

Best Action Plan

Last Modified on 09/15/2016 5:12 am EDT

The Best Action Plan section displays a summary of the Possible Actions flagged as Best Actions, as well as identifying Information Needed.

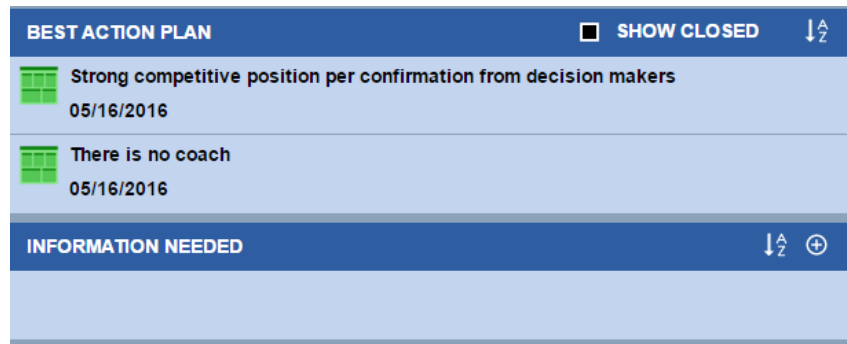


Fig. 17, Best Action Plan

Creating Best Actions

Best Actions are not created by themselves. You need to create a Possible Action first and then flag it as a Best Action by selecting the 'Best Action' check box. Best Actions cannot be edited in the Best Action Plan, they can only be edited in the Possible Actions section.

The 'Show Closed' check box is used when you want to view both Open and Closed Actions.

Creating Information Needed Items

Click the Add icon to create a new entry. If the Repository icon is visible in the top right corner of the section, then the 'View Suggested Items' option is available for selection of default sets of Information Needed. If it is not visible then there are not 'Suggested Items' available. Please contact your Sales Leader and System Administrator for availability of the repository.

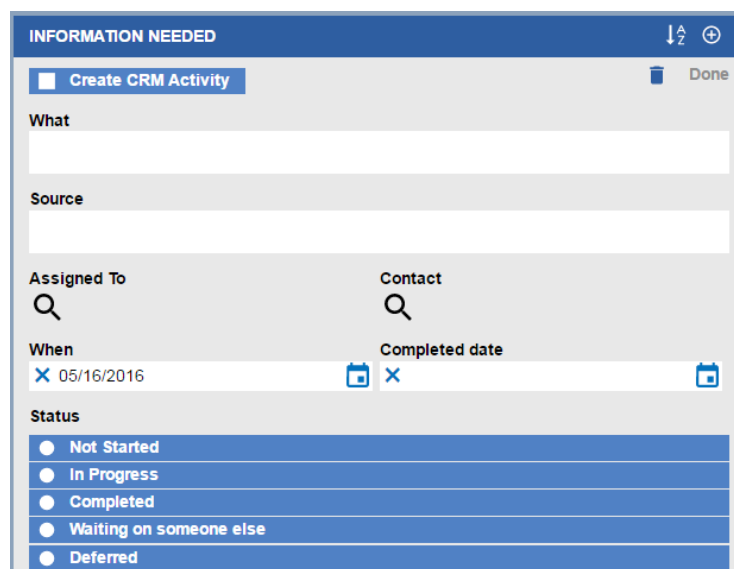
The image shows a form titled 'INFORMATION NEEDED' with a plus icon in the top right corner. At the top left of the form is a checkbox labeled 'Create CRM Activity' and a 'Done' button with a trash icon. The form contains several input fields: 'What' (a large text area), 'Source' (a text field), 'Assigned To' (a search field with a magnifying glass icon), 'Contact' (a search field with a magnifying glass icon), 'When' (a date field with a calendar icon and a close 'X' button, showing '05/16/2016'), and 'Completed date' (a date field with a calendar icon and a close 'X' button). At the bottom, there is a 'Status' section with a list of radio button options: 'Not Started', 'In Progress', 'Completed', 'Waiting on someone else', and 'Deferred'.

Fig. 17a, Creating Information Needed items

Create CRM Activity - Checkbox which will create a task in the CRM if mapping is setup within

the Admin Functions.

What - Free form text entry describing the action

Source - Free form text entry

Assigned To - User within the CRM who is responsible for completing the action (defaults to current user)

Contact - Customer contact within the CRM who the action is focused on or directed at

When - Calendar select date the action is due by (defaults to current system date)

Completed date - Calendar select date the action is completed

Status - List of action status options (Not Started, In Progress, Completed, etc.)

Best Actions along with your Possible Actions have the ability to be mapped in the CRM/SFA system. The activities show up as Tasks in the Opportunity section. If for some reason this is currently not set up in your account, contact your System Administrator to create the mapping connection between your CRM/SFA and the Blue Sheet.

Launching a Green Sheet from Blue Sheet

Launching a Conceptual Selling® Green Sheet from the Strategic Selling® Blue Sheet is done via a Green Sheet icon within the Best Action Plan section. When the "Select as Best Action" checkbox within the Possible Actions dialog is checked, and the Blue Sheet is saved, then the Green Sheet icon appears for that Best Action.

Click on the Green Sheet icon and the Green Sheet will launch in a separate window. Please note that if your user license is "Read Only", then you may not access the Green Sheet this way, and will need to launch the Green Sheet from the activity record. Launching the Green Sheet from the Blue Sheet requires either a Manager's license or a full Read/Write license.

NOTE: If your organization does not utilize the Conceptual Selling (Green Sheet), then ignore the icon.