CPMs AE Training
Customer Process Manager for Sales

December 2011

Introduction

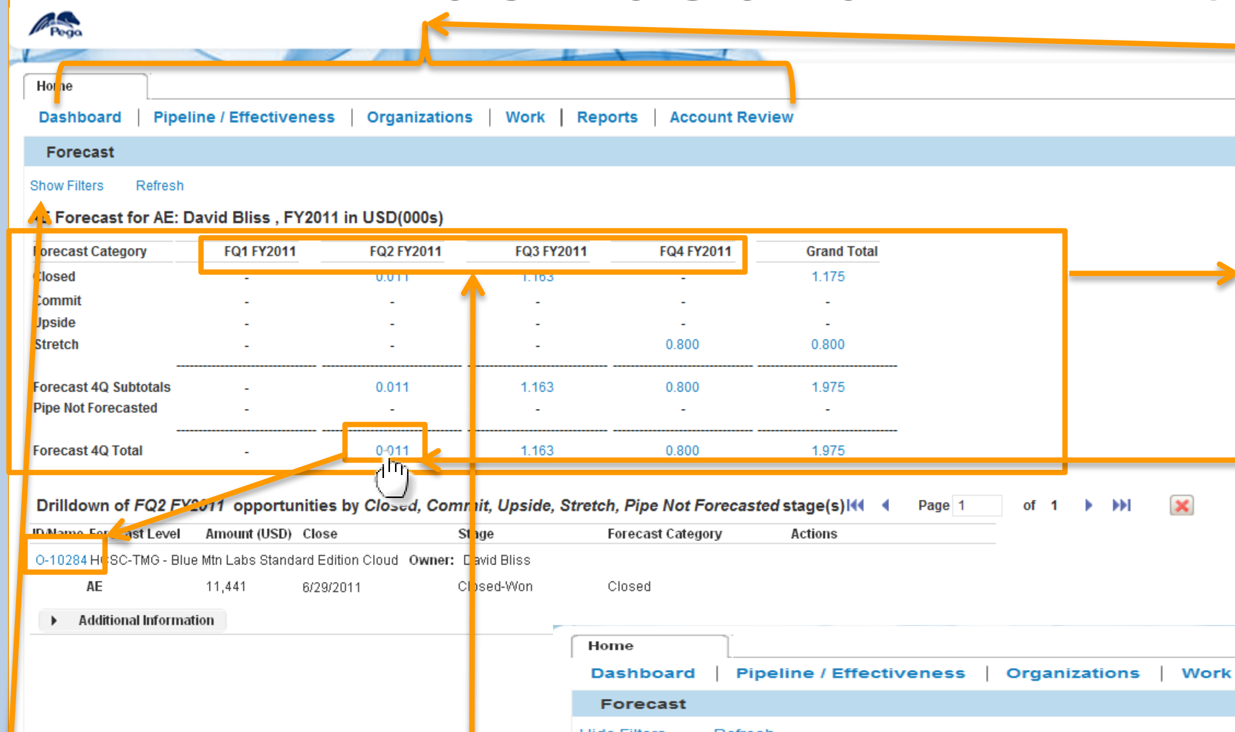
Accessing CPMs Version 6.1 SP2

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

https://sfa.pega.com/sfaprd/PRServlet

Dashboard- AE view

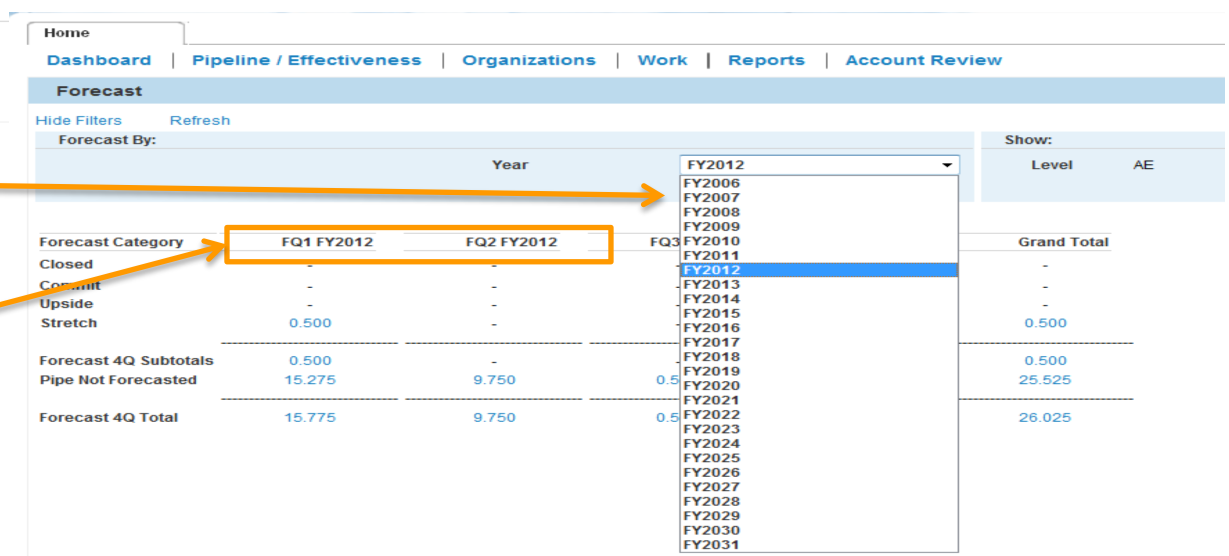
LANDING PAGE



Tabs – available from Navigation Panel.

4 Quarter Pipeline Summary for AE

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.

LANDING PAGE

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

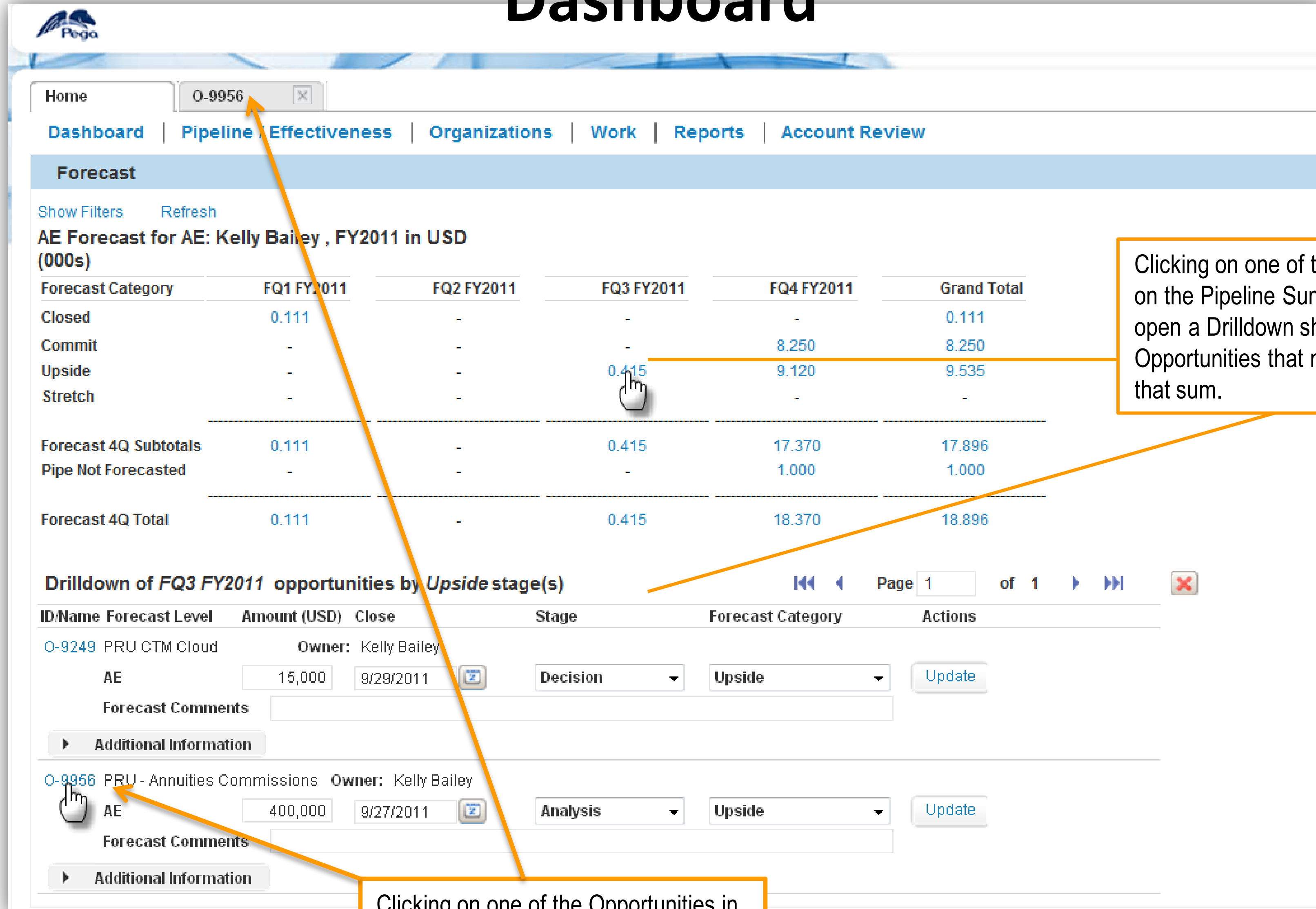
Clear Filters Apply Filters

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.

LANDING PAGE

Dashboard



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

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

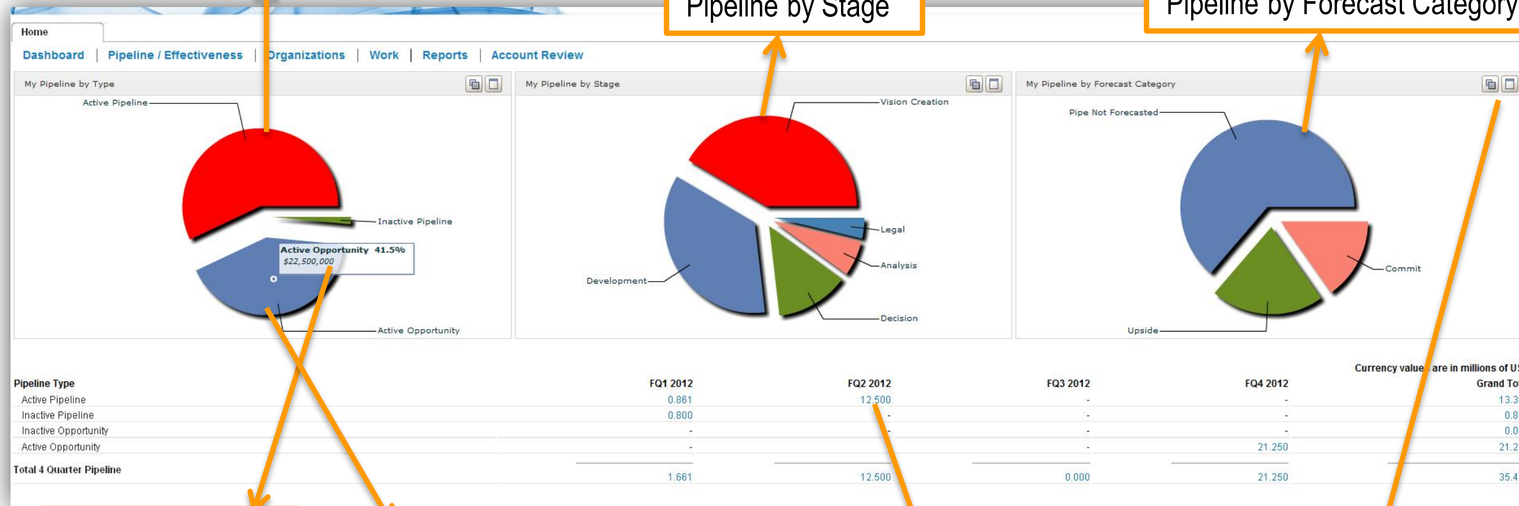
LANDING PAGE

AE Pipeline/Effectiveness

Pipeline by Type

Pipeline by Stage

Pipeline by Forecast Category

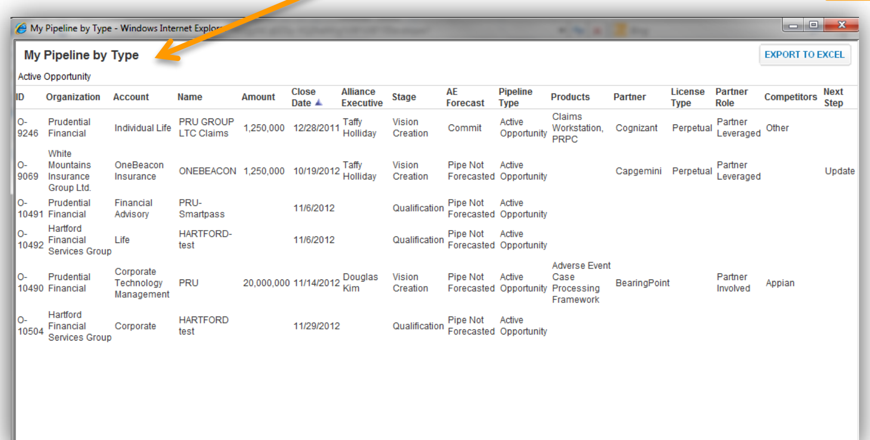


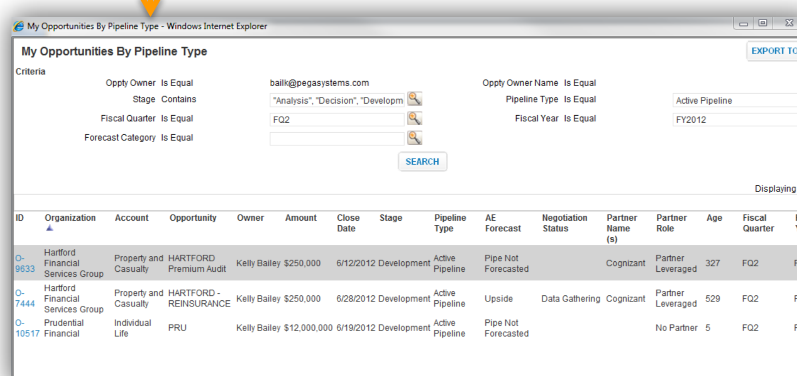
Hovering your Mouse over a section of the chart, gives you an overview of that section.

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.





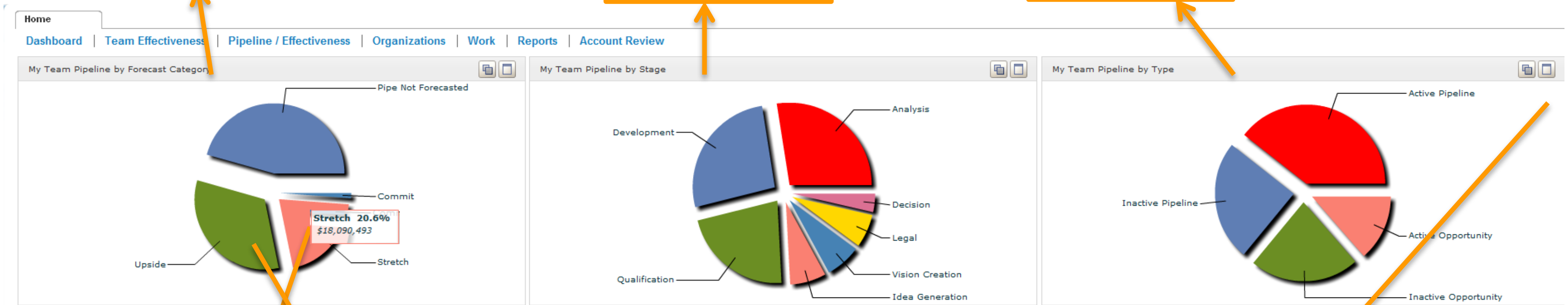
LANDING PAGE

Team Effectiveness (Manager View)

Pipeline by Forecast Category

Pipeline by Stage

Pipeline by Type



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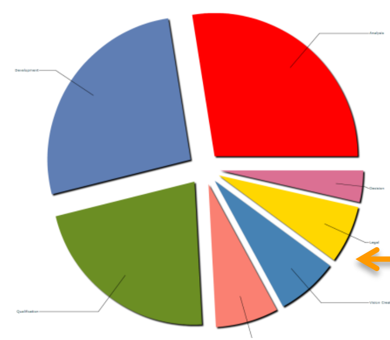
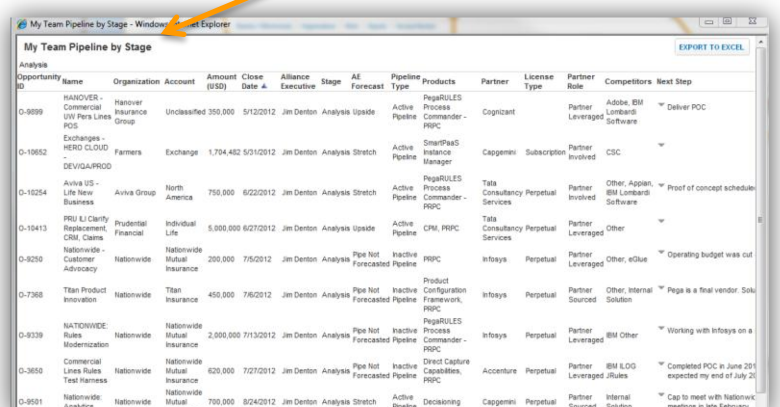


By clicking on the icon you get the data of the chart. Whereas clicking the icon will maximize the chart.



My Team Pipeline by Stage - Windows Internet Explorer

My Team Pipeline by Stage EXPORT TO EXCEL

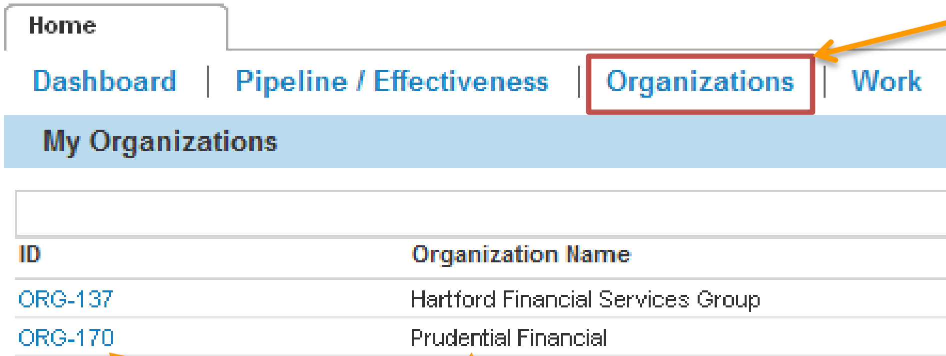
Analysis

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
O-9899	HANOVER - Commercial UW Pers Lines POS	Hanover Insurance Group	Unclassified	350,000	5/12/2012	Jim Denton	Analysis	Upside	Active Pipeline	PegaRULES Process Commander - PRPC	Cognizant		Partner Leveraged	Adobe, IBM Lombardi Software	Deliver POC
O-10652	Exchanges - HERO CLOUD - DEV/QA/PROD	Farmers	Exchange	1,704,482	5/31/2012	Jim Denton	Analysis	Stretch	Active Pipeline	SmartPaaS Instance Manager	Capgemini	Subscription	Partner Involved	CSC	
O-10254	Aviva US - Life New Business	Aviva Group	North America	750,000	6/22/2012	Jim Denton	Analysis	Stretch	Active Pipeline	PegaRULES Process Commander - PRPC	Tata Consultancy Services	Perpetual	Partner Involved	Other, Appian, IBM Lombardi Software	Proof of concept schedule
O-10413	PRU ILI Clarify Replacement, CRM, Claims	Prudential Financial	Individual Life	5,000,000	6/27/2012	Jim Denton	Analysis	Upside	Active Pipeline	CPM, PRPC	Tata Consultancy Services	Perpetual	Partner Leveraged	Other	
O-9250	Nationwide - Customer Advocacy	Nationwide	Nationwide Mutual Insurance	200,000	7/5/2012	Jim Denton	Analysis	Pipe Not Forecasted	Inactive Pipeline	PRPC	Infosys	Perpetual	Partner Leveraged	Other, eGlue	Operating budget was cut
O-7368	Titan Product Innovation	Nationwide	Titan Insurance	450,000	7/6/2012	Jim Denton	Analysis	Pipe Not Forecasted	Inactive Pipeline	Product Configuration Framework, PRPC	Infosys	Perpetual	Partner Sourced	Other, Internal Solution	Pega is a final vendor. Solu
O-9339	NATIONWIDE: Rules Modernization	Nationwide	Nationwide Mutual Insurance	2,000,000	7/13/2012	Jim Denton	Analysis	Pipe Not Forecasted	Inactive Pipeline	PegaRULES Process Commander - PRPC	Infosys	Perpetual	Partner Leveraged	IBM Other	Working with Infosys on a
O-3650	Commercial Lines Rules Test Harness	Nationwide	Nationwide Mutual Insurance	620,000	7/27/2012	Jim Denton	Analysis	Pipe Not Forecasted	Inactive Pipeline	Direct Capture Capabilities, PRPC	Accenture	Perpetual	Partner Leveraged	IBM ILOG JRules	Completed POC in June 201 expected my end of July 20
O-9501	Nationwide: Analytics	Nationwide	Nationwide Mutual Insurance	700,000	8/24/2012	Jim Denton	Analysis	Stretch	Active Pipeline	Decisioning	Capgemini	Perpetual	Partner Sourced	Internal Solution	Cap to meet with Nationwic meetings in late February.

My Pipeline by Stage EXPORT TO EXCEL

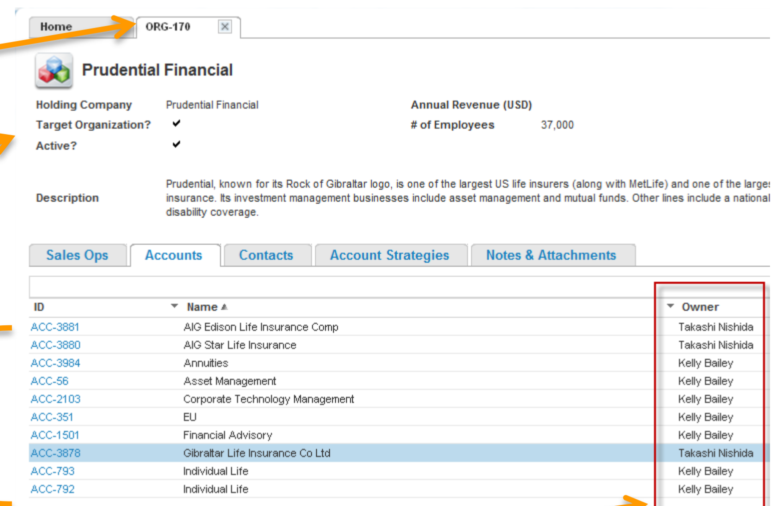
	Opportunity Count	Amount (USD)
Stage:Analysis	18	24,203,482
Stage:Development	26	23,225,010
Stage:Qualification	18	19,300,000
Stage:Idea Generation	6	6,250,000
Stage:Vision Creation	8	6,132,500
Stage:Legal	5	5,740,000
Stage:Decision	4	3,144,511
Grand Total	85	87,995,503

Organizations tab



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

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

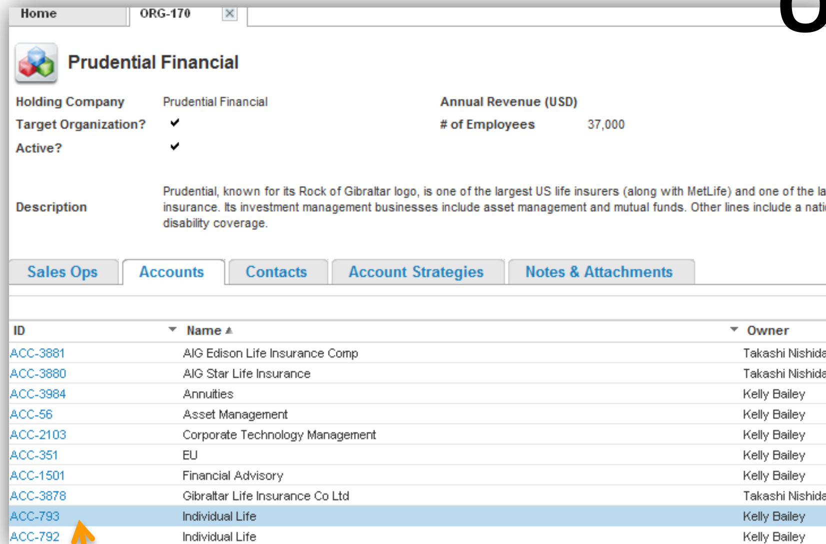


You then see the Org Header and the Related Accounts.

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.

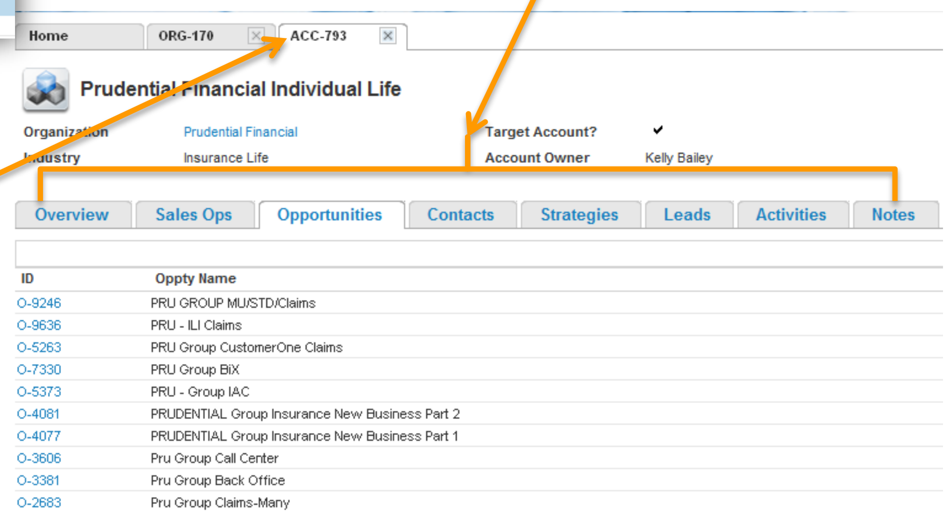
Landing Page

Organizations tab



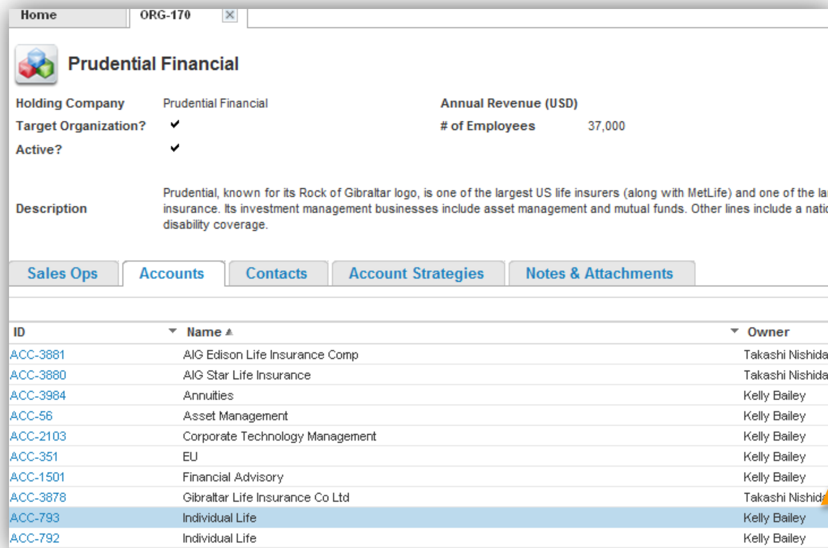
The Tabs in the middle of the page give you more details about the account

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

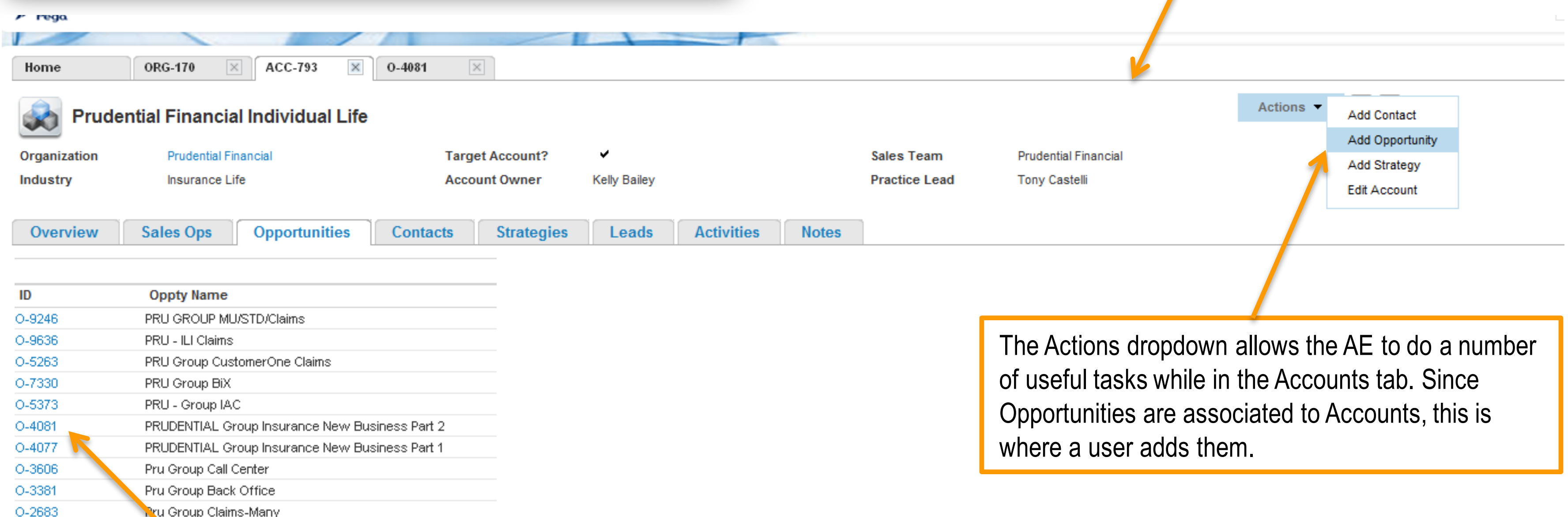


Landing Page

Accounts



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

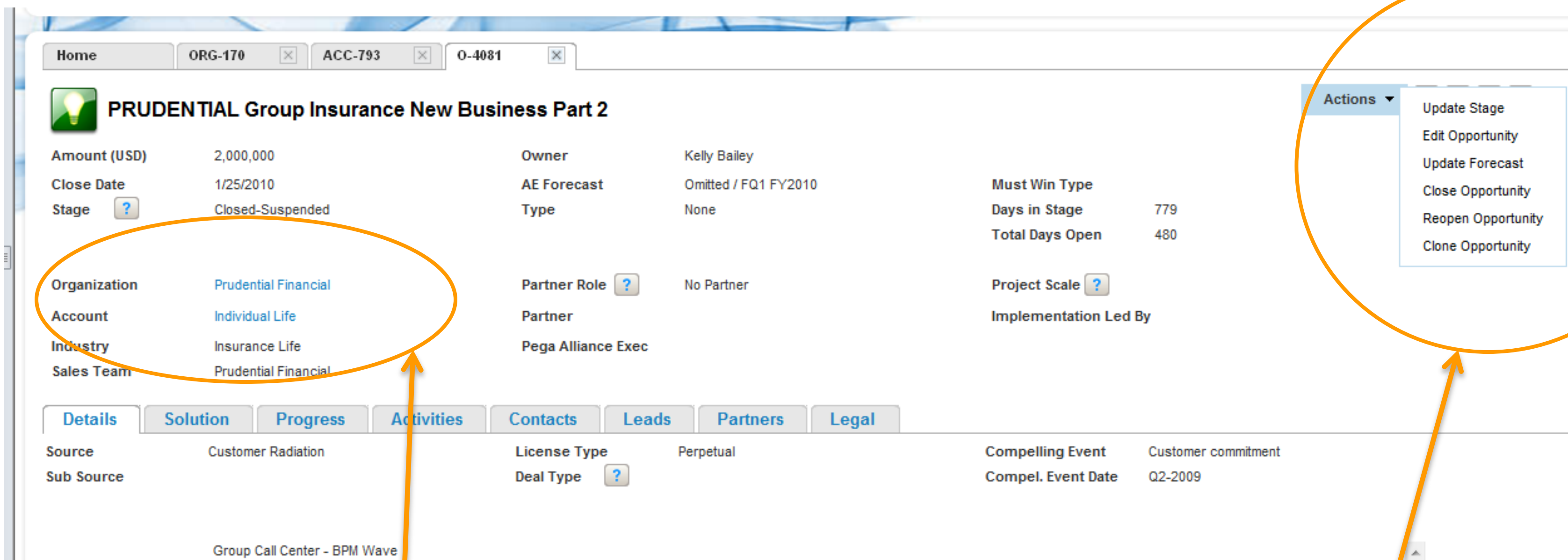


The Actions dropdown allows the AE to do a number of useful tasks while in the Accounts tab. Since Opportunities are associated to Accounts, this is where a user adds them.

You can open the Opportunities page by clicking on it’s link.

Opportunities

AE existing Opportunities



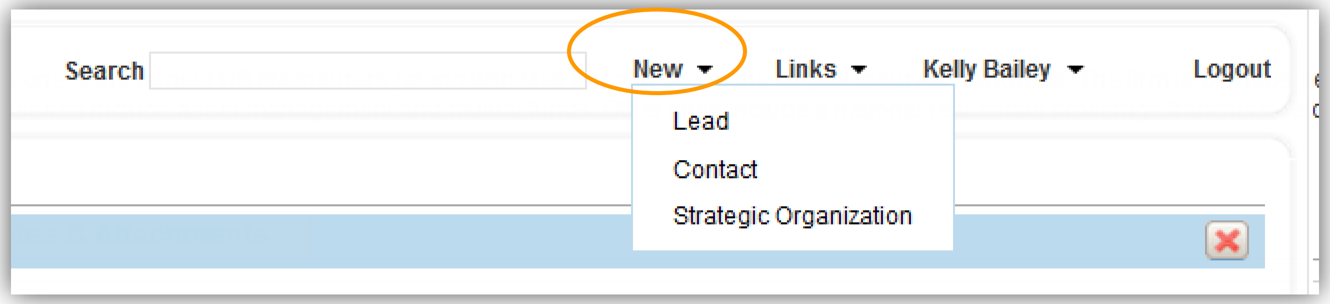
The Opportunities page gives you the pertinent information in regards to the Opportunity. The Organization and Account names are hyperlinked, so as to open new tabs if you click on them.

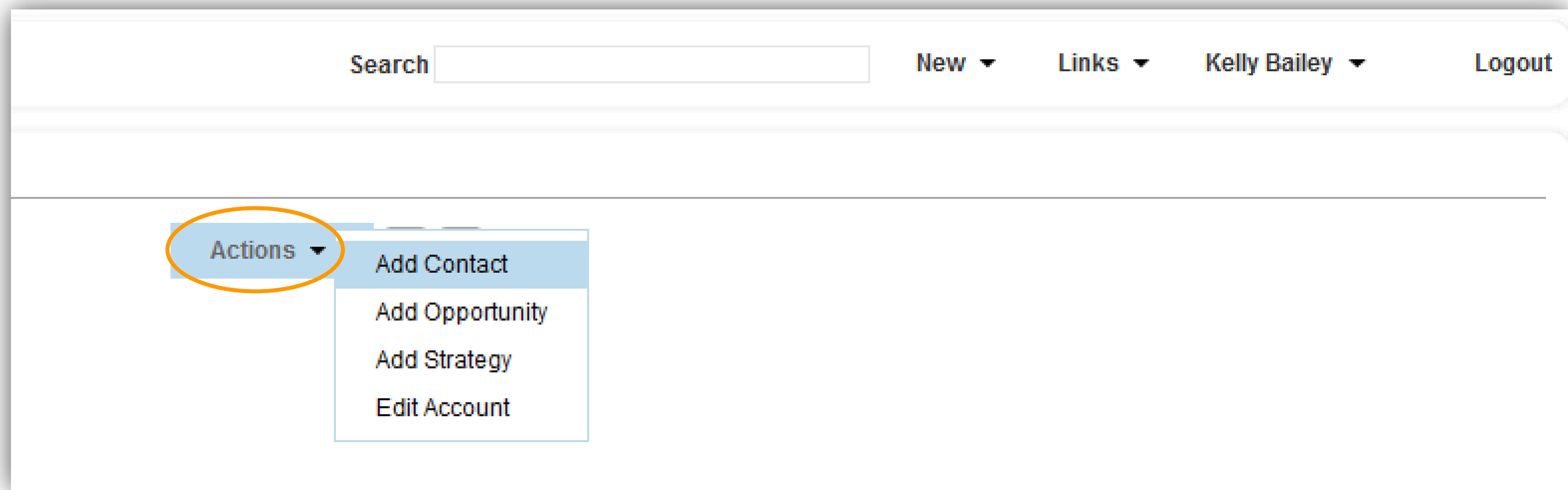
Other information can be edited or updated using the Action dropdown menu

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.

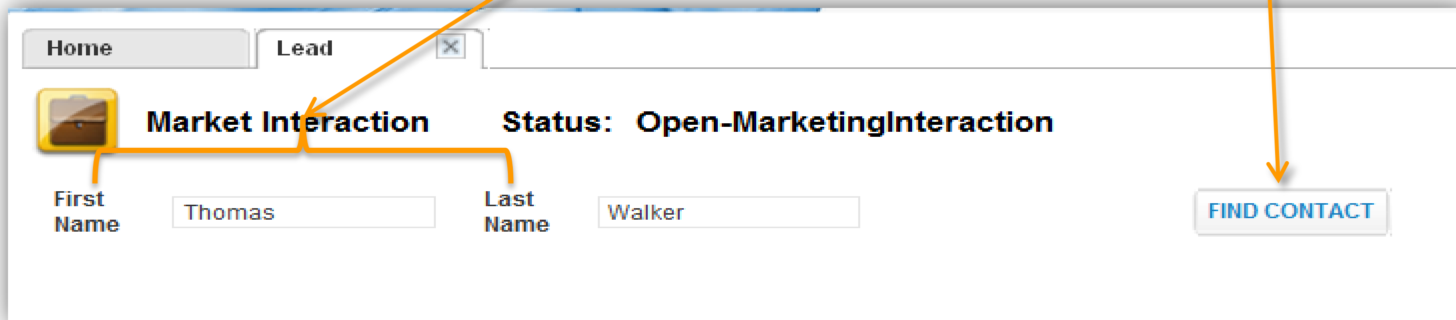
*Notice the “Actions” dropdown has different options depending on if you are in the Accounts, Leads, Opportunities or the Organization screen.

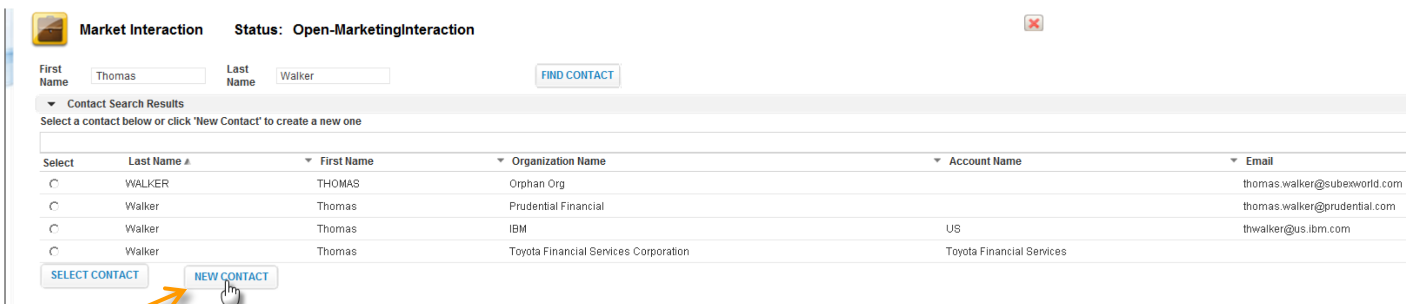




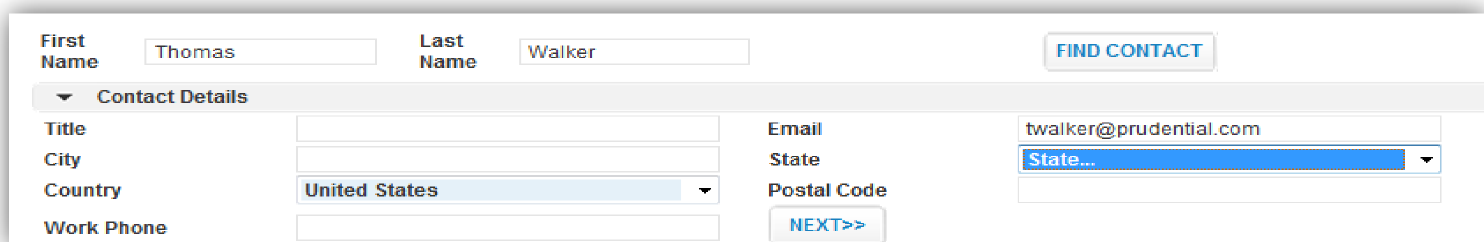
Starting New Processes – Cont'd

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





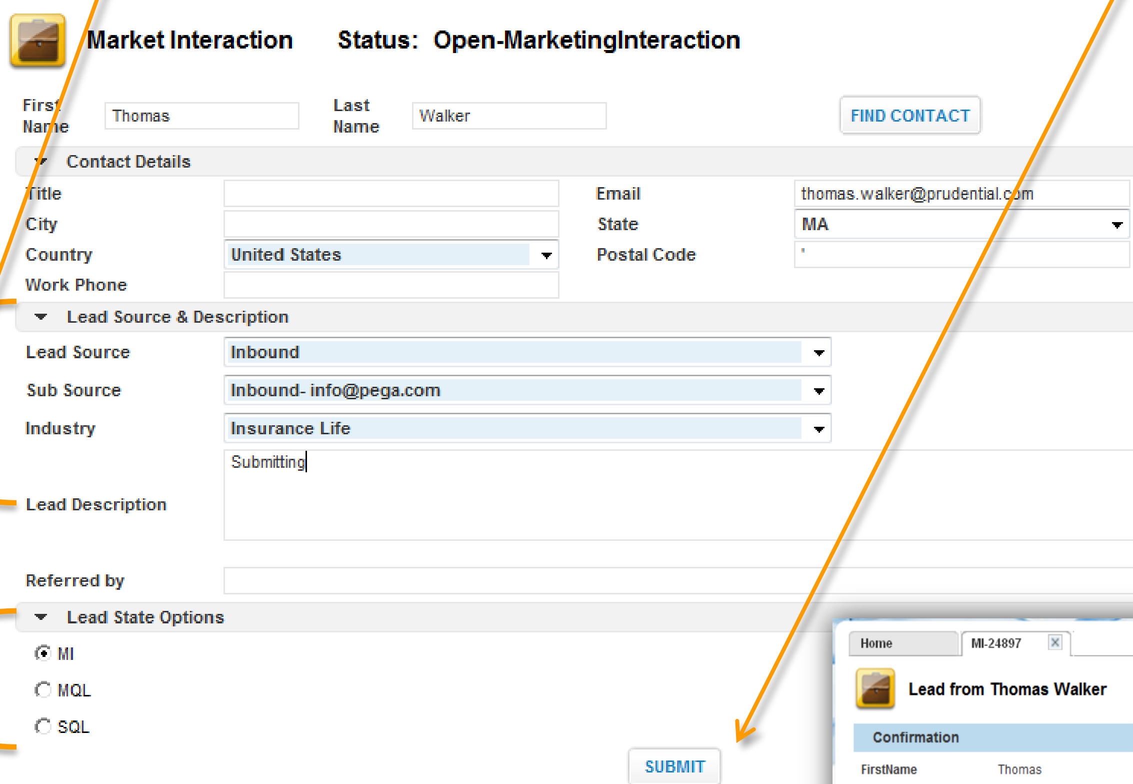
This will open a list of names. If you see the contacts name, select the Radio Button next to the name, then click Select Contact, if not, click New Contact. On New Contacts, make sure to select the country and Email address.

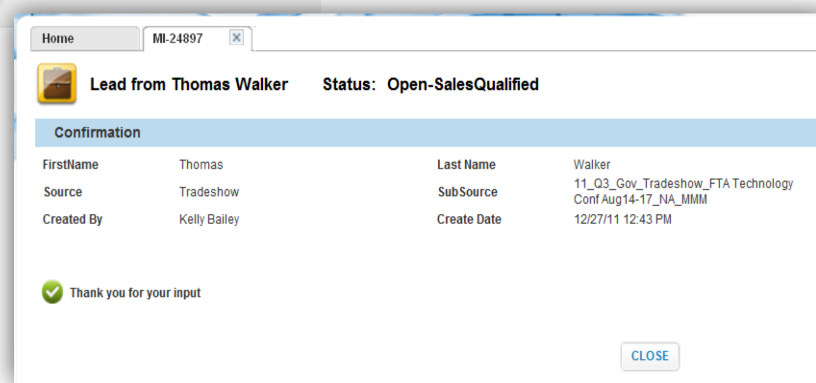


General Navigation

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



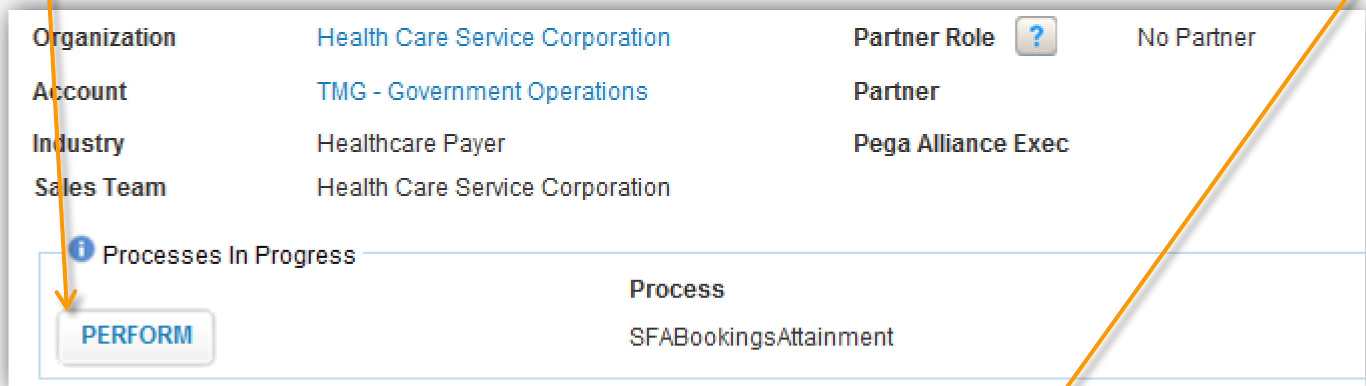


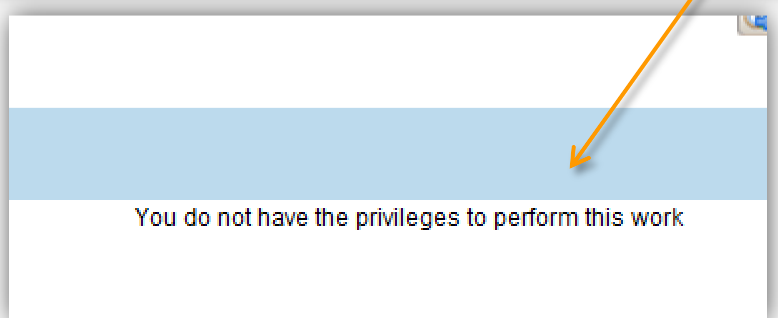
The Lead will then be sent to Sales Ops or a BGR and if this is your Account the Lead will be assigned to you.

General Navigation

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.

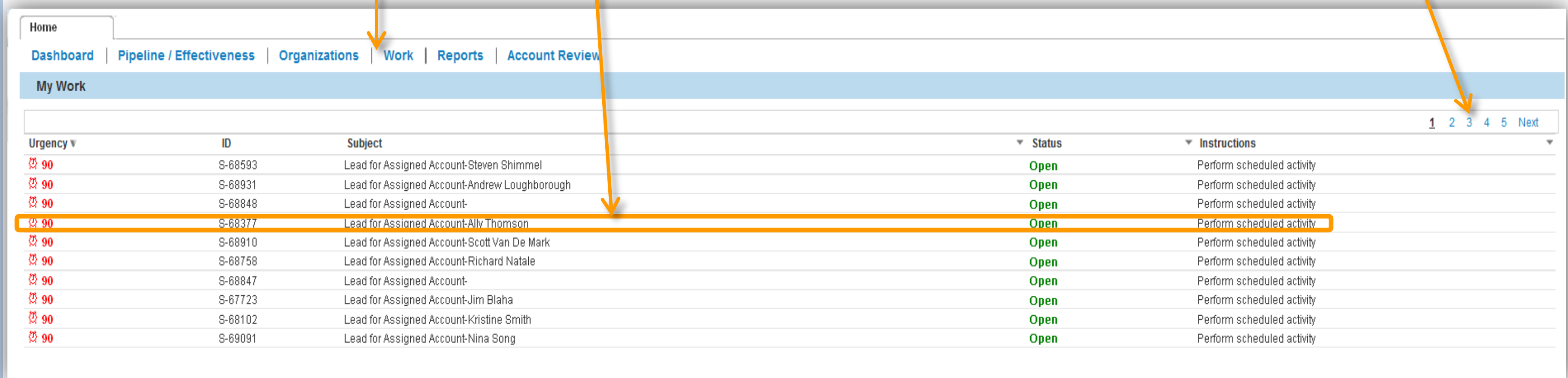




My CPMs Worklist

General Navigation

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

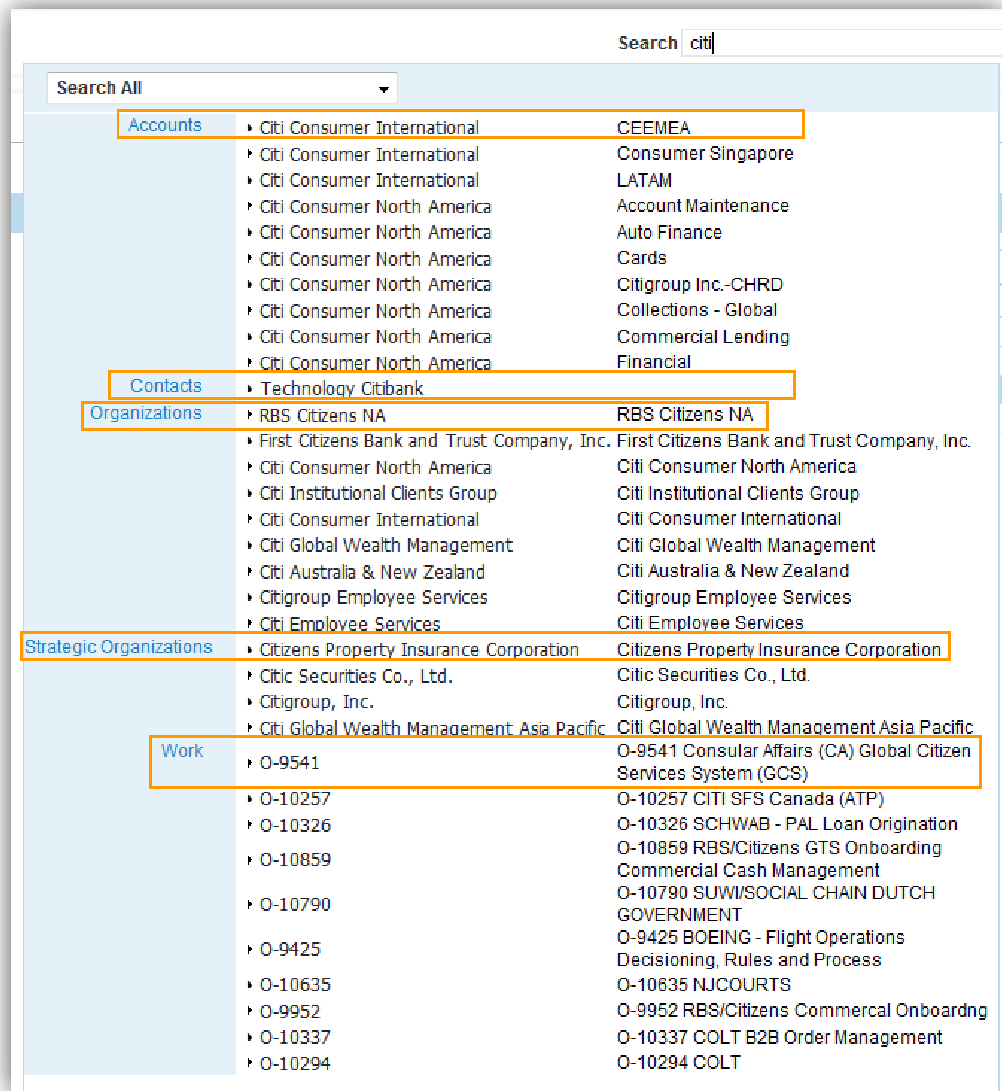


Urgency	ID	Subject	Status	Instructions
90	S-68593	Lead for Assigned Account-Steven Shimmel	Open	Perform scheduled activity
90	S-68931	Lead for Assigned Account-Andrew Loughborough	Open	Perform scheduled activity
90	S-68848	Lead for Assigned Account-	Open	Perform scheduled activity
90	S-68377	Lead for 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

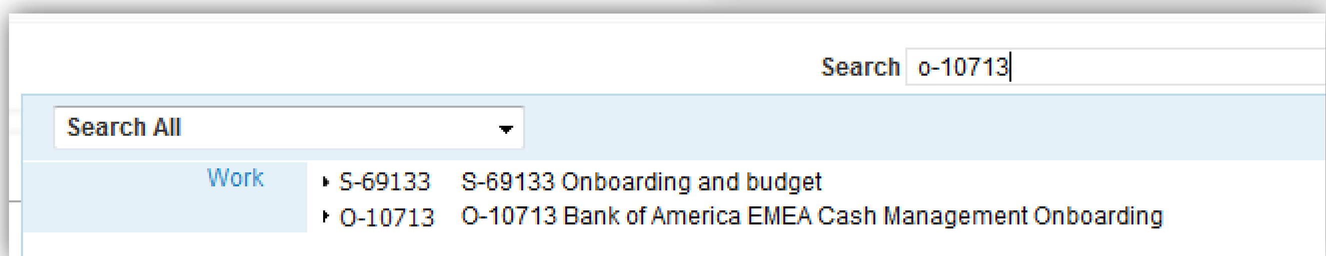
General Navigation

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 #



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

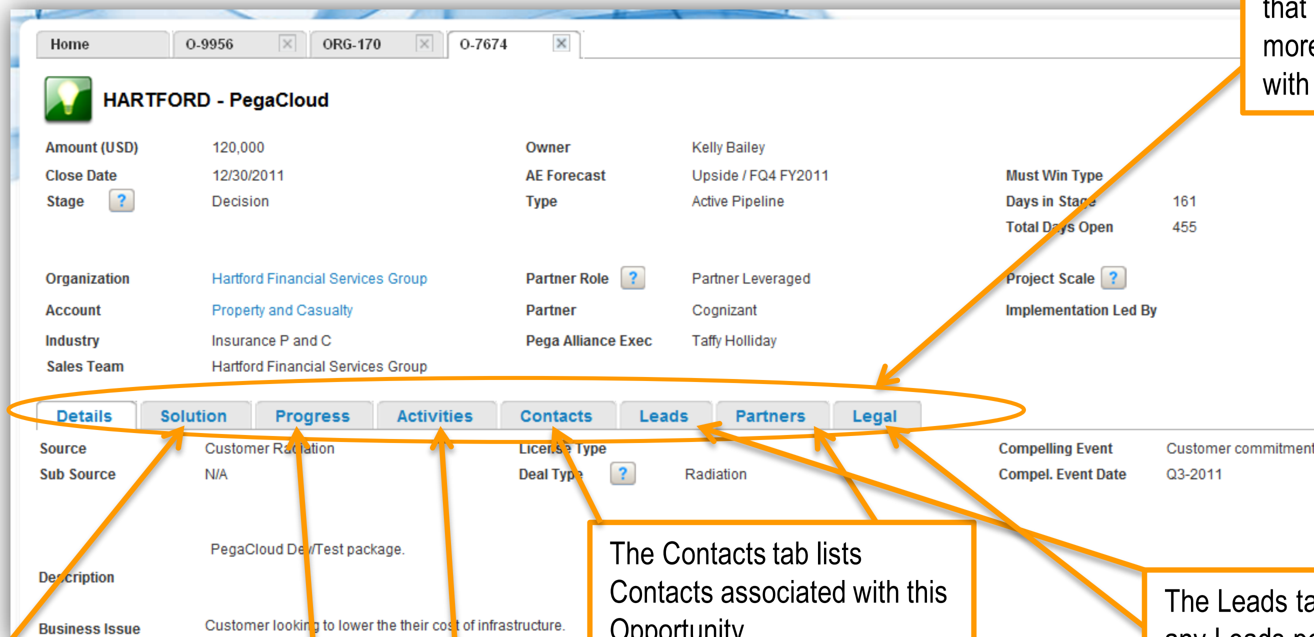
Review ID: R-11903 **Quota:** 2.930

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



The Contacts tab lists Contacts associated with this Opportunity

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

The Solution tab gives you information regarding the industry and competition

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

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

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

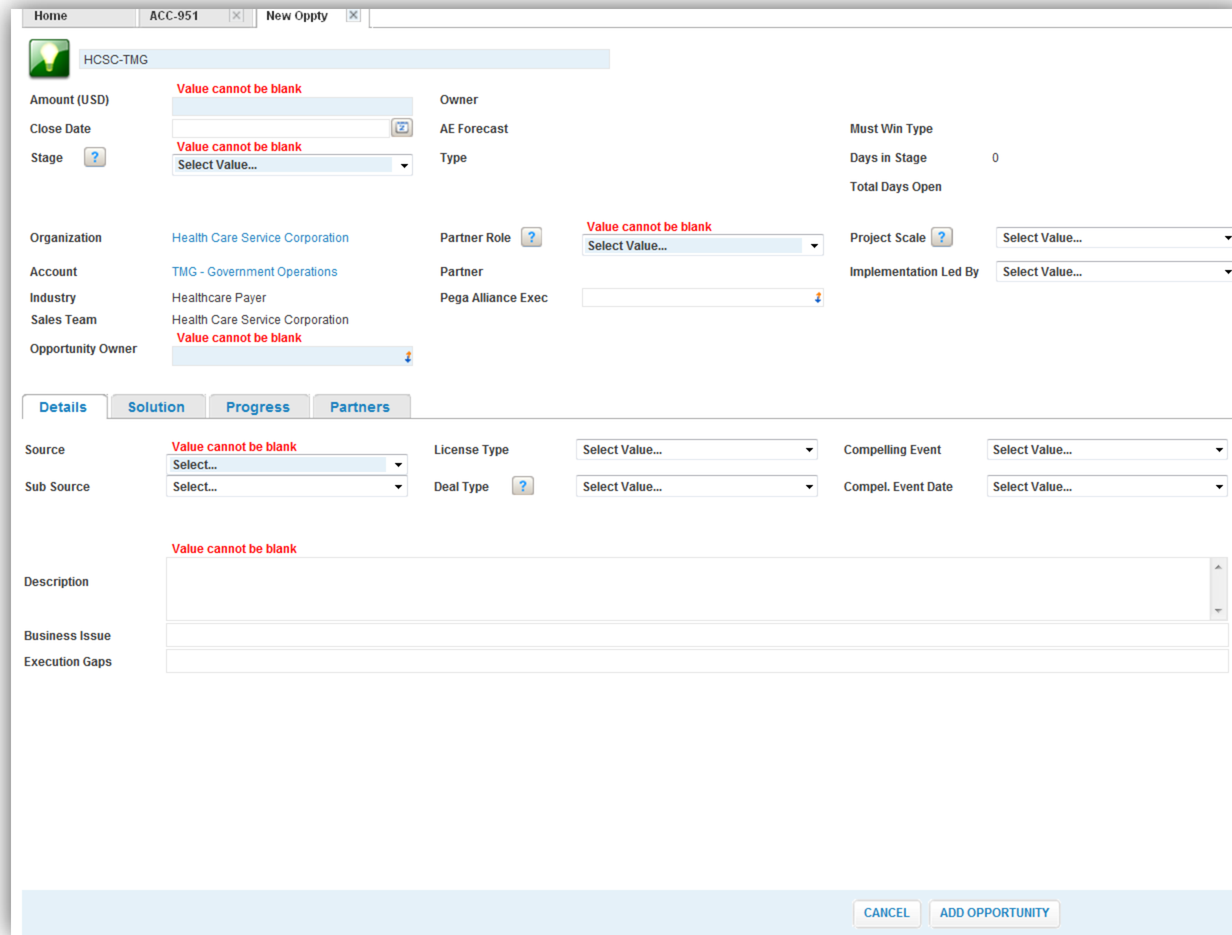
The Legal tab has Contract ID # and Contract Owner information.

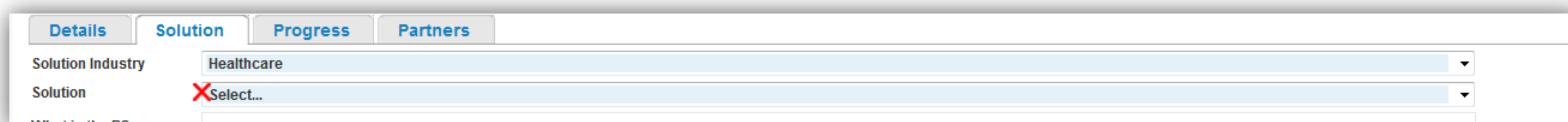
Required Fields for Opportunities

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.





Opportunity Specific Processes

– **Update Stage -** Update stage, amount, close date and milestones.

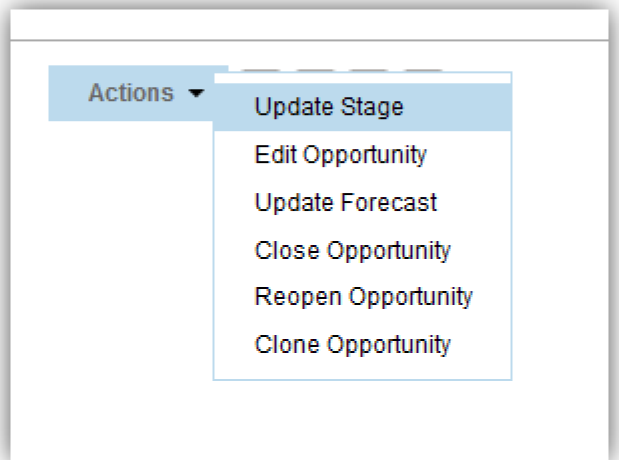
– **Edit Opportunity-** Edit opportunity details; Source, Sub Source, License Type Deal Type, Compelling Event and Compel. Event Date.

– **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

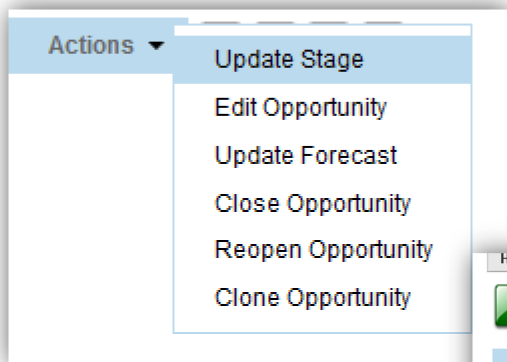
– **Reopen Opportunity** - Reopen a closed opportunity

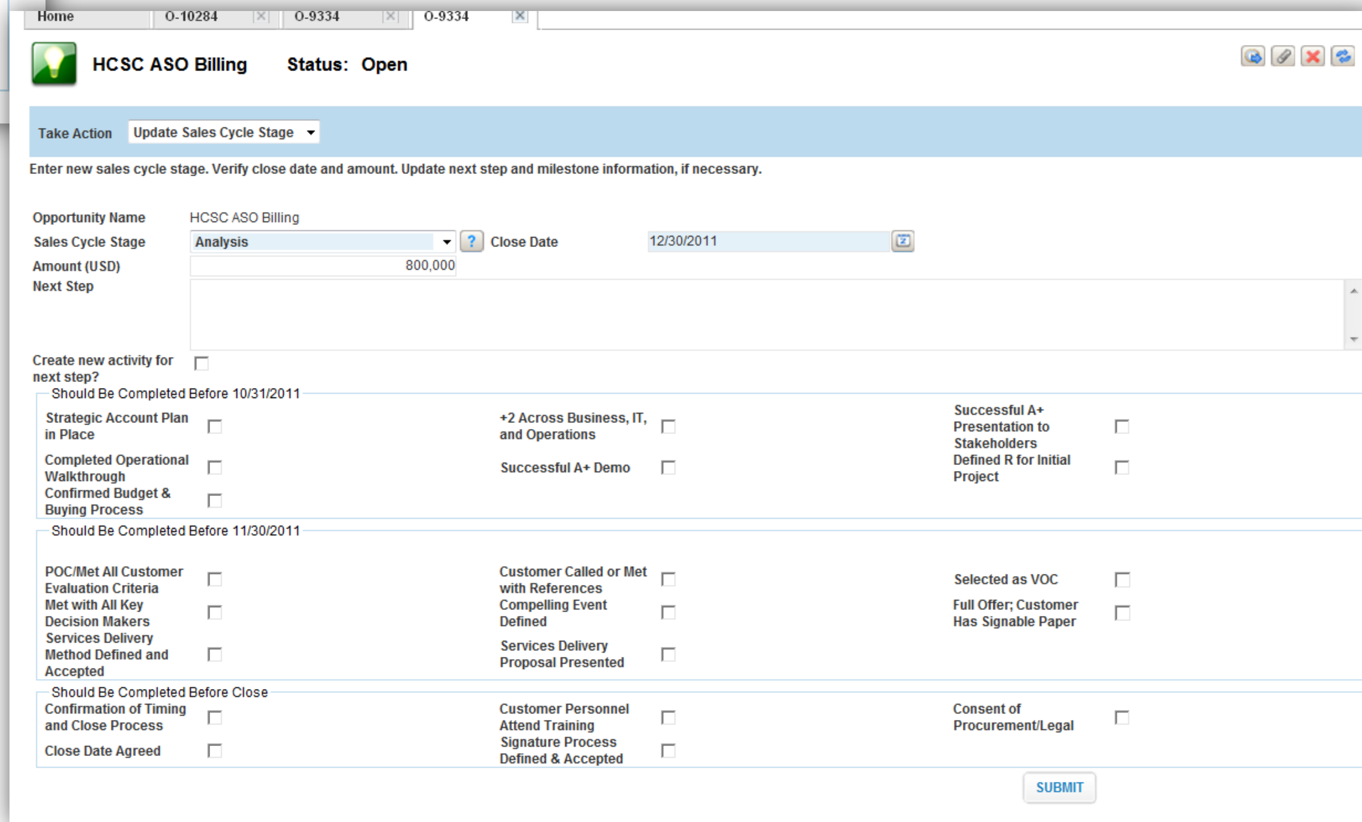
– **Clone Opportunity** - Use an existing Opportunity to create a new (similar) Opportunity



Update Stage

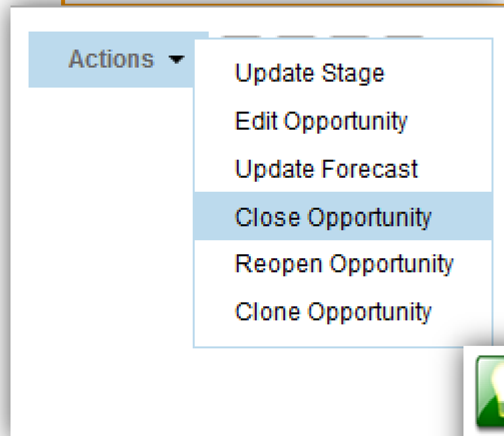
1. With the Opportunity page open, go to the “**Actions**” dropdown and select **“Update Stage”.**
2. The Opportunity stage page is displayed in editable mode.
3. Make your changes and click the **“Submit”** button at the bottom of the page.

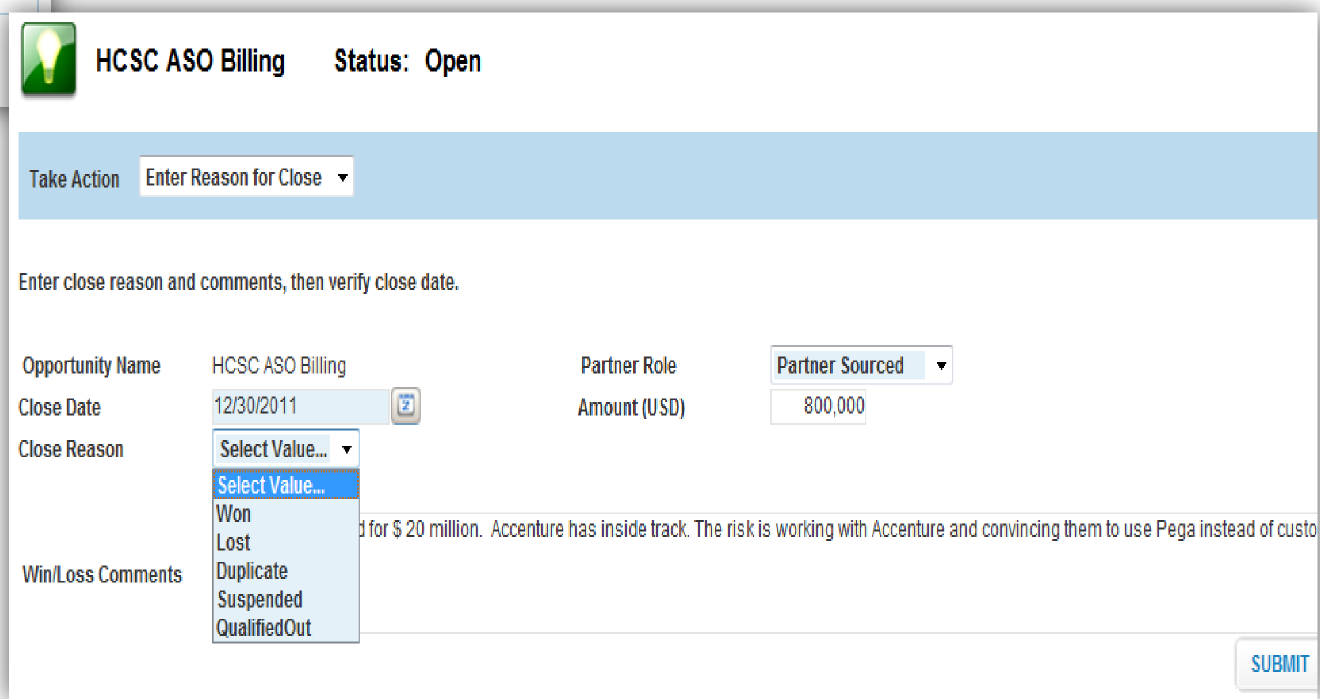




Closing an Opportunity

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"** .





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.

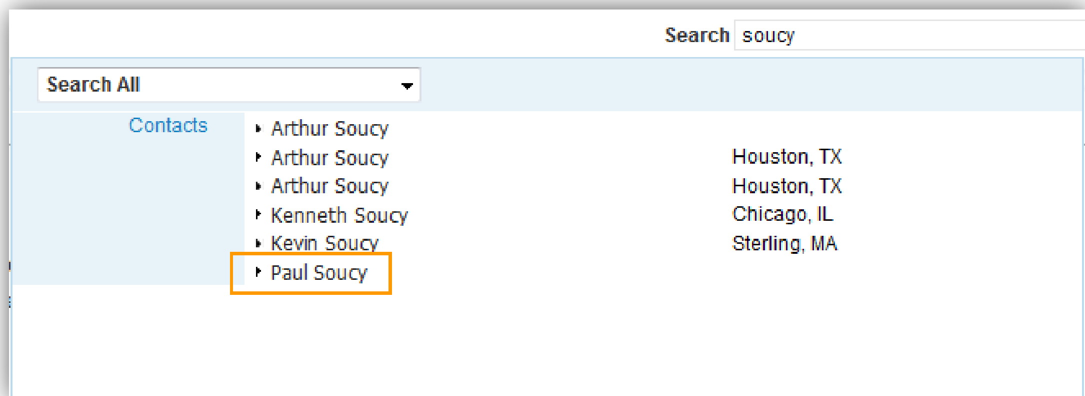
Specialized Activities include:

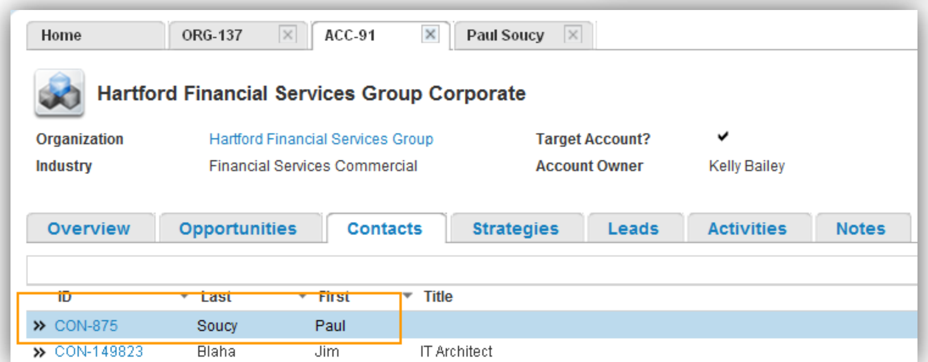
- RFP – RFI Request: RFP/RFI's need the RFP Manager's Assistance. These are only associated to Opportunities.
- Strategy Action Plans: These are Activities for Strategies. These can only be Associated with Account Strategies.

Contacts

Look up Contacts

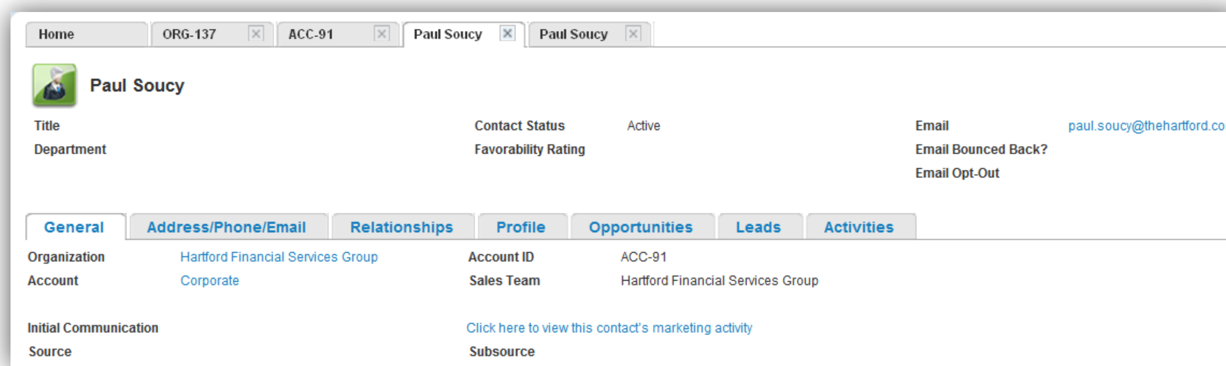
1. You can find Contacts many different ways in CPMs. The first way is to simply do a search of the name in the Search feature





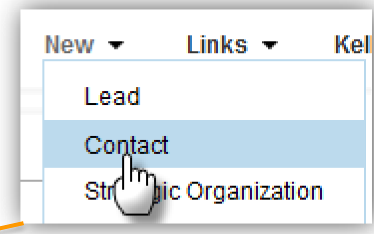
2. If you'd like to search for contacts within a particular Opportunity, Organization or in an Account, you can do that as well

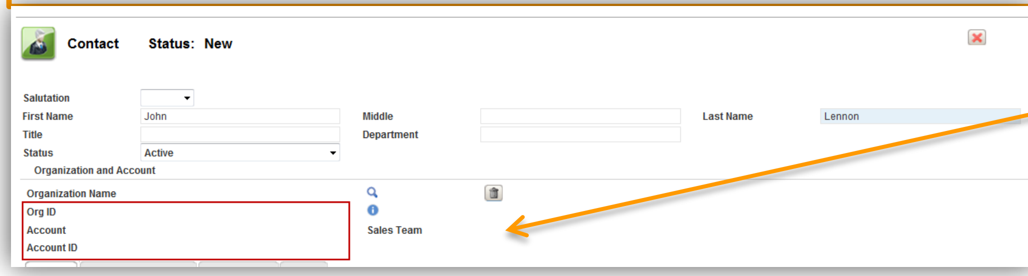
3. By clicking on the link you can open up the contacts page to get all the details available.



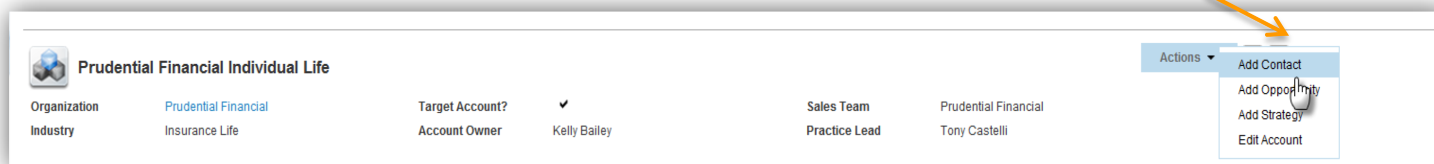
Adding a Contact

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.

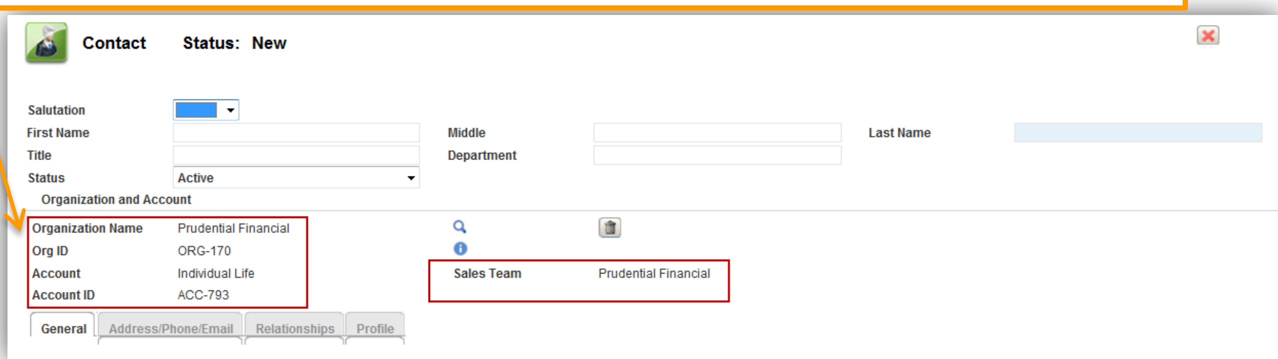




- However, **BEST PRACTICE**, is to add a contact from the ORG/ACCOUNT view.
- With the Account page in focus, go to the **Action** dropdown and select **"Add Contact"**

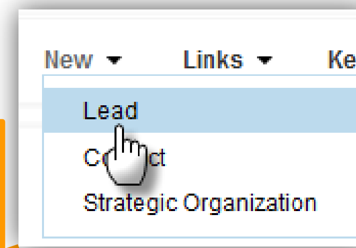


- The **"Add Contact"** page will open. By starting the Add a Contact process from within an Account, the Org/Account information will be pre-populated for you.

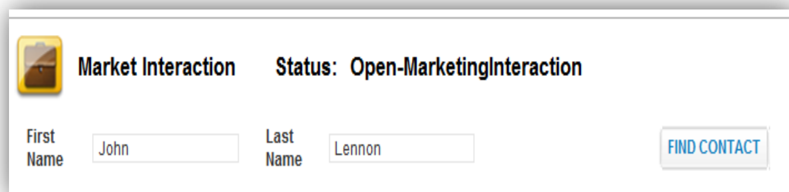


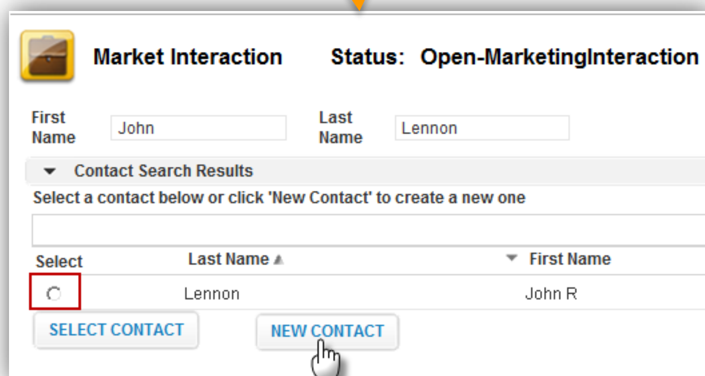
Adding a Contact through a Lead

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

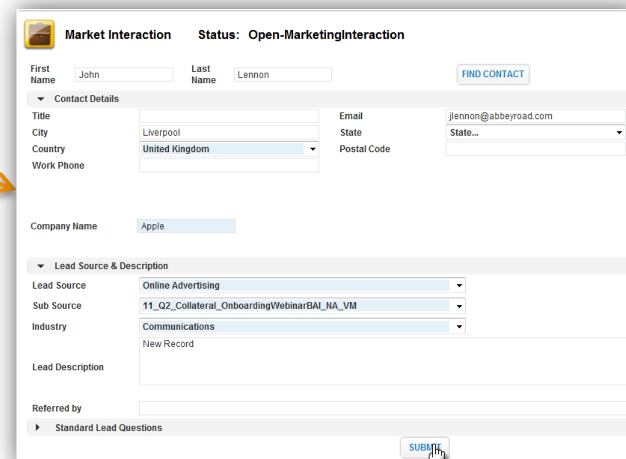


- Then fill in the first and last name





- 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.



CPMs Team Support & Commitment

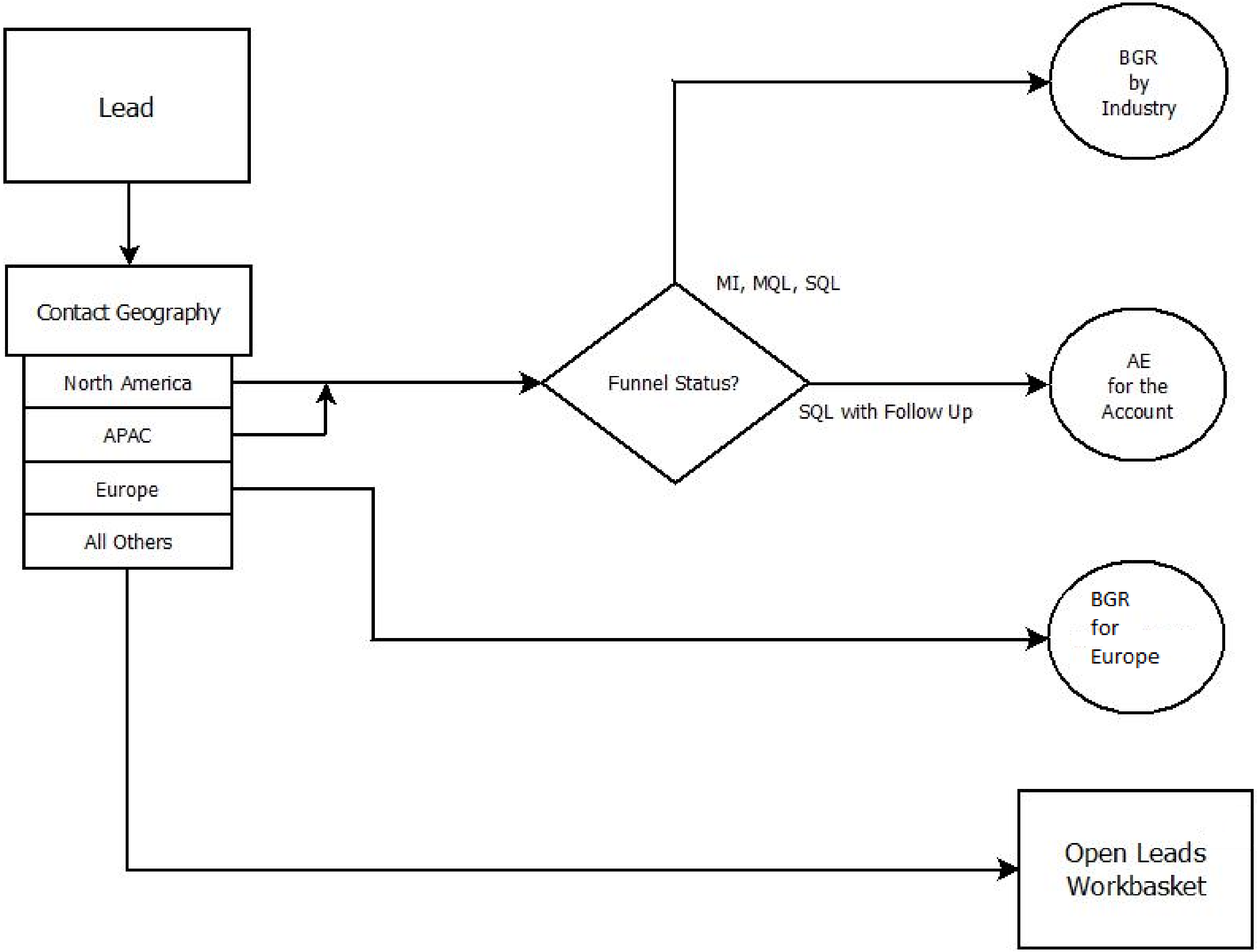
- For **Emergencies** or **Immediate Assistance**, **PLEASE CALL** the CPMs Help Desk at ext. **8669** (617-498-8669)
- For Non Emergencies, please send an email to CPMS.Helpdesk@pega.com Basic issues (new user creation, login issues, etc) and Emergencies will be addressed within the first 24 hours.
- 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

General Navigation

Status from BGR process	
Status:	**BGR Action**
Open-MarketingInteraction	*BGR creates Lead*
Open-MarketingQualified	*BGR promotes to MQL*
Open-SalesQualified	*BGR promotes to SQL without Follow Up*
Resolved-FollowUp	*BGR promotes to SQL with Follow Up*
Resolved-MarketingInteraction	*BGR resolves MI*
Resolved-MarketingQualified	*BGR resolves MQL*
Resolved-SalesQualified	*BGR resolves SQL*
Resolved-FollowUp	*Straight Through Processing*

AE interaction	
Open-Lead-Assigned	*Assign to AE*
Open-Lead-Assigned	*AE accepts assignment*
Open-RequestAccount	*AE requests Account Assignment*
Open-RequestAccount	*Sales Ops moves the Lead to their Worklist*
Resolved-NewOpportunity	*Sales Ops processes Account Request*

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.