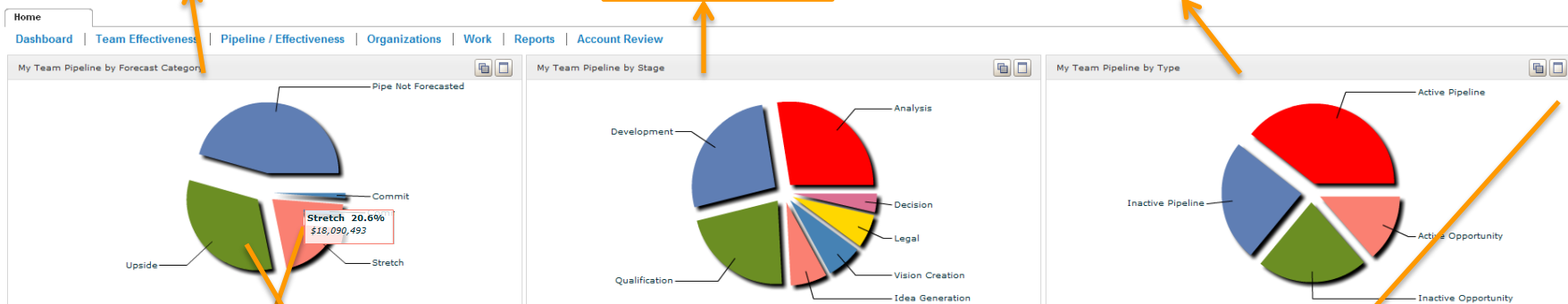
ID	Organization	Account	Opportunity	Owner	Amount	Close Date	Stage	Pipeline Type	AE Forecast	Negotiation Status	Partner Name (s)	Partner Role	Age	Fiscal Quarter	Fiscal Year
O-9833	Hartford Financial Services Group	Property and Casualty	HARTFORD - Premium Audit	Kelly Bailey	\$250,000	6/12/2012	Development	Active Pipeline	Pipe Not Forecasted		Cognizant	Partner Leveraged	327	FQ2	FY
O-7444	Hartford Financial Services Group	Property and Casualty	HARTFORD - REINSURANCE	Kelly Bailey	\$250,000	6/28/2012	Development	Active Pipeline	Upside	Data Gathering	Cognizant	Partner Leveraged	529	FQ2	FY
O-10517	Prudential Financial	Individual Life	PRU	Kelly Bailey	\$12,000,000	6/19/2012	Development	Active Pipeline	Pipe Not Forecasted		No Partner		5	FQ2	FY

Pipeline by Forecast Category

Team Effectiveness (Manager View)



Pipeline by Stage

Pipeline by Type



Hovering your Mouse over a section of the chart, gives you an overview of that section.

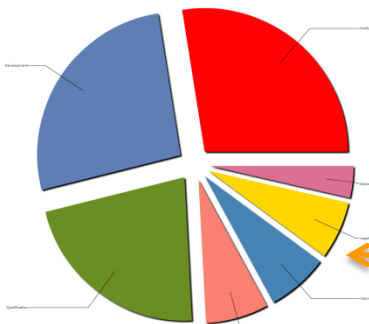
Clicking your Mouse on a section opens a report with the details, which can be exported to an Excel spreadsheet.

By clicking on the icon  you get the data of the chart. Whereas clicking the  icon will maximize the chart.

My Team Pipeline by Stage - Window Explorer

Opportunity ID	Name	Organization	Account	Amount (USD)	Close Date	Alliance Executive	Stage	AE Forecast	Pipeline Type	Products	Partner	License Type	Partner Role	Competitors	Next Step
0-9899	MANOVERS - Commercial	Manover Insurance Group	Unclassified	350,000	5/12/2012	Jim Denton	Analysis	Upside	Active Pipeline	PageRules Process Commander - PRPC	Cognizant	Partner Leveraged	Adobe, IBM, Microsoft		Deliver POC
0-10652	Exchanges - HERO CLOUD	Farmers	Exchange	1,754,452	5/31/2012	Jim Denton	Analysis	Stretch	Active Pipeline	SmartPass Instance Manager	Capgemini	Subscription	Partner Involved	CSC	
0-10254	Aviva US - Life New Business	Aviva Group	North America	750,000	6/22/2012	Jim Denton	Analysis	Stretch	Active Pipeline	PageRules Process Commander - PRPC	Tata Consultancy Services	Perpetual	Partner Involved	Other, Applian, IBM, Microsoft	Proof of concept schedule
0-10413	PRU LI Clarify Replacement, CNA, Claims	Prudential Financial	Individual Life	5,000,000	6/27/2012	Jim Denton	Analysis	Upside	Active Pipeline	PageRules Process Commander - PRPC	Tata Consultancy Services	Perpetual	Partner Involved	Other	
0-8250	Nationwide - Mutual Insurance	Nationwide	Nationwide	200,000	7/5/2012	Jim Denton	Analysis	Pipe Not Forecasted	Inactive Pipeline	PRPC	Infosys	Perpetual	Partner Leveraged	Other, xBlue	Operating budget was cut
0-7368	Titan Product Innovation	Titan Insurance	Nationwide	450,000	7/6/2012	Jim Denton	Analysis	Pipe Not Forecasted	Inactive Pipeline	Product Configuration Framework, PRPC	Infosys	Perpetual	Partner Sourced	Other, Internal Solution	Page is a final vendor. Site
0-9139	NATIONWIDE - Rules Modernization	Nationwide	Nationwide	2,000,000	7/13/2012	Jim Denton	Analysis	Pipe Not Forecasted	Inactive Pipeline	PageRules Process Commander - PRPC	Infosys	Perpetual	Partner Leveraged	IBM Other	Working with Infosys on a
0-3650	Commercial Lines Rules Test Harness	Nationwide	Nationwide	620,000	7/27/2012	Jim Denton	Analysis	Pipe Not Forecasted	Inactive Pipeline	Direct Capture Capabilities, PRPC	Accenture	Perpetual	Partner Leveraged	IBM, LOG	Completed POC in June 2012 expected my end of July 2012
0-8501	Nationwide - Analytics	Nationwide	Nationwide	700,000	8/24/2012	Jim Denton	Analysis	Stretch	Active Pipeline	Decisioning	Capgemini	Perpetual	Partner Sourced	Internal Solution	Cap to meet with Nationwide meetings in late February.

EXPORT TO EXCEL



My Pipeline by Stage

	Opportunity Count	Amount (USD)
Stage:Analysis	18	24,203,482
Stage:Development	26	23,225,010
Stage:Qualification	18	19,300,000
Stage:Idea Generation	6	6,250,000
Stage:Vision Creation	8	6,132,500
Stage:Legal	5	5,740,000
Stage:Decision	4	3,144,511
Grand Total	85	87,995,503

EXPORT TO EXCEL

Organizations tab

Clicking on the Organizations Tab will give you a list of the Organizations that you (as an Account Executive) have Accounts in.

Home | Dashboard | Pipeline / Effectiveness | **Organizations** | Work

My Organizations

ID	Organization Name
ORG-137	Hartford Financial Services Group
ORG-170	Prudential Financial

Clicking on one of the Organizations will bring up that Organization in a new tab

Home | **ORG-170** | X

Prudential Financial

Holding Company: Prudential Financial | Annual Revenue (USD):
Target Organization? ☒ | # of Employees: 37,000
Active? ☒

Description: Prudential, known for its Rock of Gibraltar logo, is one of the largest US life insurers (along with MetLife) and one of the largest insurance. Its investment management businesses include asset management and mutual funds. Other lines include a national disability coverage.

Sales Ops | Accounts | Contacts | Account Strategies | Notes & Attachments

ID	Name	Owner
ACC-3881	AIG Edison Life Insurance Comp	Takashi Nishida
ACC-3880	AIG Star Life Insurance	Takashi Nishida
ACC-3984	Annuities	Kelly Bailey
ACC-56	Asset Management	Kelly Bailey
ACC-2103	Corporate Technology Management	Kelly Bailey
ACC-351	EU	Kelly Bailey
ACC-1501	Financial Advisory	Kelly Bailey
ACC-3878	Gibraltar Life Insurance Co Ltd	Takashi Nishida
ACC-793	Individual Life	Kelly Bailey
ACC-792	Individual Life	Kelly Bailey

You then see the Org Header and the Related Accounts.

Notice, that even though an AE might own Accounts in an Organization, they might not own all of the Accounts. The Opportunities, Leads and Contacts that an AE works with are those that they own or are associated to their Accounts.

Organizations tab

Home | ORG-170

Prudential Financial

Holding Company: Prudential Financial Annual Revenue (USD):
Target Organization? ☒ # of Employees: 37,000
Active? ☒

Description: Prudential, known for its Rock of Gibraltar logo, is one of the largest US life insurers (along with MetLife) and one of the largest insurance companies in the world. Its investment management businesses include asset management and mutual funds. Other lines include a national disability coverage.

Sales Ops | **Accounts** | Contacts | Account Strategies | Notes & Attachments

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ACC-351	EU	Kelly Bailey
ACC-1501	Financial Advisory	Kelly Bailey
ACC-3878	Gibraltar Life Insurance Co Ltd	Takashi Nishida
ACC-793	Individual Life	Kelly Bailey
ACC-792	Individual Life	Kelly Bailey

The Tabs in the middle of the page give you more details about the account

By clicking on an Account link, it will open a new tab, with the Account overview on it.

Home | ORG-170 | ACC-793

Prudential Financial Individual Life

Organization: Prudential Financial Target Account? ☒
Industry: Insurance Life Account Owner: Kelly Bailey

Overview | Sales Ops | Opportunities | Contacts | Strategies | Leads | Activities | Notes

ID	Oppty Name
O-9246	PRU GROUP MU/STD/Claims
O-9636	PRU - ILI Claims
O-5263	PRU Group CustomerOne Claims
O-7330	PRU Group BIX
O-5373	PRU - Group IAC
O-4081	PRUDENTIAL Group Insurance New Business Part 2
O-4077	PRUDENTIAL Group Insurance New Business Part 1
O-3606	Pru Group Call Center
O-3381	Pru Group Back Office
O-2683	Pru Group Claims-Many

Accounts

Home | ORG-170

Prudential Financial

Holding Company: Prudential Financial Annual Revenue (USD):
Target Organization? ☒ # of Employees: 37,000
Active? ☒

Description: Prudential, known for its Rock of Gibraltar logo, is one of the largest US life insurers (along with MetLife) and one of the largest insurance companies in the world. Its investment management businesses include asset management and mutual funds. Other lines include a national disability coverage.

Sales Ops | **Accounts** | Contacts | Account Strategies | Notes & Attachments

ID	Name	Owner
ACC-3881	AIG Edison Life Insurance Comp	Takashi Nishida
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ACC-56	Asset Management	Kelly Bailey
ACC-2103	Corporate Technology Management	Kelly Bailey
ACC-351	EU	Kelly Bailey
ACC-1501	Financial Advisory	Kelly Bailey
ACC-3878	Gibraltar Life Insurance Co Ltd	Takashi Nishida
ACC-793	Individual Life	Kelly Bailey
ACC-792	Individual Life	Kelly Bailey

By clicking on an Account link, it will open a new tab, with the Account overview on it.

Home | ORG-170 | ACC-793 | O-4081

Prudential Financial Individual Life

Organization: Prudential Financial Target Account? ☒ Sales Team: Prudential Financial
Industry: Insurance Life Account Owner: Kelly Bailey Practice Lead: Tony Castelli

Overview | Sales Ops | **Opportunities** | Contacts | Strategies | Leads | Activities | Notes

ID	Oppty Name
O-9246	PRU GROUP MU/STD/Claims
O-9636	PRU - ILI Claims
O-5263	PRU Group CustomerOne Claims
O-7330	PRU Group BIX
O-5373	PRU - Group IAC
O-4081	PRUDENTIAL Group Insurance New Business Part 2
O-4077	PRUDENTIAL Group Insurance New Business Part 1
O-3606	Pru Group Call Center
O-3381	Pru Group Back Office
O-2683	Pru Group Claims-Many

Actions ▾
Add Contact
Add Opportunity
Add Strategy
Edit Account

The Actions dropdown allows the AE to do a number of useful tasks while in the Accounts tab. Since Opportunities are associated to Accounts, this is where a user adds them.

You can open the Opportunities page by clicking on its link.

AE existing Opportunities

Home | ORG-170 | ACC-793 | O-4081

PRUDENTIAL Group Insurance New Business Part 2

Amount (USD)	2,000,000	Owner	Kelly Bailey	Must Win Type	
Close Date	1/25/2010	AE Forecast	Omitted / FQ1 FY2010	Days in Stage	779
Stage	? Closed-Suspended	Type	None	Total Days Open	480
Organization	Prudential Financial	Partner Role	? No Partner	Project Scale	?
Account	Individual Life	Partner		Implementation Led By	
Industry	Insurance Life	Pega Alliance Exec			
Sales Team	Prudential Financial				

Details | Solution | Progress | Activities | Contacts | Leads | Partners | Legal

Source	Customer Radiation	License Type	Perpetual	Compelling Event	Customer commitment
Sub Source		Deal Type	?	Compel. Event Date	Q2-2009

Group Call Center - BPM Wave

Actions

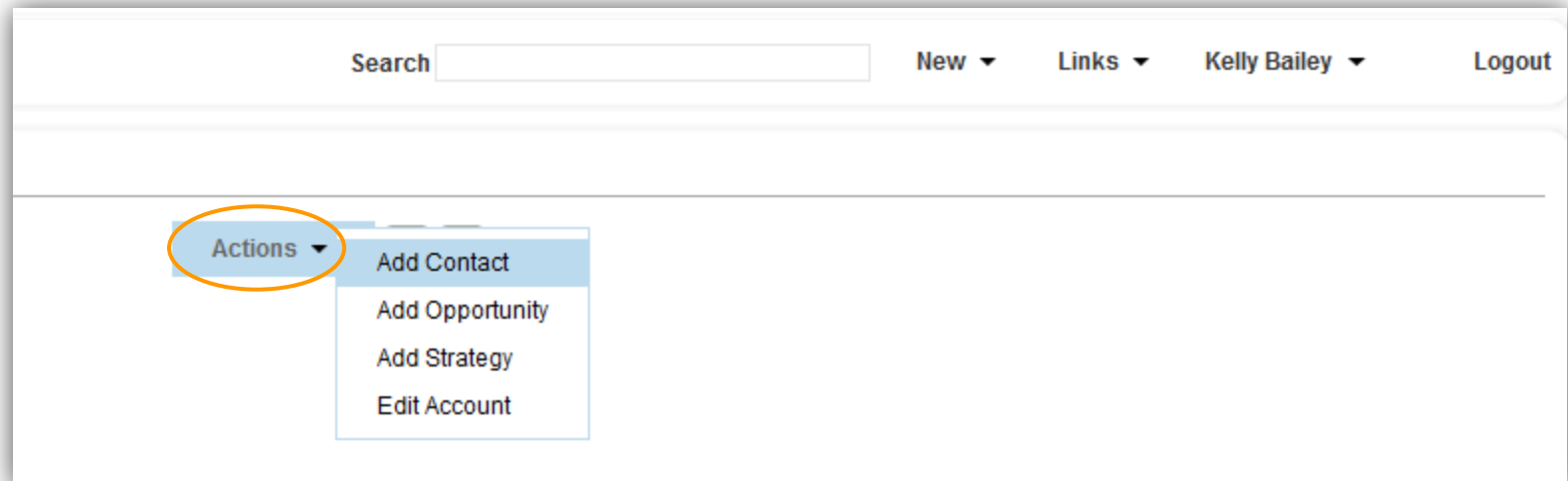
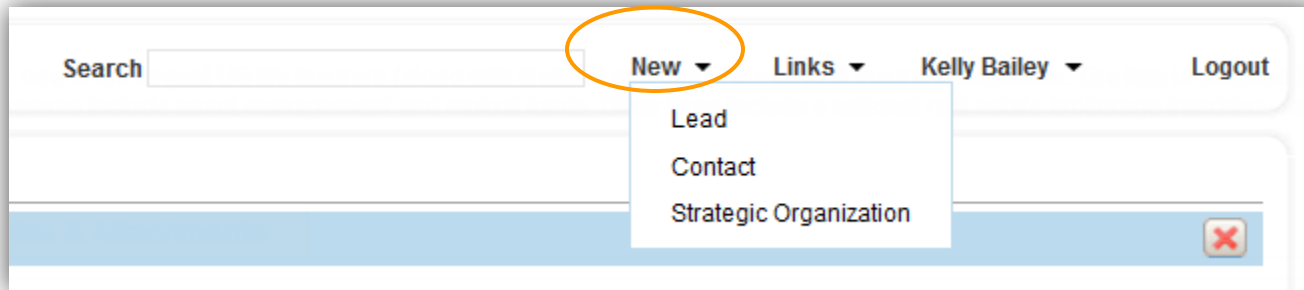
- Update Stage
- Edit Opportunity
- Update Forecast
- Close Opportunity
- Reopen Opportunity
- Clone Opportunity

The Opportunities page gives you the pertinent information in regards to the Opportunity. The Organization and Account names are hyperlinked, so as to open new tabs if you click on them.

Other information can be edited or updated using the Action dropdown menu

Starting New Processes

1. To start a new process, you must launch it by clicking on the “New” or the “Actions” dropdown menus
2. Only processes which you are allowed to perform are listed in your navigation panel.
*Notice the “Actions” dropdown has different options depending on if you are in the Accounts, Leads, Opportunities or the Organization screen.



Starting New Processes – Cont'd

When starting a new Lead, you will be prompted to enter the Contact name, after entering the name, click Find Contact.

Home Lead

Market Interaction Status: Open-MarketingInteraction

First Name Thomas Last Name Walker

FIND CONTACT

Market Interaction Status: Open-MarketingInteraction

First Name Thomas Last Name Walker FIND CONTACT

▼ Contact Search Results
Select a contact below or click 'New Contact' to create a new one

Select	Last Name ▲	First Name ▼	Organization Name ▼	Account Name ▼	Email ▼
<input type="radio"/>	WALKER	THOMAS	Orphan Org		thomas.walker@subexworld.com
<input type="radio"/>	Walker	Thomas	Prudential Financial		thomas.walker@prudential.com
<input type="radio"/>	Walker	Thomas	IBM	US	thwalker@us.ibm.com
<input type="radio"/>	Walker	Thomas	Toyota Financial Services Corporation	Toyota Financial Services	

SELECT CONTACT NEW CONTACT

This will open a list of names. If you see the contacts name, select the Radio Button next to the name, then click Select Contact, if not, click New Contact. On New Contacts, make sure to select the country and Email address.

First Name Thomas Last Name Walker FIND CONTACT

▼ Contact Details

Title

City

Country United States

Work Phone

Email twalker@prudential.com


State State...

Postal Code

NEXT>>

Submitting a Lead

After you select the contact, make sure to fill out the Lead Source, Sub Source, Industry and Lead Description also choose the Radio Button next to either MI, MQL or SQL. Then click on the Submit button

 **Market Interaction** **Status: Open-MarketingInteraction**

First Name: Last Name: [FIND CONTACT](#)

Contact Details

Title: Email:
City: State:
Country: Postal Code:
Work Phone:

Lead Source & Description

Lead Source:
Sub Source:
Industry:
Lead Description:


Referred by:

Lead State Options

☒ MI
☐ MQL
☐ SQL


[SUBMIT](#)

Home MI-24897

 **Lead from Thomas Walker** **Status: Open-SalesQualified**

Confirmation

FirstName	Thomas	Last Name	Walker
Source	Tradeshaw	SubSource	11_Q3_Gov_Tradeshaw_FTA Technology Conf Aug14-17_NA_MMM
Created By	Kelly Bailey	Create Date	12/27/11 12:43 PM

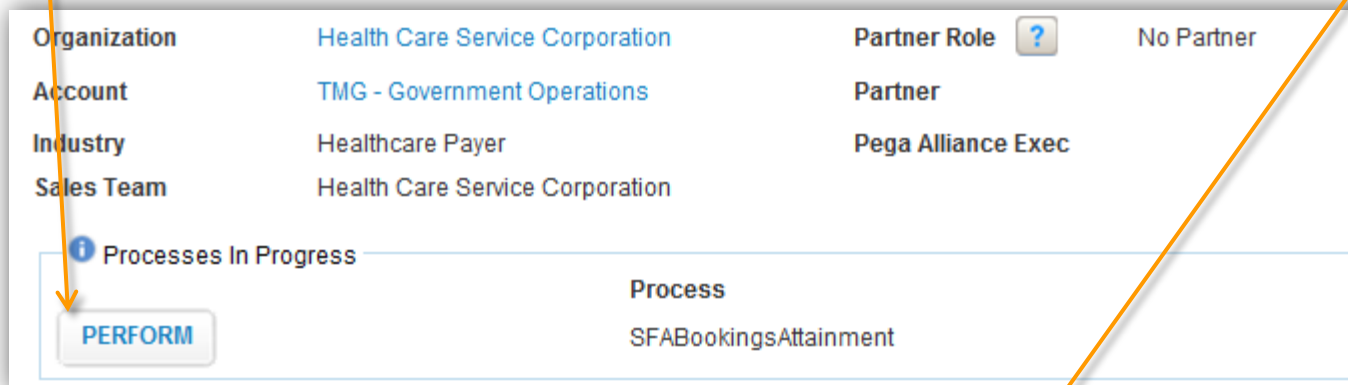
 Thank you for your input

[CLOSE](#)

The Lead will then be sent to Sales Ops or a BGR and if this is your Account the Lead will be assigned to you.

Continuing Existing Processes

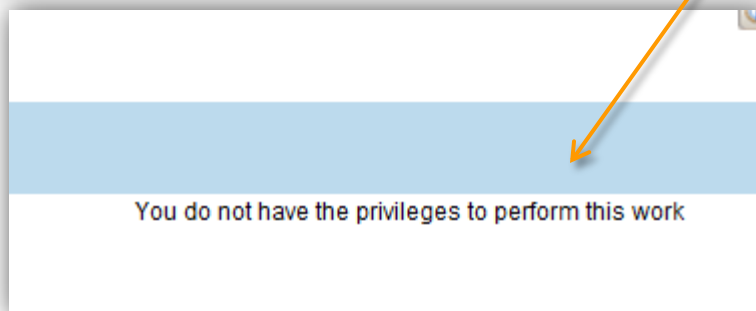
1. Existing processes or activities that you have entered into CPMs, will often request you click a **“Perform”** button before you can edit the associated process or activity.
2. If you do not have authorization to execute this step of the process, when you click the **“Perform”** button you will be redirected to a screen that states you are unauthorized to proceed.



The screenshot shows a web interface with a header section containing metadata and a table below it. The header includes fields for Organization (Health Care Service Corporation), Account (TMG - Government Operations), Industry (Healthcare Payer), and Sales Team (Health Care Service Corporation). To the right, it shows Partner Role (No Partner), Partner (Partner), and Pega Alliance Exec (Pega Alliance Exec). Below the header is a table with a single row. The first column of the table is labeled 'Processes In Progress' and contains a 'PERFORM' button. The second column is labeled 'Process' and contains the text 'SFABookingsAttainment'.

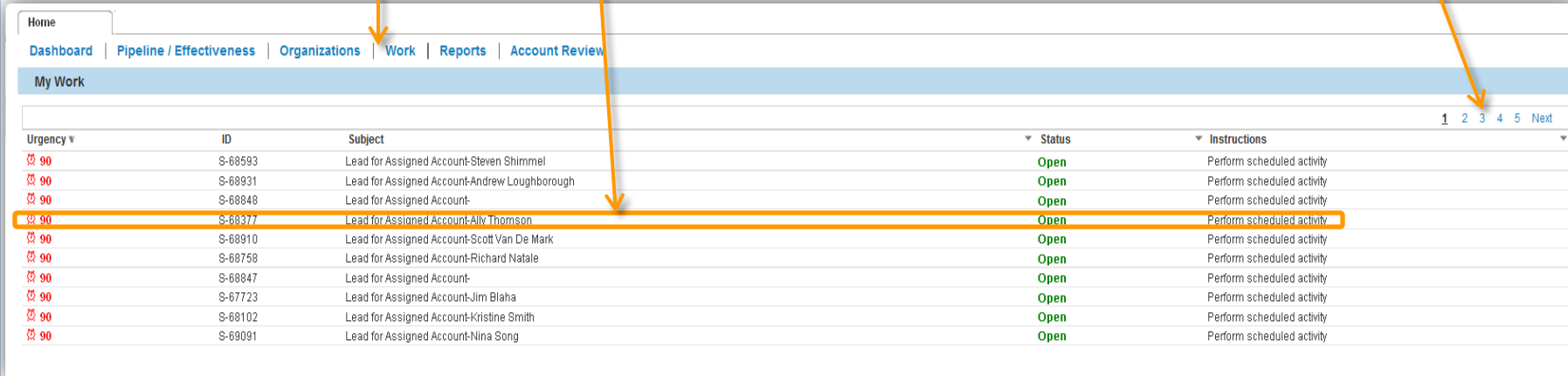
Organization	Health Care Service Corporation	Partner Role	No Partner
Account	TMG - Government Operations	Partner	Partner
Industry	Healthcare Payer	Pega Alliance Exec	Pega Alliance Exec
Sales Team	Health Care Service Corporation		

Processes In Progress	Process
PERFORM	SFABookingsAttainment



My CPMs Worklist

1. You can access YOUR CPMs WORKLIST by clicking on the Work tab
2. If there is more than one page of pending work you can click on the additional page numbers
3. You can click anywhere on the line of a particular item to open it up in a new tab



Home				
Dashboard	Pipeline / Effectiveness	Organizations	Work	Reports Account Review
My Work				
			1 2 3 4 5 Next	
Urgency ▼	ID	Subject	Status	Instructions
90	S-68593	Lead for Assigned Account-Steven Shimmel	Open	Perform scheduled activity
90	S-68931	Lead for Assigned Account-Andrew Loughborough	Open	Perform scheduled activity
90	S-68848	Lead for Assigned Account-	Open	Perform scheduled activity
90	S-68377	Lead for Assigned Account-Ally Thomson	Open	Perform scheduled activity
90	S-68910	Lead for Assigned Account-Scott Van De Mark	Open	Perform scheduled activity
90	S-68758	Lead for Assigned Account-Richard Natale	Open	Perform scheduled activity
90	S-68847	Lead for Assigned Account-	Open	Perform scheduled activity
90	S-67723	Lead for Assigned Account-Jim Blaha	Open	Perform scheduled activity
90	S-68102	Lead for Assigned Account-Kristine Smith	Open	Perform scheduled activity
90	S-69091	Lead for Assigned Account-Nina Song	Open	Perform scheduled activity

Search Capabilities

Global Search – Quickly searches Account ,Contact, Organization and Opportunity by Name for matching strings.

Also you can search by Lead, Activity or Opportunity ID #

Search

Search All

Accounts	Contacts	Organizations	Strategic Organizations	Work
<ul style="list-style-type: none"> ▶ Citi Consumer International ▶ Citi Consumer International ▶ Citi Consumer International ▶ Citi Consumer North America ▶ Citi Consumer North America ▶ Citi Consumer North America ▶ Citi Consumer North America ▶ Citi Consumer North America ▶ Citi Consumer North America ▶ Citi Consumer North America ▶ Technology Citibank 	<ul style="list-style-type: none"> CEEMEA Consumer Singapore LATAM Account Maintenance Auto Finance Cards Citigroup Inc.-CHRD Collections - Global Commercial Lending Financial 	<ul style="list-style-type: none"> RBS Citizens NA First Citizens Bank and Trust Company, Inc. Citi Consumer North America Citi Institutional Clients Group Citi Consumer International Citi Global Wealth Management Citi Australia & New Zealand Citigroup Employee Services Citi Employee Services 	<ul style="list-style-type: none"> Citizens Property Insurance Corporation Citic Securities Co., Ltd. Citigroup, Inc. Citi Global Wealth Management Asia Pacific 	<ul style="list-style-type: none"> O-9541 O-10257 O-10326 O-10859 O-10790 O-9425 O-10635 O-9952 O-10337 O-10294

Search

Search All

Work
<ul style="list-style-type: none"> ▶ S-69133 S-69133 Onboarding and budget ▶ O-10713 O-10713 Bank of America EMEA Cash Management Onboarding

ACCOUNT REVIEW

By clicking on the Account Review gadget, you'll get a list of your accounts. To edit one or more of the reviews select New Review in the Actions drop down.

[Home](#) | [ORG-137](#) | [ORG-137](#)

[Dashboard](#) | [Pipeline / Effectiveness](#) | [Organizations](#) | [Work](#) | [Reports](#) | [Account Review](#)

Account Review for FQ4 11/03/11 09:03 AM Actions

Current as of: Nov 3, 2011 9:03:11 AM

Status: Finalized

Review ID: R-11898







Quota: 2.930

Currency values are in millions of USD

Holding Company Name	# of Emps	Total Revenue	Rate Relationship	# of Opps	Active Pipeline	Current Year Bookings	Prior Year Bookings	Prior Quarter Planned(Days)	Prior Quarter Actual(Days)	Current Quarter Planned(Days)	PRPC Adoption level
Hartford Financial Services Group	21000	23,000M	0.5	7	11.750		0.952	20	0	0	4
Prudential Financial	37000	0M	0.2	11	6.600	0.111	0.224	20	0	0	4
White Mountains Insurance Group Ltd.	5000	0M	0.5	1				0	0	0	0
Portfolio Total				19	0.000	0.111	1.176	40	0	0	

Account Review History

This will open the accounts in a new tab, where you can choose which one to edit.

 **FQ4 12/27/11 01:36 PM** **Status: Open**     

Take Action Edit Review

Current as of: Dec 27, 2011 1:36:02 PM

Status: Open

Review ID: R-11903

Quota: 2.930

Currency values are in millions of USD

Holding Company	# of Emps	Total Revenue	Rate Relationship	# of Opps	Active Pipeline	Current Year Bookings	Prior Year Bookings	Prior Quarter Planned(Days)	Prior Quarter Actual(Days)	Current Quarter Planned(Days)	PRPC Adoption level	
Hartford Financial Services Group	21000	23,000M	0.5	9	11.870		0.952	0	0	0	4	EDIT
Prudential Financial	37000	0M	0.2	12	6.600	0.111	0.224	0	0	0	4	EDIT
White Mountains Insurance Group Ltd.	5000	0M	0.5	1				0	0	0	0	EDIT
Total				22	0.000		1.176	0	0	0		

OPPORTUNITIES

The screenshot shows the 'HARTFORD - PegaCloud' interface. At the top, there are browser tabs for 'Home', 'O-9956', 'ORG-170', and 'O-7674'. Below the header, the main content area is divided into two sections. The left section contains a grid of fields: Amount (USD) 120,000, Close Date 12/30/2011, Stage Decision, Organization Hartford Financial Services Group, Account Property and Casualty, Industry Insurance P and C, and Sales Team Hartford Financial Services Group. The right section contains: Owner Kelly Bailey, AE Forecast Upside / FQ4 FY2011, Type Active Pipeline, Must Win Type, Days in Stage 161, Total Days Open 455, Partner Role Partner Leveraged, Partner Cognizant, Pega Alliance Exec Taffy Holliday, Project Scale, and Implementation Led By. Below these fields is a horizontal tab bar with tabs: Details, Solution, Progress, Activities, Contacts, Leads, Partners, and Legal. The 'Details' tab is currently selected. Below the tabs, the 'Details' section shows: Source Customer Radiation, Sub Source N/A, Description PegaCloud Dev/Test package., and Business Issue Customer looking to lower the their cost of infrastructure. To the right of the tabs, there are fields for License Type, Deal Type, and Compelling Event. The 'Contacts' tab is highlighted with an orange circle, and an arrow points from a callout box to it. Other arrows point from callout boxes to the 'Solution', 'Progress', 'Activities', 'Leads', 'Partners', and 'Legal' tabs.

Field	Value
Amount (USD)	120,000
Close Date	12/30/2011
Stage	Decision
Organization	Hartford Financial Services Group
Account	Property and Casualty
Industry	Insurance P and C
Sales Team	Hartford Financial Services Group
Owner	Kelly Bailey
AE Forecast	Upside / FQ4 FY2011
Type	Active Pipeline
Must Win Type	
Days in Stage	161
Total Days Open	455
Partner Role	Partner Leveraged
Partner	Cognizant
Pega Alliance Exec	Taffy Holliday
Project Scale	
Implementation Led By	

Field	Value
Source	Customer Radiation
Sub Source	N/A
Description	PegaCloud Dev/Test package.
Business Issue	Customer looking to lower the their cost of infrastructure.

Field	Value
License Type	
Deal Type	Radiation
Compelling Event	Customer commitment
Compel. Event Date	Q3-2011

The middle of the Opportunities page has tabs that allow you to find out more information associated with the Opportunity.

The Solution tab gives you information regarding the industry and competition

The Progress tab gives you an overview on past and upcoming Milestones

The Activities tab will give you any Activities pending for this Opportunity

The Contacts tab lists Contacts associated with this Opportunity

The Partners tab lists Partners and their roles associated with this Opportunity

The Leads tab will give you any Leads pending for this Opportunity

The Legal tab has Contract ID # and Contract Owner information.

Required Fields for Opportunities

Required fields are indicated by a **RED “Value cannot be blank”** (Red “Value cannot be blank” or X’s appear after you click the submit button and data has not been entered in all the required fields.)

Note that **Required Fields** are **DYNAMIC**, and will change based on the values of certain Opportunity fields (i.e., Stage).

Solution– Since you start filling out the fields in the “Details” tab, you might not remember to open the other tabs. The “Solution” tab has two fields that are required and will prevent you from submitting your Opportunity if you do not select them.

Home ACC-951 New Oppty

HCSC-TMG

Amount (USD) Value cannot be blank

Close Date Value cannot be blank

Stage Value cannot be blank

Organization Health Care Service Corporation

Account TMG - Government Operations

Industry Healthcare Payer

Sales Team Health Care Service Corporation

Opportunity Owner Value cannot be blank

Partner Role Value cannot be blank

Partner Pega Alliance Exec

Must Win Type

Days in Stage 0

Total Days Open

Project Scale Value cannot be blank

Implementation Led By

Details Solution Progress Partners

Source Value cannot be blank

Sub Source Value cannot be blank

License Type

Deal Type

Compelling Event

Compel. Event Date

Description Value cannot be blank

Business Issue

Execution Gaps

CANCEL ADD OPPORTUNITY

Details Solution Progress Partners

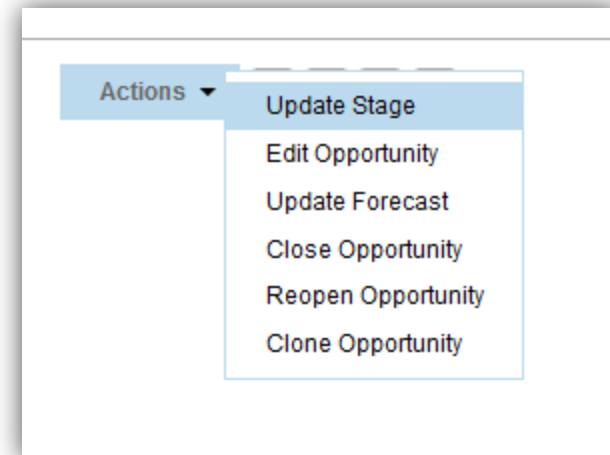
Solution Industry Healthcare

Solution X Select...

What is the R?

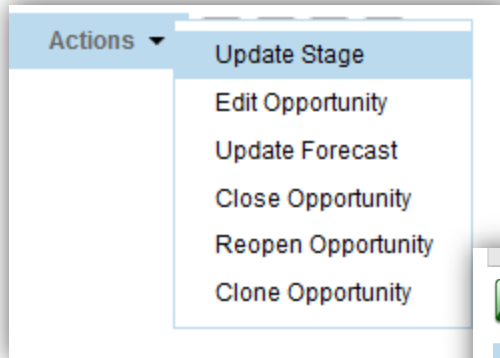
Opportunity Specific Processes

- **Update Stage** - Update stage, amount, close date and milestones.
- **Edit Opportunity**- Edit opportunity details; Source, Sub Source, License Type Deal Type, Compelling Event and Compel. Event Date.
- **Update Forecast**- Update forecast information for this opportunity.
- **Reassign Opportunity** - Reassign the opportunity to a new owner
- **Close Opportunity** -Close a won, lost, suspended or dup opportunity
- **Reopen Opportunity** - Reopen a closed opportunity
- **Clone Opportunity** - Use an existing Opportunity to create a new (similar) Opportunity



Update Stage

1. With the Opportunity page open, go to the “**Actions**” dropdown and select “**Update Stage**”.
2. The Opportunity stage page is displayed in editable mode.
3. Make your changes and click the “**Submit**” button at the bottom of the page.



A screenshot of a web application showing the 'HCSC ASO Billing' opportunity page. The page title is 'HCSC ASO Billing' with a status of 'Open'. The 'Take Action' dropdown is set to 'Update Sales Cycle Stage'. Below this, a message states: 'Enter new sales cycle stage. Verify close date and amount. Update next step and milestone information, if necessary.'

The form contains the following fields:

- Opportunity Name: HCSC ASO Billing
- Sales Cycle Stage: Analysis (dropdown menu)
- Close Date: 12/30/2011 (calendar icon)
- Amount (USD): 800,000
- Next Step: (empty text area)

Below the form, there is a section for 'Create new activity for next step?' with a checkbox. This section is divided into three groups of tasks, each with a 'Should Be Completed Before' date and a list of tasks with checkboxes:

- Should Be Completed Before 10/31/2011**
 - Strategic Account Plan in Place ☐
 - Completed Operational Walkthrough ☐
 - Confirmed Budget & Buying Process ☐
 - +2 Across Business, IT, and Operations ☐
 - Successful A+ Demo ☐
 - Successful A+ Presentation to Stakeholders Defined R for Initial Project ☐
- Should Be Completed Before 11/30/2011**
 - POC/Met All Customer Evaluation Criteria ☐
 - Met with All Key Decision Makers ☐
 - Services Delivery Method Defined and Accepted ☐
 - Customer Called or Met with References ☐
 - Compelling Event Defined ☐
 - Services Delivery Proposal Presented ☐
 - Selected as VOC ☐
 - Full Offer; Customer Has Signable Paper ☐
- Should Be Completed Before Close**
 - Confirmation of Timing and Close Process ☐
 - Close Date Agreed ☐
 - Customer Personnel Attend Training ☐
 - Signature Process Defined & Accepted ☐
 - Consent of Procurement/Legal ☐

A 'SUBMIT' button is located at the bottom right of the page.

Closing an Opportunity

1. With the Opportunity page open, go to the “**Actions**” dropdown and select “**Close Opportunity**”.
2. Enter a reason for closing the opportunity, then click “**Submit**” .

The screenshot shows the 'Close Opportunity' workflow in a CRM system. On the left, an 'Actions' dropdown menu is open, showing options: 'Update Stage', 'Edit Opportunity', 'Update Forecast', 'Close Opportunity' (highlighted), 'Reopen Opportunity', and 'Clone Opportunity'. The main form is titled 'HCSC ASO Billing' with a status of 'Open'. It features a 'Take Action' section with a dropdown set to 'Enter Reason for Close'. Below this, a text prompt reads 'Enter close reason and comments, then verify close date.' The form contains several fields: 'Opportunity Name' (HCSC ASO Billing), 'Partner Role' (Partner Sourced), 'Close Date' (12/30/2011), 'Amount (USD)' (800,000), and 'Close Reason' (a dropdown menu with options: 'Select Value...', 'Select Value...', 'Won', 'Lost', 'Duplicate', 'Suspended', 'QualifiedOut'). A 'Win/Loss Comments' field is also present. A 'SUBMIT' button is located at the bottom right.

Actions ▾

- Update Stage
- Edit Opportunity
- Update Forecast
- Close Opportunity**
- Reopen Opportunity
- Clone Opportunity

HCSC ASO Billing Status: Open

Take Action Enter Reason for Close ▾

Enter close reason and comments, then verify close date.

Opportunity Name HCSC ASO Billing Partner Role Partner Sourced ▾

Close Date 12/30/2011 Amount (USD) 800,000

Close Reason Select Value... ▾

- Select Value...
- Won
- Lost
- Duplicate
- Suspended
- QualifiedOut

Win/Loss Comments

SUBMIT

Forecast Stage Definitions

Commit – 90% or greater Confidence (Should win in quarter):

- **Key milestones typically completed (in addition to those in Upside):**
 - Pega is VOC
 - Customer has an approved compelling business case
 - There is a known compelling event to drive the commit timing
 - Full offer negotiated and customer has signable paper

Upside – 70% or greater Confidence (Could Win in quarter):

- **Key milestones typically completed:**
 - Customer has budget and buying process confirmed
 - There is a compelling event
 - We have a strong competitive position and understanding
 - The 'R' is known "as a number" and compelling

Stretch- 50% or less Confidence

- Meets Upside milestone criteria
- Win could get deferred to subsequent quarter, but push for this quarter

Pipe Not Forecasted

- The Remaining Opportunities that are not Committed, Upside or Stretched.

The Three Types of Activities

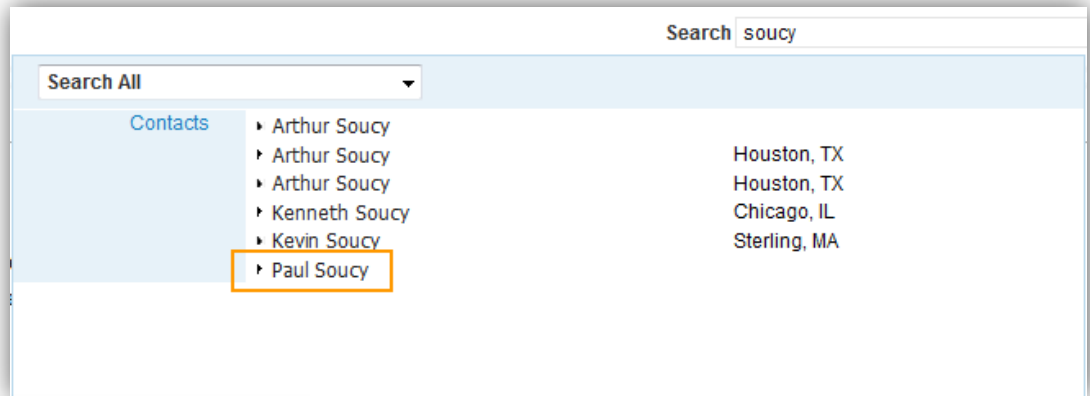
General Activities include: Client Meeting, Client Dinner, Operational Walkthrough, Corporate Visit, Client Marketing, ROI/BVA, General Work, etc.

Specialized Activities include:

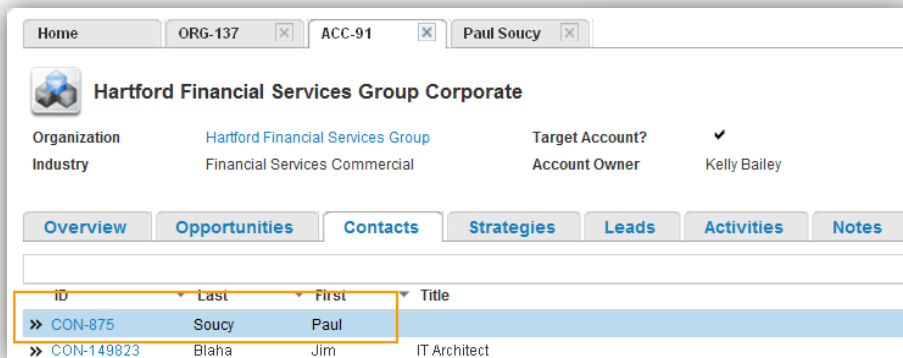
- **RFP – RFI Request:** RFP/RFI's need the RFP Manager's Assistance. These are only associated to Opportunities.
- **Strategy Action Plans:** These are Activities for Strategies. These can only be Associated with Account Strategies.

Look up Contacts

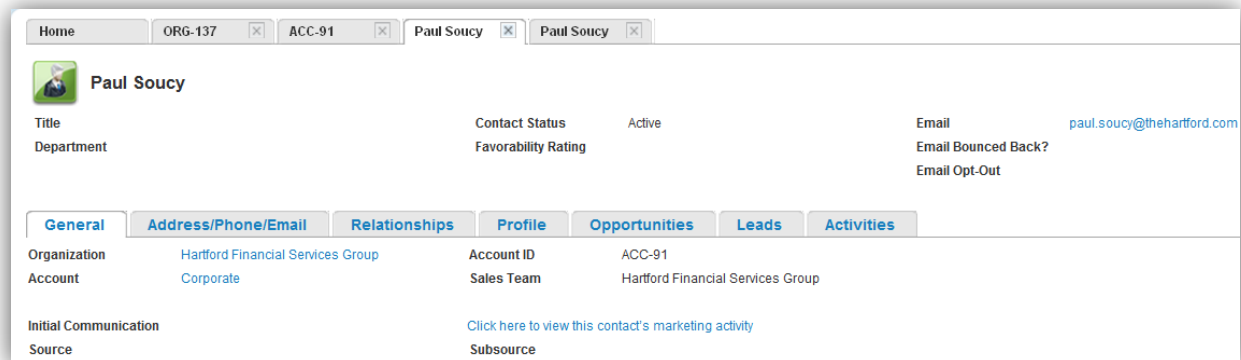
1. You can find Contacts many different ways in CPMs. The first way is to simply do a search of the name in the Search feature



2. If you'd like to search for contacts within a particular Opportunity, Organization or in an Account, you can do that as well

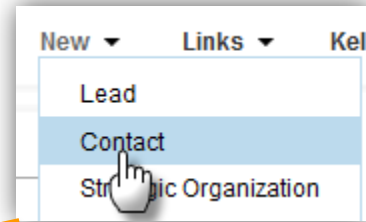


3. By clicking on the link you can open up the contacts page to get all the details available.



Adding a Contact

1. One way of adding a contact is to go to the “New” dropdown and Click on the **Contact** link.
2. This will open the “New” Contact page and you will have to fill in all information.

A screenshot of a 'New Contact' form. The form has a header with a contact icon and the text 'Contact Status: New'. Below this, there are fields for 'Salutation', 'First Name' (with 'John' entered), 'Middle', 'Last Name' (with 'Lennon' entered), 'Title', 'Department', and 'Status' (with 'Active' selected). At the bottom, there is a section titled 'Organization and Account' with fields for 'Org ID', 'Account', and 'Account ID'. An orange arrow points from the 'Contact' link in the dropdown menu to this form.

- However, **BEST PRACTICE**, is to add a contact from the ORG/ACCOUNT view.
- With the Account page in focus, go to the **Action** dropdown and select “**Add Contact**”

A screenshot of an account page for 'Prudential Financial Individual Life'. The page shows various details like 'Organization', 'Industry', 'Target Account?', 'Account Owner', 'Sales Team', and 'Practice Lead'. On the right side, there is an 'Actions' dropdown menu. The 'Add Contact' option is selected and highlighted in blue. An orange arrow points from the 'Add Contact' option in the dropdown menu to the 'Add Contact' page below.

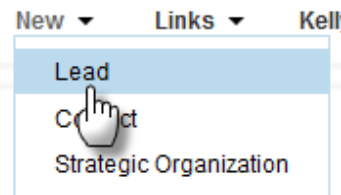
- The “**Add Contact**” page will open. By starting the Add a Contact process from within an Account, the Org/Account information will be pre-populated for you.

A screenshot of the 'Add Contact' form, which is pre-populated with information from the account. The form has a header with a contact icon and the text 'Contact Status: New'. Below this, there are fields for 'Salutation', 'First Name', 'Middle', 'Last Name', 'Title', 'Department', and 'Status' (with 'Active' selected). At the bottom, there is a section titled 'Organization and Account' with fields for 'Organization Name' (Prudential Financial), 'Org ID' (ORG-170), 'Account' (Individual Life), and 'Account ID' (ACC-793). There is also a 'Sales Team' field with 'Prudential Financial' entered. The 'General' tab is selected at the bottom. An orange arrow points from the 'Add Contact' option in the dropdown menu to this form.

Adding a Contact through a Lead

- Then fill in the first and last name

- Another way is to create a new Lead.
- First go to the **New** dropdown and select **Lead**

A screenshot of a 'Market Interaction' form. At the top, it says 'Market Interaction' and 'Status: Open-MarketingInteraction'. Below this, there are two input fields: 'First Name' with the value 'John' and 'Last Name' with the value 'Lennon'. To the right of these fields is a blue button labeled 'FIND CONTACT'.

- If the contact already exists select the Radio button, if not click **New Contact**.
- This will open the **Market Interaction** page, which allows you to fill in all of the details at once.

A screenshot of the 'Market Interaction' form, showing search results. At the top, it says 'Market Interaction' and 'Status: Open-MarketingInteraction'. Below this, there are two input fields: 'First Name' with the value 'John' and 'Last Name' with the value 'Lennon'. To the right of these fields is a blue button labeled 'FIND CONTACT'. Below the input fields is a section titled 'Contact Search Results' with the text 'Select a contact below or click 'New Contact' to create a new one'. Below this text is a table with columns 'Select', 'Last Name', and 'First Name'. The table has one row with a radio button in the 'Select' column, 'Lennon' in the 'Last Name' column, and 'John R' in the 'First Name' column. Below the table are two buttons: 'SELECT CONTACT' and 'NEW CONTACT'. A mouse cursor is pointing at the 'NEW CONTACT' button.A screenshot of the 'Market Interaction' form, showing detailed contact information. At the top, it says 'Market Interaction' and 'Status: Open-MarketingInteraction'. Below this, there are two input fields: 'First Name' with the value 'John' and 'Last Name' with the value 'Lennon'. To the right of these fields is a blue button labeled 'FIND CONTACT'. Below the input fields is a section titled 'Contact Details' with fields for 'Title', 'City' (Liverpool), 'Country' (United Kingdom), 'Work Phone', 'Email' (jennon@abbeyroad.com), 'State' (State...), and 'Postal Code'. Below this is a section titled 'Lead Source & Description' with fields for 'Lead Source' (Online Advertising), 'Sub Source' (11_Q2_Collateral_OnboardingWebinarBAL_NA_VM), 'Industry' (Communications), and 'Lead Description' (New Record). Below this is a section titled 'Referred by' with a field for 'Standard Lead Questions'. At the bottom right is a blue button labeled 'SUBMIT'.

CPMs Team Support & Commitment

- For **Emergencies** or **Immediate Assistance**, **PLEASE CALL** the CPMs Help Desk at ext. **8669** (617-498-8669)
- For Non Emergencies, please send an email to CPMS.Helpdesk@pega.com
Basic issues (new user creation, login issues, etc) and Emergencies will be addressed within the first 24 hours.
- More complex issues (bugs, enhancement requests, etc) will be acknowledged and clarifying information collected within the first business day.
- We will then keep you informed as the issue is being resolved.
- *** Also, we want to hear from you.... Please send us emails with suggestions & feedback.

CPMs Acronyms

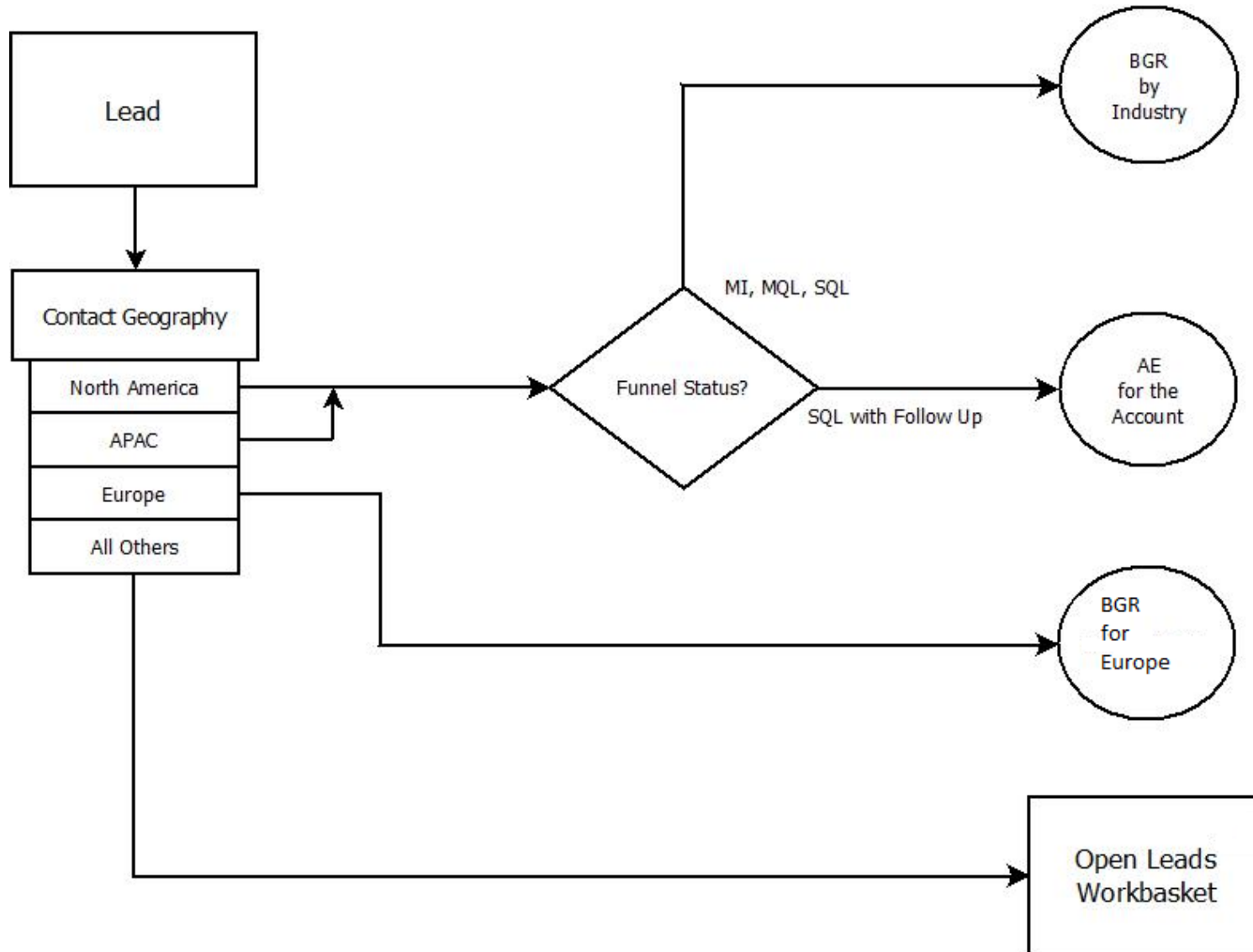
CPMs Terminology

ACC	Account
AS	Account Strategy
CON	Contact
MI	Lead
O	Opportunity
ORG	Organization
R	Review
S	Scheduled Activity
SORG	Strategic Organization

Lead Terminology

MI	Marketing Interaction	Initial stage
MQL	Marketing Qualified Lead	Next step, ready for an AE to handle the account
SQL	Sales Qualified Lead	Has had an AE further qualify this lead

Lead Assignment Flow



Lead Status

Status from BGR process

Status:	BGR Action
Open-MarketingInteraction	<i>BGR creates Lead</i>
Open-MarketingQualified	<i>BGR promotes to MQL</i>
Open-SalesQualified	<i>BGR promotes to SQL without Follow Up</i>
Resolved-FollowUp	<i>BGR promotes to SQL with Follow Up</i>
Resolved-MarketingInteraction	<i>BGR resolves MI</i>
Resolved-MarketingQualified	<i>BGR resolves MQL</i>
Resolved-SalesQualified	<i>BGR resolves SQL</i>
Resolved-FollowUp	<i>Straight Through Processing</i>

AE interaction

Open-Lead-Assigned	<i>Assign to AE</i>
Open-Lead-Assigned	<i>AE accepts assignment</i>
Open-RequestAccount	<i>AE requests Account Assignment</i>
Open-RequestAccount	<i>Sales Ops moves the Lead to their Worklist</i>
Resolved-NewOpportunity	<i>Sales Ops processes Account Request</i>

Buttons and Icons

Submit

Commits data to the database (like “Save”). Usually advances a work object through a flow

Save

Commits data to the database (like “Submit”). Typically does not advance a flow

Close

Closes open Work Object after an item has been submitted. Screen will move next available tab “in focus

Return

Returns to previous Work Object after an item has been submitted.

Launch

Located in the left hand navigation panel, the Launch button is used to start a new process



Indicates the availability of more information via hover (also indicated by italicized text in other parts of the application)



Indicates an error. To see the specific error message, hover over the red x.



Browse Category display available “canned” reports.



Create Custom Report icon is used to create custom reports.



Add a Row is used to add an item to a list (i.e., Associate a Contact to an Account)



Denotes auto-complete field for Pega contacts



Magnifying glass is used to search Contacts, Organizations and Accounts



Pick value is used to find available value for Filters

Actions ▼

Located in the top middle of the page, Action dropdown allows the user different options, depending on the Status of the Lead, Opportunity or Action and the users access.



Located to the right hand side of the Action dropdown, the history icon, displays audit trail on this work object.



Located to the right hand side of the Action dropdown, the attachment icon, allows viewing or editing of attachments related to this work object.



Located to the right hand side of the Action dropdown, the Close icon, closes the current view without saving changes.



Located to the right hand side of the Action dropdown, the Refresh icon allows you to refresh the current page, to reflect recent changes.