Aliaxis CRM

USER MANUAL

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1. Introduction

1 Introduction

This book is a manual of the CRM that is part of the CRM training materials.

The whole training materials contain:

a) this manual that details all the vocabulary, and all the entities and the fields of the forms.

b) a set of tutorials in form of videos that show how the CRM works and the dynamics aspects that may be more complex to explain than a manual.

c) Takotac: a set of drills in the form of questions to understand what to in the different situations.

d) a follow up document that explains to anyone the proper sequence to learn the CRM.

These elements complement each other to explain how CRM works.

Convention

All fields that should be entered in a form will have **this style** in the documentation.

All calculated fields will have **this style.**

2. Terminology

2 Terminology

2.1 Dynamics terminology

With Dynamics 365, as with any product, before using it, it is essential to understand how it works. In order to understand how it works, one needs to understand its components and the vocabulary it uses. This chapter explains the key terms you need to know.

- **Activity**: In English, activity is defined as something that has been done or that should be done. In Dynamics, this includes all interactions with a customer, whether an individual or a legal entity, i.e., appointments, phone calls, letters, emails, tasks, etc. Activities are stored in special forms that have the foolowing characteristics :
  - A "Regarding" field to connect the activity to any entity to designate who or what is concerned by this activity (which contact, which account, which opportunity, which initiative, etc.)
  - A special button “Mark Complete” to indicate that the activity has been done.
  - Activities are visible in the Timeline of the entity referenced in the regarding field.

- **Assign**: most forms have an assign button. This allows one to change the owner of a record. For example, if an account is assigned to another sales person. The assign button will change the ownership of the account. When someone assigns a record to somebody else, the new owner receives an email stating so.
- **Business Process Flow**: it is a representation of a business process and is displayed visually as a heading across the top of a form. Business Process Flows are not automated processes. They are a guide to help complete a process

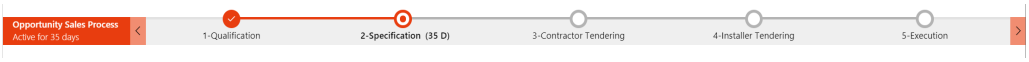


Figure 1 : A business Process Flow

- **Connections and connection roles:** connections in Dynamics enable you to create and view the relationships between accounts. A connection has a role that explains this relationship. For example, *Ferguson Plc.* could be the distributor of *Subs Plumbing & Heating Ltd*. We would create a "distributor" role. Of course, if *Ferguson Plc*. is the distributor of *Subs Plumbing & Heating Ltd*, then *Subs Plumbing & Heating Ltd* is a distribution client of *Ferguson Plc.* So the role reads as a distributor in one direction and as a distribution client in the other direction.

- **Dashboard**: A dashboard is a live snapshot of the CRM data at a given time. It is possible to display graphs, views, web pages directly in a dashboard.
- **Entity**: An entitity, according to the dictionnary, is a thing with distinct and independent existence. In Dynamics, an entity is synonymous with a file or a table. Examples of entities are account, contact, prospects, opportunities, etc.
- **Field**: a field is simply a "box" into which data is entered. Fields always belong to an entity. For example, the Last Name and First Name fields belong to the Contact entity, and we use them to enter the name of a person. An entity is comparable to an Excel data table, and the fields correspond to the columns of the table. The fields are of several types: text, list, whole no., decimal, etc.
- **Form**: A form is a CRM screen that displays the contents of a selected record (for example, the record for the contact "John Smith"). A given entity (e.g., contact) may have several forms: a form that displays all fields, and a quick entry form that displays only the main fields. There are often 2 forms in the CRM, the standard form and the Quick Create form that can be accessed with the + on the top ribbon. (see Quick create form below)
- **Marketing lists:** despite its name, marketing lists are not for marketing only. It is a list of either accounts or contacts grouped together. It can be a list of people invited to a fair, a list of companies that I must pay extra attention to, a buying group, etc.
- **Owner**: In Dynamics, each record belongs to a user or a team. For example, a salesman, John, is responsible for 15 accounts. All 15 accounts will be tagged as belonging to John. This allows him to quickly access the information that concerns him: views of his accounts, reports for his accounts, own dashboards and KPIs: accounts, contacts, activities, etc. On top of that, it allows to create fine security features: for example, prohibiting anyone other than the owner from seeing or modifying data.
- **Quick create form:** it is a simplified form with only the key fields. It has less fields, and appears on top of what was on the screen.

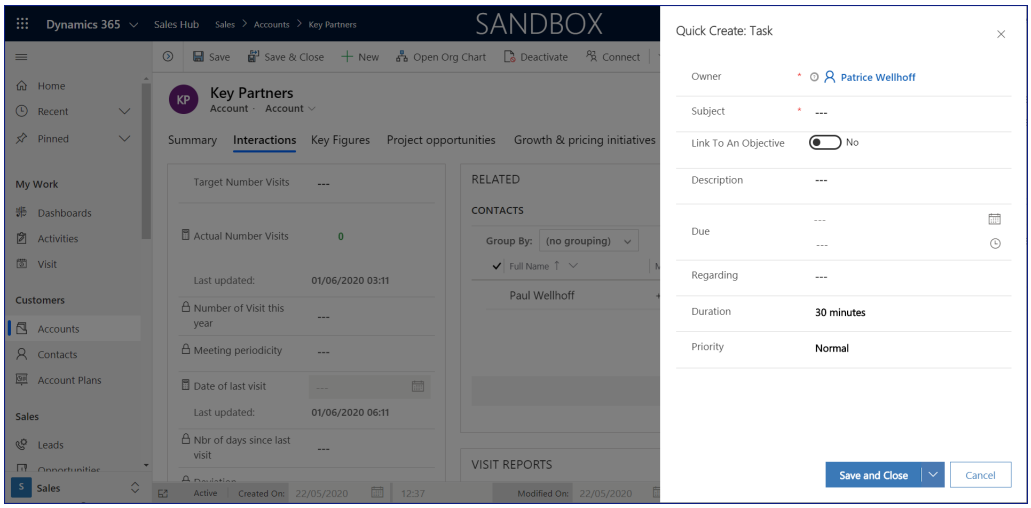


Figure 2: Quick Create task over an account

- **Record**: A record is a set of fields related to an entity. For example, you may have 100 contacts in your system: each one is a record. An entity is comparable to an Excel data table, and the records correspond to the rows of the table.
- **Regarding:** a special field in the activities form to designate designate who or what is concerned by this activity (which contact, which account, which opportunity, which initiative, etc.)
- **Related (Tab):** Anything that is related to the current record as a one-to-many relationship appears in a sub-grid on the form, and under the record menu on the navigation bar. For example, each account (one) may have one or more contacts (many) shown on the account form. The majority of relationships are visible in the form, but some may not be, when the link is rarely used. It will always be found in the Related tab.

Figure 3: Related tab in the Account form

- **Section:** part of a form grouping several fields together.

Figure 4: 2 sections of the Account form

- **Selector**: the selector is the small symbol at the right of the name of a view, a dashboard, etc. It allows one to change the current view, dashboard. The

little pin at the left of the items displayed can be used to change the default view/dashboard that you want to display.

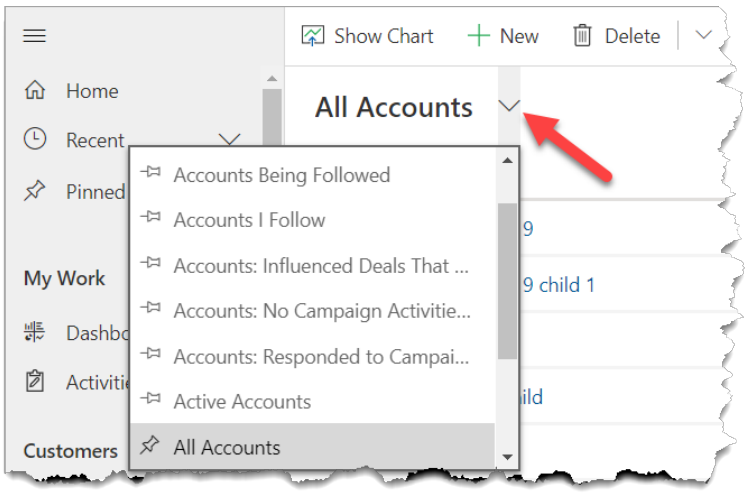


Figure 5: View selector

- **Share**: Most forms have a share button. This allows one to share the ownership of a record with several people. For example, several sales persons must work together on the same account, but the security options selected only allow the owner to modify them. One will have to share the record in order to work on it with others. Sharing does not change the owner of an account.
- **Tab**: the highest-level part of a form

Figure 6: Tabs of the Account form

- **View**: Views allow you to filter, sort, and display the records of an entity. For example, we could create the view of contacts that belong to customer type accounts of a given salesperson. A view displays the fields that are considered important, not necessarily all fields.

2.2 Marketing entities

There are different entities that are interrelated in order to perform a sales or marketing campaign.

They are summarized below. A video explains how to perform a marketing campaign and how all these entities work together.

Relationship between Marketing entities

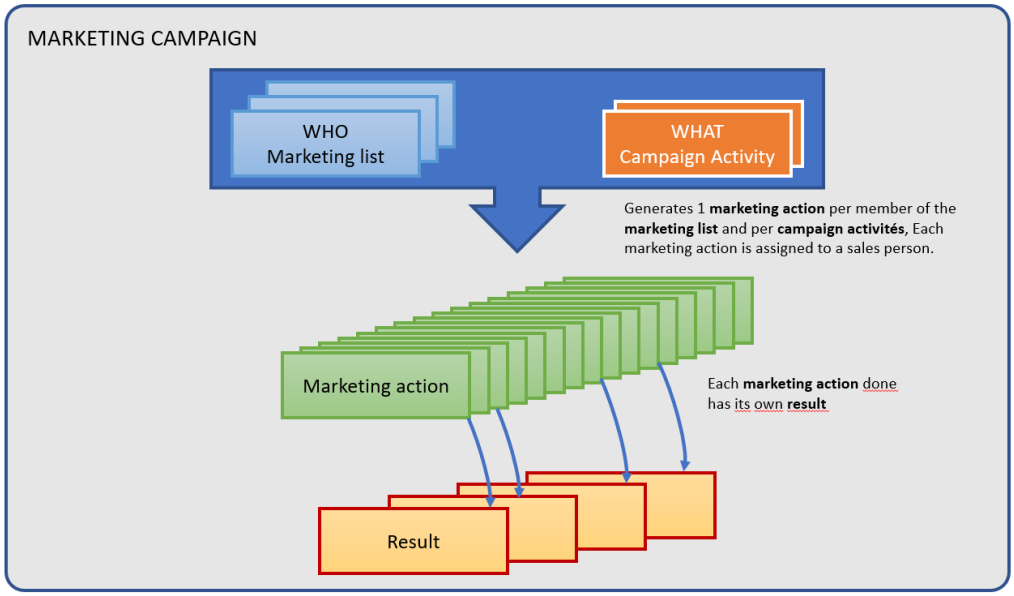


Figure 7: Marketing diagram

Marketing campaign: encompass all the data of a campaign; a campaign is a planned set of activities that people carry out over some time in order to achieve something.

Marketing list: it contains who this campaign is addressed to (accounts or contacts)

Campaign Activity: it is a description of the action to be carried out with the various customers referenced in the marketing lists.

Marketing action: Once the marketing lists and campaign activity have been defined, the system will generate per customer referenced in the lists a marketing action to be performed corresponding to the defined campaign activity. If there is only one campaign activity (which is recommended), there are as many marketing actions as there are customers in the marketing lists.

Results: Each marketing action will give a result, which will be stored in a Campaign Response record.

2.3 Business Terminology

- **Account prioritisation :** customer prioritization & time investment is based on both size of the customer and current share of wallet
  - Grow: these are accounts where we have both a high share of wallet and a high growth potential. They should represent 40-45% of the visits.
  - Invest: these are accounts where we have a low share of wallet and a high growth potential They should represent 45-50% of the visits.

- Maintain: these are accounts where we have a high share of wallet and a low growth potential. They should represent 10-15% of the visits.
- Monitor: these are accounts where we have a low share of wallet and a low growth potential. They should represent 0-5% of the visits.

- **Account type:** describes the general activity of an account. It can be one of the following: Investor, Planner, Contractor, Installer, Distributor, Utility or OEM.
- **Buying group:** group of distributors that buy together to negociate better prices. An account can be part of several buying groups. Buying groups are stored in marketing lists (see definition).
- **Growth Database:** it is a mapping of the total market, account per account for those we know, and globalized for the accounts we do not know, with their demand by product, our share of wallet, and our primary competitors. The growth database is the total of all the "Aliaxis Business Overview" records.
- **Initiative** : An initiative is a specific action to achieve sustainable or temporary impact on sales volume (Net Sales) and/or margin (Contribution), or to ensure not to lose a customer that we may risk to lose. It is always specific to an account and a product family. The owner of the initiative is the salesperson who will implement the initiative, often the sales rep. We have 3 types of initiatives :
  - Growth : any initiative which purpose is to increase the volume of sales versus the previous period..
  - Pricing: any initiative which purpose is to increase margin compared to the previous period.
  - Protect: this is a new type of initiative. This is when we are at risk of losing business if we do things as usual. Therefore we have to act not to lose business, and we create this as an initiative to follow it up. The estimated revenue if the value of the business that is at risk.
- **Leads and opportunities**: An opportunity is a customer project for which we have decided to spend time and effort in order to place our products. That is what we call qualifying an opportunity. Before an opportunity is qualified, it is called a **lead**. Once it has been qualified it becomes an **opportunity**. Leads and opportunities are two different entities.
- **Nature of activities** : See below

Name
Acoustic Engineering Office
Architect
Bricklayer / Mason
Building Infrastructure / Structural Engineering Office

Building Materials Trade
Building products
Carpenter
Civil Engineering
Civils
Consultant
Developer
Distributor (administrative)
Drywall worker
Electrical device specialist
Electrical Installer
Engineering office
EPC
Floor covering installers
Fluid Technology Engineering Office
General Builder
General Contractor
General Contractor and Real Estate Developper
General Wholesaler
Groundworker
Hotel Owners
House Builder - National
House Builder - Small / Medium
HVAC & Plumbing
HVAC contractor
Industrial Engineering
Industrial Owners
Industrial supplies specialist
Industry Specialist
Inspection office
Interior Designer
Investor end user
Iron and Metal Merchants
Ironmongers
Landscaping
Landscaping contractors
Large DIY
Major Buildings Contractor

Medium DIY
MEP Consultant
Merchant website
Metallic Construction contractor
Metallic Construction Installer
MOD Owners
Other
Other Industry
Other private owner
Other public owner
Piping Installer
Plastics Specialist
Plumbing and HVAC contractor
Private Healthcare Owners
Professional union
Project management assistance
Public Healthcare Owners
Quantity Surveyor
Road / Infrastructure / Utilities contractor
Roofer / Roofline
Roofing Contractor
Roofing Specialist
Sanitary and heating Merchant
Self-employed contractor
Social Dwellings
State Administration / Municipality
Surface treatment
Swimming Pool Construction
Tiling Specialist
Timber Merchants
Training Company
Utilities piping system contractor
Waste Water Drainage
Water Supply Company
Water Treatment

- **Product:** what is called a product in the CRM is a product family. We do not go beyond this level to analyze customer interest, opportunities or initiatives.

List of UK products

ABS	Frames & Supports	Monoklip	Redi Roof Vents
Accessories for pipelines	FRIAFIT	Nicoll AAV	REDI Sewage
Accessories for pipelines system	Friagrip	Nicoll Bathroom Floor Drains	Redi Visible tanks
Accessories for valves	FRIALEN	Nicoll Frame & Support	Riuvert S&W PVC
Accessories for valves system	Friaphon	Nicoll Hydrotherapy	Roof & Terrace Drain
Acoustic drainage Non Aliaxis	FRIATOOLS	Nicoll Inspection Chambers	Roof Drainage
Acoustic drainage Non Sytem	Fuel System	Nicoll PVC S&W Easthetic	Roof vents
Acoustic Soil & Waste	Gamma 55	Nicoll R&T Drain	Roofing
Actuation	Gas Supply	Nicoll Roof Vents	Saddles
Air release valve	Gas supply PE systems	Nicoll S&W PVC	Sanit
Air release valve_	Gaskets	Nicoll Sewage	Sanit AAV
Airline Xtra	GASYPOL	Nicoll Toilet seat	Sanit Bathroom Floor Drains
Akasison L	Girair PVC	Nicoll Visible tanks	Sanit Concealed Cistern
Akasison L-202006091406266561	Girpi S&W PVC	Nicoll Waste Outlets & Traps	Sanit Toilet seat
Akasison XL	Goema	Nicoll WC Flush & Float valves	Sanit Visible tanks
Akatherm S&W HDPE	GPS black 200mm to 400mm	Nicoll WC Pan Connector	Sanit Waste Outlets & Traps
AkathermPlus&AkathermThermoPlus	GPS black 110mm to 180mm	No System gutters	Sanit WC Flush & Float valves
AMAX	GPS black over 400mm	Non System roof vents	Sanit WC Pan Connector
Astore	GPS black over 400mm	Non Sytem Radator heating	Sewage
Astore ABS	GPS black up to 90mm	Non Sytem roof & terrace drains	Sewage PE Systems
Automatic	GPS blue up to 90mm	Non Sytem Sewage	Silicon free
Barbed Fittings & Clips	GPS blue 200 mm to 400mm	Non Sytem standard soil & waste	Simodual
Barbed Fittings & Clips_	GPS blue up to 90mm	Non Sytem Surface heating & cooloing	Single wall
Bathroom Floor Drains	GPS blue10mm to 180mm	Non-sys Bathroom Floor Drains	Siphonic Roof Drainage
Bathroom Floor Drains_	GPS Gaskets	Non-sys Concealed cistern	Soil & Waste & Vent
Below Ground Drainage	GPS orange 110mm to 180mm	Non-sys Frame & Support	Solemur
Below Ground Drainage_	GPS orange 200mm to 400mm	Non-sys Hydrotherapy	Solenoid valves
Belriv	GPS orange over 400mm	Non-sys Hydrotherapy	Solenoid valves_
Bespoke PE Fabrication	GPS orange up to 90mm	Non-sys Toilet seat	Solvent Welded Systems PVC-C
Building Prefab	GPS yellow	Non-sys Visible tanks	Solvent Welded Systems PVC-U
Building Prefab_	Guardian	Non-sys Waste Outlets & Traps	Spare parts

Button Drip	Happy Support	Non-sys WC Flush & Float valves	Spare parts system
Button Drip_	High purity	Non-sys WC Pan Connector	Specialist soil & waste Non Aliaxis
Channel Drains (Light Duty)	High purity_	Other Brand PP Systems	Specialist soil & waste Non Sytem
Chemical Monitoring	Hometech	Other Brand PVC-C Systems	Specialist Soil&Waste
Chilled and cold water	Hot & Cold	Other Brand PVC-U Systems	Spigot fittings
Chilled water Non Aliaxis	Hot (& Cold) Potable Water Supply	Other Brand PVDF Systems	Spigot fittings_
Chilled water Non Sytem	HTA	Other double containement	Sprinklers
Chutunic	HTA-E	Others pipe clips	Standard Soil & Waste
Close Fit	Hunter Bathroom Floor Drains	Ottima	Storm Water Management
Cobra	Hunter Waste Outlets & Traps	Ovation	Storm water Non Sytem
Column Pipe	Hunter WC Pan Connector	PE Jointing	Straub Flex
Column Pipe	Hydrotherapy	PE speciality systems	Straub GRIP
Compressed Air	Impact Sprinkler	PE System Industry Non Aliaxis	Studor AAV
Compression (For Rural Irrigation)	Impact sprinkler_	PE water supply Non Sytem	Studor PAPA
Compression (for rural irrigation)_	Industrial Prefab	PHILMAC	Surface / Floor Drainage
Compression fittings	Industrial Prefab	Phonoblack	Surface Drainage (HD)
Concealed Cisterns	Industrial Prefab_	Phonoclip	Surface Heating / Cooling
Connecto	Infiltration / Storage / Retention	Phonoline	Threaded fittings & Saddles
Continuous duct	Inline Drip	Pipe Support & Clips	Threaded fittings & Saddles_
Control	Inline Drip_	Pipe Support & Clips_	Toilet seat
Corzan	INNOGAZ	Pipe-In-Pipe	Tools
dBlue	Inspection chambers	Plastic joints	Transportable Sprinklers
Demi Ronde	Installation tools	Plastic Saddles	Transportable Sprinklers_
Double Containment	Installation tools system	PLX Close fit	UK AAV
Double Containment_	Instrumentation	PLX Pipe in Pipe	Valves
Drainage Venting	Irrigation valvesy	PLX Single Wall	Valves & Saddles Non Aliaxis
Drip	Irrigation Water Supply	PP System FIP	Valves & Saddles Non Sytem
DURAFUSE	ISEA	PP System Jimten	Valves and saddles
Durapipe FIP PVC	ISEA_	Prefab	Valves_
Durapipe Polypropylene	Jimten (Sistema collector)	Prefab / Project	Visible tanks
Durapipe PVDF	Jimten (Sistema collector)	Process piping	VJ Aquafast

Durapipe Superflo ABS Imperial	Jimten Bathroom Floor Drains	Process piping Welded Systems	VJ Dismantling Joint
Durapipe Superflo ABS Metric	Jimten channel drains	Process piping Solvent Welded Systems	VJ Friagrip
Easy clip	Jimten Hydrotherapy	Process piping tools & accessories	VJ Maxifit
Electrical Cable management	Jimten macerators	Protectaflex	VJ Megafit
Electrofusion	Jimten Visible tanks	Protecta-Line	VJ Others
Electrofusion fittings	Jimten Waste Outlets & Traps	Purestation	VJ Ultragrip
Electrofusion Non Sytem	Jimten WC Flush & Float valves	Purestation_	Vodalis
Elite	Jimten WC Pan Connector	PUSHFAST	Vulcathene Dual Contained
Enpure	Kenadrain	PVC	Vulcathene Enfusion
ENVIROLINE	Kryoclim	PVC Systems	Vulcathene Mechanical
Excel+	Low Density Poly Pipe	PVC-C System FIP	Washroom & Bathroom Equipment
Fascia & Soffit	Low Density Poly Pipe_	PVC-U System Astore	Waste Outlets & Traps
Filtmaster Automatic	Macerators	PVC-U System FIP	Waste Outlets & Traps_
Filtmaster Manual	MAGNUM 3G	PVC-U System Girpi	Water management
Filtration	MAGNUM FIP	PVC-U System Nicoll	Water Supply
Fitmaster joints	Manholes & Chambers	PVDF System FIP	Water Supply PE systems
FLEXIPOL	Manual	Radiator heating	WC Flush & Float valves
Flow meters	MASA Black	Rain Gutters & Pipes	WC Pan Connector
Flow Monitoring	MASA Cable Protection	REDI AAV	Wefatherm
FLS Chemical Monitoring	Mechanical joints	Redi channel drains	Welded Systems PE
FLS Control	Metal flanges	REDI Inspection chambers	Welded Systems PP
FLS Flow meters	Metal flanges system	Redi Manholes & chambers	Welded Systems PVDF
FLS Flow Monitoring	Metal joints	Redi PVC S&W Grey	Well Casing
Fluxo	Micro Sprinklers	Redi PVC S&W Orange	Well Casing_
Fluxol	Micro Sprinklers_	Redi PVC Sewage	YUNTAFLEX

- **Product opportunity:** see project opportunity.
- **Project** : a proposed or planned undertaking of a construction or a renovation.
- **Project opportunity:** An opportunity consists of a **project opportunity** record that contains the key elements of the opportunity and its progress, and several **product opportunities**, one for each product. Indeed, in a given opportunity, several products can be proposed and we may only be selected for some of them. Thus, an opportunity is monitored at the global level

(project opportunity) and at the level of each product (product opportunity). Product opportunities are listed in the project opportunity, Product opportunities tab.

- **Project priority:** Our projects have 4 possible levels of priority, depending on the importance of the project and our relationship with the stakeholder (see Aliaxis Relationship in the contact form 51 and opportunity win rates in the Account Project Opportunity tab 47) :
  - "1. Must win": This is for projects of high value or high strategic importance, and when we have a high relationship with the stakeholder These projects are 100% tracked and clearly assigned to sales specification salespersons. We need to use all available tools and support resources to win. We seek high win rates.
  - "2. Tough but a big win": This is for projects of high value or high strategic importance, and when we have a weak relationship with the stakeholder. These projects tracking will depend on the probability of winning. They can be an important channel to foster relationships with new stakeholders.. They are pursued until a competitor has clearly won, but as a lower priority than the "must win" projects.
  - "3. Go-to" gap fillers. This is for projects of low value and low strategic importance, and when we have a high relationship with the stakeholder. They should be tracked on an ad-hoc basis, depending on other projects in the pipeline and project importance (e.g. if follow-on projects to come). They are tracked and followed-up only if pipeline is low.
  - "4. Not a focus area": This is for projects of low value and low strategic importance, and when we have a low relationship with the stakeholder. These projects are captured through distribution and other installer pull activities. Digital also to be significantly leveraged. They are not supposed to be pursued through specification sales.
- **Roles:** Defines the respective functions of an account in an opportunity**.** Let's imagine that Premier Inn decides to create a new hotel in Peterborough. Their engineering office is the Finninox. Taymor Plumbing Supplies and Plumbstock March have been providing our products to Smartheat Plumbing & Heating Ltd who is the installer. All these companies are involved in this project. So whenever we open any of these accounts, we need to see that they are taking part in the Perterborough Premier Inn construction project. But they have different roles: Premier Inn is the investor, Finninox is the Planner, Taymor Plumbing Supplies and Plumbstock March are the distributors and Smartheat Plumbing & Heating Ltd is the installer. So one given opportunity will be accessible from several accounts.
- **Segments**: we have 3 segments at Aliaxis : Building, Industry and Infrastructure.
- **Subsegments:** see below

Parent Segment	Name
Building	Non residential - Commercial building / shops
Building	Non Residential - Government buildings
Building	Non Residential - Hospital & Healthcare
Building	Non Residential - Hospitality
Building	Non Residential - Industry warehouse buildings
Building	Non Residential - Leisure
Building	Non Residential - Office buildings
Building	Non Residential - Schools
Building	Residential - multi-occupancy - private
Building	Residential - multi-occupancy - public
Building	Residential - multiple Single dwelling - private
Building	Residential - multiple Single dwelling - public
Building	Residential - single dwelling
Industry	(Waste) Water Treatment (Industrial auxiliary)
Industry	(Waste) Water Treatment (Municipal core)
Industry	Agriculture
Industry	Aquariums
Industry	Automotive
Industry	Chemical Process Industry
Industry	Food & Beverage
Industry	Manufacturing Industry
Industry	Micro-electronics
Industry	Mining and aggregates
Industry	Pharmaceutical
Industry	Power Plants
Industry	Refueling
Industry	Shipbuilding / Marine
Industry	Surface Treatment
Industry	Swimming Pools & Spas
Infrastructure	District Heating
Infrastructure	Gas
Infrastructure	Harbours & Waterways
Infrastructure	Multi Utility
Infrastructure	Potable Water
Infrastructure	Power
Infrastructure	Rail
Infrastructure	Road
Infrastructure	Sewage
Infrastructure	Storm Water
Infrastructure	Telecom
Infrastructure	Water & Gas Rehabilitation

- **Specified:** a planner can specify our products in a project. In our opportunities we will find it at the product opportunity leveL There are 2 reasons that will determine that we have been specified : 1. Our brand (or

our product family) is in the technical specification of the project (e.g. FIP valve or similar). 2. A key unique technical characteristic of our product/s is in the technical specification of the project (this put us in an extremely advantageous position and cut most of our competitors out of the project).

3. Dynamics behaviour

3 Dynamics behaviour

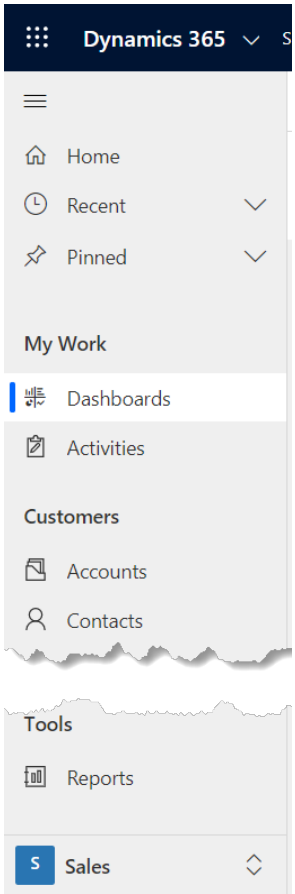
Microsoft CRM may seem complicated at first glance, but once you understand its interface, everything becomes simple and readable.

The purpose of this section is to explain how to navigate through CRM.

3.1 Navigation Bar

The navigation bar is the general menu of the application.

- **Home** goes to the Home Page
- **Recent** shows the last open elements. It can be a view, a form or a dashboard. It is very useful to go back to a previous step. Each of these elements can be pinned for a regular access.
- **Pinned** elements appear on the Pinned entry.
- The remainder of the list are the dashboards or entities.
- The bottom line can change the menu, in case several menus have been created (such as Sales, Marketing, etc.)



3.2 Dashboards

Dashboards in Dynamics provide an overview of actionable business data that's viewable across the organization. Dashboards allow seeing important data at a glance.

Dashboards use views, lists, and charts to bring meaningful data to one place.

To select a dashboard, use the dashboard selector. Click on the selector, and then select the dashboard to open from the drop-down list.

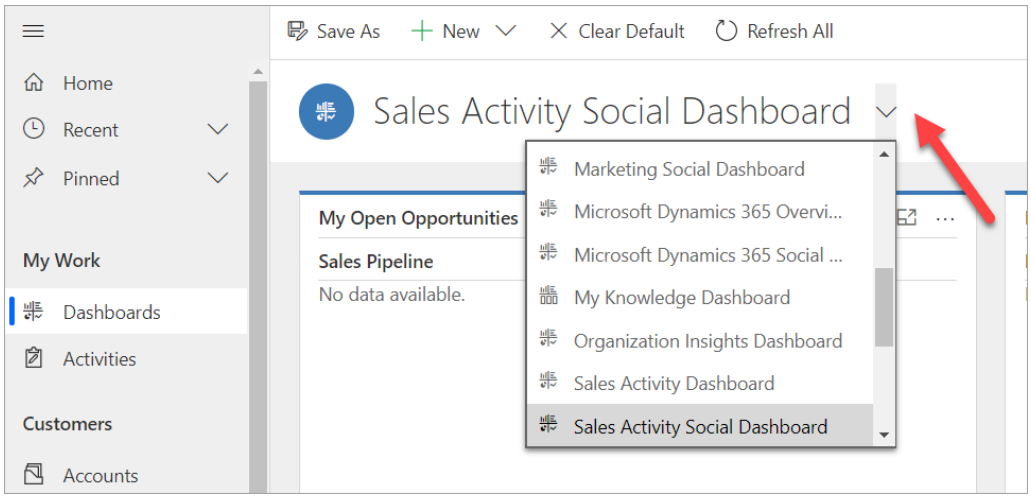


Figure 8: The dashboard selector

3.3 Views

Views are used to display lists of records of the same type.

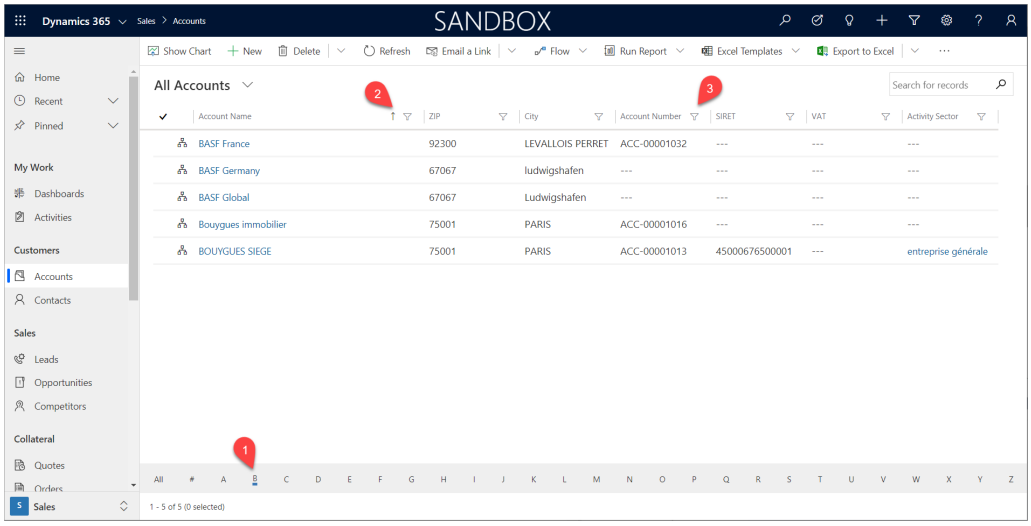


Figure 9: A view

It is possible to sort a view on any column, or to filter records so that you do not see all of them.

The following view only displays the accounts starting with the letter "B" as requested by (1)

This view has been sorted by descending customer names as shown by the upward pointing arrow (2). To sort on a column, simply click on the column name. The first click sorts in ascending order and the second click sorts in descending order.

It is also possible to filter a column: just click on the funnel (3) on top of column and choose the selection criterion: it is possible to choose the filter criterion that will depend on the type of data in the column, as shown in the table below :

TEXT	NUMBER	DATE
Equals	Equals	On
Does not equal	Does not equal	On or before
Is Greater than	Begins with	On or after
Is Greater than or equal to	Ends with	
Is Less than	Contains	
Is Less than or equal to		

Figure 10: Filters depend on the content

2 types of views

There are two different types of view that do not look alike and do not behave in the same way: the non-editable view and the editable view.

A non editable view is used to visualize data and to access records.

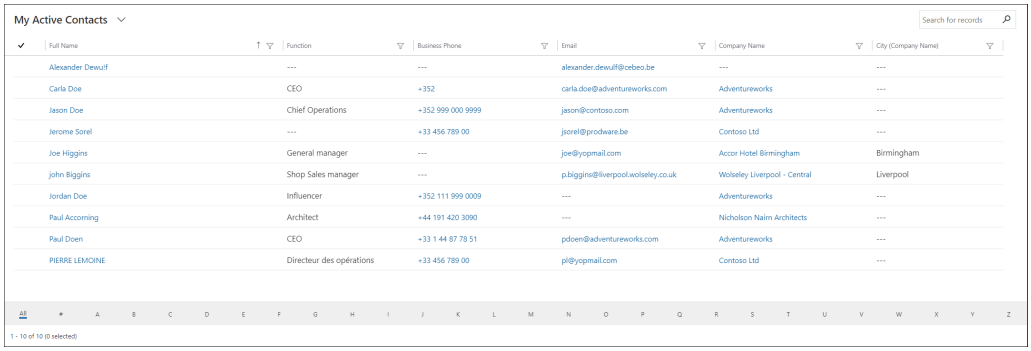


Figure 11: Non editable view

An editable view does the same, and makes it also possible to update values in the view without opening a form.

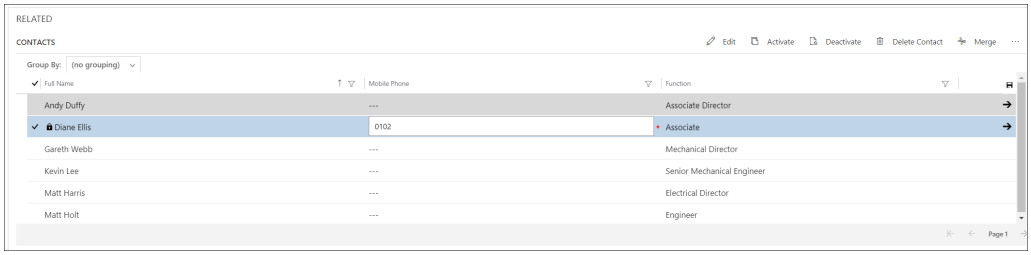


Figure 12: Editable view

To open a form, one must first select the record and then click on the Edit button. The small diskette icon at the top right of the view saves the data changed in the view.

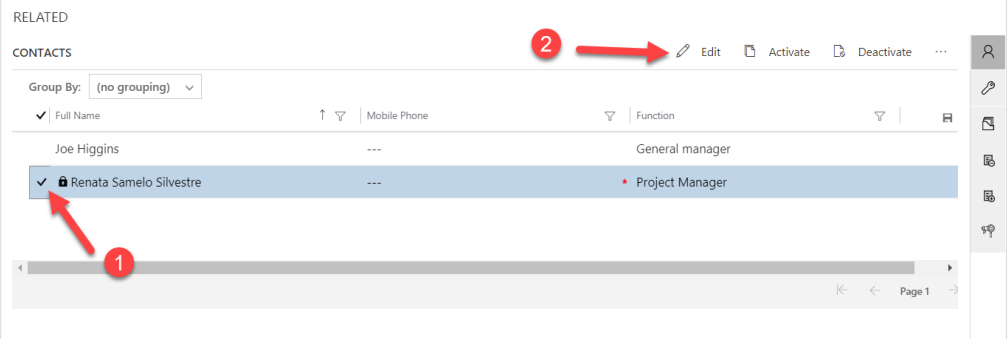


Figure 13: Accessing a record in a editable view

3.4 Searching for records

In Dynamics, there are 2 mains ways to perform a search:

1. One can search a given record in a given view.
2. One can search a given record anywhere in the CRM.

How to search a given record in a given view?

Use the Search for records entry field. The information will only be searched in the current view. This, if you want, for example, to find a record in all the accounts, choose first the view "All Accounts". Note that this field can use the wildcard:

- *Wolsel* will search any data that starts with *Wolsel*
- **olsel* wil search for any data that contains *olsel*
- **olsel*infra* will search for any data that contains *olsel* first and *infra* after

Note that the search is NOT case sensitive

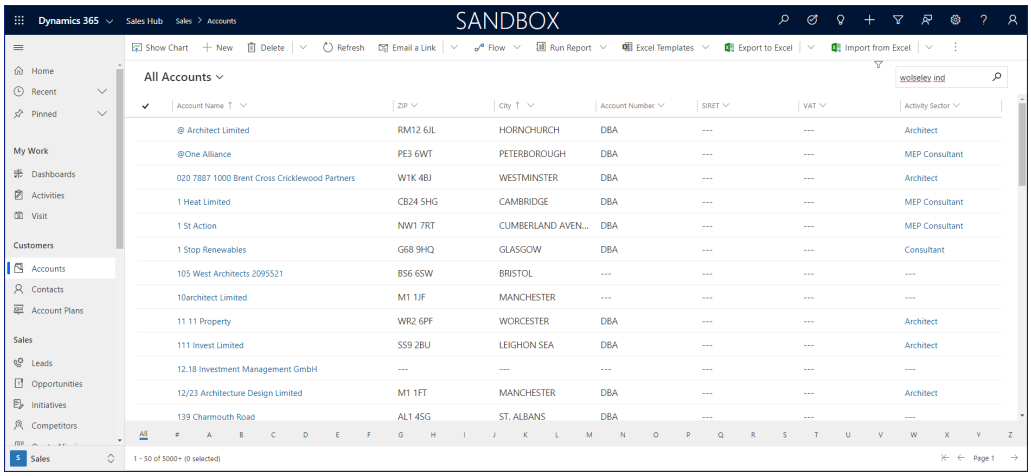


Figure 14: Search Wolseley Industry in "All Accounts"

Here is the result:

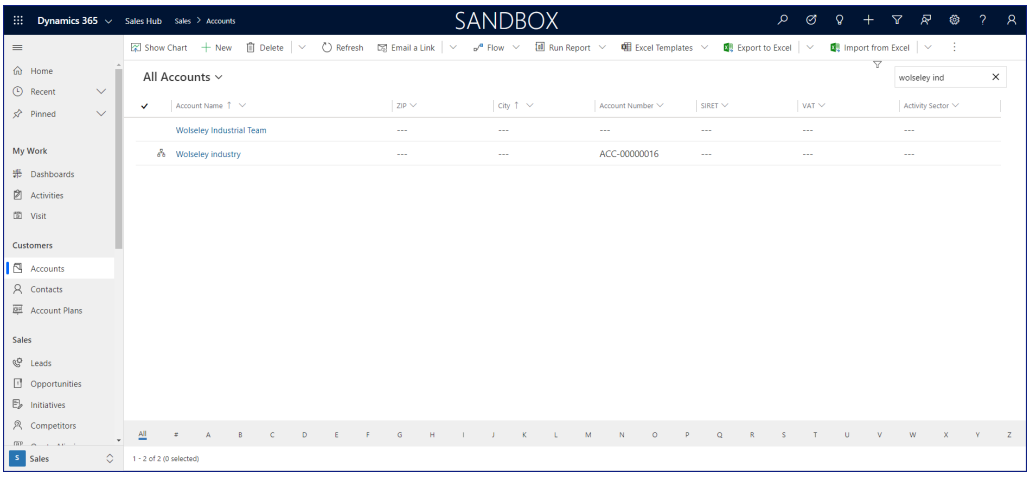


Figure 15: Finding Wolseley Industry in all Accounts

How to search a given record anywhere in the CRM?

Use the search button at the top of the form

Figure 16: Global search

Here are the results:

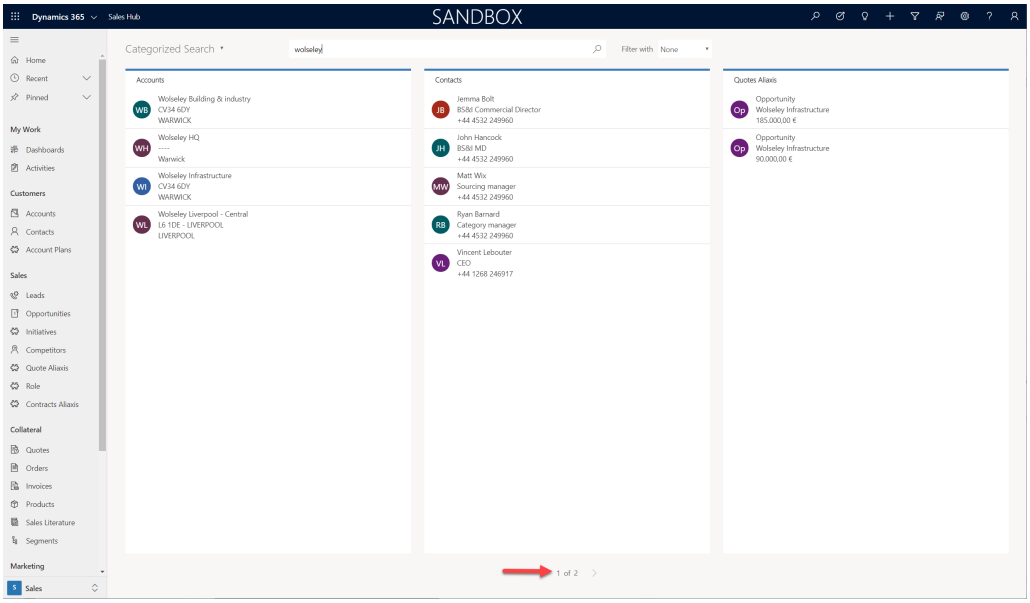


Figure 17: Global serch - Result page 1

We have the results in columns. Each column represent a type of entity. We find Wolseley in 4 accounts, in 5 contacts and 2 quotes. And there is a second page:

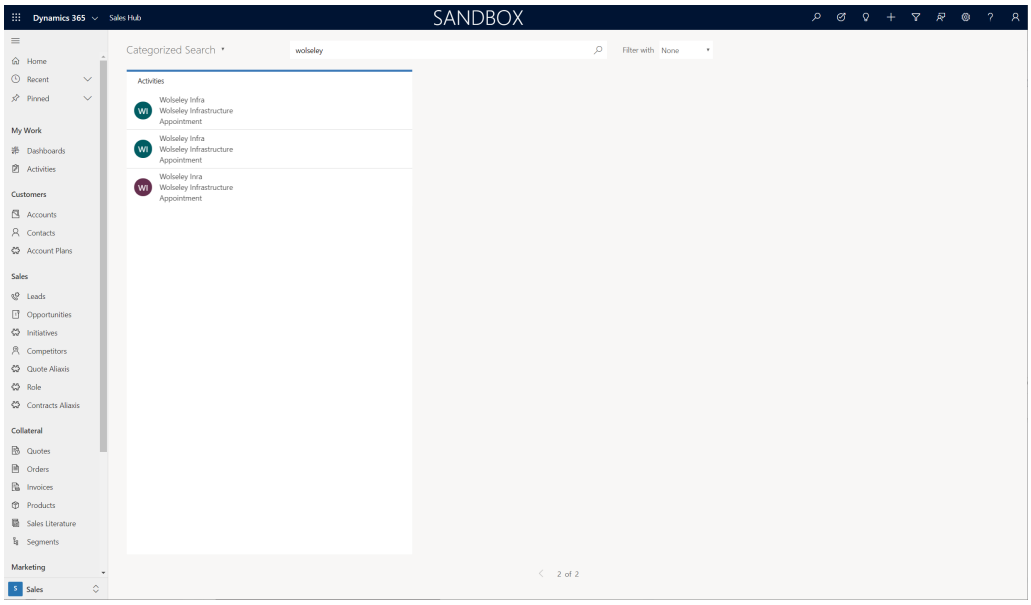


Figure 18: Global serch - Result page 1

We can also find Wolseley in 3 activities (3 appointments)

3.5 Saving changes

There are 2 possible positions for the Save button : on the top row, or on the bottom right of the window:

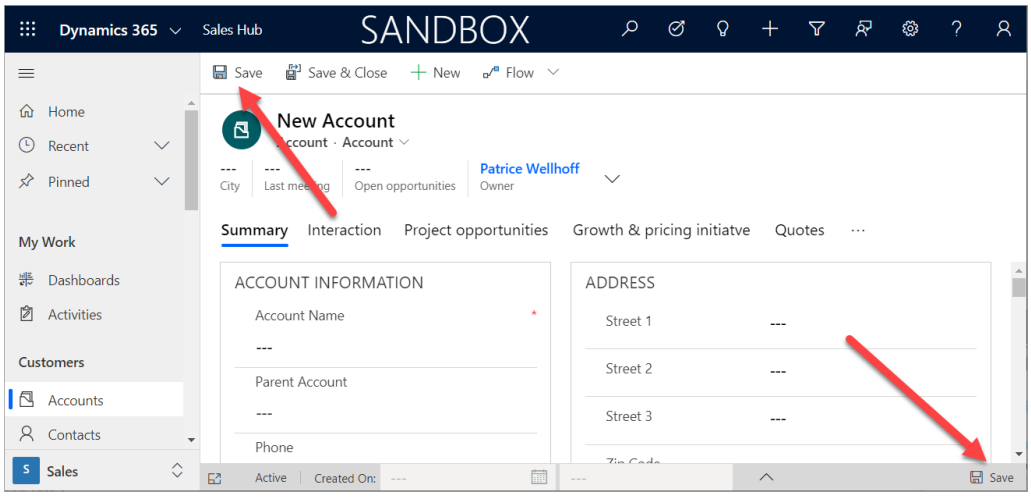


Figure 19: Save buttons

The save button at the bottom right is an autosave button:

- If you change elements in the form, the display will look like that:

Figure 20: Autosave button - not yet saved

- 30 seconds after, the record will automatically be saved.

- If you try to quit the form without saving it, the form will also be automatically saved.

3.6 Lookup fields

Lookup helps you to choose records from a related entity. When you select a related entity and enter search criteria, such as a name or email address, lookup automatically begins to resolve the partial text and displays any matching records. If no records are displayed after you have typed the full text of your search criteria, a message is displayed specifying that there are no records.

For example, you might search for the name *Adrian Dumitrascu*. When you type *ad*, possible matching records are automatically populated and displayed.

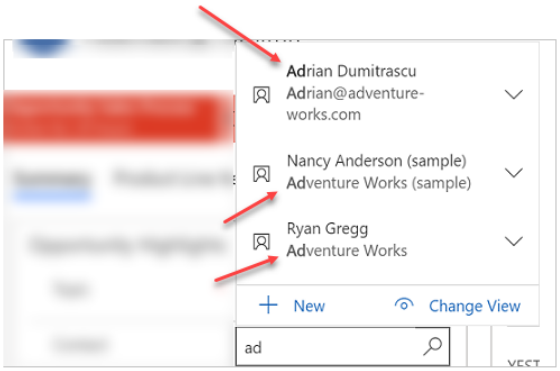


Figure 21: Lookup

When you select the lookup field, the five most recently used records are displayed along with five favorite records. Which records are displayed depends on your view history and the favorites you've pinned.

- **+ New**: you can create a new record by selecting the New button (you must have sufficient permissions to view the New button and create a record.)
- **Search field**:The default search result for lookup search is, **begins with**. This means results include records that begin with a specific word. For example, if you want to search for *Alpine Ski House*, type alp in the search box; if you type *ski*, the record will not show up in the search result. For a wildcard search use asterisks: For example, type **ski*.
- **Change view**: Selecting Change View lets you determine what you want to view in the records. For example, if you want to view only the contacts that you follow, select Change View > Contacts being followed. Only the contacts that you are following will be displayed.

3.7 Email a link

It may happen that you want to inform somebody about an important information in a record. The button, email a link, that appears on the top of the

screen allows you to do that. You can email a record by selecting the record in a view :

Figure 22: email a link (view)

Or you can do it from a form.

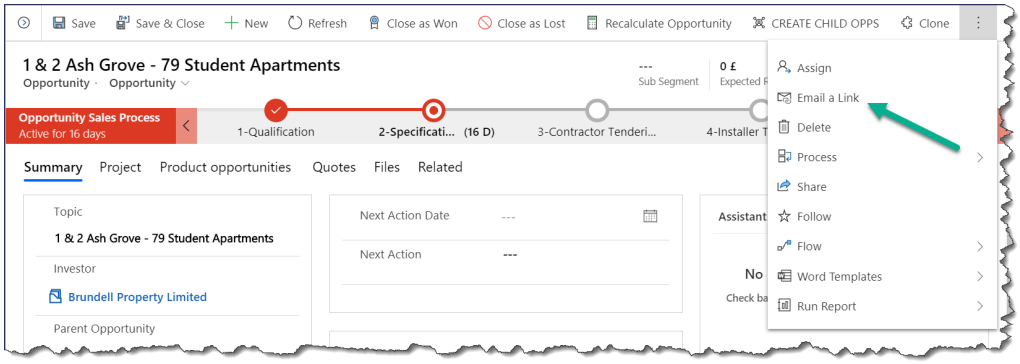


Figure 22: email a link (form)

This will trigger an email with a link to the record:

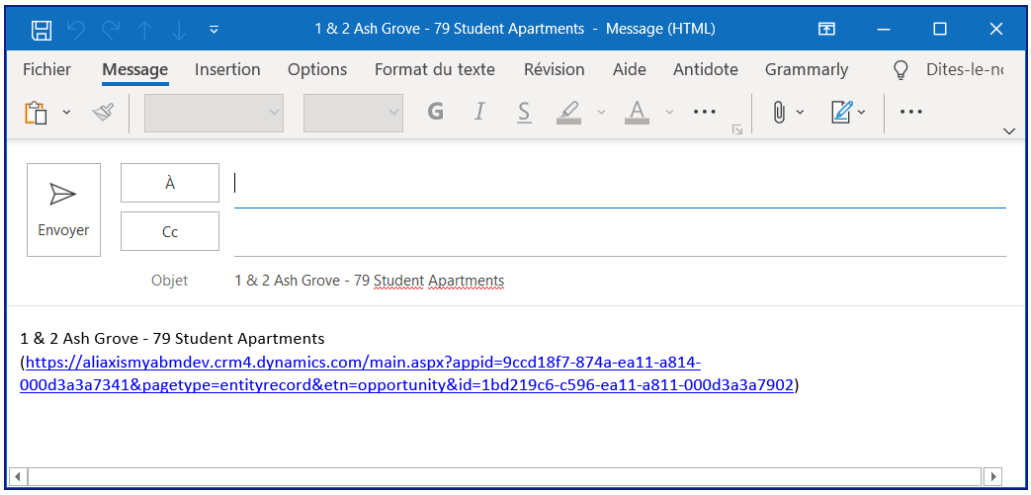


Figure 23: email a link (Outlook)

3.8 Other

The Timeline

The timeline is visible in many Dynamics entities. It is a sequential log of what event or activity occurred.

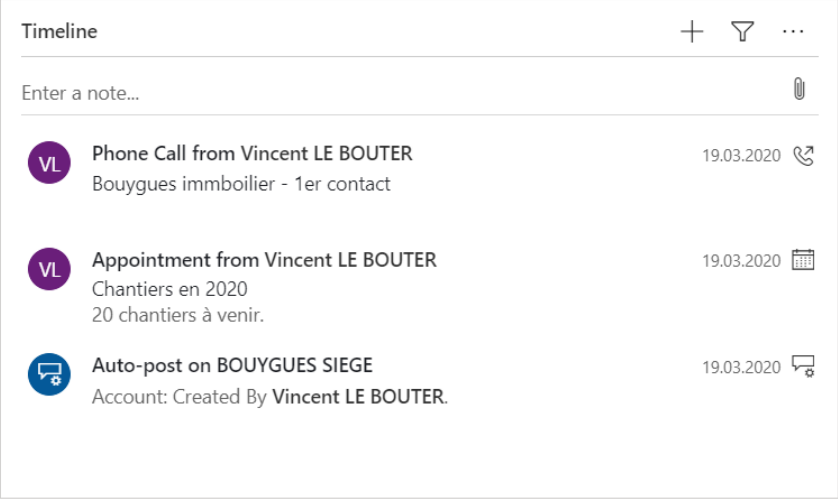


Figure 24: A timeline

Accounts, contacts, opportunities, and initiatives have a timeline in their form. The most recent event is on top of the timeline.

As far as the account is concerned, its timeline automatically consolidates the content of all the activities of all its contacts, opportunities and initiatives.

The Relationship Assistant

This assistant aids in monitoring and tracking daily actions and communications. It consists of an assemblage of action cards hosted within Relationship Assistant. It displays tailored, actionable insights throughout the application. Its functionality includes:

- Reminding of upcoming activities.
- Gauging communications in order to intelligently advise the right time to reach out to an inactive contact in your portfolio.
- Alerting to Opportunity close dates as they approach.

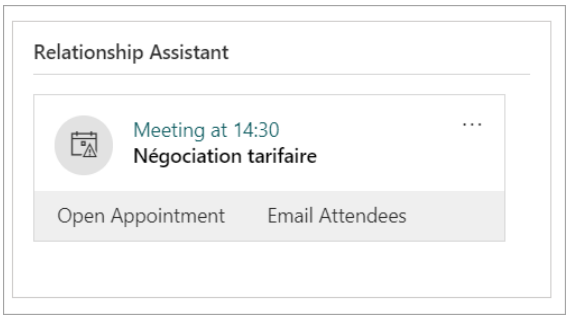


Figure 25: The relationship assistant

The relationship assistant is displayed in different forms and dashboards.

3.9 Security and confidentiality

The general rules that have been implemented are the following:

- In each country, the management will access to all the data of the country, with no restriction.
- In each country, the rest of the people will access all the data of the country, except the restricted parts of the contracts.
- As far as industry is concerned, all the industry related records are visible to all the people of industry, regardless of the country.
- If a given record needs to be shared with other people who normally do not have access to it, it is possible to share this record through the "Share" button. Warning : sharing documents slows the system.

3.10 Personalization Settings

Your CRM can be personalized, and some settings should be known.

They are all available thanks to the gear wheel on the upper zone of the screen.

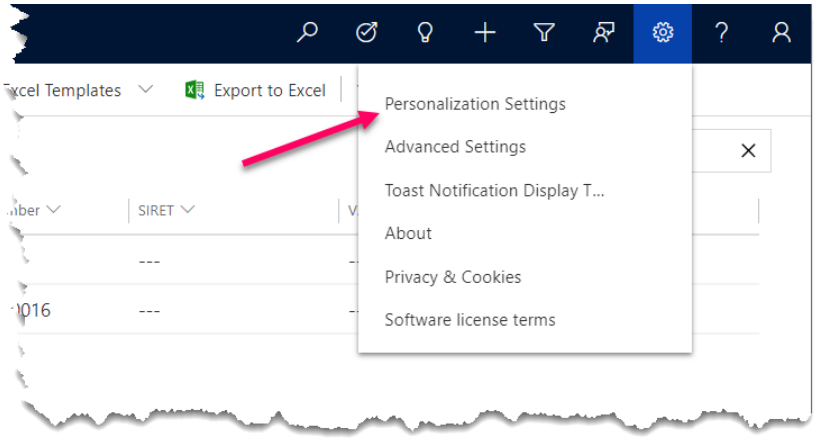


Figure 26: Access to the personalization settings

Default currency :

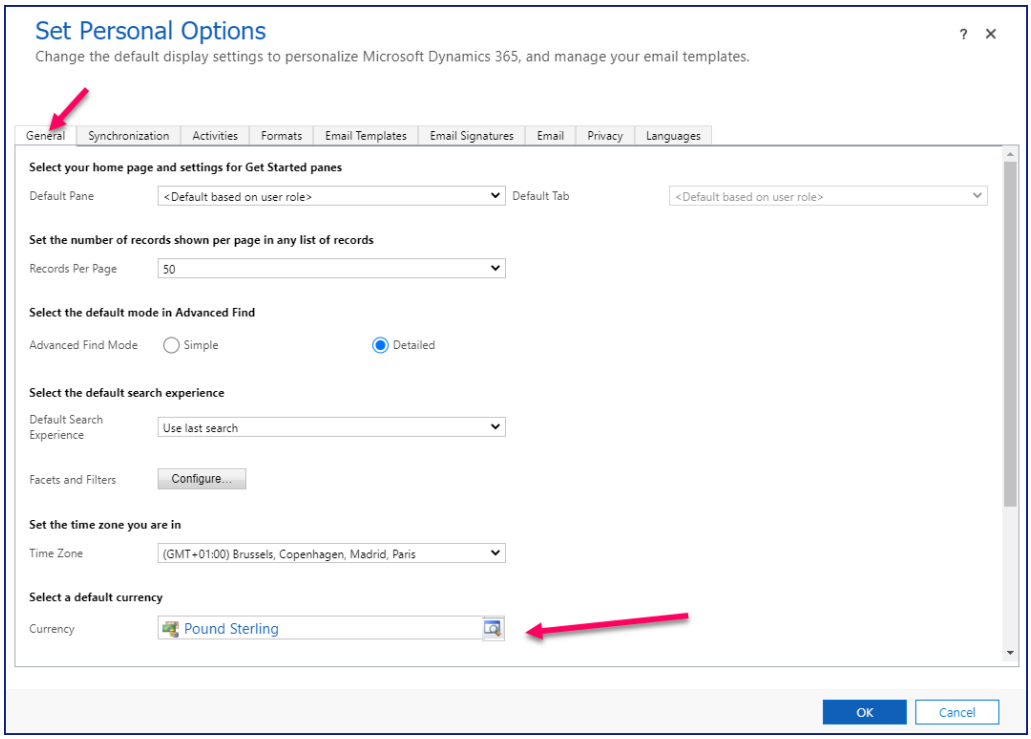


Figure 27: Currency

Default language:

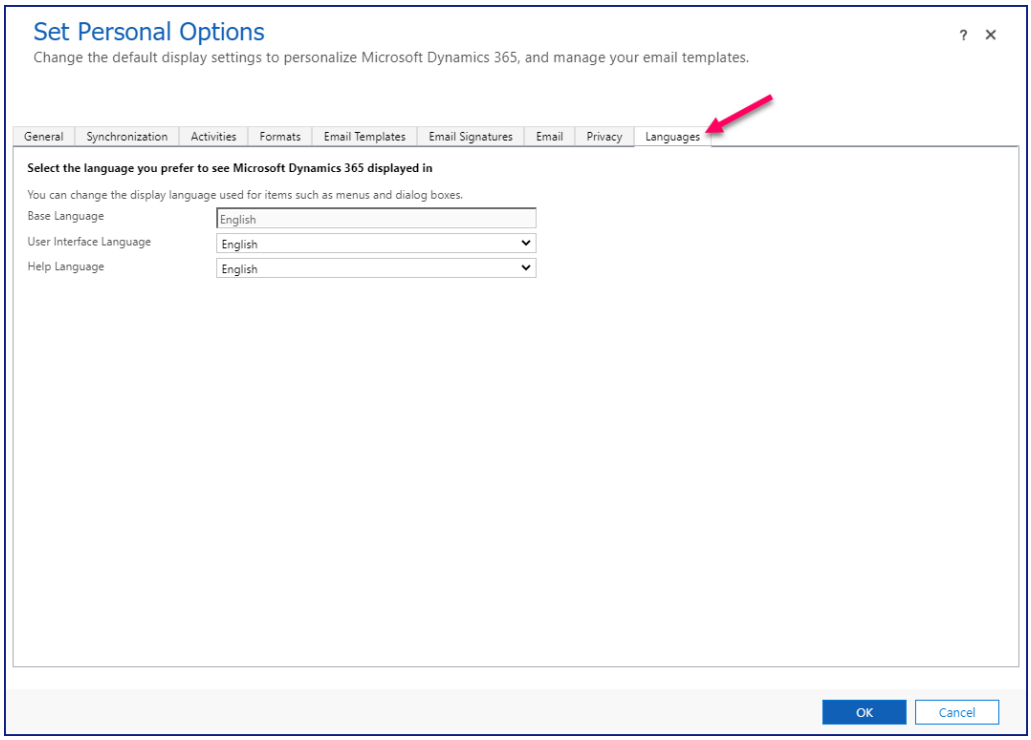


Figure 28: CRM Language

Default format:

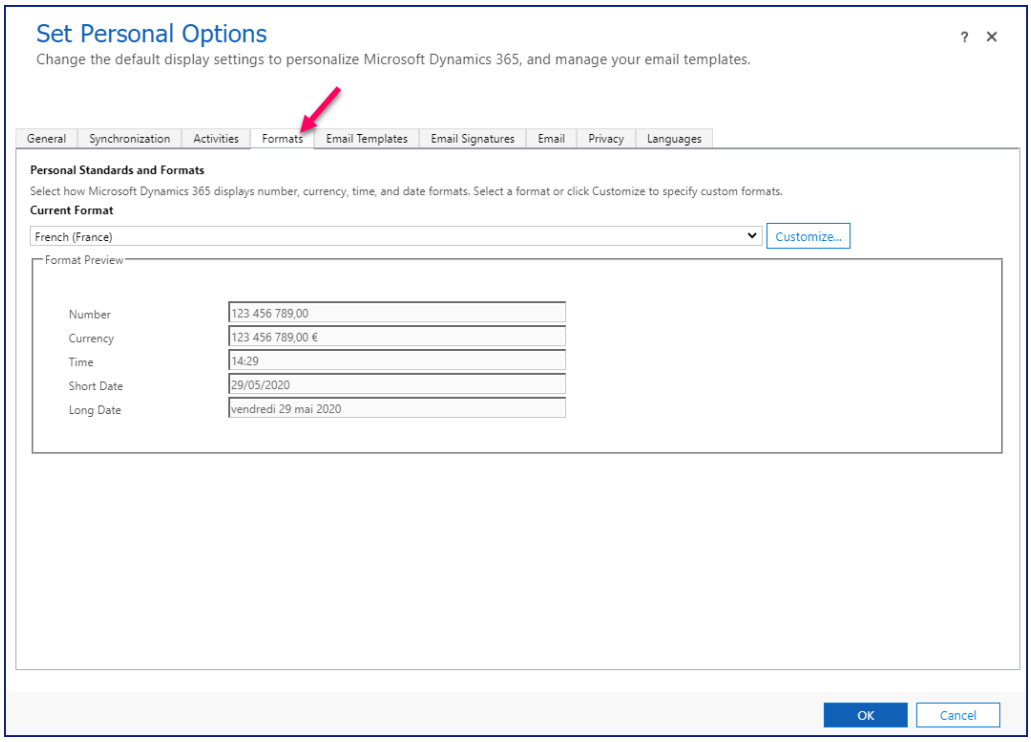


Figure 28: CRM Format

4. List of Entities

4 List of Entities

4.1 Account

An account is any legal entity that we want to keep track of: for example, it could be a distributor, a hotel company that builds a new hotel, a plumber, or an architect.

On the top of the form, there are 4 fields that are always visible. They are filled or calculated in the main area of the form and are displayed here for better access to key information.

Figure 29: Account Header

- **City:** the city of the account
- **Account Prioritization:** designates the business effort that is intended to be spent on this account: Grow, Maintain, Invest or Monitor (see business terminology page 12)
- **Last meeting:** it is a calculated field based on the appointments. It stores the date of the last appointment marked as finished.
- **Owner**: it is the sales person in charge of this account. Each account has only one owner. In case we have several sales persons in charge of an account, the main sales person is stored here, an the others are filled in the section Account management of the summary tab.

4.1.1 Account - Summary Tab

The summary tab stores the description of the account and our relationship.

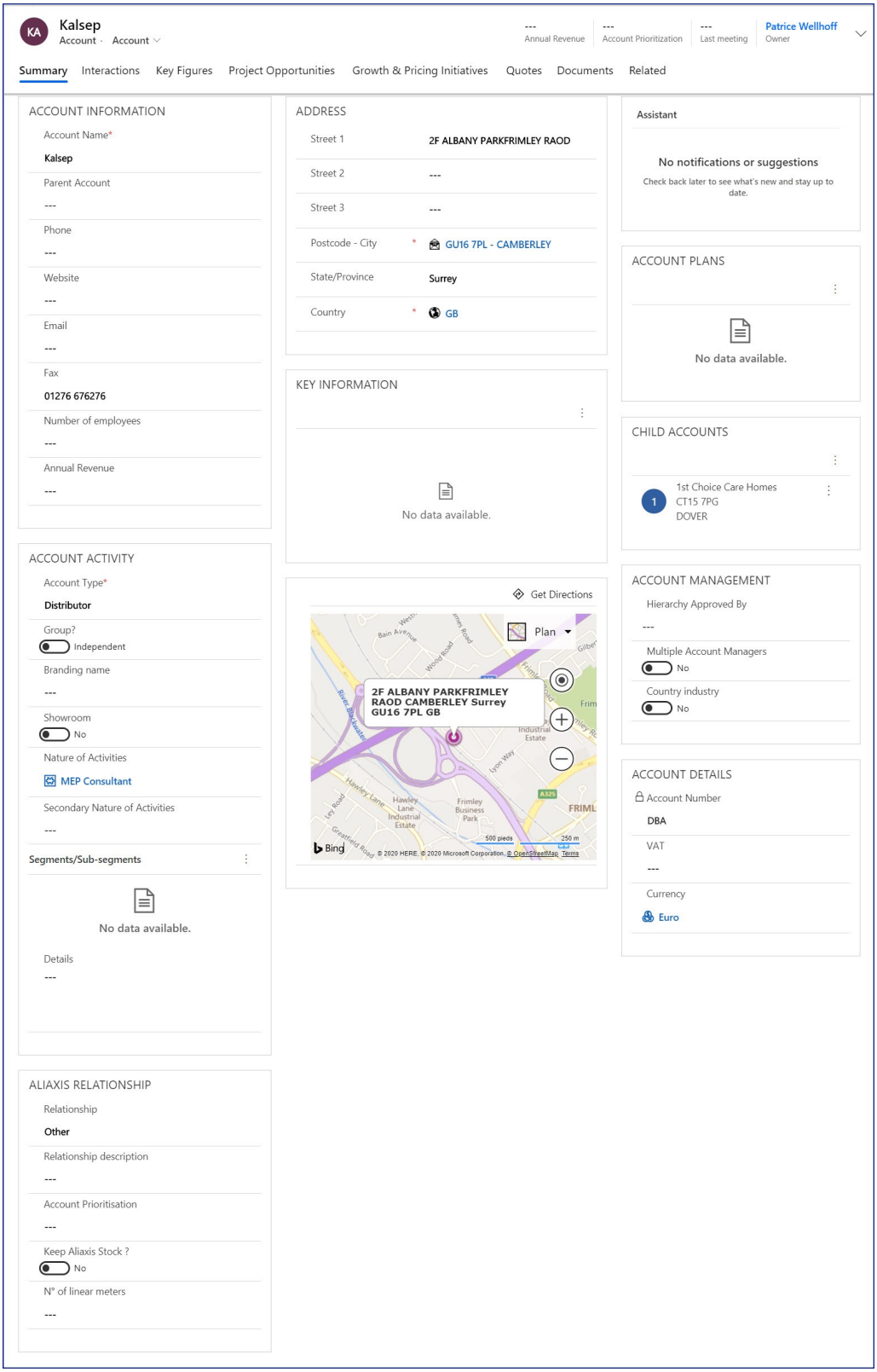


Figure 30: Account Summary tab

Account information section

This section is used to store key customer data.

- **Account Name:** self explanatory
- **Parent account:** in the case, an account is the subsidiary of another account, one needs to fill here the name of the parent account. If the parent account does not exist, a parent account should be created.
- **Phone:** self explanatory
- **Website:** self explanatory
- **Fax:** self explanatory
- **Number of employees** is a text field to be able to fill the exact data (e.g., 8) or a range (e.g., 1-10)
- **Annual revenue:** to be filled by the sales person.

Account activity section

Here are the data that describe the activity of our customer.

- **Account type:** this field describes the general activity of an account. It can be one of the following: Investor, Planner, Contractor, Installer, Distributor, Utility or OEM. *Depending on this account type, some fields will appear or disappear in the Account activity section and in the Aliaxis relationship section. see below)*
  - *For OEM, Installer or contractor*, no additional field is displayed
  - *For Investors*
    - **Public / Private:** is the account a public or private?
  - *For Planners*
    - **Collaboration in the past ?** Have we collaborated in the past with this Planner ?
  - *For Utilities,*
    - **Public / Private:** is the utility public or private?
    - **Installing?** Is the utility doing the installation?
    - **Planning?** Is the utility doing the planning?
    - **N° of Inhabitants served:** size of the population served by this utility
  - *For Distributors*
    - **Group?** Is this distributor part of a buying group?
    - **Branding name:** name of the brand under which the company operates
    - **Showroom:** does the distributor have a showroom?
    - **Keep Aliaxis Stock?** does the distributor keep a stock of at least one Aliaxis product range.

  - **N° of linear meters:** Number of linear meters of Aliaxis products at this premises

- **Nature of activities:** to be chosen from a list. It is the main activity of our customer. Enter his account type and the system will prompt with all the possible nature of activities for this account type (see glossary) 12
- **Second nature of activities:** to be chosen from a list. To be filled only if our customer has a second main activity. (see Terminology for more information + lien hypertexte)
- **Segments / Sub-segments:** The segments and sub-segments in which the account is active. It is calculated on the basis of the opportunities in which the account is active, and can be completed by the sales team. See page 77

Aliaxis Relationship section

This section defines our relationship to the account

- **Relationship:** Describes if the account is a direct customer, an indirect customer, a lost customer, a prospect or if we have another type of relationship. These fields are to be filled by the sales person, as they can only be evaluated by the salesperson : is he a prospect or an indirect customer ? Is he or not a lost customer ?
- **Account Prioritisation:** this field designates the business effort that is intended to be spent on this account: Grow, Maintain, Invest or Decrease. (see glossary)
- **Parent Account Prioritisation:** only appears if a parent account is filled. The content is inherited from the parent account

Address section

- **Street 1, 2, 3:** self explanatory.
- **Postcode:** to be searched in a list. one can either enter a postal code or a city. In either case, a sub-list to choose from will be displayed. The list depends on the country field. If the postcode is missing you can create one by clicking on the + New Zipcode link:

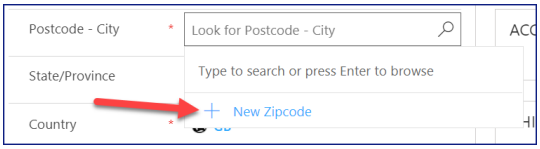


Figure 31: Zipcode creation

A quick create form appears. Enter the new code as below:

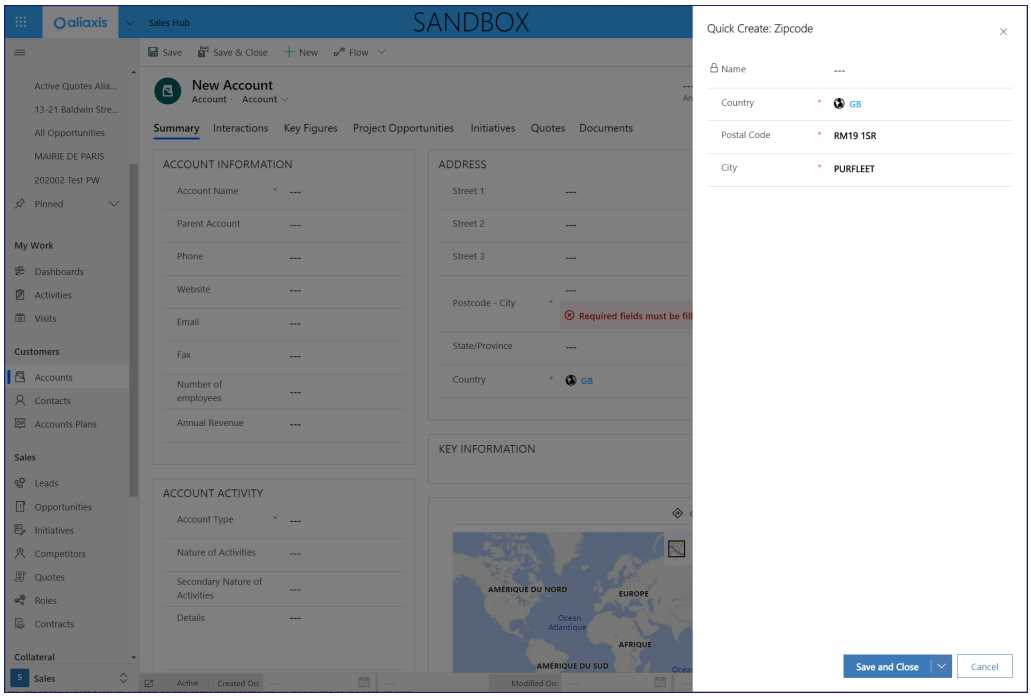


Figure 32: Zipcode creation

- **State/Province:** self explanatory.
- **Country:** will be pre populated with the country of the end user. The value can be changed.
- **MAP :** the map is calculated AFTER the address has been saved. Before saving, it may display a totally incorrect area, as it will only search on the street name without taking the country, city and zip code into consideration.
- **Get Directions:** only works on IOS or Android and will open one of the GPS navigation software app of your smartphone.

Key Information section

Its main purpose is to disseminate in all child accounts of a given account an agreement taken at a higher level, such as a national agreement. With this functionality, a director or a sales manager can set objectives for all the accounts of a customer in his area. For example, if a sales manager enters into a national agreement with a distributor, he or she could indicate the actions to be taken in all outlets in the Key Information section. This information will then be reported in all the corresponding accounts and will appear in this field.

Account plans

Will display a list of existing account plans of this account.

Child Accounts

One will find here all the children's accounts of the current account. Clicking on one of the items of the list will display the child's account form.

Account Management

- **Hierarchy Approved By:** when attaching an account to a parent account, the sales manager of the parent account is asked to validate this attachment, to best ensure that the account hierarchy is correct. He must put his name in this field to signify that he has validated the hierarchy. As long as this field is empty, this account appears in the "Account Hierarchy Validation" view of the parent account manager to indicate that he has an account to validate.
- **Multiple account managers:** Some accounts may have multiple account managers. The main account manager appears on the top right of the form. In the case of multiple account managers, one can add here the account managers for one or several segments, as well as their prioritization for this segment.
- **Industry Specific?** Indicate Yes if this account is an industry account. All the industry accounts are shared amongst the industry team in EMEA.
- **Key Account team:** if this account belongs to a key Account, name of the team of users in charge of the Key Account

Account Details

- **VAT:** VAT number of the Account. For France, we also have the SIREN, SIRET and NAF Code, Last Event Date and Last Event that will appear.

Note:

There is a duplication warning in case an account is entered twice. It works like this: if 2 accounts have the same first 7 letters of their name and the same postal code, Dynamics will issue a duplication warning. Then, it is up to the user to determine whether or not it is a duplicate, and to save the record or not.

4.1.2 Account - Interactions Tab

The purpose of this section is to summarize all interactions we may have with this account, or any of its contacts, excluding projects and initiatives. Projects and initiatives can be found on dedicated tabs.

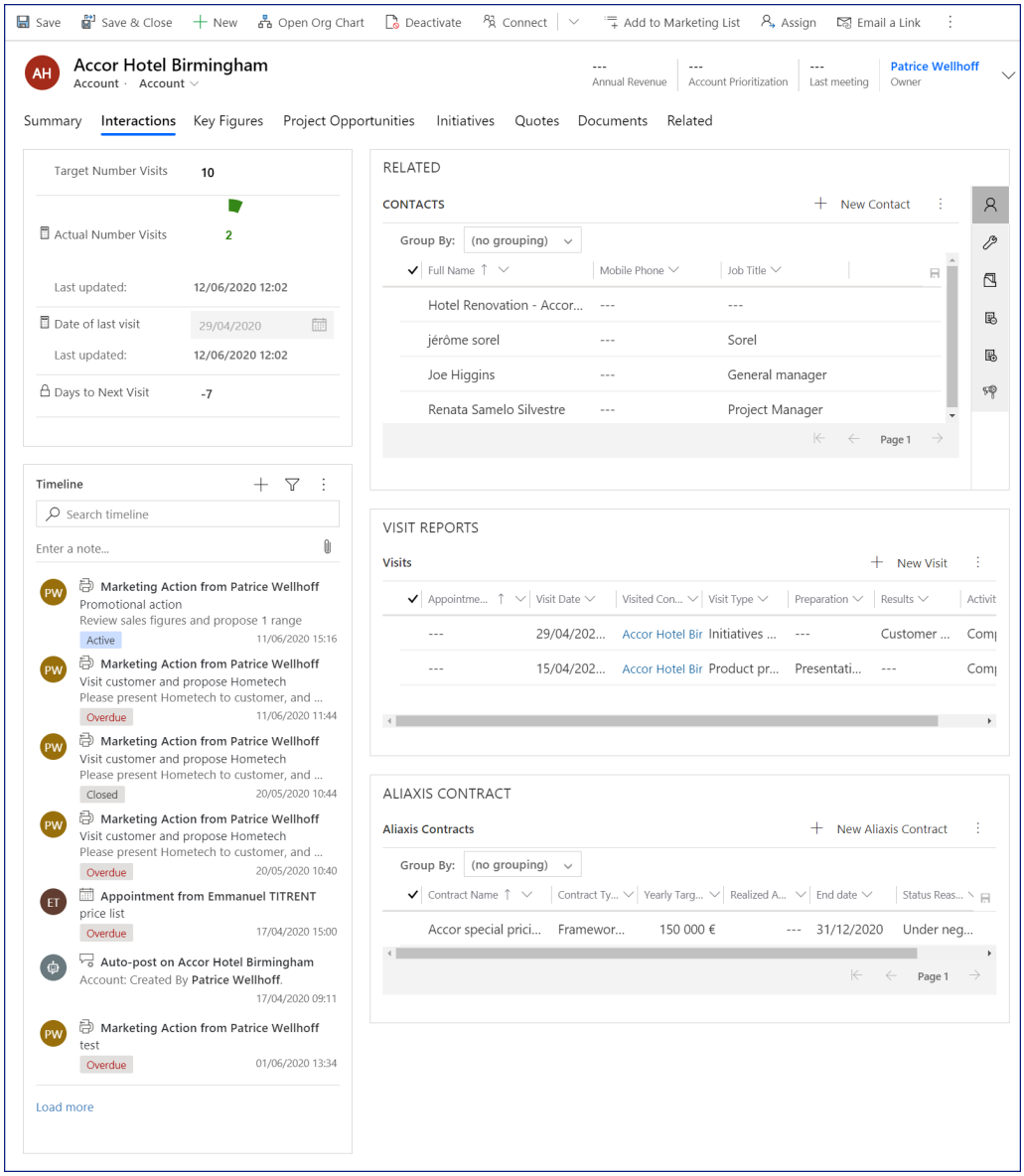


Figure 33: Account Interaction tab

Left column, 1st section

- **Target number of visits**: this is the total number of visits planned for this account during the current civil year. If there are more than one sales person for this account, the target number is the total planned number of visits of all sales persons.
- **Actual number of visits:** this is an automated calculation. It takes into accounts the total number of visits that have been marked complete. The field is followed by another field called **Last updated**. This indicates when

the system has calculated the actual number of visits. One can always recalculate the Actual number of visits by clicking on the calculator icon at the left of the name of the field.

- **Date of last visit:** it is the date of the last visit marked as complete. If you last visit does not appear here, it is because your visit has not been marked as complete.
- **Days to Next Visit:** it is a calculated field. It indicates the theoretical number of days until the next visit to be made. If the number is negative, it means that you are late for your visit. Of course, this is only an indicator and does not take into account the low and high months, vacations, client with seasonal activity, etc.

  How is the Days to next visit calculated?

  - the system calculates the number of days since the last visit

  - then the system calculates a meeting periodicity. It is a calculated field that divides the year in target number of visits. For example, if one is planning 12 visits per year, the meeting periodicity will be 360/12 = 30 days, meaning that one is supposed to see his customer approximately every 30 days.Days to Next Visit = Meeting periodicity - number of days since last visit.

  Days to Next Visit = Meeting periodicity - number of days since last visit

The timeline section:

on the account form, the timeline stores all the events related to the account, and also includes all those related to any contact of this account.

Right column

This column displays different views, grouped in a "reference panel". Each icon on the right selects a different view. all views work the same way.

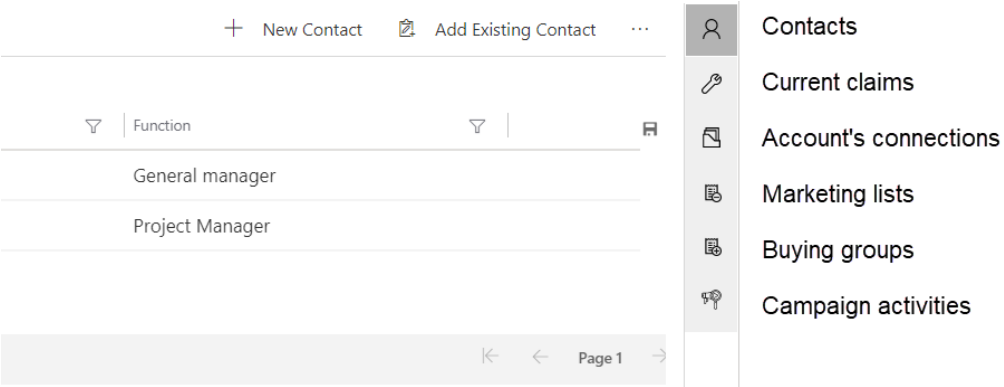


Figure 34: Account - Interaction tab - Reference Panel

If you click on a line, you will access a mini form

To change or access the full record, one must first select it. Then an edit button will appear as shown below:

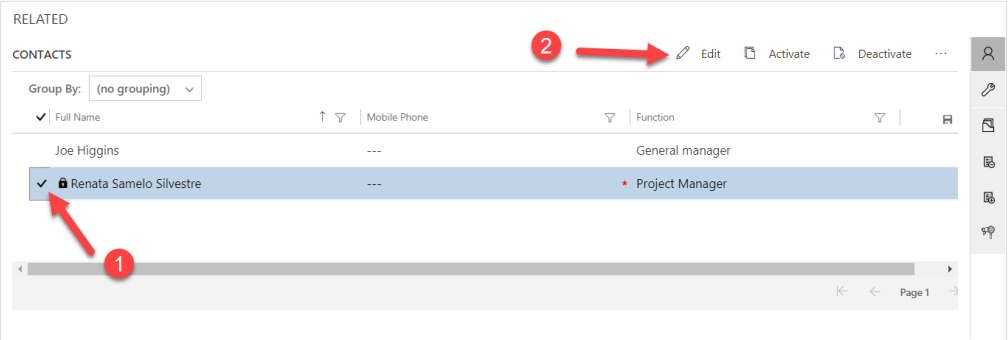


Figure 35: Reference panel - visualise or update a record

Visit reports section

This view displays all the visit reports of this account, in chronological order (the 1st is the more recent)

- **Appointment date**: if an appointment has been taken, then the visit date will appear in this column
- **Visit date**: if no appointment has been taken, then the visit date will appear in this column
- **Visited contact**: self explanatory
- **Visit type**: self explanatory
- **Preparation**: self explanatory
- **Results**: self explanatory
- **Activity status**: only those marked complete will be taken into account for the last visit date or the number of visits.

Contracts section

Here is a list of the customer contracts.

4.1.2.1 Contact - Org Chart

To access the org chart of the contacts of a company, click on the Org chart button:

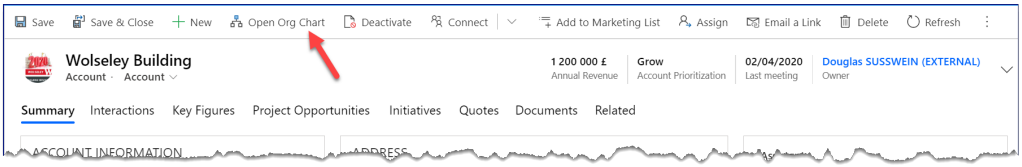


Figure 36: Org Chart Button

To create the organization chart, simply select a person and drag and drop it onto another person.

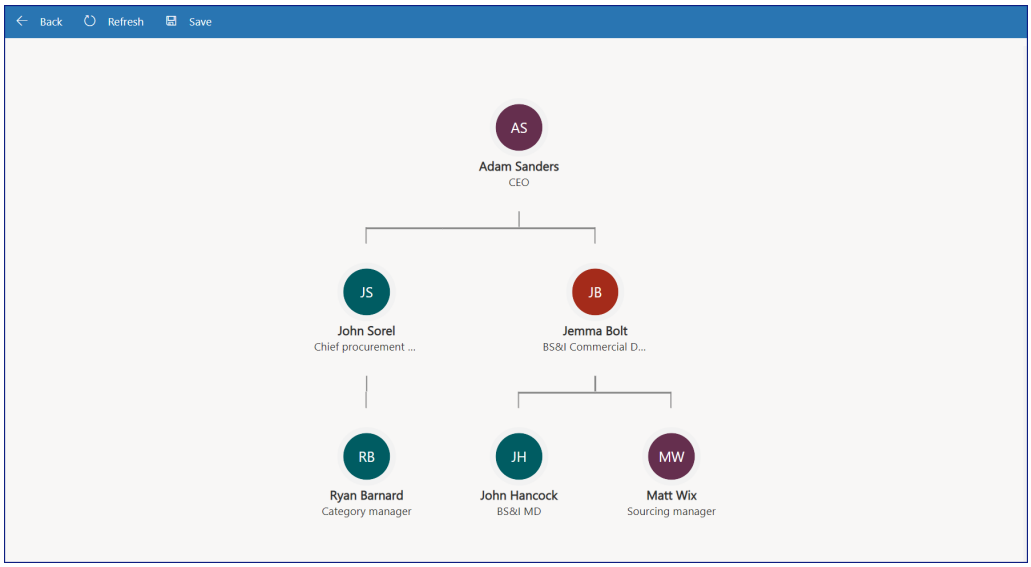


Figure 37: The Org Chart

If person B is dragged over person A, then person B is positioned as a member of person A's staff.

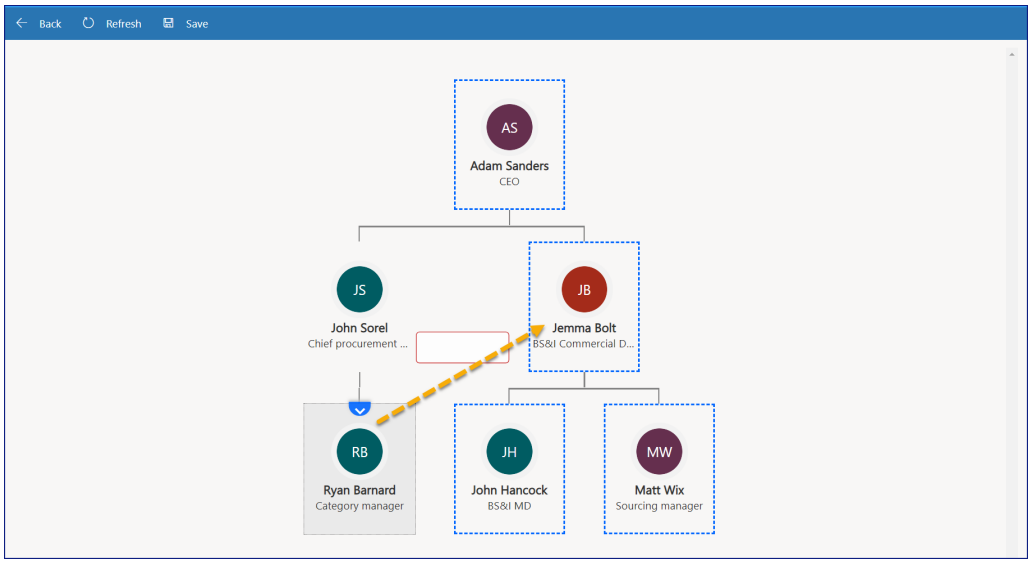


Figure 38: Moving people on the org chart

Result after dragging Ryan Barnard over Jemma Bolt:

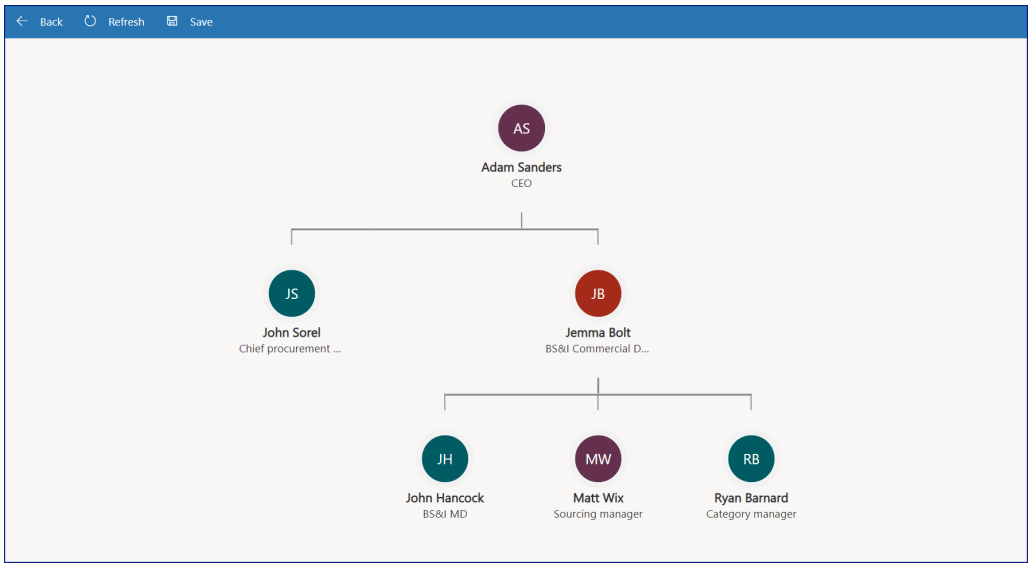


Figure 39: After changing org chart

How to remove a contact from the org chart

To remove a contact from the organization chart, select it and click the Delete button on the command bar. This removes the contact from the organization chart, but it does not remove the contact, only the association the contact has with the account. When a Contact User is deleted, the Contact User's direct reports (if available) are moved to the level of the deleted Contact User.

How to add a new contact from the org chart?

To create a contact, select New Contact. It will open the Contact Quick Create form (see page 52)

and enter the contact details in the quick create form.

Select Save and close.

In the Find Records sidebar, select Add. After you save the contact, the flowchart displays the contact now associated with the account with their full name and role.

Double-click the contact to add more contacts to the flowchart or edit the contact's details. A contact can have only one manager, but can have multiple direct reports.

4.1.3 Account - Key Figures Tab

4.1.4 Account - Project Opportunities Tab

This tab displays all the opportunities in which the account is involved.

Let's imagine that Premier Inn decides to create a new hotel in Peterborough. Their engineering office is the Finninox. Taymor Plumbing Supplies and Plumbstock March have been providing our products to Smartheat Plumbing & Heating Ltd who is the installer.

All these companies are involved in this project. So whenever we open any of these accounts, we will see that opportunity in their account. So one given opportunity will be accessible from several accounts.

The screen displays 3 charts and 2 grids:

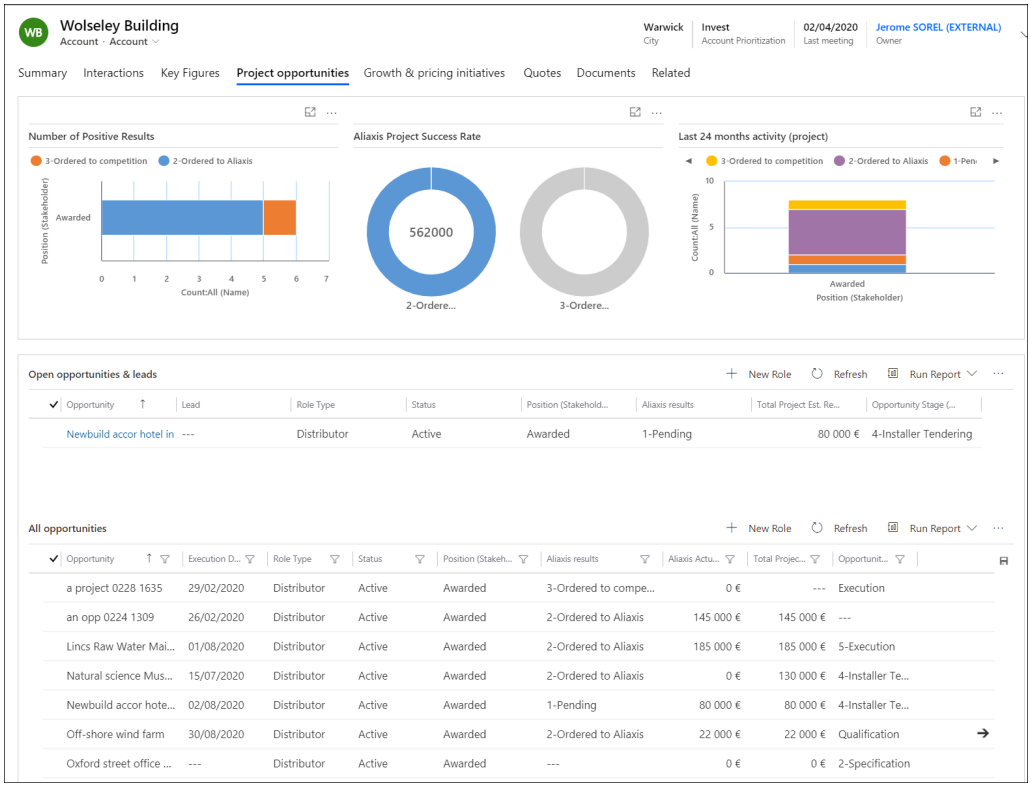


Figure 40: Project opportunities tab

Charts

The 3 charts analyze the opportunities created in the last 24 months.

Top left chart

This graph shows the opportunities won by this account and separates those where he placed us an order (or specified us if planner) in blue and those where he did not place an order (or specified us if planner) in red.

Displays only the awarded opportunities (the account has been awarded the opportunity). In the example above, Wolseley Building won 6 projects, out of

which 5 have resulted in Aliaxis products being installed, and one without Aliaxis products.

Central chart

This graph shows the opportunities won by this account and separates those where he placed us an order (or specified us if planner) on the left and those where he did not place an order (or specified us if planner) on the right.

The left ring displays how much has been ordered to Aliaxis (in value inside the ring, in percentage see color of the ring)

The right ring displays how much has been ordered to competition (in value inside the ring, in percentage see color of the ring)

Top right chart

This chart represents out of the total opportunities won by an account in the last 24 months, how many have resulted in purchases for Aliaxis, for the competition, or are still awaiting orders.

The views

The top view displays all the opportunities we should focus on as we can influence buying Aliaxis products. The bottom view displays all the opportunities for this account, present, and past, won or lost.

On both views, we have 2 important columns: position and Aliaxis results

- **Position (stakeholder)** defines the status of the opportunity as far as the account is concerned:
  for this account, is he the owner of the opportunity (i.e. the investor) or is he pending selection? Has he been ruled out? Has he been awarded the contract? Is he a sub contractor?
- **Aliaxis result** only makes sense if the position of the stakeholder is awarded. In this case, what is the final result for Aliaxis? Is it still pending? Did it result in order to Aliaxis? Did it result in order to competition?, or in case of a planner, did he specify us? Did he not specify us? This is the key data to determine the affinity level of our account.

4.1.5 Account - Growth and Price Initiatives Tab

This tab displays all the initiatives of the last 24 months for this account, whether the account is a target or an invoiced account.

- **Target Account:** that means that the initiative is directed towards this account.
- **Invoiced Account:** it means that this account is the one that will be billed, therefore through which the outcome of the initiative can be measured.

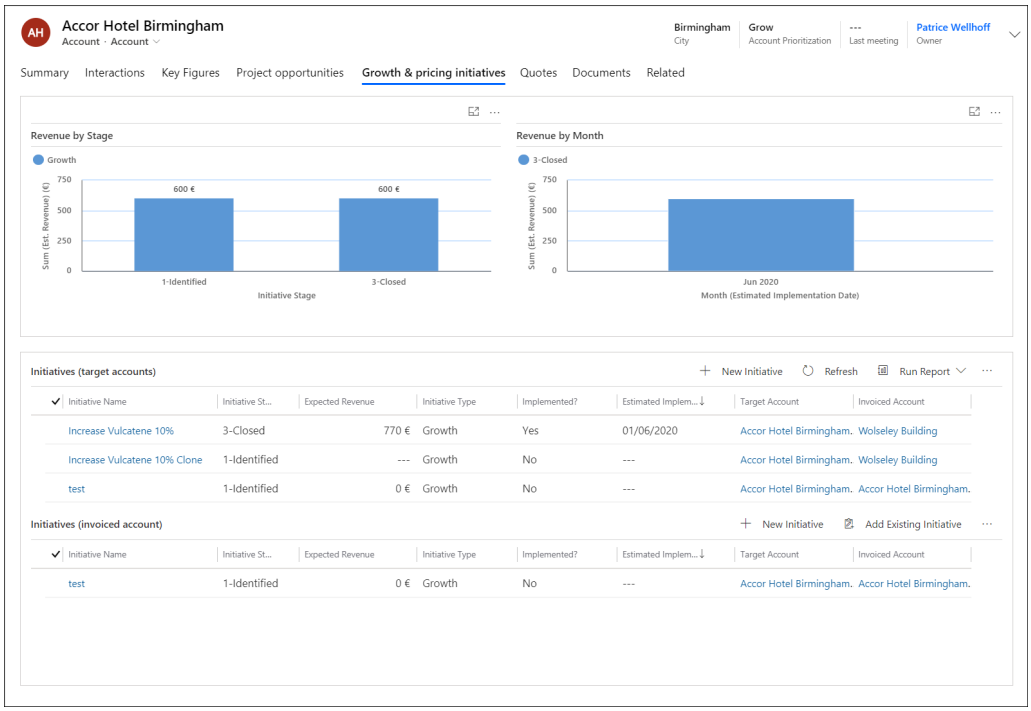


Figure 41: Account - Initiatives tab

Charts

- **Revenue by stage** (top left): displays the total revenue of the initiatives stage (Identified, Planned or Closed)
- **Revenue by month** (top right): displays the total revenue of the initiatives per month

Views

The top view displays all initiatives where the current account is the target account. The bottom view displays all the initiatives where the current account is the invoiced account. If an account is the target account and the invoiced account, the initiative will appear in both views.

4.1.6 Account - Quotes Tab

Her you will find all the quotes of the customer that the back-office attached to the account.

Most of the time, these quotes are the ones with special prices. "Usual" quotes do not need to be logged in the CRM, as they already are in the ERP.

They can be downloaded using this grid.

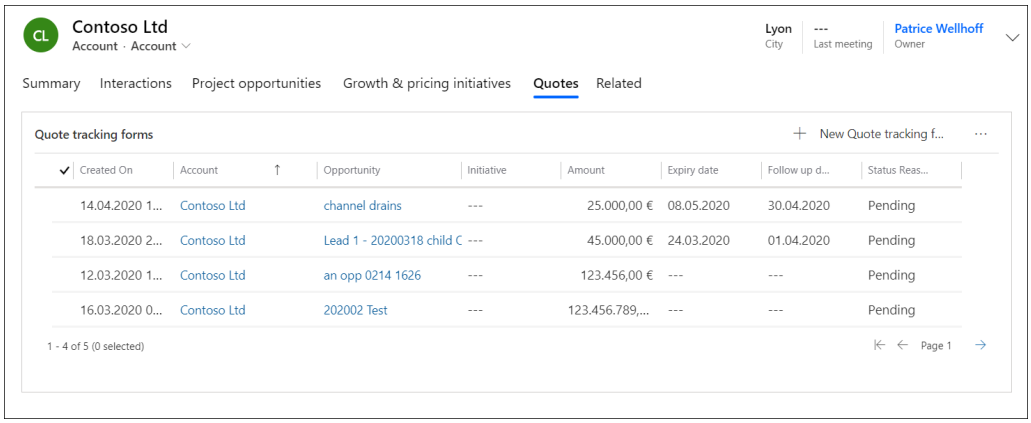


Figure 42: Account - Quotes tab

4.1.7 Account - Documents Tab

Here are all the documents related to this customer and stored in SharePoint.

All the documents can be downloaded from this form.

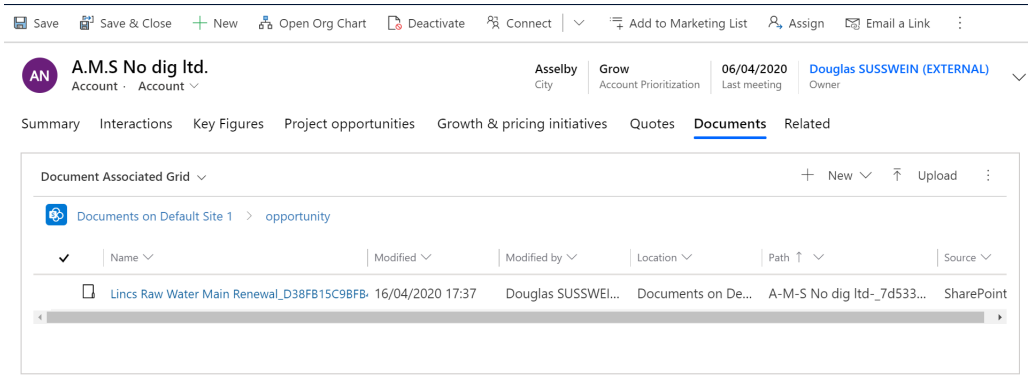


Figure 43: Account - dicument tab

4.2 Contact

A contact is an individual.

A contact may or may not be linked to an account.

When a contact is linked to an account, it means that they work for that account.

Please note: it can happen that a contact changes company and therefore moves from one account to another. The good practice is to indicate in the contact record of the first account that he has left the company, and to recreate the contact in the new account. Failure to do so could result in the activity history of the first account ending up in the second account, giving incorrect information.

4.2.1 Contact - Summary Tab

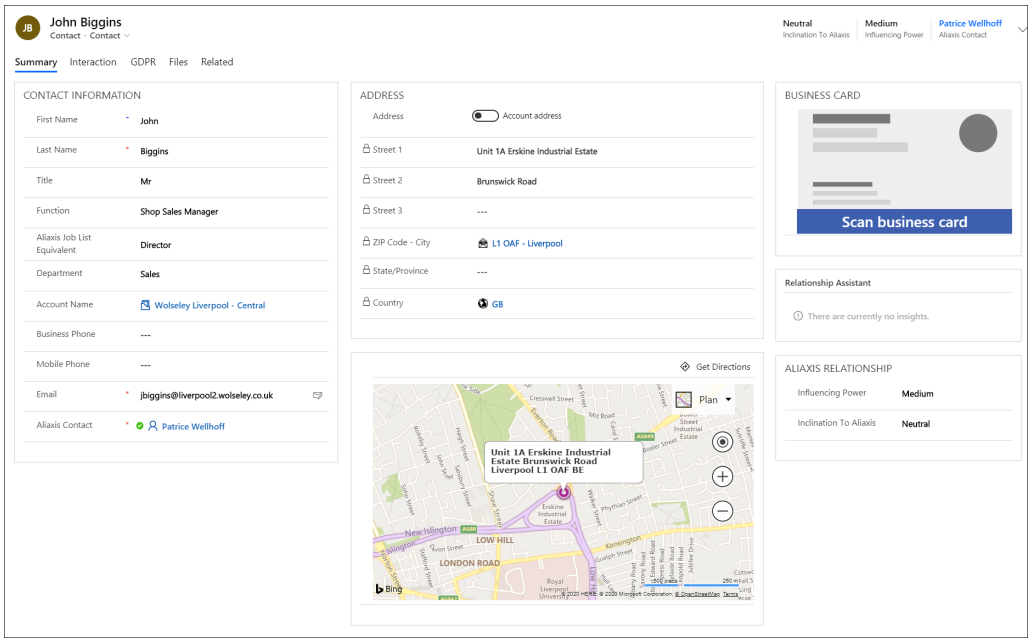


Figure 44: Contact Summary Tab

Contact information section:

- **First Name, Last Name:** self explanatory.
- **Title:** Mr, Ms,. Used to define gender.
- **Job title:** official function as written in the contact business card.
- **Aliaxis job equivalent and Department:** the combination of these 2 fields will allow to classify this function. For example, the commercial sales director of a distributor could be director (Aliaxis Job List Equivalent) and Sales (Department)
- **Business Phone, Mobile Phone and email:** although they are indicated as mandatory, only one of them needs to be filled. As soon as one is filled, the others are no longer mandatory.

Address section:

- **Address:** if the slider is set to Account Address, this means that the contact's address corresponds to that of the account on which it depends. If it is set to Contact specif address, the values can be entered by the user.

Business card section:

- **Scan business card:** This button activates the business card recognition. On a PC, the system will ask for a photo/scan of a business card. On a mobile phone this will trigger its camera.

Aliaxis relationship section:

- **Influencing Power:** it is the level of influence that this customer has on the choice of manufacturer (Aliaxis or the competition). It is to be estimated by the salesperson.
- **Inclination to Aliaxis:** Is this client for or against Aliaxis, or is he neutral?. It is to be estimated by the salesperson.

4.2.2 Contact - Quick Create Form

When creating a contact from an account, a Quick Create form pops up.

To create a contact from an Account, click on new contact:

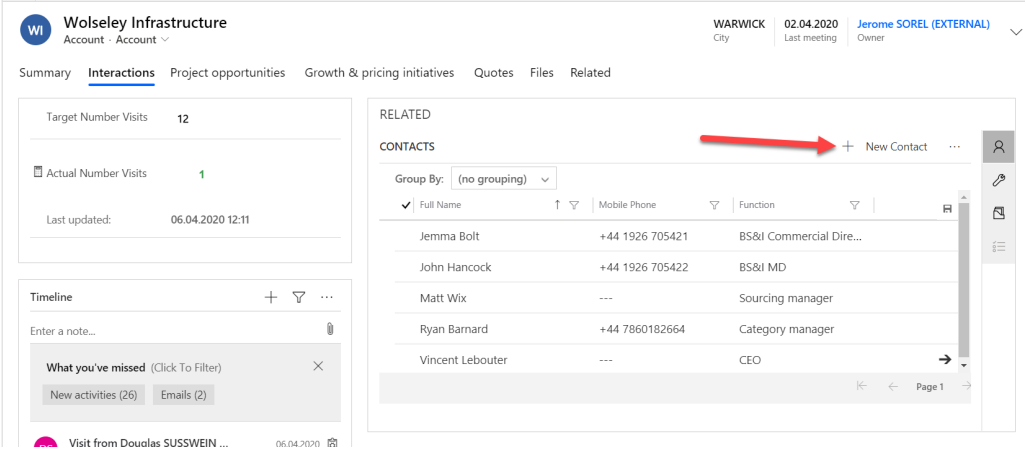


Figure 45: Contact - Create from Account form

A new Quick Create form pops up:

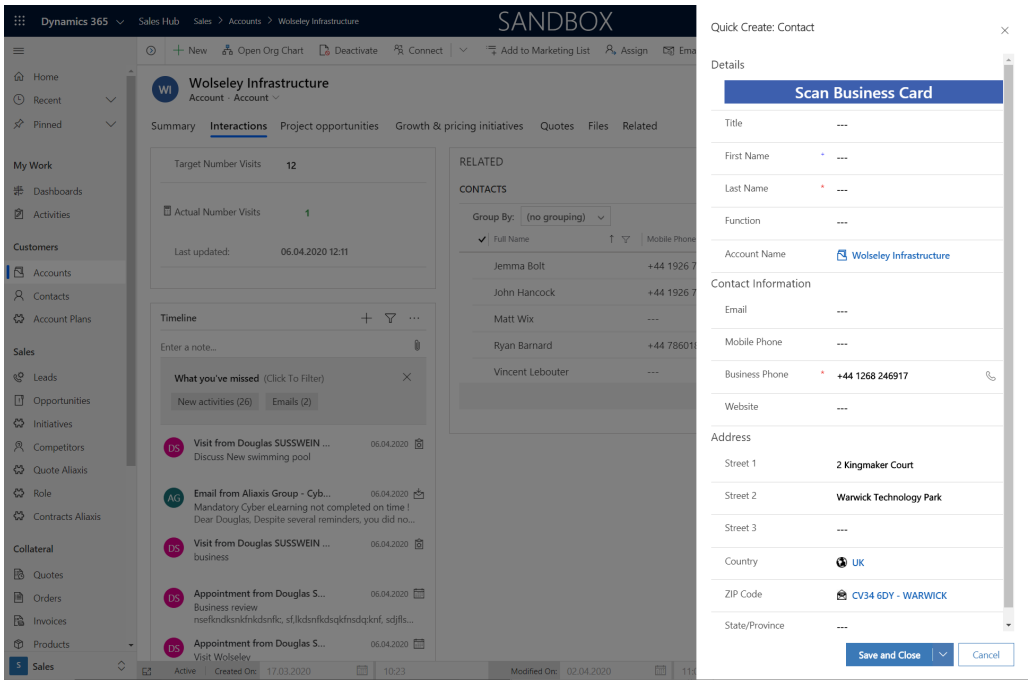


Figure 46: Contact - Quick Create Form

Title, First Name, Last Name, Function, email, mobile phone, and business phone should be entered.

Address: come pre populated with the account address, but can be changed by the user.

Scanning business card

See video "How to scan a business card"

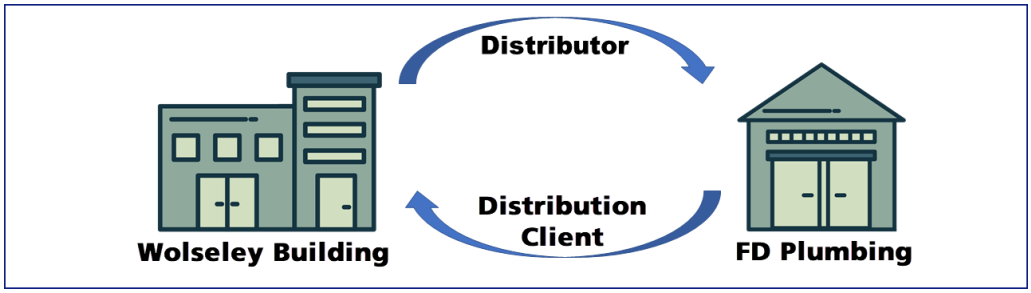
4.3 Connection

Connections in Dynamics enable you to create and view the relationships between Accounts.

These are explained and seen in action in the video 01. Account Connections

A connection has a role that explains this relationship.

For example, *Wolseley Building* could be the distributor of *FD Plumbing*. This also means that *FD Plumbing* is a client *of Wolseley Building*. So the role reads as a distributor in one direction and as a distribution client in the other direction.



Connection form

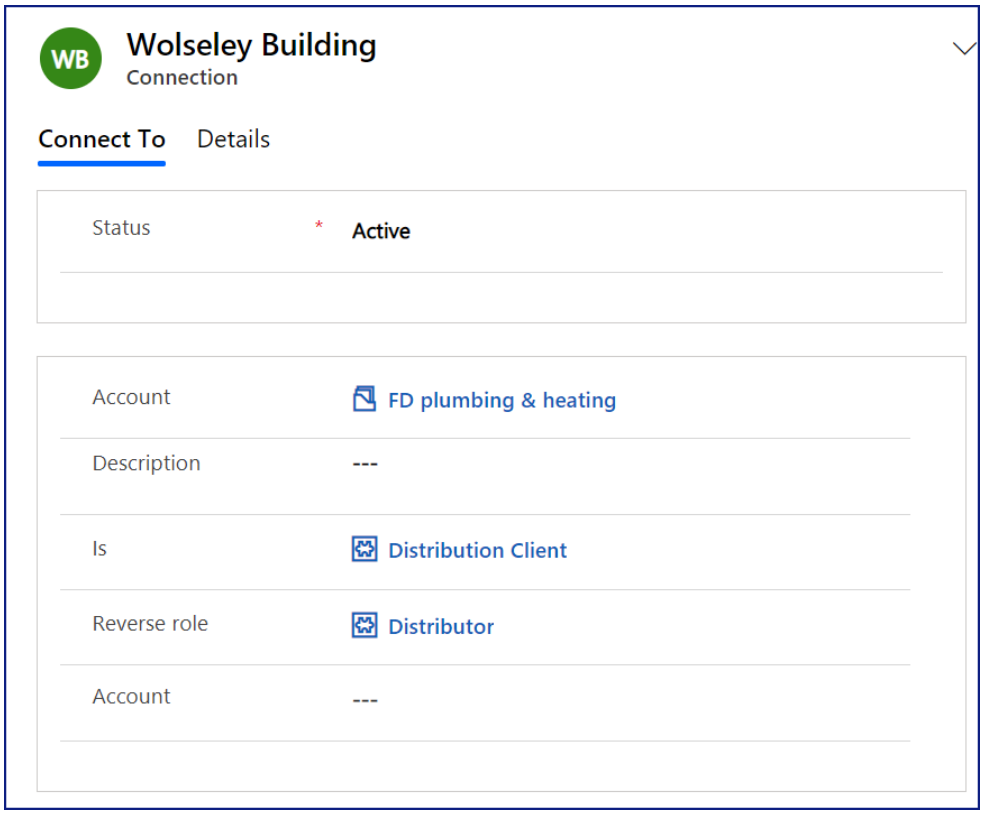
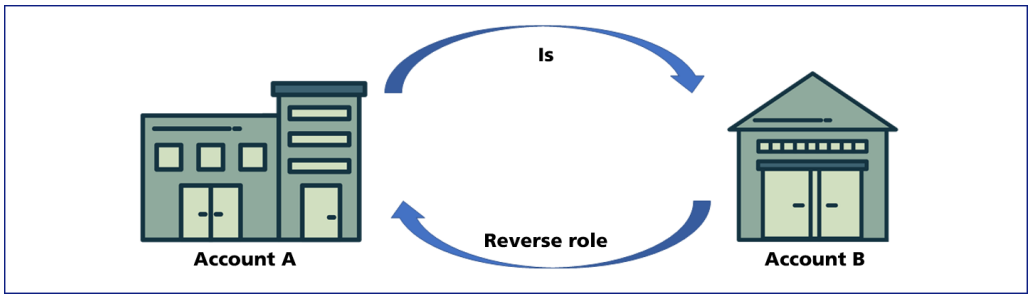


Figure 47: Connection Form

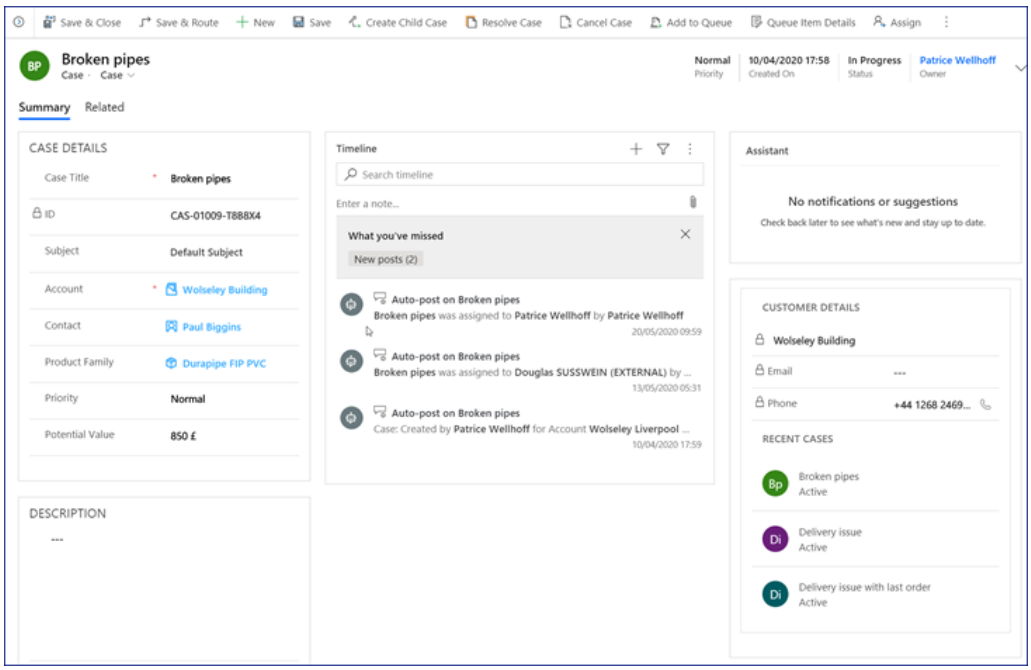
If we create a connection between company A and company B,

- **Account (top of section):** would be company A
- **Description:** any additional information (such as number 1 client)
- **Is:** the role of company A in the relationship with company B
- **Reverse role:** the role of company B in the relationship with company A
- **Account:** would be company B



4.4 Claims

A case is a situation requiring investigation or action. Most of the time, it is triggered by a customer claim, therefore claims or cases are synonymous, in our CRM perimeter.



Subject : cancelled order

contract claim

customer error

damaged

driver error

duplicate invoice

label error

late delivery

loading error

lost goods

manufacturing error

pick error

price/disc

sales error

short delivery

uplift request

3rd party error

product recal

4.5 Account Plan

Account planning widens our focus from short-term, opportunity-driven conversations to long-term customer-centric conversations.

The Account Plan helps the salesperson to know the account inside and out. The plan contains critical information about the account. Capturing this information down in a concise, structured way helps the salesperson to focus on what is important about the account and how it aligns with Aliaxis' offering and objectives.

An account plan is a document designed to plan over the year or more the actions to be carried out on a given account.

As it will require a period of thinking in order to deepen our knowledge of the account and to study a development strategy, an account plan is made only for our strategic or priority accounts.

A given account can have several account plans during a given year, as it is possible to create one account plan per segment.

4.5.1 Account Plan - Account Background Tab

This tab contains the key data to understand the account's challenges and priorities.

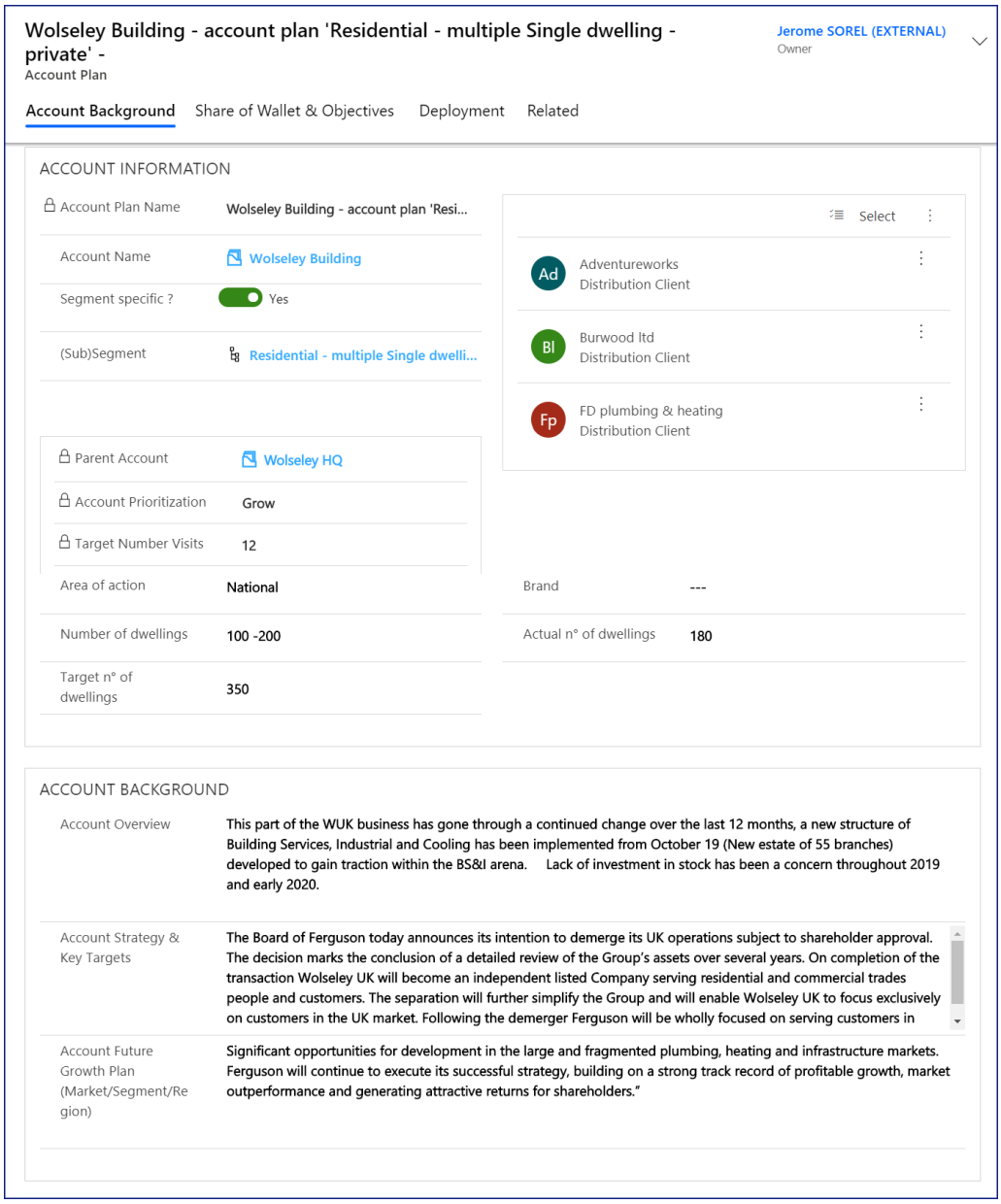


Figure 48: Account Background Tab

Account Information Section

- **Account plan name:** name of the account plan
- **Account name:** link to the account
- **Segment specific**: if Yes, one needs to specify which segment is concerned in the (Sub)Segment field
- **Sub(Segment):** appears only if the account plan is segment specific
- **Parent Account, Account prioritisation, target number of visits, actual number of visits** and **Last updated:** all fields come from the account form.

The following section will only appear for the multiple single dwelling sub segment:

- **Area of action:** Is the scope of this Account national, regional or local?

The other fields are self explanatory.

Account Background section

The 3 fields, **Account Overview, Key Strategy** and **Key Targets** and **Account Future Growth Plan** indicate the client's intentions, ambitions and strategy. They are NOT our intentions or strategy towards the client. These fields are intended to better understand our client's interests.

4.5.2 Account Plan - Share of Wallet & Objectives

In this tab we will identify Aliaxis' opportunity landscape, define strategy, offering and objectives.

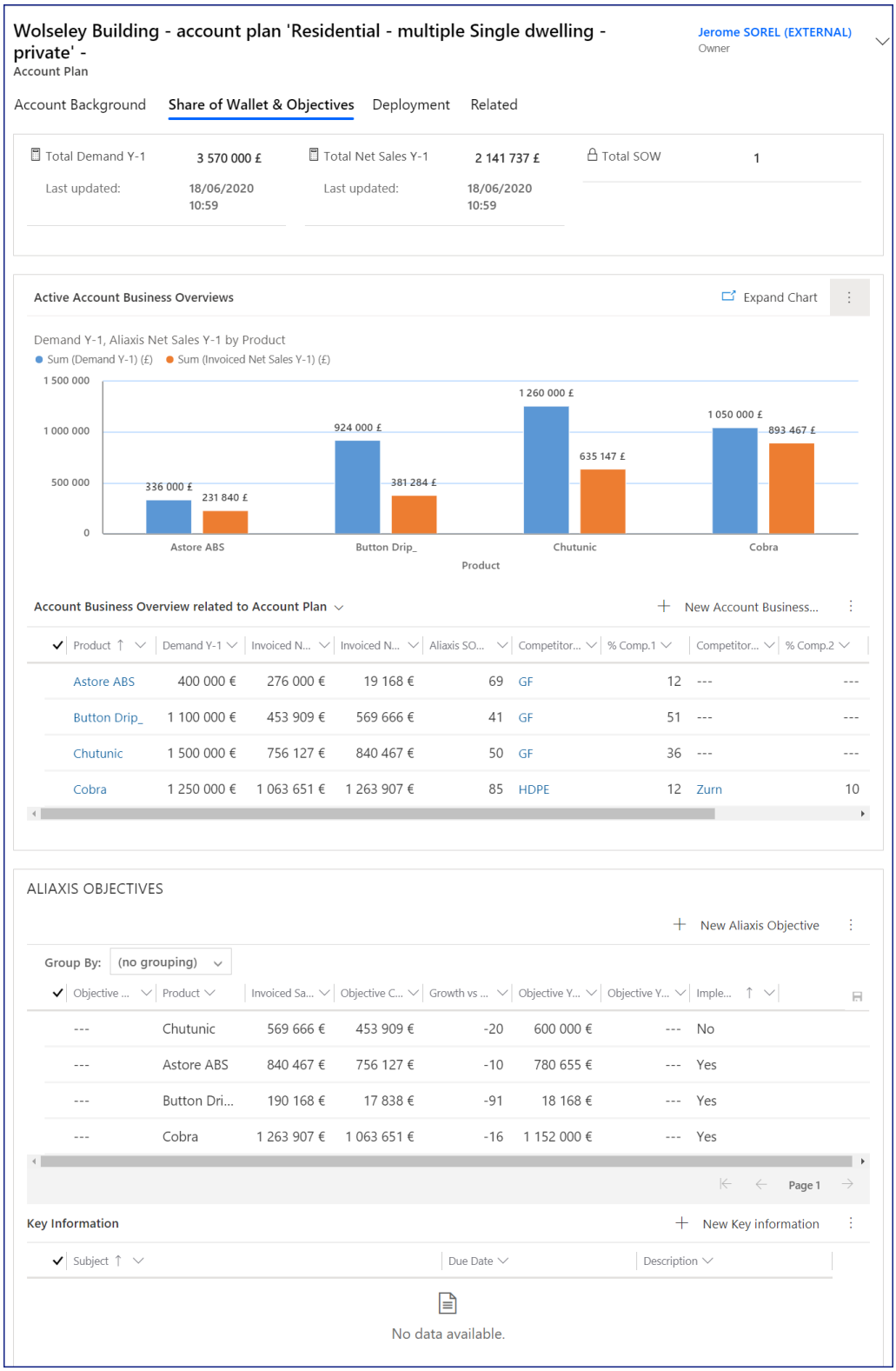


Figure 49: Account Plan - Share of Wallet and Objectives tab

- **Total Demand Y-1:** calculated field (date and time of calculation just below figure). The total demand refers to the Total Addressable Market (TAM) of the account.

- **Total Net Sales Y-1:** self explanatory. Calculated field (date and time of calculation just below figure)

Chart

The top chart displays per product for which we have an account business overview, the total customer demand (in blue) and the total net sales (in red) for Y-1.

Account Business Overview (see also page 63)

The next table can be directly filled or imported from Excel. Its purpose is to determine how the account has been performing with our products and services and the share of wallet of our main competitors with that account.

- **Demand y-1:** Account total demand in terms of net sales for the reference year, preferably the most recent full year N-1.
- **Aliaxis Net Sales Y-1:** Aliaxis Net Sales Full Year N-1 (N refers to the current year.)
- **Aliaxis Net Sales Y-2:** Aliaxis Net Sales Full Year N-2
- **Aliaxis Net Sales YTD:** Aliaxis year to date net sales for the current year N.
- **Aliaxis Share of Wallet:** Our share of wallet at the account calculated by dividing Aliaxis net sales of the most recent full year N-1 by the total full year demand of the account.
- **Competitor 1:** Name of the competitor.
- **% Competitor 1:** Share of wallet of the competitor expressed as a percentage of the account's total full year demand.
- **Competitor 2:** Name of the competitor.
- **% Competitor 2:** Share of wallet of the competitor expressed as a percentage of the account's total full year demand.

Note: if we combine all these records of all the accounts, added to the cumulative data of those account we do not have in our CRM, we will result in the growth database (see glossary)

Aliaxis Objectives

Here we will record a summary of the short to longer terms objectives we want to achieve with the account.

- **Objective Description:** Description of the objective to achieve. Objective should be specific and actionable. Not all objectives have to be financial objectives. They may also be specific enablers. An objective may be translated into multiple actions in the Action Plan section of the Value Proposition Tab.

- **Product:** the product family or sub-family level. Warning: don't create 2 lines of objectives for one product (do not split one product into 2 objectives) as it would lead to wrong reports)
- **Aliaxis Net Sales Y-1:** Base year used to compare the progress against. An objective is the impact we want to achieve compared to the situation of the base year N-1.
- **Objectives Current Year, Objectives Year+ 1, Objectives Year+ 2:** Financial impact expected after achieving the objective in the respective years.
- **Growth potential Y+1:** calculated (objectives current year/net sales Y-1)
- **Implemented Y/N:** Indication whether the objective of Aliaxis Net Sales Current Year has been achieved in the current year.

Key Information

These are instructions that the manager of the account plan wants to pass on to all the salespeople in charge of child accounts of that company. Key information can be filled at the Account plan level or at the account level.

For example, a Sales Director in charge of Wolseley HQ, after a negociation with the headquarterss could agree on a 2 month promotion for all the Wolseley shops. This information needs to be passed on for actions and will be displayed in the account form of each Wolseley account.

4.5.3 Account Plan - Deployment

In this tab, we will detail our action plan and implementation.

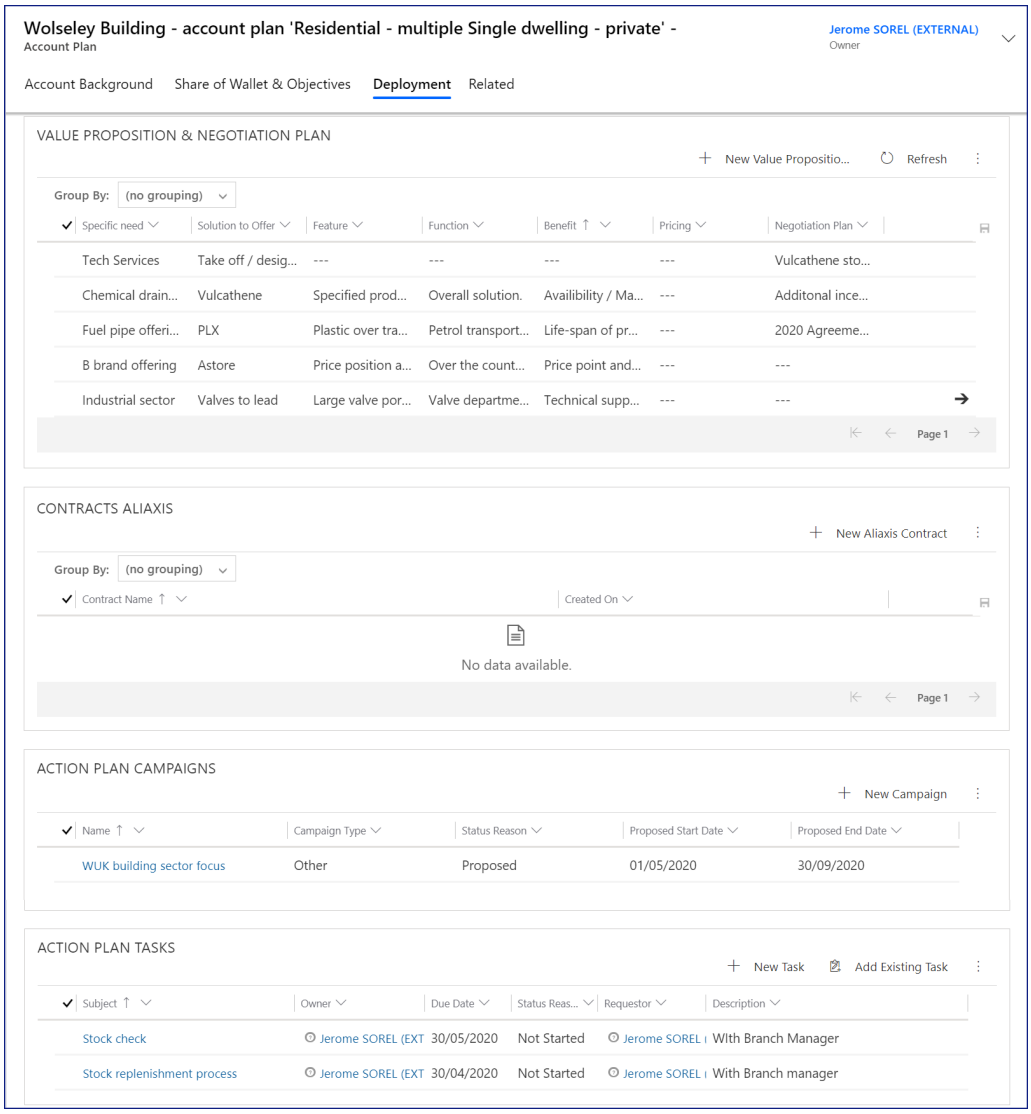


Figure 50: Account Plan - Deployment tab

Value Proposition and Negotiation Plan section

A value proposition is a clear statement that explains how our product or service solves or improves the account's problems, that delivers specific benefits, and that tells the account why they should buy from Aliaxis and not from the competition.The negotiation strategy describes the what the objective of the negotiation is and how you plan to get there.

- **Specific Need:** Here are the account's specific needs, what would make the account's job or life easier, or the main difficulties and challenges the account encounters, or the problems that the account intends to solve with the purchase of products or services. There may also be latent needs, issues and problems that the account has not yet realized.
- **Solution to Offer:** Which product and service help satisfy the account's specific need? Which product and service create account gains or alleviate account pains? Product or service name. Level of detail to be determined per

business unit, usually a higher level in the product hierarchy such as e.g., the product family or sub-family level.

- **Feature:** A fact about our products or services that brings value or benefit to the account.
- **Function:** Here, we will explain what the feature of our product or service will do for our account, how will the feature help satisfy the account's specific needs.
- **Benefit:** What quantifiable benefits will the product or service bring to the account Benefits are typically stated in terms of loss or gain and are the best when they are quantifiable. It explains what's in for the account.
- **Pricing:** Price you want to obtain for the product or service.The Pricing field is optional. Not all value propositions have a corresponding price.
- **Negotiation Plan:** The negotiation strategy describes the what the objective of the negotiation is and how you plan to achieve the objective. How will you sell the corresponding value proposition to the account? What will you do in case the account challenges or rejects your value proposition?

Contracts

The contracts that have been signed before or during the period are an asset that we must use to achieve our objectives. They are accessible in this section.

Action plan campaigns

A campaign can be launched to achieve one of the objectives. If so, indicate the campaign here. This will allow access to the campaign results from the account plan.

Action plan tasks

Here we will define the actions to be executed to achieve the objectives

4.6 Growth Database

The growth database is a mapping of the total market, account per account and product by product, for those we know, and globalized for the accounts we do not know, with their demand by product, our share of wallet, and our primary competitors.

The growth database is the total of all the "Aliaxis Business Overview" records.

As far as the growth database is concerned, we have 3 types of accounts

a) the accounts of the CRM with an account plan.

b) the accounts of the CRM without an account plan

c) all the other accounts that we do not know.

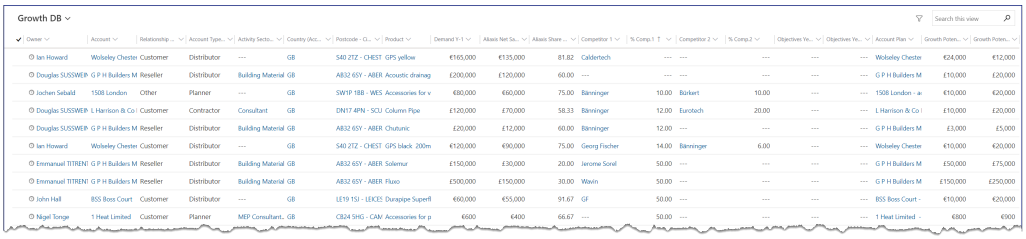


Figure 51: The Growth Database

Accounts of the CRM with an account plan:

For all our accounts for which we have an account plan, this is shown in the on Account Plan - Share of Wallet & Objectives tab. (see page 58)

Accounts of the CRM without an account plan:

One enters the form below:

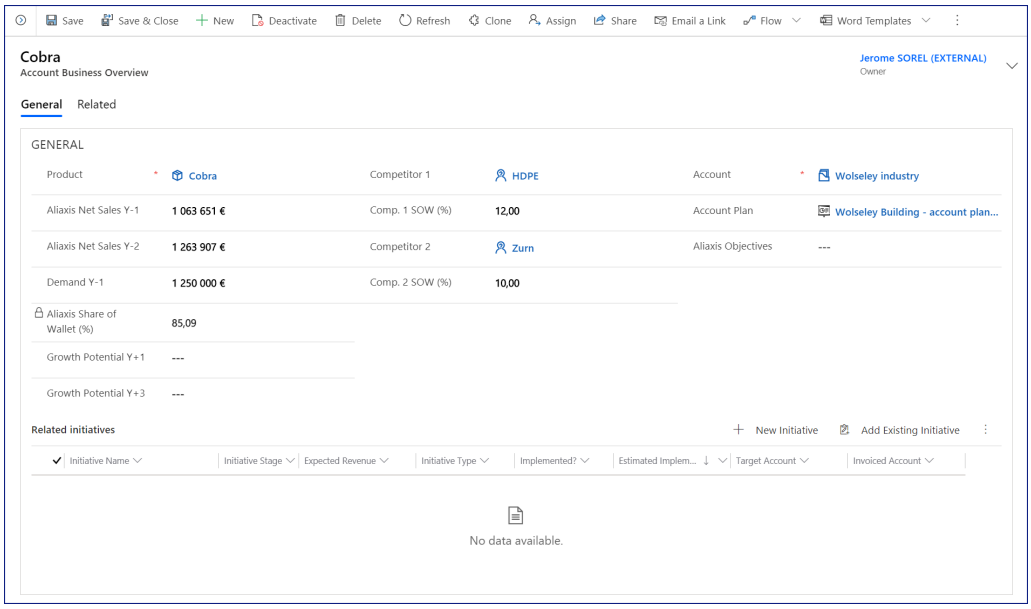


Figure 52: Account Business Overview.

- **Product:** self explanatory.
- **Account**: self explanatory.
- **Account Plan**: self explanatory. Only filled if this is part of an account plan.
- **Demand y-1:** Account total demand in terms of net sales for the reference year, preferably the most recent full year N-1.
- **Aliaxis Net Sales Y-1:** Aliaxis Net Sales Full Year N-1 (N refers to the current year.)
- **Aliaxis Net Sales Y-2:** Aliaxis Net Sales Full Year N-2
- **Aliaxis Net Sales YTD:** Aliaxis year to date net sales for the current year N.

- **Aliaxis Share of Wallet:** Our share of wallet at the account calculated by dividing Aliaxis net sales of the most recent full year N-1 by the total full year demand of the account.
- **Competitor 1:** Name of the competitor.
- **% Competitor 1:** Share of wallet of the competitor expressed as a percentage of the account's total full year demand.
- **Competitor 2:** Name of the competitor.
- **% Competitor 2:** Share of wallet of the competitor expressed as a percentage of the account's total full year demand.
- **Growth Potential Y+1:** self explanatory.
- **Growth Potential Y+2:** self explanatory.
- **Aliaxis Objective:** Description of the objective to achieve. All objectives should be specific, actionable, have due dates and clear owners to track progress. Not all objectives have to be financial objectives. They may also be specific enablers.
- **Related Initiatives**: For those accounts without an account plan, one can link initiatives to reach the expected growth.

4.7 Contract

This entity provides access to customer contracts via a link to Sharepoint.

The fields of this entity allow a quick view of the contract content without having to open it.

In addition, in the case of framework contracts, it allows a simple follow-up of the target given on this contract and the figure achieved (if the account signing the contract is not directly invoiced).

It may happen that the contract itself is confidential, in which case the link to Sharepoint will not allow you to see the contract. Only the fields of the form will remain visible..

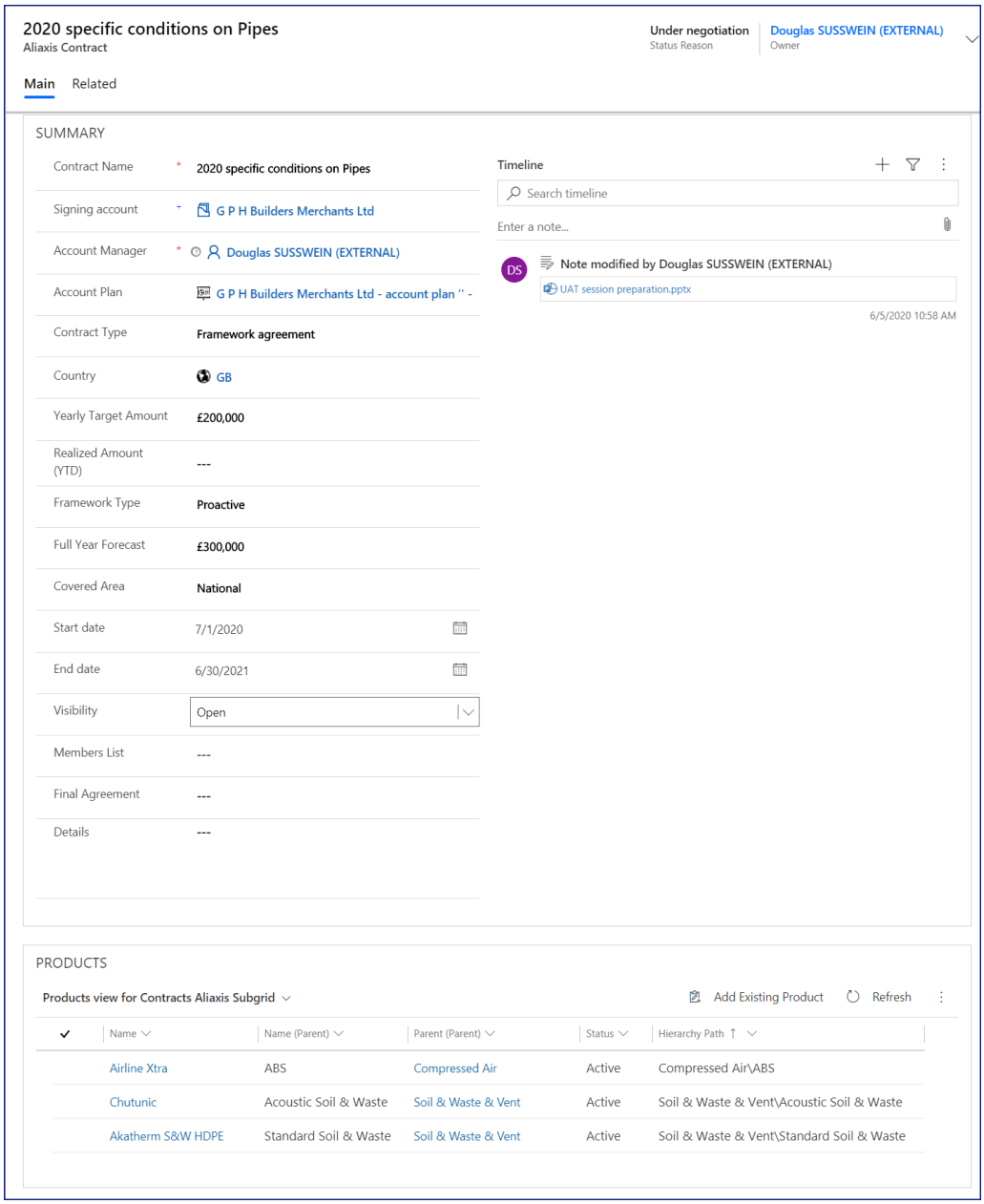


Figure 53: Contract form

- **Contract name** : name given to the contract
- **Signing account :** which account has signed the contract.
- **Account Plan** : Accounts plans are also related to the contracts, as they are a means to reach the objectives. Each Account plan has objectives and deployments. The contracts that relate to an account plan objective should be related to the account plan as they are an asset that we must use to achive our objectives.
- **Contract type:** either a standard contract or a framework agreement (which includes the contracts with a buying group)
- **Country:** self explanatory

- **Yearly Target Amount (**framework contract only) : in case of a framework contract, how much do we want to achieve thanks to this framework contract. This field is to be filled by the person in charge of the contract.
- **Realized amount (YTD):** in case of a framework contract, where are we currently at? This field is to be filled by the person in charge of the contract. In the case of a framework contract for which the account is not invoiced directly, this field allows you to enter the last value reached on this contract.
- **Framework type :** can be tender or proactive. (just for information)
- **Full year forecast:** forecast for the coming 12 months after contract sign up.
- **Covered Area:** is this an international, a national, a regional or a local contract ? (just for information)
- **Start Date:** contract start date
- **End Date:** contract end date
- **Visibility:** Open or Restricted:
  - Restricted: members of the Business Unit only can see this record
  - Open: all the people of the country can see the record.

Note: the visibility of the PDF of the contract is different hand handled on Sharepoint. Usually one can access the contracts documents that he signed, and only the contract forms for the one he did not sign. Management have access to all contracts.

- **Members List:** this is a link to a marketing list containing all the accounts that can benefit from this contract
- **Final Agreement:** Link to SharePoint document (URL)
- **Products:** list of products covered by the contract

Contract security:

We have a 2-level security

- Access to the CRM record
- Access to the contract document itself.

The CRM record access depends on the **Visibility** field:

- Restricted: this record is accessible by one's BU (see security) and higher BUs.
- Open: accessible to lower BUs, too (all the people of the country).

The contract document access depends on SharePoint security, which is in the hand of each country. Having access to the CRM record does offer automatic access to the contract document

- The document is accessed via a link to the contract document stored in SharePoint contained in the **Final Agreement** field

4.8 Lead

Leads and opportunities: An opportunity is a situation in which it seems possible to make a sale, based on a set of indications or clues. The further the opportunity progresses, the higher the likelihood that the deal will take place. The very first step to take is to identify if an opportunity is a real opportunity worth investing time. This is what we call to qualify an opportunity.

Because we do not need much information at the initial phases, and that we will need more and more data as the process progresses, we have two forms in the CRM:

- The first form is called a **lead**. It is an opportunity that has not yet been qualified. It has a specific form, similar to an opportunity with fewer fields to fill.
- The **opportunity** starts after qualification. When the lead is qualified, all the data are automatically transferred from the lead to a new opportunity form and the previous lead form is marked as inactive.

Figure 54: Lead - Opportunity process

Note: a lead is an optional step. If an opportunity is worth working on, there is no benefit to creating a lead and then to qualify it as an opportunity. It is simpler to create an opportunity directly.

4.8.1 Lead - Summary Tab

In Dynamics, a lead is the initial form before qualification. When the lead is qualified, all the data are automatically transferred to the opportunity form.

Since we may know very little data in the initial phase, only the lead name (field topic) and segments are mandatory.

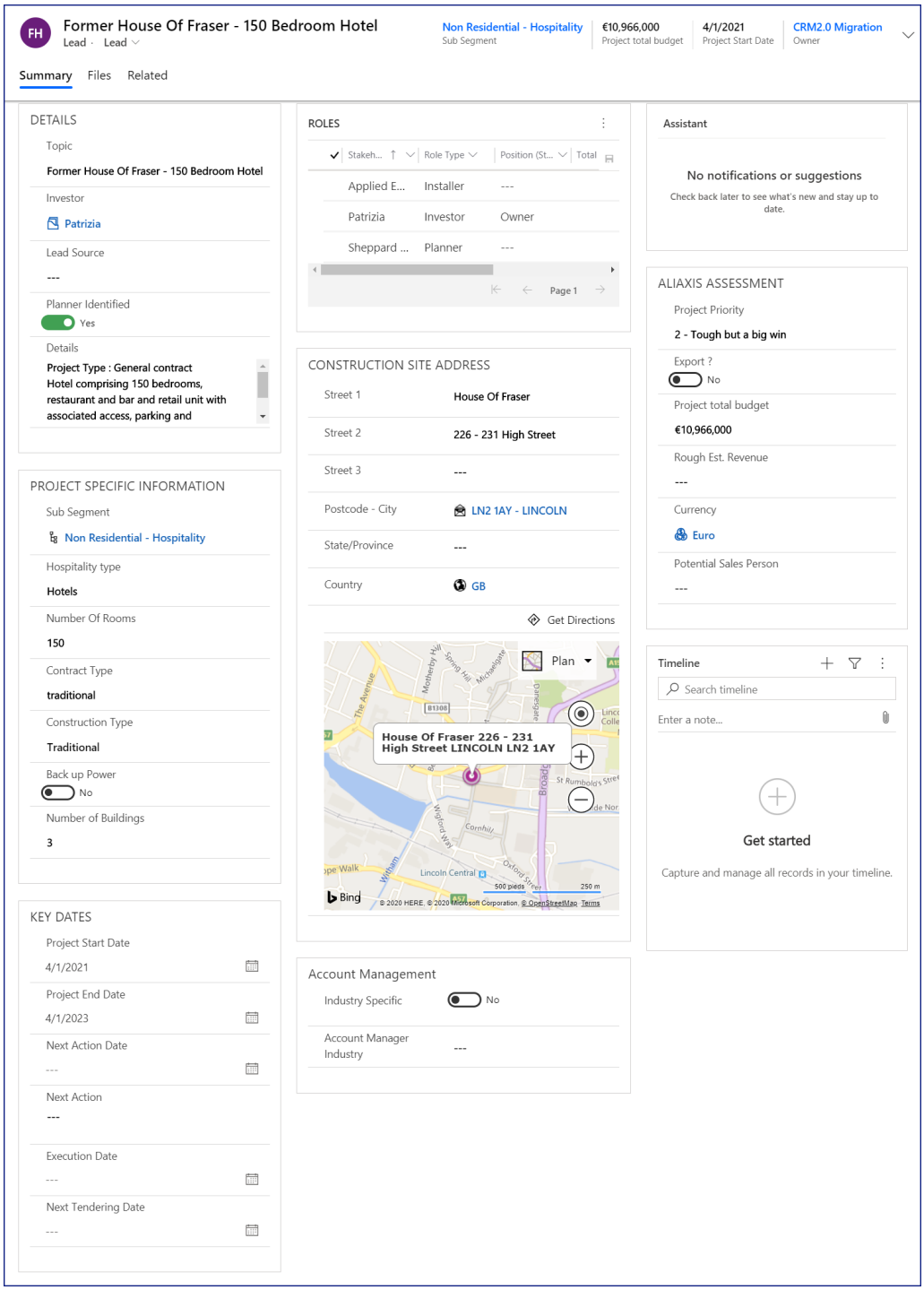


Figure 55: Lead - Summary Tab

Details section:

- **Topic**: this field should describe the lead.
- **Investor**: it is the legal entity for whom the project is to be implemented and carried out. The Investor can already be in our account database or not. If the Investor is not in our account database, it will be created when the lead will be qualified.

- **Contact**: optional name of the person in charge of the project or RFQ at the Investor. The contact can already be in our account database or not. If the contact is not in our contact database, it will be created when the lead will be qualified.
- **Lead source:** most of our Leads are imported (Barbour ABI, Protel...) This field is to designate the original source of the lead.
- **Planner identified**: Self explanatory
- **Details**: to add more information needed about this Lead.

Project specific section:

Subsegment: indicate the subsegment information for the project. In case there are two subsegments or more for the project, indicate the main subsegments. Mandatory to qualify the lead.

Roles section:

Indicate the known accounts and roles for this lead (who is the investor, the planner, etc.)

Construction site address:

self explanatory

Aliaxis Assesment section:

- **Project Priority:** see business terminology.
- **Export:** is this lead being dealt with by the export department?
- **Project total budget:** It is the total budget of the project, which helps to understand the size of the project.
- **Rough estimated revenue:** that's roughly how much we think we can earn on this project
- **Potential Sales Person:** is calculated, depending on the segment/subsegment and the Postcode of the project. Can be changed as needed. Mandatory to qualify a lead.
- **Currency:** self explanatory.

Key Dates section:

- **Next action date:** self explanatory
- **Next action:** self explanatory
- **Execution date:** estimated date we will receive our first order for this project
- **Next tendering date:** self explanatory
- **Project start date:** self explanatory

- **Project end date:** self explanatory

4.8.2 Lead - Business Process Flow

The business process flow is the red line on top of the form that represent the progress of the lead/opportunity.

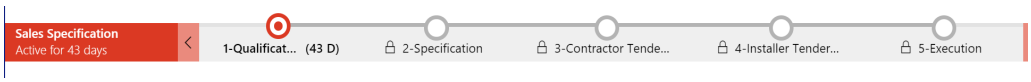


Figure 56: Business process flow

A lead can is qualified if it has been decided that the project is worth investing the necessary energy and we have the elements for the system to propose a sales person (i.e. by the segment and the postcode of the project)

The way to qualify a lead is by clicking on the Qualify button, *not* by using the Next stage button. This Next stage button is only useful when one reopens an inactive lead, and want to move from the lead to the project opportunity.

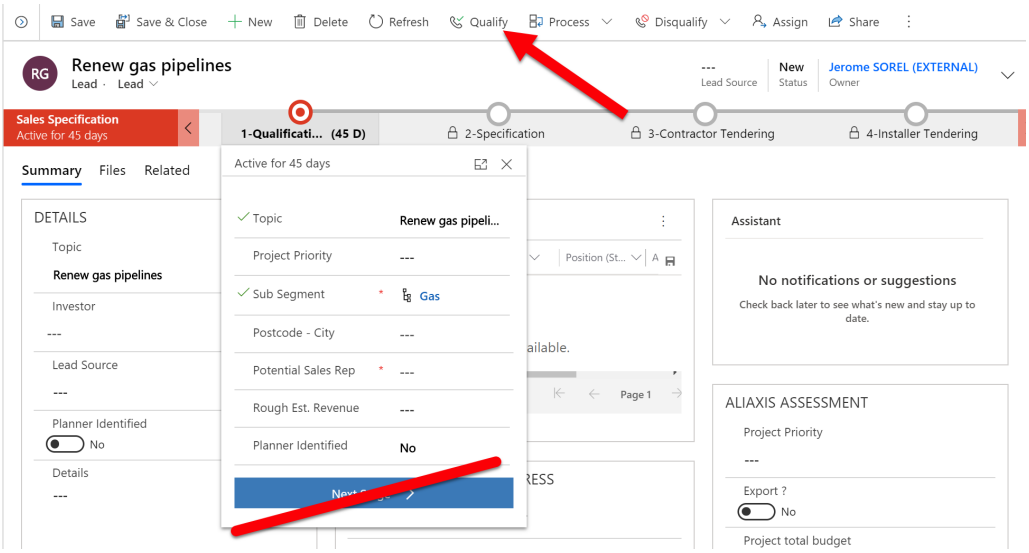


Figure 57: Lead Qualification

When a lead is qualified, it will deactivate the lead and create a matching opportunity record, and assign it to the potential sales representative who becomes the owner of the opportunity.

An email is also sent to the sales representative to let him know of this assignation.

The rest of the the process continues in the opportunity.

4.9 Project Opportunity

Leads and opportunities:

An opportunity is a customer project for which we have decided to spend time and effort in order to place our products.

We have decided to work on it because the opportunity is worth it and we think we have a chance to win it. That is what we call qualifying an opportunity.

Before an opportunity is qualified, it is named a lead.

Because we do not need much information at the initial phases, and that we will need more and more data as the process progresses, we have two forms in the CRM:

The first form is called a lead. It is an opportunity that has not yet been qualified. It has a specific form, similar to an opportunity with fewer fields to fill.

The opportunity starts after qualification. When the lead is qualified, all the data are automatically transferred from the lead to a new opportunity form and the previous lead form is marked as inactive.

Figure 58: Lead - Opportunity process

Note: a lead is an optional step. If an opportunity is worth working on, there is no benefit to creating an lead and then to qualify it as an opportunity. It is more simple to create an opportunity directly.

4.9.1 Opportunity Budgets and Revenues

Since they are different budgets in the opportunities, it is best to define them all in this section

Here is what you will find at the project level or product level of the opportunity

Project level	Product level
Project Total Budget	
Rough Estimated Revenue	Estimated Revenue
Actual Revenue	Actual Revenue
Open Revenue	
Expected Revenue	

Product opportunity level

Estimated Revenue: it is how much we think we can earn for a given product.

Actual Revenue: it is how much we have really charged for a product. If the product is marked as lost it is automatically zero, if it is marked at won, it has to be entered by the salesperson. It is always empty if the status of the product opportunity is "Open"

Project opportunity level

Project Total Budget: exactly what it means. It is the total construction site budget (not Aliaxis' share, not Aliaxis potential sales) which helps to understand the size of the project;

Rough Estimated Revenue: that's roughly how much we think we can earn on this project. It is different from the Estimated Revenue, which is calculated product per product, as we can have an idea of the Rough estimated revenue way before we have estimated revenues product per product.

Actual Revenue (calculated): It is how much we have earned so far on this project. Technically, it is the total revenue of the product opportunities won.

Open Revenue (calculated): it is how much we can still earn on this project. Technically, it is the sum of the estimated revenues for all the products that we have neither won nor lost (which are those we can still win). These products are in status "Open".

Expected revenue (calculated): It is how much we expect to earn in the project. Technically, it is the sum of the Actual Revenue and the Open Revenue.

4.9.2 Project Opportunity - Summary Tab

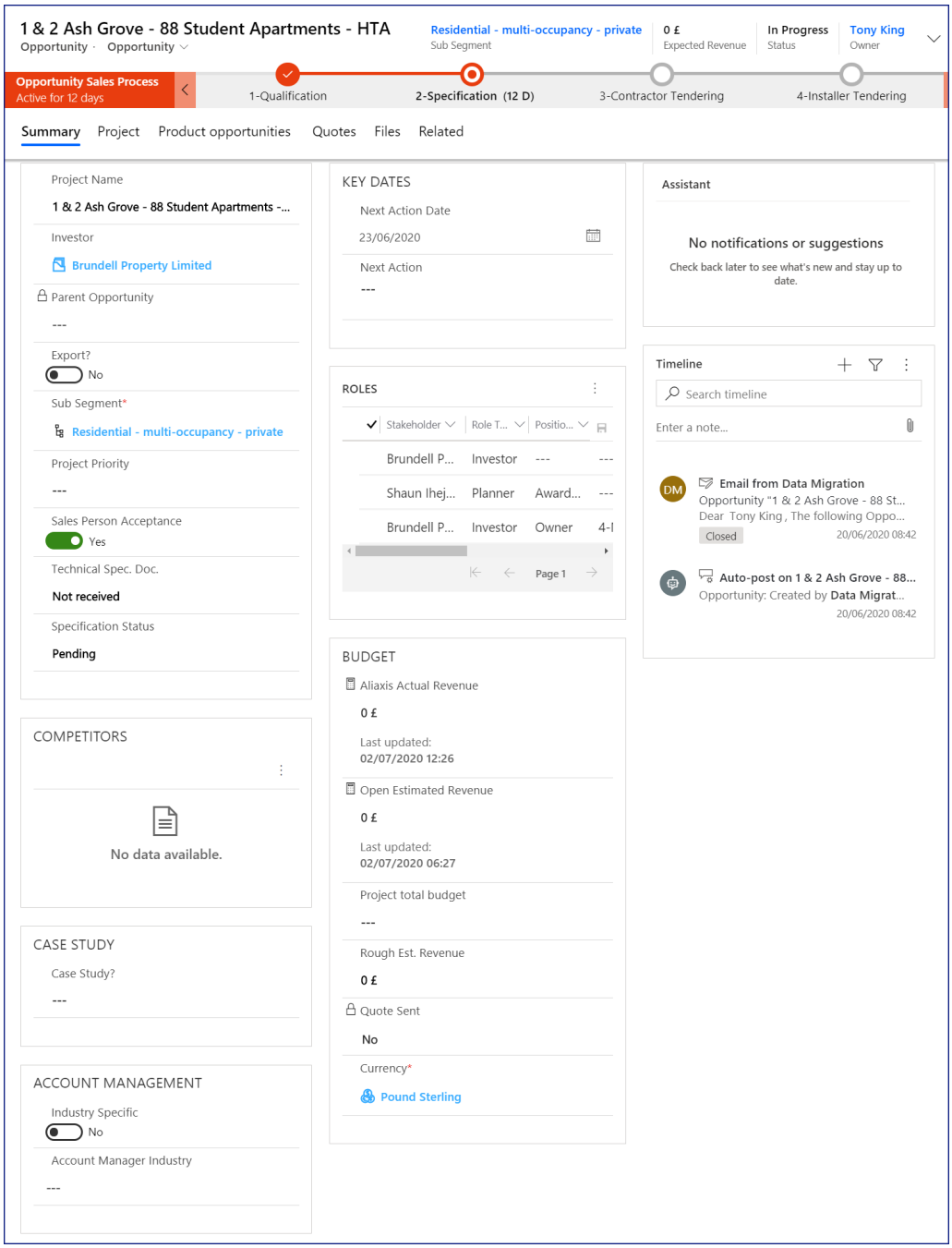


Figure 59: Opportunity Summary

Top of Form

First section

- **Topic**: this field should describe the opportunity.
- **Investor:** it is the legal entity for whom the project is to be implemented and carried out.
- **Export:** Is this lead being dealt with by the export department?

- **Sub segment**: indicate the sub segment of the project (see glossary). This field is manadatory and will populate in all the accounts active on this opportunity that they are active in this subsegment.

Note : Do not enter a segment instead of a sub-segment. Failure to do so will prevent to generate the product opportunities

- **Project priority**: Must win, tough but a good win, goto, not a focus area (see business terminology.)
- **Sales person acceptance:** if a sales person refuses the opportunity, he must move the slider to no and explain why in the justification field that appears.
- **Justification**: choose one of the possible reason for refusing the opportunity.

Note: if the salesperson refuses a product, the opportunity will return to technical department to assign it to another salesperson, and the reason why the 1st salesperson refused the opportunity will be logged into the timeline.

- **Technical Spec. Doc:** indicate if we have or not the document. If yes, it should be stored it in the Files tab.
- **Specification status:** this is were we identify if we have been specified or not. the following rules apply:
  - Specified: at least one product has been specified.
  - Spec broken by competition : we had one or more products specified, and we no longer have any, and at least one product was "spec broken by competition "
  - Spec broken by Aliaxis : Our competitor has been specified, be we were not, and there is at least one product that we won for which our competitor was prescribed
  - Pending: we do not know yet if we have been specified or not
  - Open spec: specifications are not brand specific

Note: logically, this should be indicated at the product level, rather than at the project level, and it can be as the field exists at the product level. To avoid having to indicate everything, product by product, we have put this field at the level of the opportunity to simplify the data entry work. However, if you prefer to have more precision on your opportunities, you can enter this information at the level of each product of the opportunity.

Competitors section:

If competition is in this project, indicate who it is in the subgrid.

Case study section:

A case study may have been requested (usually by marketing). Indicate here its status:

- Requested : an internal request was issued to the sales representative to carry out a case study.
- In progress: the study is ongoing
- Ready to publish: The sales representative has completed its work on the case study and provided it to the applicant.
- Published: Published by marketing and available to sales people.

Next action section

- **Next action date:** self explanatory
- **Next action:** self explanatory

Roles section:

Indicate here the various stakeholders of the project and their role. Roles can be Investor, Planner, Contractor, Installer, Distributor, Utility or OEM (see glossary)

Budget section (see definitions page 72)

- **Project total budget:** total construction site budget (not Aliaxis' share, not Aliaxis potential sales)
- **Aliaxis actual revenue**: total revenue of the product opportunities won
- **Expected revenue:** it is the sum of the estimated revenues of all the products for which no decision has been taken (not lost, not won), plus the Aliaxis actual revenue.
- **Rough estimated revenue:** Aliaxis expected revenue. This can be changed at any time during the project. This field is repeated on the top of the form.
- **Quote sent:** if at least one quote has been sent for this project, the system will display "Yes" (calculated field)
- **Currency:** self explanatory

Closing an opportunity

Opportunities are *not* automatically closed. It is up to the sales person to decide to close the opportunity.

4.9.3 Project Opportunity - Project Tab

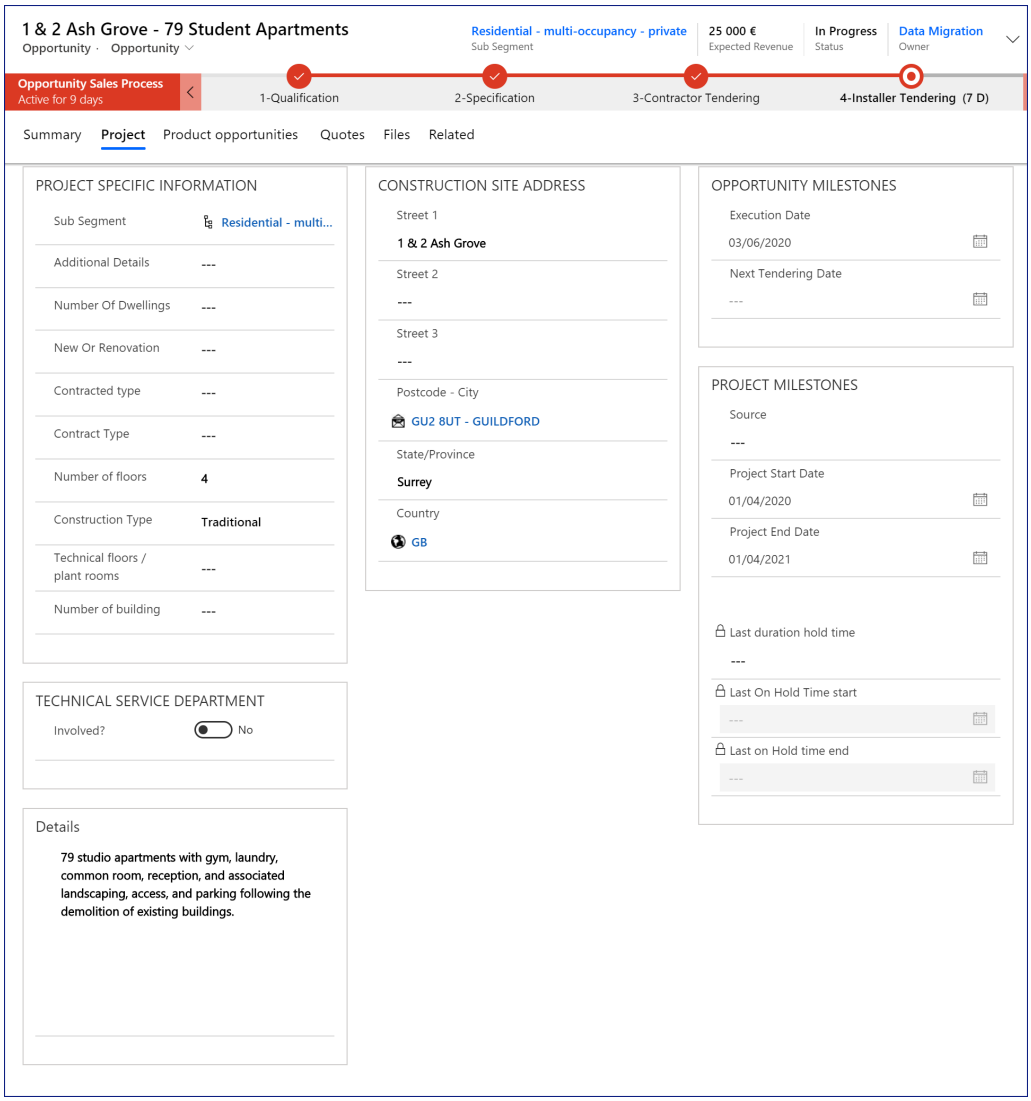


Figure 60: Opportunity Project tab

Project specific information section

- **Sub segment**: indicate the sub segment of the project (see glossary). This field has a few roles:
  a. To better characterize the project. depending on this field, new fields to better describe the project will appear. All these fields are self explanatory.
  b. Depending on the sub segment chosen, different fields additional fields will appear to better define the project. These fields are self explanatory.
  c. It will automatically add this sub-segment in the segment/sub-segment section of each account related to this opportunity (i.e. specified in the role section.) See page 39
  d. It will make it possible to generate the product opportunities.

Note : Do not enter a segment instead of a sub-segment. Failure to do so will prevent to generate the product opportunities

- The remaining fields are self explanatory

Technical service department:

Indicate if our technical service department is or not involved in the project.

If yes, fill the detail field to add information about the technical service department involved.

Detail section:

Self explanatory

Construction site address section:

Self explanatory

Opportunity milestones section:

- **Execution date:** estimated date we will receive our first order for this project
- **Next tendering date:** self explanatory. It's purpose is not to miss the next deadline in order to have well surrounded the people who have to be.

Project milestones section:

- **Source:** most of our Leads are imported (Barbour ABI, Protel...) This field is to designate the original source of the opportunity.
- **Project start date:** self explanatory
- **Project end date:** self explanatory
- **Last duration hold time:** calculated from the two next fields.
- **Last On Hold time start:** a project can be put on hold. This is to indicate when the project went on hold.
- **Last On hold time end:** a project can be put on hold. This is to indicate when the project has restarted.

4.9.4 Project Opportunity - Product Opportunities Tab

This section displays the product opportunities.

Indeed, an opportunity can lead to the sale of a set of different products. The list of these products appears in the central grid of the screen.

This grid can be generated by clicking on the 'Create Chid opps' button on the top of the form, or you can add one by one the products in the sub-grid.

How to generate product opportunity?

click on the 'Create Chid opps' button on the top of the form.

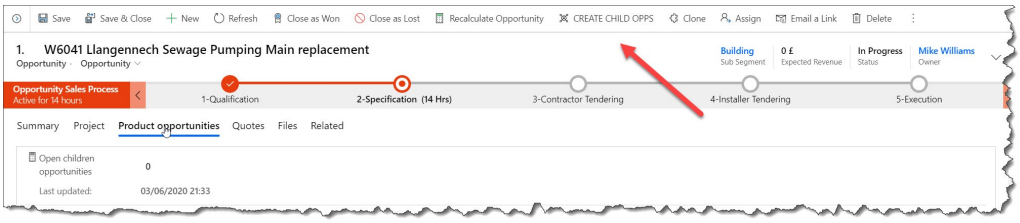


Figure 61: Child opportunities button

This will open a new window with 2 buttons. Click on Start Process.

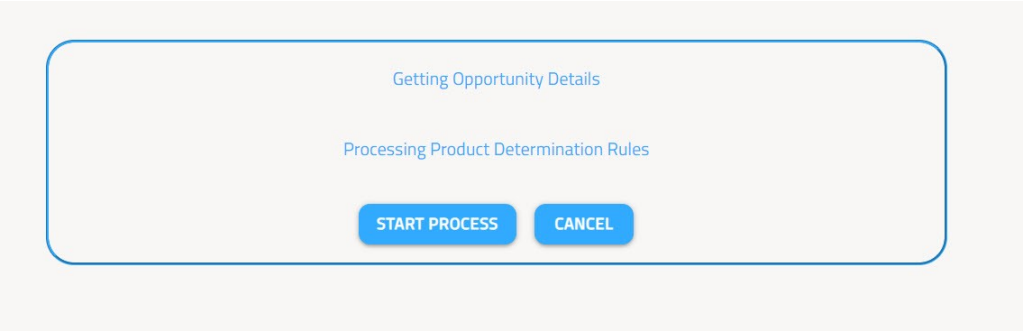


Figure 62:

A pop up window appear. It will propose a list of all the products of the sub-segment.

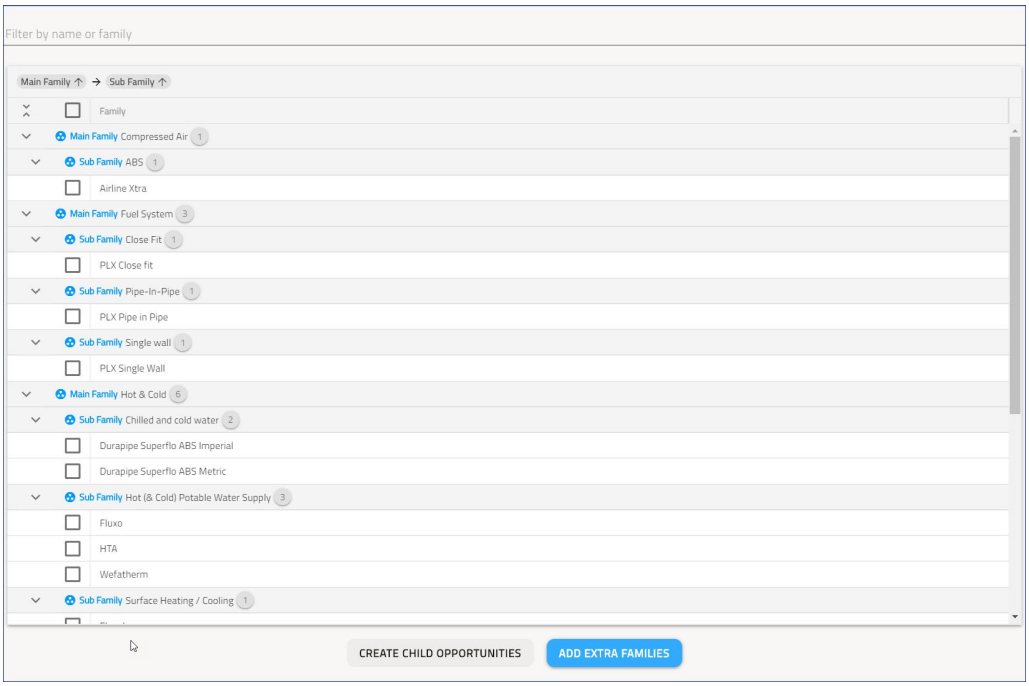


Figure 63:

You can select/unselect at any level that will select the children products. You could also add product from other families by clicking "Add Extra Families".

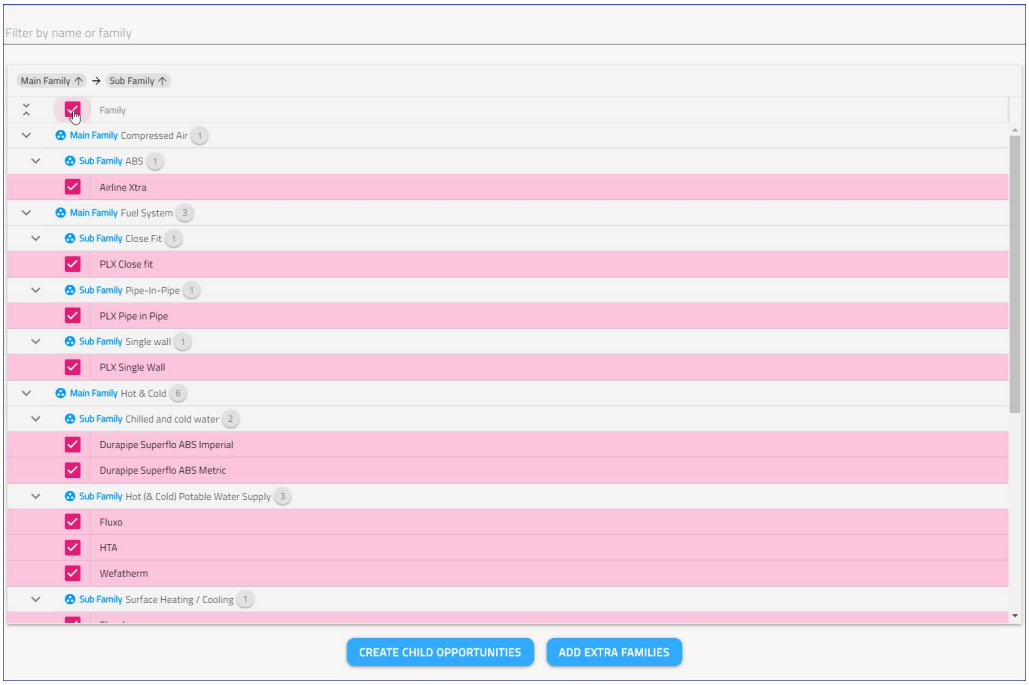


Figure 64: Family Selected

Just unselect those products that should not belong to this project opportunity.

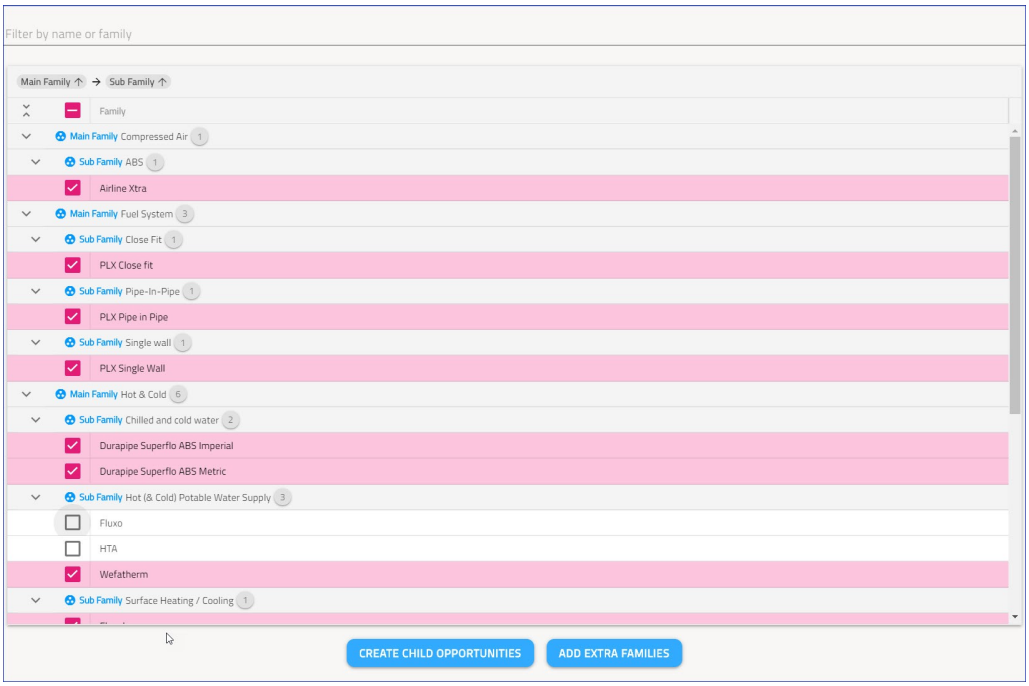


Figure 65: Fluxo and HTA unselected

When you are done, click on the button "Create Child Opportunities." It will then generate all the product opportunities.

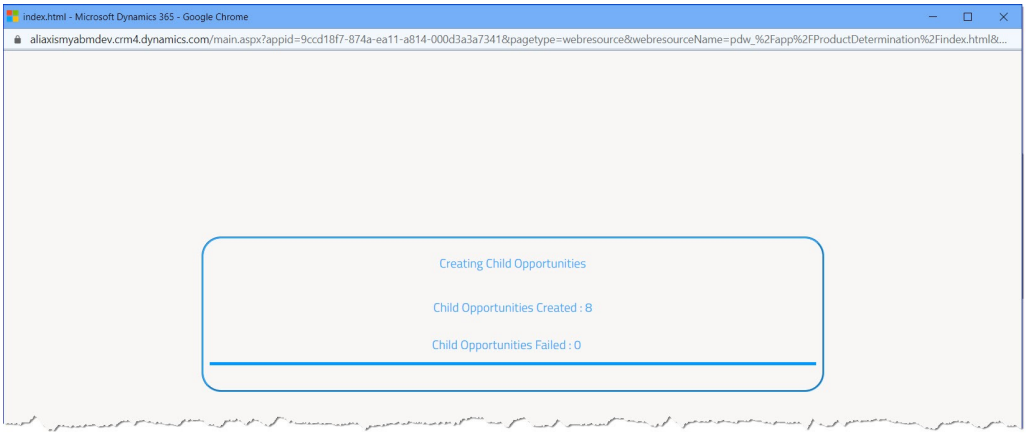


Figure 66:

Close the form.

You are in the Project opportunity again with all the product opportunities in the center grid.

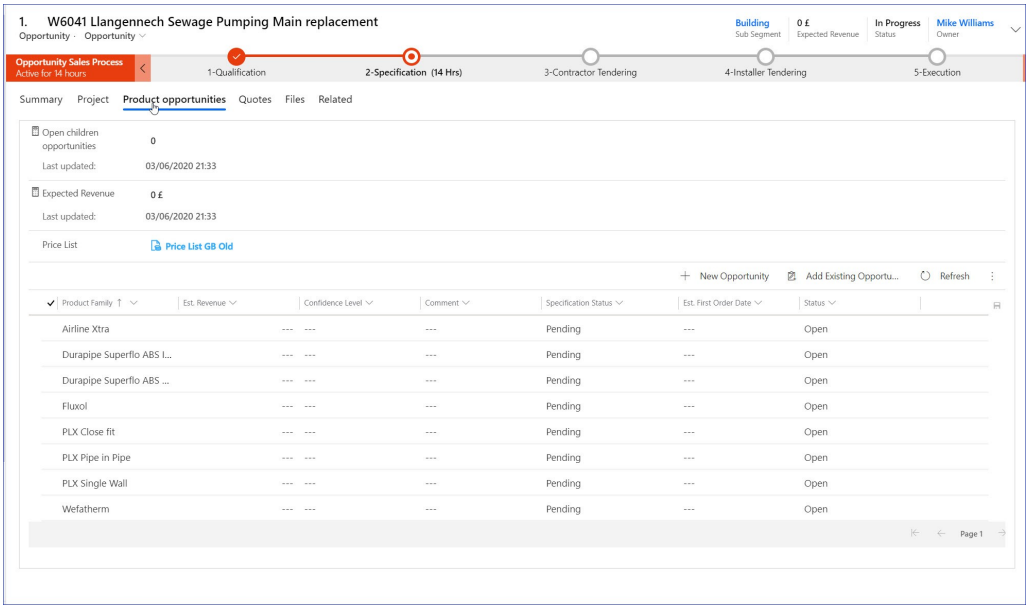


Figure 67:

How to manually enter a product opportunity?

One can also enter product one by one, by clicking on the + New Opportunity button at the top of the grid. It will open a Quick Create form as here:

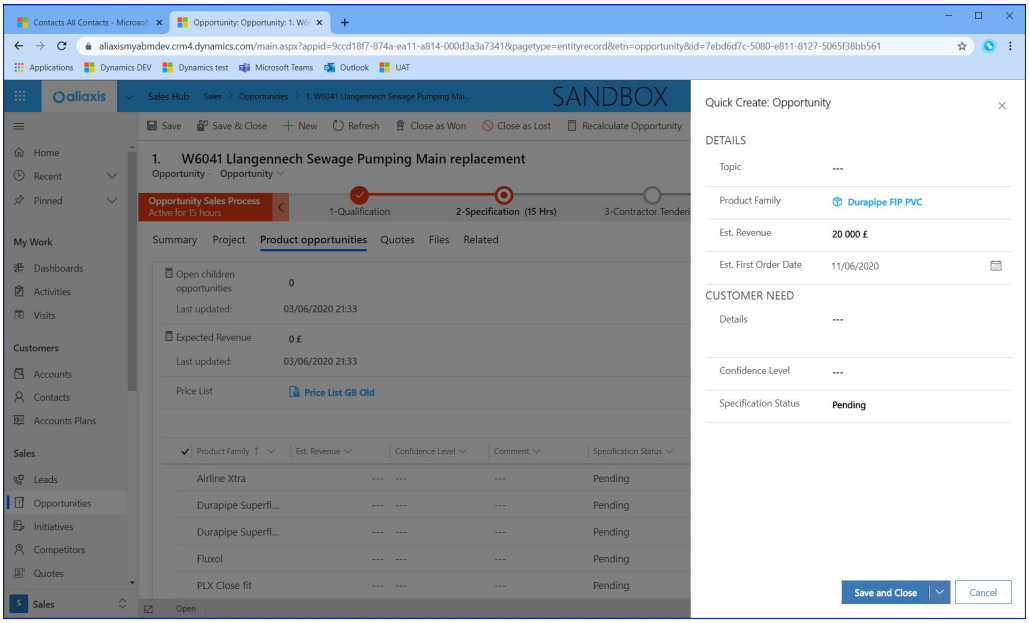


Figure 68:

To see the new generated or manually added product opportunities, one must refresh the page.

Topic: no need to fill

Product family

- **Estimated revenue:** estimated revenue for this product
- **Estimated first order date:** self explanatory
- Details ? Comment ?
- **Confidence level:** can be either 0-25%, 25-50%, 50-75% or 75-100%. Just indicate your subjective feeling.
- **Specification status:** Status of the specification of this product. It can either have been *specified*, or *not specified*, or the specification can be an *open specification*, or it can still be *pending*. If one product opportunity has been specified, the project opportunity is considered as specified.

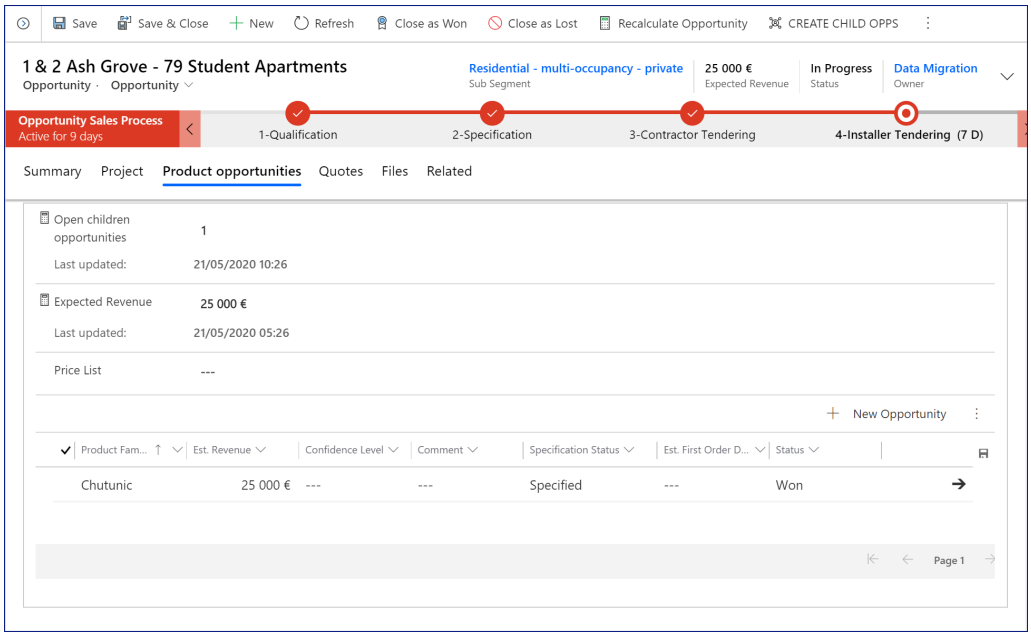


Figure 69: Product opportunities tab.

The opportunity is followed up at the product opportunity level, since each product could be won or lost.

Top of form

- **Open children opportunities:** number of children opportunities not yet closed (i.e. that can still be won!)
- **Expected revenue:** it is the sum of the rough estimated revenues of all the products for which no decision has been taken (not lost, not won), plus the Aliaxis actual revenue.

Opportunity product subgrid

The main information can be directly entered or updated in the grid:

- **Estimated revenue:** estimated revenue for this product.
- **Confidence level:** can be either 0-25%, 25-50%, 50-75% or 75-100%. Just indicate your subjective feeling.
- **Comment:** any relevant information to add.
- **Specification status:** Status of the specification of this product. It can either have been *specified*, or *not specified*, or the specification can be an *open specification*, or it can still be *pending*. If one product opportunity has been specified, the project opportunity is considered as specified.
- **Estimated first order date:** self explanatory
- **Status:** Open, Won, Lost.

4.9.4.1 Product Opportunity

The full product opportunity form

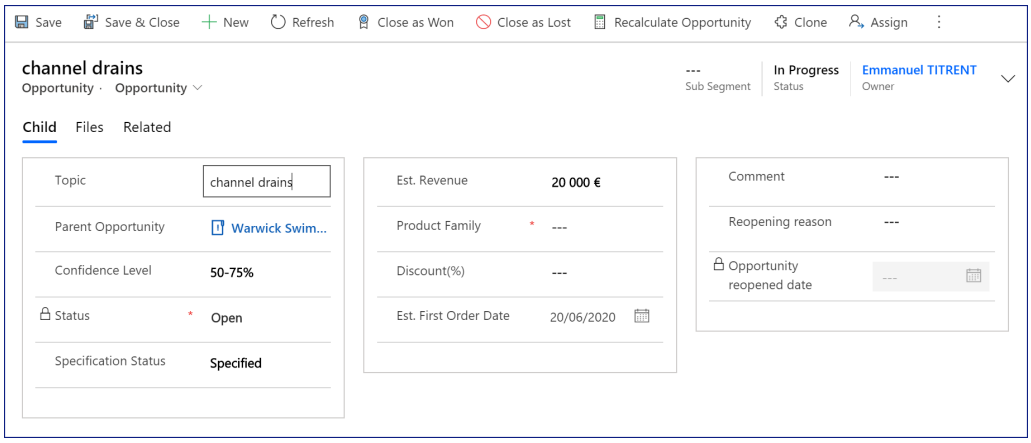


Figure 70: Product opportunity form

This form has few additional fields:

- **Topic:** automatically calculated from the product family
- **Parent opportunity:** it is always the project opportunity
- **Product family:** Here a some example of product families for the Irrigation Water Supply application:

Barbed Fittings & Clips	Irrigation Water Supply
Column Pipe	Irrigation Water Supply
Compression (For Rural Irrigation)	Irrigation Water Supply
Low Density Poly Pipe	Irrigation Water Supply
Threaded fittings & Saddles	Irrigation Water Supply
Well Casing	Irrigation Water Supply

Figure 71: some products families and applications

- **Reopening reason:** a closed product opportunity may need to be reopened. For example a lost opportunity may eventually be won despite we were ruled out because the competition could not deliver. When a lost or won opportunity needs to be reopened, indicate the reason here (choose from existing list).
- **Opportunity reopened date:** When a lost or won opportunity needs to be reopened, indicate the reopening date here.

- **Specification status:** this is were we identify if we have been specified or not. the following rules apply:
  - Specified
  - Spec broken by competition
  - Spec broken by Aliaxis
  - Pending: we do not know yet the result

- Open spec: specifications are not brand specific

Note: logically, this should be indicated only at the product level. To avoid having to report everything, product by product, we have put this field at the level of the opportunity too, to simplify the data entry work. However, if you prefer to have more precision on your opportunities, you can enter this information at the level of each product of the opportunity.

4.9.5 Project Opportunity - Quotes tab

Enter topic text here.

4.9.6 Project opportunity - Business Process Flow

The Lead - Opportunity business process flow is here to indicate the progress of the opportunity, so that you can quickly know what phase of the process you are at.

Each completed step is represented by a white tick on a red background.

The current step is indicated by a red circle with a red dot, is written in bold and indicates how long the opportunity has been at that step.

Steps that have not yet been completed are shown in grey.

Figure 72: Opportunity Business Process Flow

In this example, the Qualification, Specification and Contractor Tendering steps are done. We have been in the Installer Tendering step for 8 days. Execution step is the next step.

In the opportunity form, some fields are mandatory. When they are mandatory only to move from one step to another, a red star next to the label will be visible only in this pop-up window.

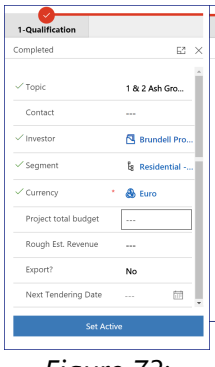


Figure 73: Qualification step

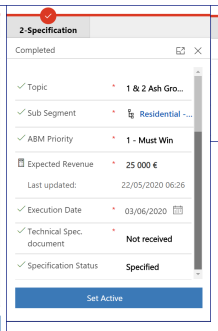


Figure 74: Specification step

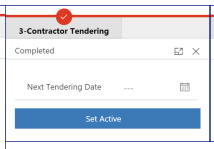


Figure 75: Contractor Tendering step

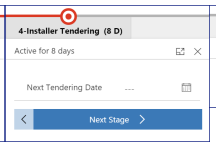


Figure 76: Installer Tendering step

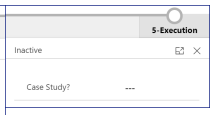


Figure 77: Execution Step

4.10 Quote

A quote is accompanied with a quote tracking form. It is a small form filled by the sender of the quote to store key information of a quote, so that it can be followed in the CRM without having to always open the attachment.

In most cases, this form gives access to the email exchanges concerning the quote, and consequently to the quote, which is attached to the email.

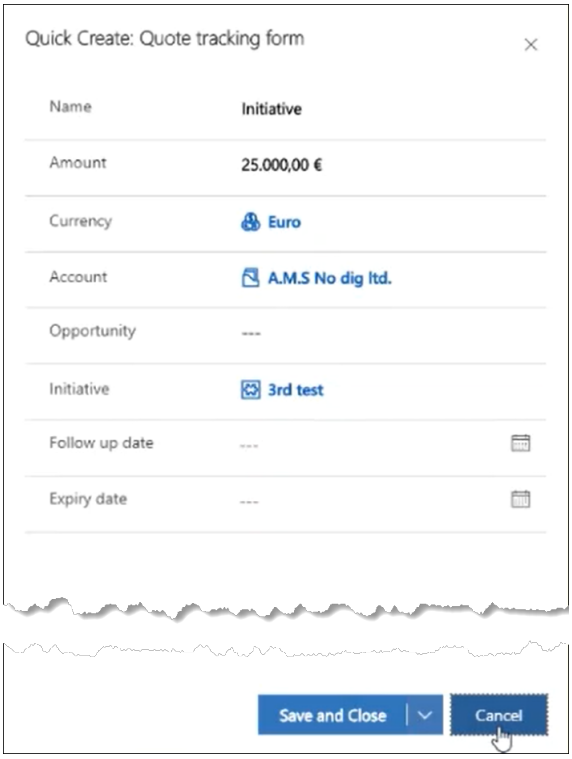


Figure 78: Quote tracking form in Outlook

In Dynamics, the Quote tracking forms can be directly accessed from the Account, the opportunities and in the initiatives forms through the Quote Tab:

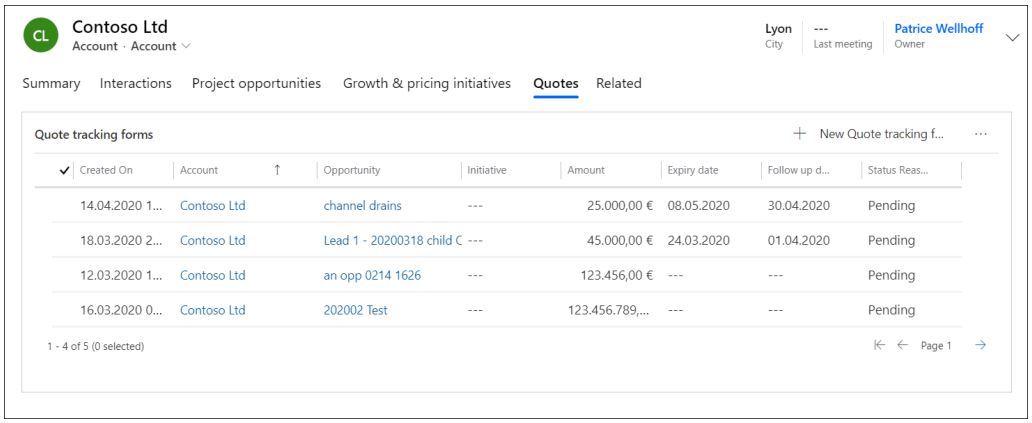


Figure 79: Account - Quote Tab

Opening a Quote tracking form will display the form and the related emails concerning this quote:

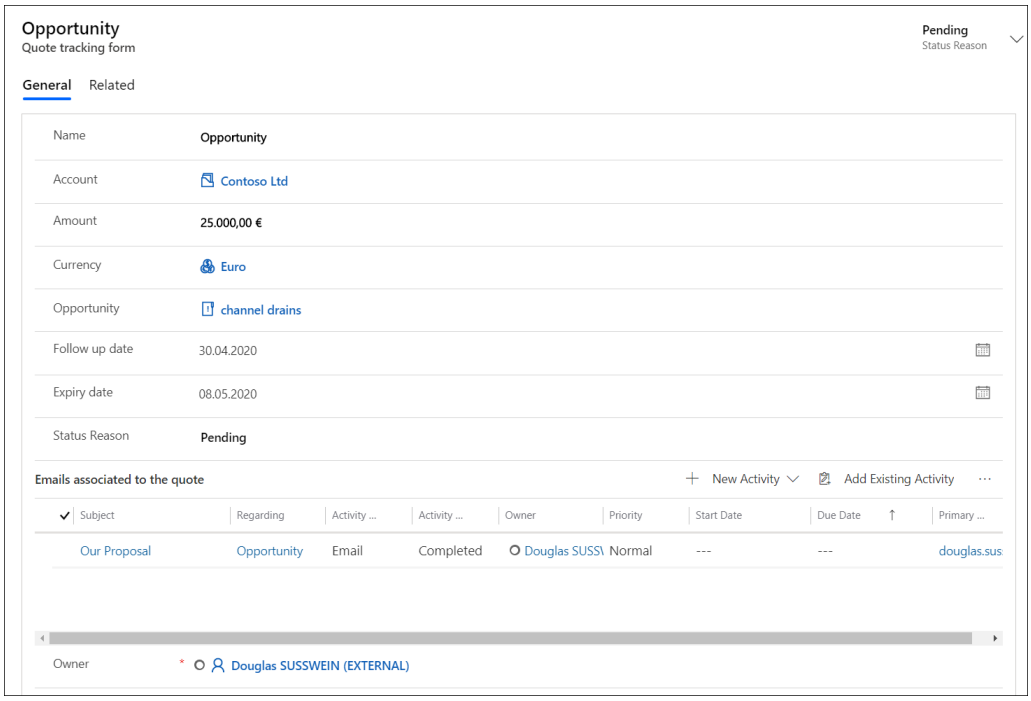


Figure 80: Quote tracking form in Dynamics

Open the email to open the attachment.

All the fields are self explanatory

How to send a quote from Outlook and make it visible in the CRM?

See page 139

4.11 Role

A role is a function or part performed in a particular operation.

For example, we have an opportunity called Links Raw Water Main Renewal. Several companies may bid on this tender. One of them is a big contractor that can do planning and installing. But he bids on the installation only. So, for this opportunity, he will be an installer. This is what is stored in the role entity.

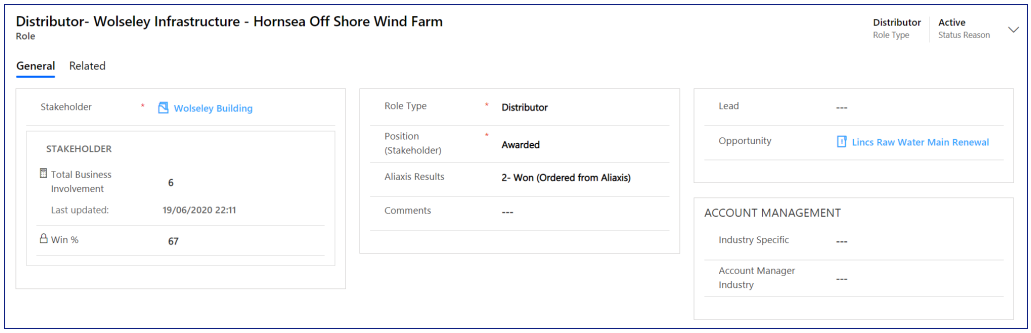


Figure 81: Role

- **Stakeholder:** it is the name of the concerned account
- **Total business involvement** is the number of awarded projects for which the supplier has been decided.
- **win %** is calculated by dividing the number of projects won by Aliaxis on the total number of projects awarded to the account.

- **Role type:** it is the key information on this form. It describes the role based on data from a list (Investor, Planner, Contractor, Installer, Distributor, Utility or OEM)
- **Position (Stakeholder):** it is the stakeholder position concerning his role. It is based on data from a list (Owner, Awarded, Pending selection, Ruled out, subcontractor.

- Owner	All investors will always only have the "Owner" role.
- Awarded	If the stakeholder has won his part of the tender (can be a planner, a distributor, etc.) Rule to apply for a distributor or installer to declare the position awarded: If we did a special price, it's when the first order at that special price is received. If no special price, that's when the installer tells us that he made the order and gives us the name of the distributor he ordered from.
- Pending selection	If decision has not yet been taken.
- Ruled out	If the stakeholder has lost the tender.
- Subcontractor	If the stakeholder is a subcontractor of another stakeholder.

- **Aliaxis Results:** It is the end result for Aliaxis. An installer can have been awarded a tender for an opportunity where we have been specified, and nevertheless buy from the competition (or the opposite)

1. Pending	We are awaiting orders
2. Ordered to Aliaxis	We have received order thanks to this Stakeholder
3. Ordered to Competition	We expected order thanks to this Stakeholder, but he ordered to the competition
4. N/A	Not available
5. Specified	If the stakeholder is a planner and has specified our products
6. Not Specified	If the stakeholder is a planner and has not specified our products

- **Comment:** free field to add any information concerning this role.

- **Lead**: If the role is linked to a lead, indicate here the lead.
- **Opportunity**: if the role is linked to an opportunity, indicate here the opportunity.

4.12 Initiative

An initiative is a specific action to achieve sustainable or temporary impact on sales volume (Net Sales) and/or margin (Contribution), or to ensure not to lose a customer that we may risk to lose. It is always specific to an account and a product family. The owner of the initiative is the salesperson who will implement the initiative, often the sales rep. We have 3 types of initiatives :

- Growth : this is an initiative the will impact positively the sales volume.
- Pricing: this is an initiative that will impact the margin positively.
- Protect: this is a new type of initiative. This is when we are at risk of losing business if we do things as usual. Therefore we have to act not to lose business., and we create this as an initiative to follow it up. The estimated revenue if the value of the business that is at risk.

4.12.1 Initiatives - Summary Tab

The initiative form only has one tab: the Summary tab

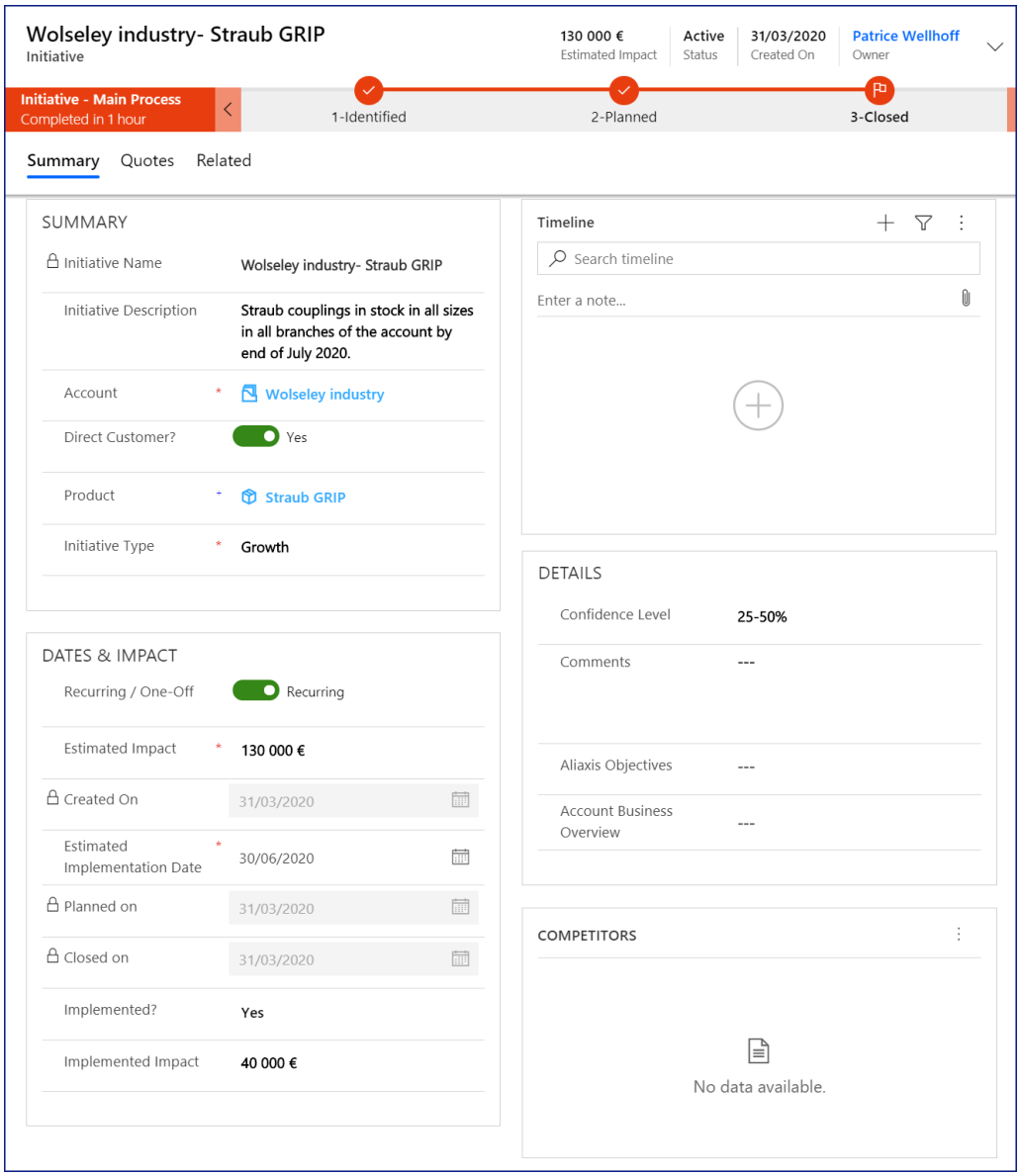


Figure 82: Initiative form

- **Owner:** the person who will implement the initiative, most often the sales rep

Summary Section

- **Initiative Name:** self explanatory (calculated with the name of the account and the name of the product).
- **Initiative description:** Clear description of the initiative, with specific data.
- **Account:** the account towards which the action is directed.
- **Direct Customer?** If No, the account will ask for an invoiced account.
- **Invoiced Account:** the account that will be billed through which the outcome of the initiative can be measured.

  Examples:

Initiative 1: To sell to industry XYZ Straub pipe couplings for their repairs. We do not sell directly to industry XYZ. Therefore, the Account will be Industry XYZ and the Invoiced Account will be the distributor who sells him the Staub pipe couplings.

Initiative 2: To increase the price on the Chutunic product family for Distributor ABC by 2%. Account and Invoiced Account will both be Distributor ABC.

Initiative 3: I need to provide Distributor ABC a better price on our gutters in order to earn a contract with a regional home builder. Account will be Distributor ABC as we gear all actions towards him and Invoiced Account is also Distributor ABC. We will note in the comment field that the purpose is to win the regional home builder market.

- **Product:** product covered by this initiative.
- **Initiative type:** we have 3 types of initiatives :
  - Growth : this is an initiative the will impact positively the sales volume
  - Pricing: this is an initiative that will impact positively the margin.
  - Protect: this is a new type of initiative. This is when we are at risk of losing business if we do things as usual. Therefore we have to act not to lose business., and we create this as initiative to follow it up. The estimated revenue if the value of the business that is at risk.

Dates and Impact Section

- **Recurring/One-Off:** is this initiative a one-off or a recurring initiative? A recurring initiative is one for which we need to sustain the impact every year (for example, selling a new type of product). A one off would typically be for a given project.
- **Estimated Impact:**
  - For the growth or pricing initiative, it is the estimated increase in revenue. It can be revalued over time. In the case of a recurring initiative, indicate the estimation based on an entire year (12 months) at run-rate.
  - For the Prote
    ùhytrwqse ZXS3R4E>
    140c103.
  - 021t initiative, the estimated revenue is the amount we could lose.

Formula:
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HJ0042 CV/.01.2

31302>
uture quantity x Future price) - (Current quantity x Current price)

	Growth	Pricing	Protect
Current situation	Current quantity x Current price = 15 pcs x £ 40/pc = £ 600		
Initiative	increase volume with 20%	increase price with + £ 5/pc	Risk of losing 1/3 of the business
Future situation	Future quantity x Future price= 18 pcs x £ 40/pc = £ 720	Future quantity x Future price= 15 pcs x £ 45/pc = £ 675	Future quantity x Future price= 10 pcs x £ 40/pc = £ 400
Impact	£ 720 - £ 600 = £ 120	£ 675 - £ 600 = £ 75	£ 400 - £ 600 = (£ 200)

- **Created on:** self explanatory
- **Estimated implementation date:** to be filled by the person working on the initiative. Estimated date of order confirmation when creating the initiative
- **Planned on:** calculated date when the process moved to planned.
- **Closed on:** calculated date when the process moved to Closed
- **Implemented Y/N:** Yes when the customer has confirmed the conditions.
- **Implemented Impact:** the result of the initiative. If the initiative is recurring, only enter the estimated implemented revenue in the next 12 months. Enter what you agreed with, with the customer.

Details section

- **Confidence level:** information that should evolve during time.
- **Comments:** self explanatory
- **Aliaxis Objectives:** Aliaxis objectives are part of the Account Plan. When fixing an objective in an account plan, it is a good idea to create an initiative to follow up with the objective. This field is the link between the Aliaxis objective and the account plan.
- **Account Business Overview:** if an initiative is related to a element of the Growth database, this will be the link to the Account Business overview record .

Competitors

Self explanatory

The initiative Business process flow:

Flow stage	Status	Status Reason	Explanation
Identified	Active	Identified	the initiative has been entered but not yet approved by the sales manager.

Planned	Active	Planned	the initiative has been approved. the initiative is planned for implementation.
Closed	Inactive	Implemented	All actions for a one-off initiative have been implemented. There's sufficient tangible evidence that the initiative will result in the short to mid term in issued invoices and payment.
Closed	Active	On Going	All actions for a recurring initiative have been implemented.
Closed	Inactive	Lost	The initiative was not successful.
Closed	Inactive	Cancelled	The initiative has been cancelled by us.

4.13 Visit and appointment

In the CRM we have 2 different entities :

- Appointment, which is the similar entity as an Outlook Appointment
- Visit, which records the content of the visit and the visit report.

We separated this into 2 entities for few reasons :

- One can create the visit form before the appointment
- One can create an appointment first and a visit later.
- As appointments are connected to Outlook, filling an appointment in the CRM results in an automatic invitation to the customer. This would, therefore, also send the customer all the visit information.

See video to understand the relationship between Appointments and Visits.

4.13.1 Visit - General tab

This is the form where to enter the purpose and results of the visit.

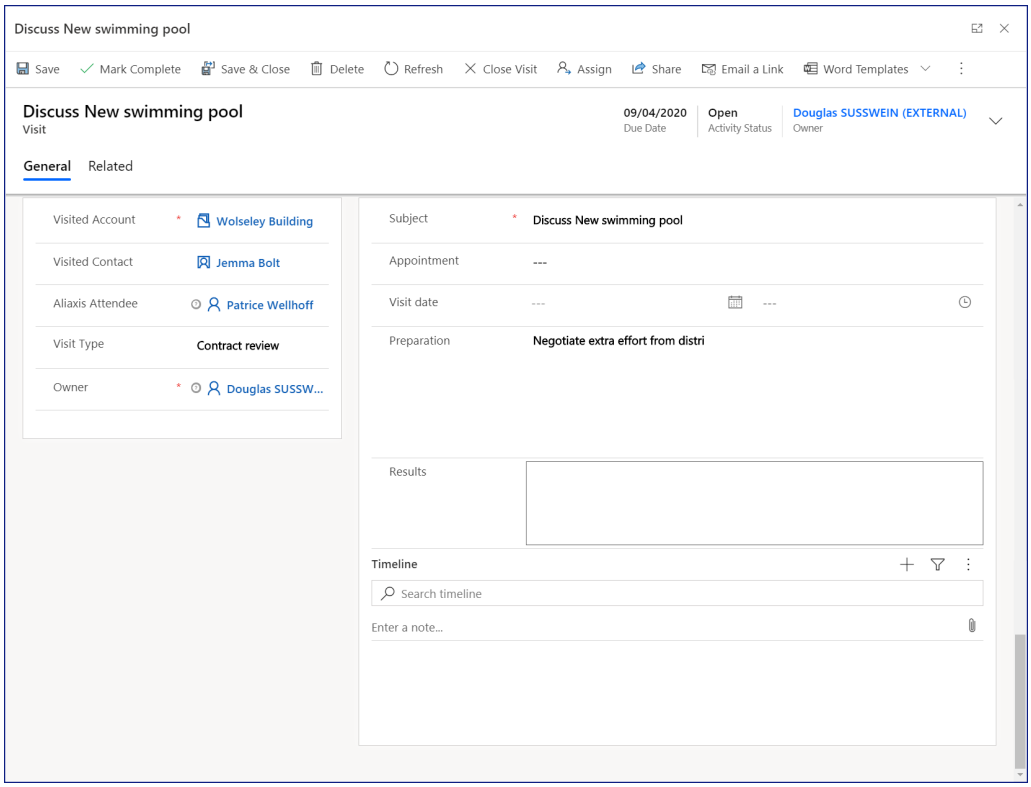


Figure 83: Visit

Left Section

- **Visited Account:** self explanatory
- **Visited Contact:** self explanatory
- **Aliaxis Attendee:** additional Aliaxis Attendee (main Attendee is the owner, see below)
- **Visit Type:** can be one of the followings:

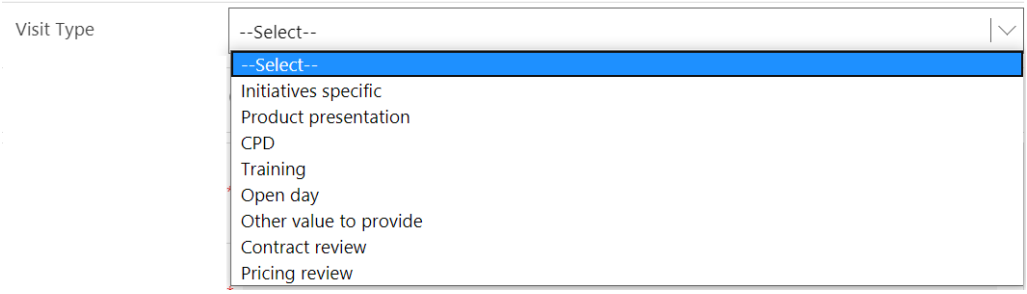


Figure 84: Visit types

- **Owner:** Sales person in charge of the visit.

Right Section

- **Subject:** self explanatory

- **Appointment:** link to an appointment form (not mandatory) When an appointment is linked to a visit, the date and time of the visit appear on the form, and the visit date field below disappears.
- **Visit Date:** to enter visit date in case no appointment has been scheduled.
- **Preparation:** data for the the visit prepare
- **Results:** results of the visit
- **Timeline:** useful if you want to can attach notes here

Important

Visit reports are very important for the business. Since visit report writing is an essential part of the job and the reports you produce provide the management with valuable business information, here is a reminder of the key elements of a visit report:

Context: What was the context?

- What situation were you in?
- What background information does the reader of your report need to understand the context?
- What was the task you were expected to perform?
- What needed to be done?
- What challenges did you expect to face?

Action: What were the actions you took?

- What actions did you take?
- (You can also outline what alternatives you considered)

Result: What were the results?

- What impact did your actions have?
- (These do not have to be all puppies and rainbows. You can admit that you got it wrong on the first try and had to go back and fix something)

4.13.2 Appointment

This record is the counterpart of the appointment in Outlook and has the corresponding fields.

It is can be synchronized with Outlook.

The behaviour is as follow:

- Any appointment created in Dynamics will appear in Outlook. The invite is not automatically sent to the customer. It will appear in your Outlook Agenda with a black background (C below). Once sent, it will appear as a usual appointment (D below)

- Any appointment created in Outlook can appear in the CRM if it tracked with the Dynamics pane (see page 136).

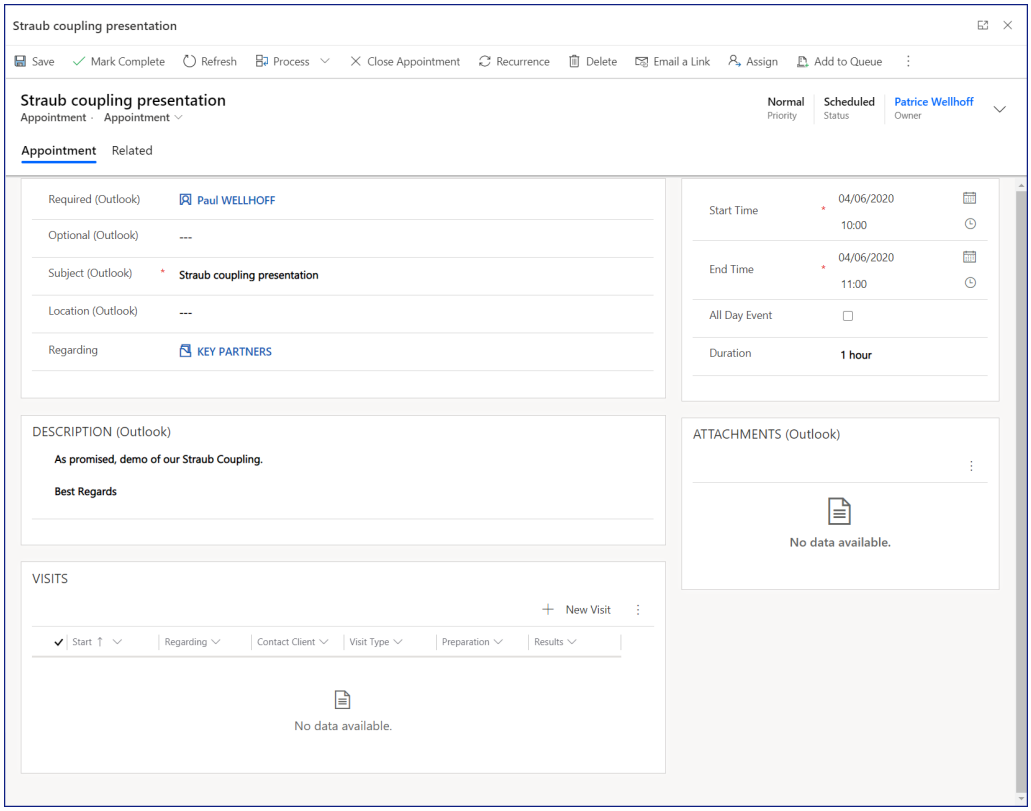


Figure 85: Appointment in CRM

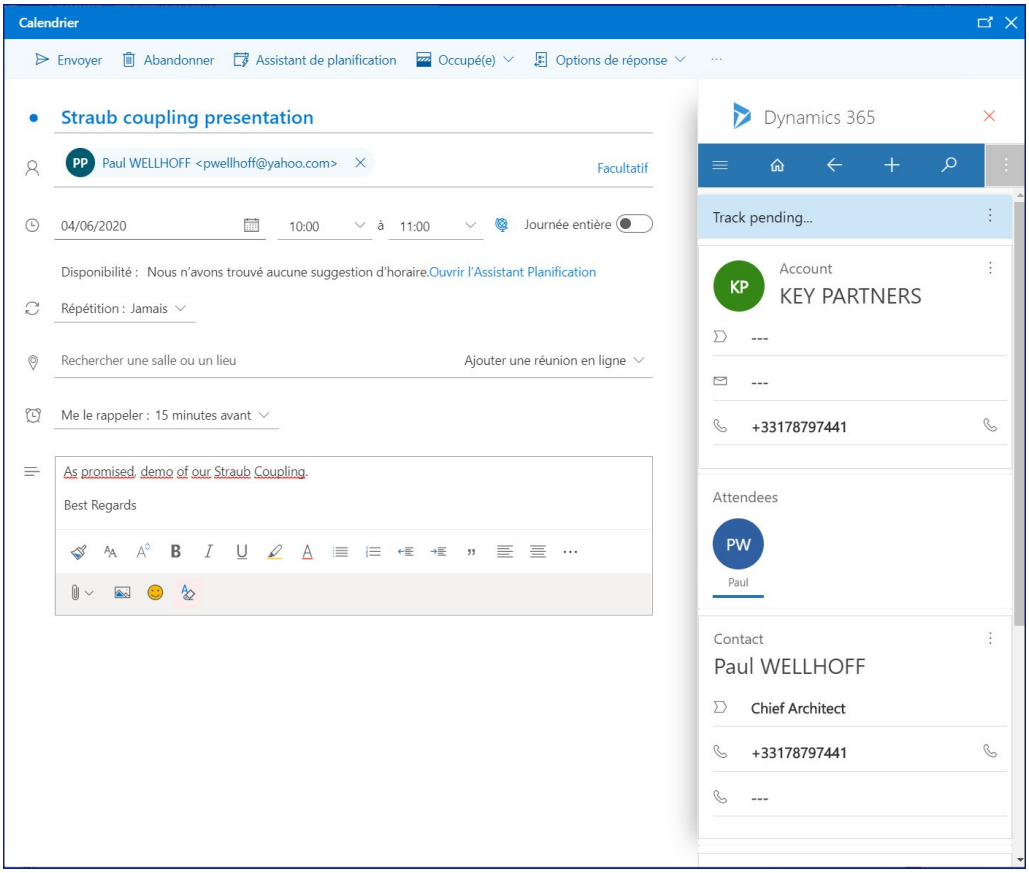


Figure 86: Matching Outlook Appointment

How to create an appointment and a visit

See page 140

4.14 Marketing Lists

A marketing list is a list of prospects, accounts or contacts. A marketing list allows you to group customers according to needs in order to perform certain actions.

Lists could group together, for example:

- All contacts who came to a certain event
- All the accounts of a buying group
- The list of prospects for which a decision must be made in September.
- All my accounts to whom I'm distributing a new catalogue this week.
- All the installers of a single-family home builder
- All the purchasing managers on all my accounts.
- Etc.

Then we will be able to trigger any actions to do, such as taking appointments, sending promo, calling, etc.

To better understand the relationship between all the marketing entities go to page 11

4.14.1 Summary Tab

This tab allows you to describe the list, give it a name and possibly a purpose.

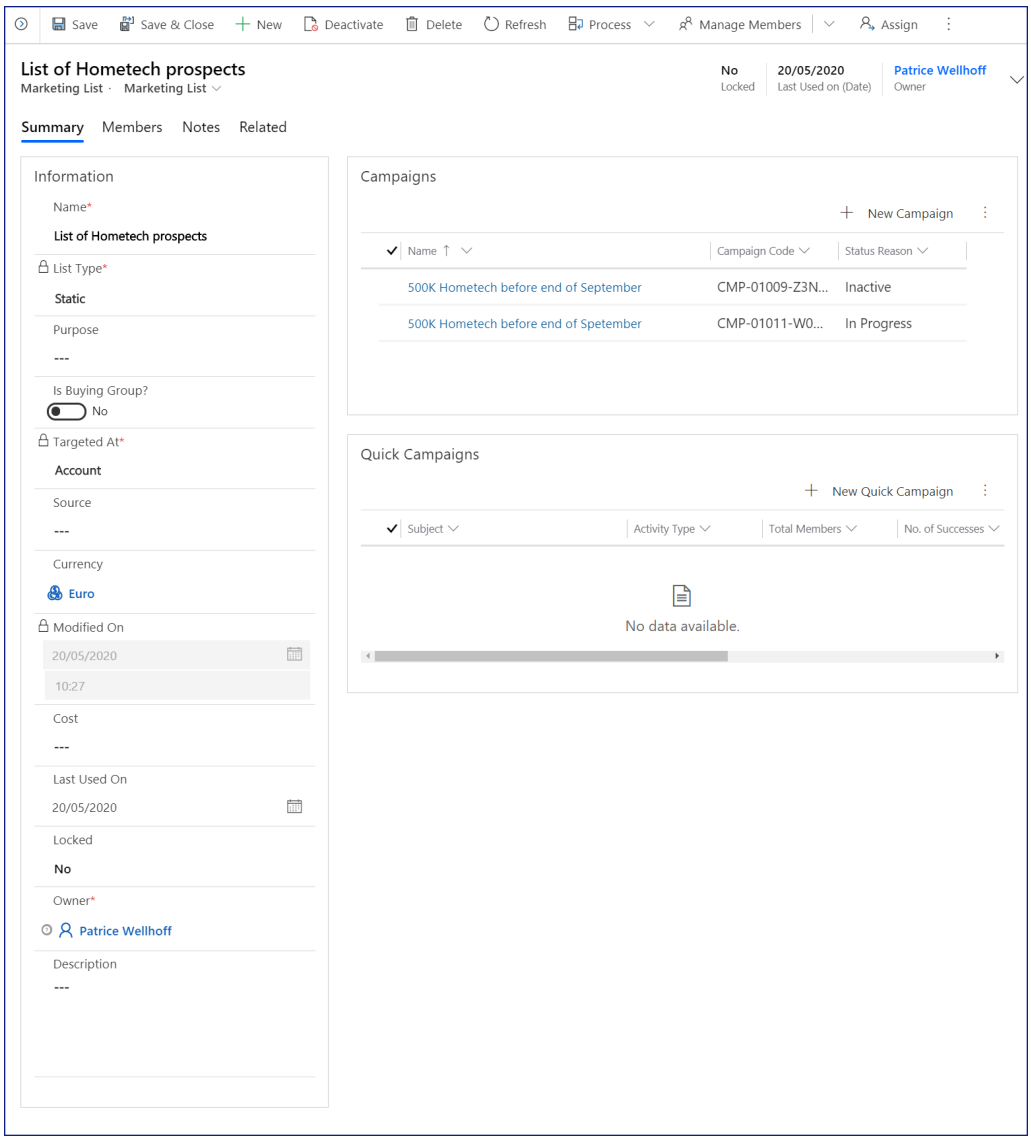


Figure 87: Marketing List - Summary tab

Two fields in this form are very important and must be understood: List type and Targeted at.

- **Name:** self explanatory
- **List type:** this allows to declare if a list is static or dynamic. A static list stores a list of names. A dynamic list memorizes a query that allows to find the names. A dynamic list is thus reconstituted with each use.

  Consequently, the members of a static list do not change unless they are added or deleted by a user action. On the other hand, the members of a dynamic list can completely change without voluntary intervention. This

could be the result of the query "contact city = London" Each time a new Londoner contact is added, it will be selected during the search of such a dynamic list.

List type and targeted At cannot be changed. In case of an error, you must delete the list and recreate a new one.

- **Purpose:** Indicate the intended use of the marketing list to identify its key segments, target offers, or business group. *Although this field is not mandatory, it is strongly recommended to fill it in, as marketing lists tend to be created often, and the name is not always enough to understand what they are supposed to gather and their purpose. Indicate here the intended use of the marketing list (and indicate in the description field below what the list is supposed to group together.)*
- **Is buying group?** This field allow us to designate this list as a buying group. In the CRM buying groups are stored in the form of marketing lists. Usually a buying group is a static list, so as to be able to manually add or remove members of the list.
- **Targeted at:** Since a list is a collection of identical records, we need to choose which records will be part of the list: it will either be Accounts or contacts, as far as Aliaxis is concerned. These cannot be mixed within the same marketing list.

  List type and targeted At cannot be changed. In case of an error, you must delete the list and recreate a new one.
- **Source:** You can indicate here a source (such as "attendees of our January event, given by Mr XXX)
- **Currency:** if a cost is attached to this marketing list, indicate here the currency of the cost
- **Modified on:** self explanatory.
- **Cost:** if needed, you can type here the cost of obtaining the marketing list.
- **Last Used On**: Shows the date and time when the marketing list was last used in a campaign or in the creation of marketing activities.
- **Locked:** If you lock a marketing list by selecting Yes for the Locked field, then you cannot add or remove members to the marketing list. This is to avoid future mistakes. to add or remove members, once locked, you have to change back the value to No and save the marketing list. After you finalize your members, you can lock your marketing list by changing the Locked value back to Yes.
- **Owner:** self explanatory
- **Description:** describe the contents of this list. *Although this field is not mandatory, it is strongly recommended to fill it in, as marketing lists tend to be created often, and the name is not always enough to understand what they are supposed to gather and their purpose. Indicate here what the list is*

supposed to group together (and indicate in the source field above the purpose of the list.)

4.14.2 Members Tab

This tab allows you to enter members into a marketing list, and works differently depending on whether the list is static or dynamic.

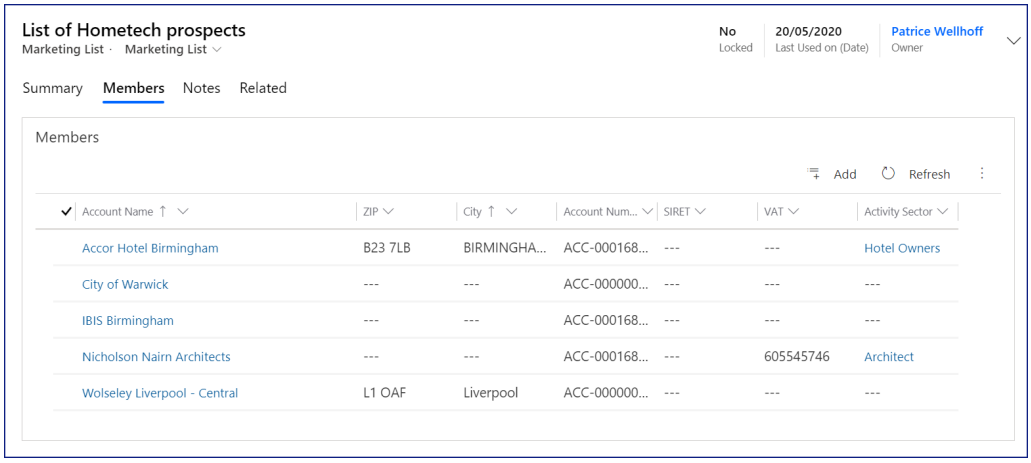


Figure 88: Marketing List - Members tab.png

Static list :

There are several ways to add members to a static list:

1. Entering members one by one from the account view: This is the easiest way to do it when you want to choose individually who should or should not be part of the list. This is done from the customer view (accounts, contacts or leads). Simply select the contacts you want to put in the marketing list and then click on the Add to Marketing List button.

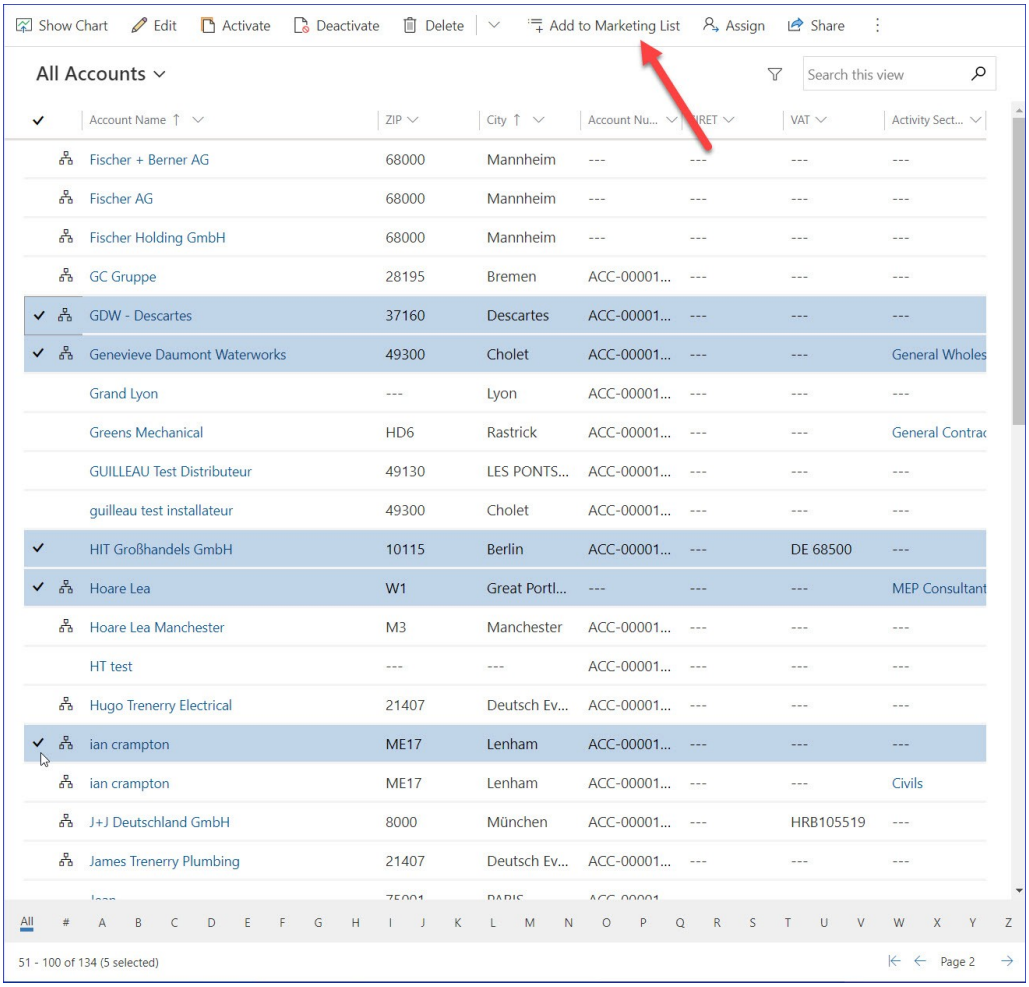


Figure 89: Accounts - Add to marketing list

2. Enter the members one by one from the member tab: this is done directly from the marketing list, by clicking on the Manage Members button, and then selecting the records one by one in the right pane. It is not a very easy way to proceed, unless you have very few members to add.

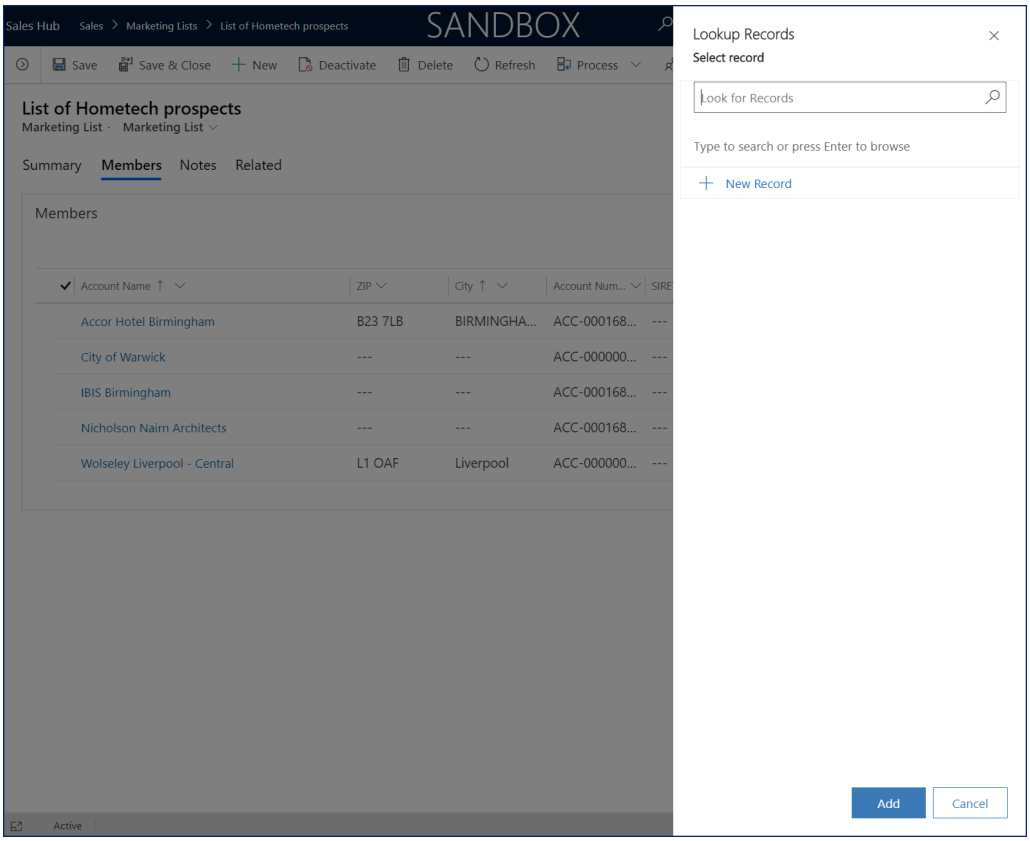


Figure 90: Adding Member in Marketing Lists

3. Entering members from a query: Finally, there is a 3rd way, thanks to queries: it is possible to make one or more queries to build up one's list. For example, a series of queries could be :

- A first query that finds all the purchase managers of our customers...

- A second query that deletes all people working in London.

The query tool will be explained in the level 2 training.

Dynamic list :

A dynamic list also consists of a query. But the members are not stored in the list, only the query is. Therefore, each time the list is consulted, the query runs and can give different results if customer information has been added, deleted or modified.

The query tool will be explained in the level 2 training.

4.15 Marketing Campaign

Per the dictionary, a campaign is a planned set of activities that people carry out over some time in order to achieve something.

A marketing campaign is a campaign aimed at increasing sales or getting new leads.

Note : to better understand the relationship between all the marketing entities go to page 11

Best practice: the management of each country should decide who should be allowed to create campaigns, as with marketing campaigns, you will request actions to be done - most of the times by the sales representative.

4.15.1 Marketing Campaign - Summary Tab

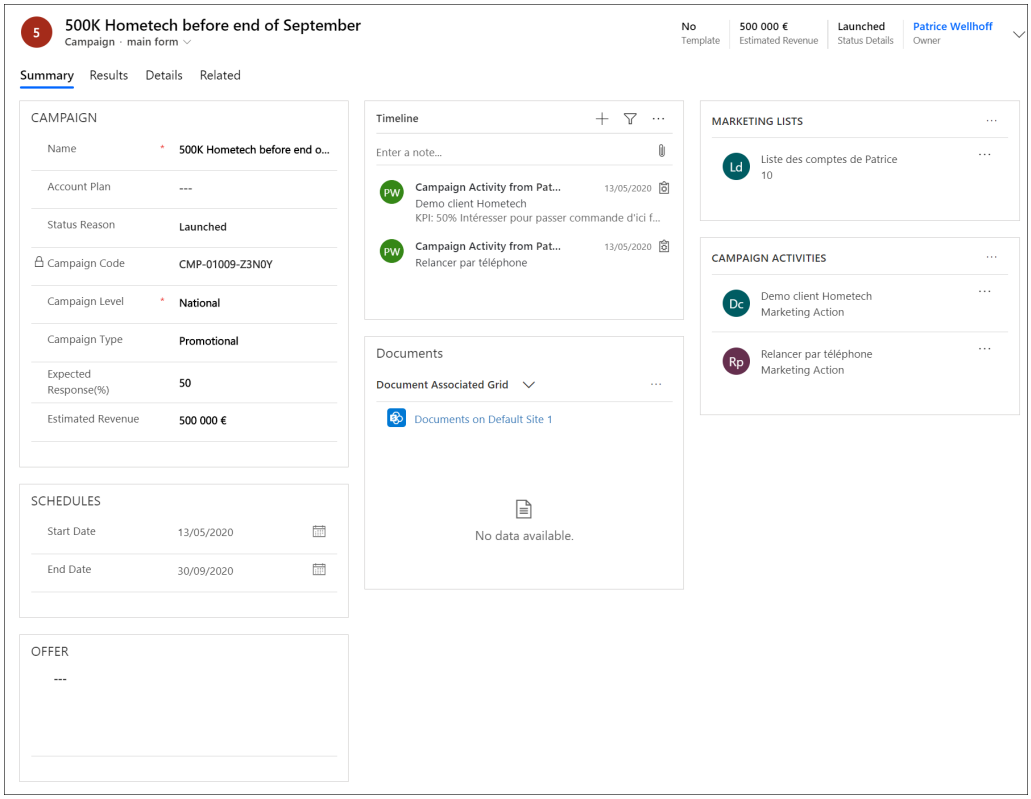


Figure 91: Marketing Campaign - Summary tab

The marketing campaign is the container of all the campaign

- **Name:** give a name to your campaign.
- **Account plan:** a marketing campaign can be linked to an account plan, as a marketing campaign could be part of an action plan entered at the account plan level.
- **Status reason:** it defines if the campaign is being prepared, has been launched or is finished.
- **Campaign code:** unique ID given by the system
- **Campaign level:** is it an international, a national, a regional or a local campaign?
- **Campaign type:** enter if it is a promotional campaign, a product-specific campaign, a contract-specific campaign, or an account-specific campaign.
- **Expected response:** the marketing actions will be distributed amongst the salespeople. Each marketing action will need to be reported, with 2 KPIs: the

1st KPI is: customer interested or not interested. This field is to enter the percentage of interested people that we intend to reach.

- **Estimated revenue:** the expected marketing actions will be distributed amongst the salespeople. Each marketing action will need to be reported, with 2 KPIs: 2nd KPI is the expected revenue. This field is to enter the total expected revenue of the action.
- **Schedules:** Enter the start date and the end date of the campaign
- **Offer:** detail the offer if needed, to better understand the campaign.

Timeline section:

Each Marketing action distributed through this campaign will be indicated in the timeline.

Documents section:

Documents can be attached to the campaign in order to distribute them to all parties. It could be for example a PDF presentation of a new product.

Marketing lists section:

A marketing list is a list of target accounts or contacts one want to address through a marketing campaign. Enter here the different marketing lists towards which the campaign is aimed.

Campaign activities section:

This is the template of the activity that needs to be distributed to different salespersons. It is possible to have different activities assigned (such as activity 1 is "call customer for appointment" and activity 2 is "visit customer". This is not advised, as all results of all campaign activities are summed at the marketing campaign level, which makes it difficult to analyze the results.

4.15.2 Marketing Campaign - Results

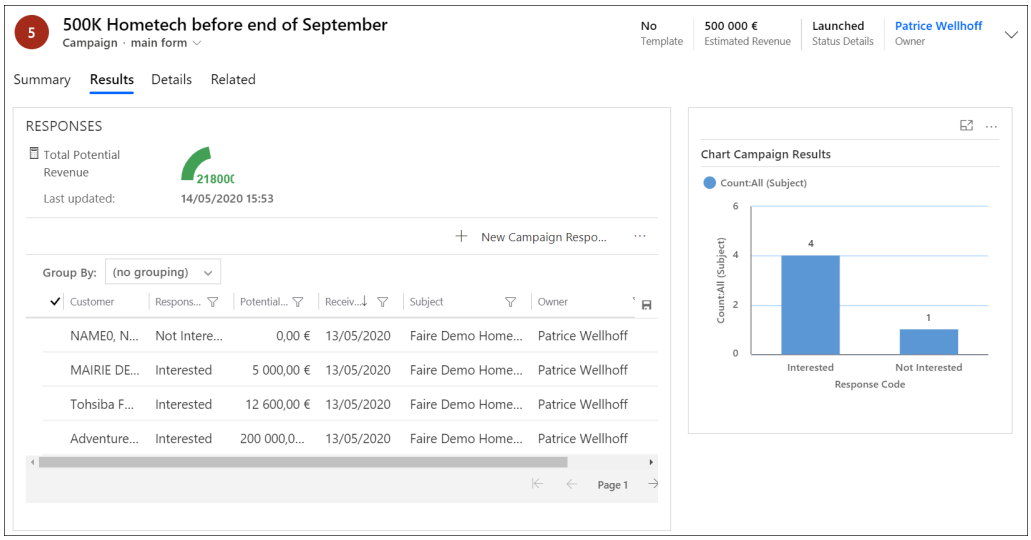


Figure 92: Marketing Campaign - Result tab

This form is only for display.

It displays on the left all the results of the marketing actions reported.

- The 2nd column of the view (interested, not interested) is summarized on the graphic on the right
- The 3rd column of the view (potential revenue) is summarized on the top of the form (value rounded). A graph displays how far we are to the estimated revenue of the campaign (in our example, Estimated revenue is 500 000€ as seen on top of the form, and total is 218 000, thus the green curved line (100% would be half circle)

4.16 Campaign Activity

A campaign activity is a description of the action to be carried out with the various customers referenced in the marketing lists. It is used to generate any marketing actions, one per customer of the campaign.

to better understand the relationship between all the marketing entities go to page 11.

4.16.1 Campaign Activity Tab

This tab is a full description of the activity. There can be several campaign activities in a given marketing campaign, and we do not advise to do that as it makes it challenging to analyze the results afterwards.

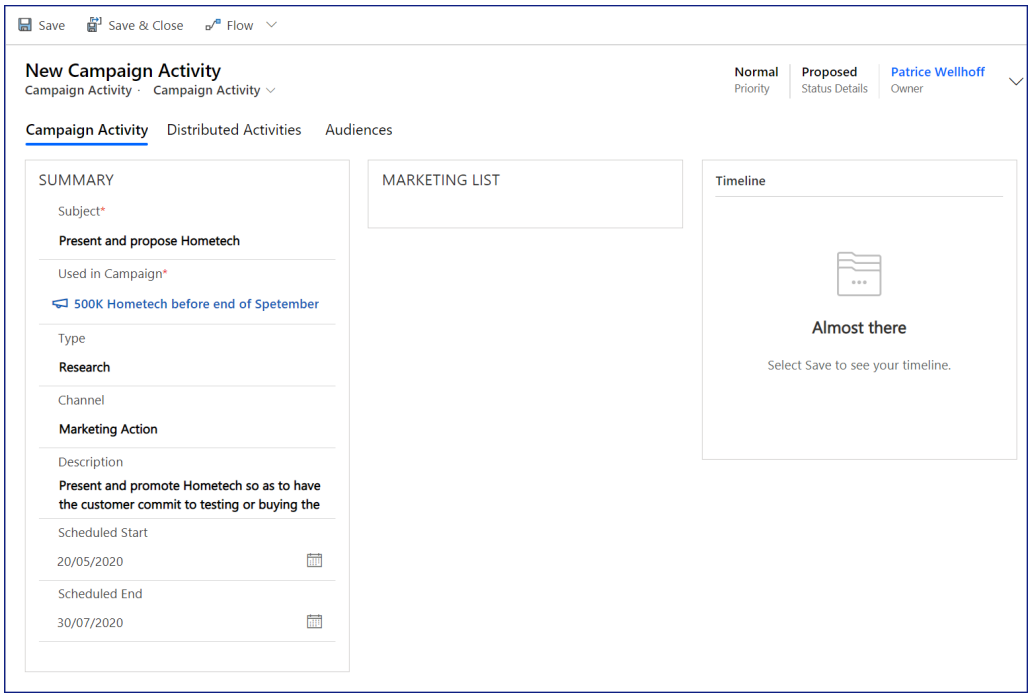


Figure 93: Campaign Activity Tab - before generating Marketing Actions

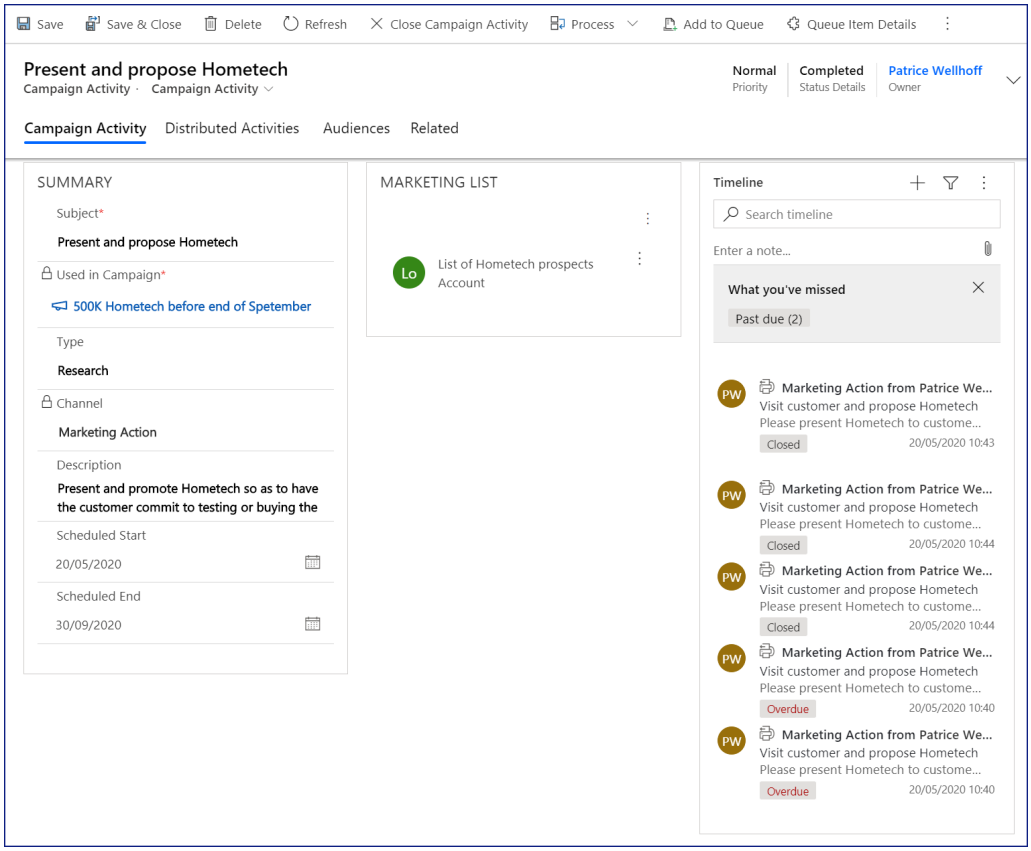


Figure 94: Campaign Activity Tab

Summary section

- **Subject**: Self explanatory
- **Used in Campaign:** link to the marketing campaign

- **Type**: Select the type of campaign activity to indicate the purpose of the activity.
- **Channel:** This is to select how this activity will be performed. For Aliaxis, it will always be a campaign activity.
- **Description**: Description of the activity.
- **Scheduled Start**: Scheduled start of the activity.
- **Scheduled End:** Scheduled end of the activity.

Marketing list section

It contains the marketing lists of the campaign by default. But it is always possible to remove a marketing list from the list if we do not want to perform the activity on this list.

Timeline

It is empty when a new marketing list is created and will be filled with all the marketing actions generated afterwards.

4.16.2 Distributed Activities Tab

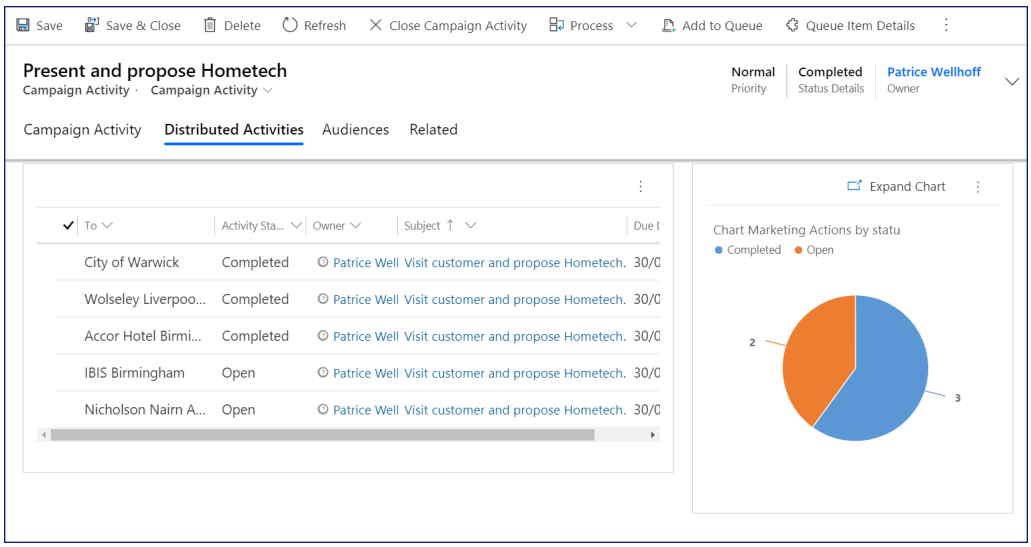


Figure 95: Distributed Activities

This form displays all the distributed activities on the left, with their statuses (Open or Completed) and a graph representing the proportion of completed activities compared to open activities. There is nothing to fill here.

4.16.3 Audiences Tab

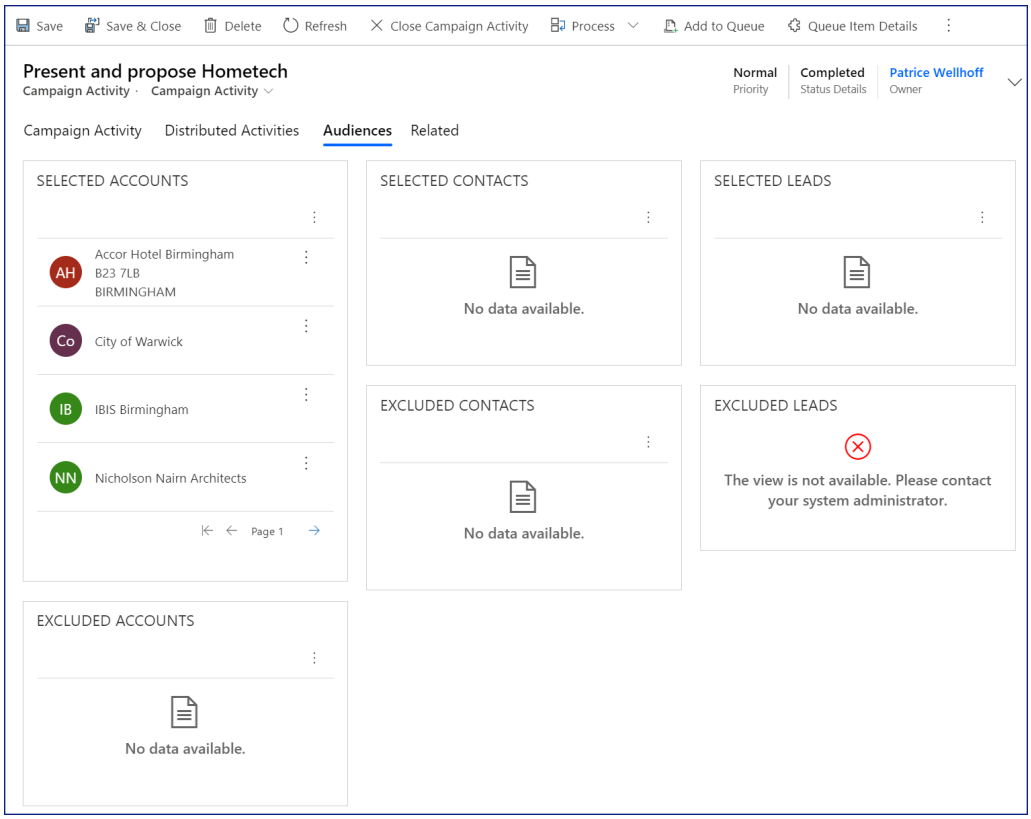


Figure 96: Campaign Activity Audiences

This is a list of all accounts and contacts concerned with this activity.

There is nothing to fill here.

4.16.4 How to generate Marketing Actions from a Campaign Activity

Step 1: Fill the Campaign Activity form:

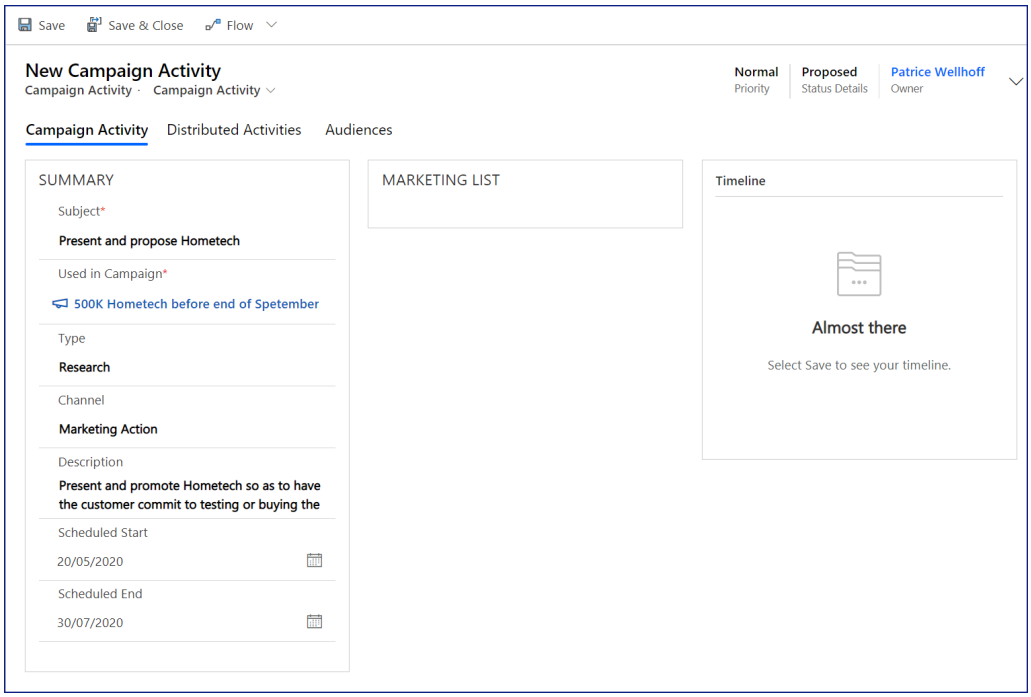


Figure 97: Campaign Activity Tab

Step 2: Save the record

Step 3: click on the Distribute Campaign button

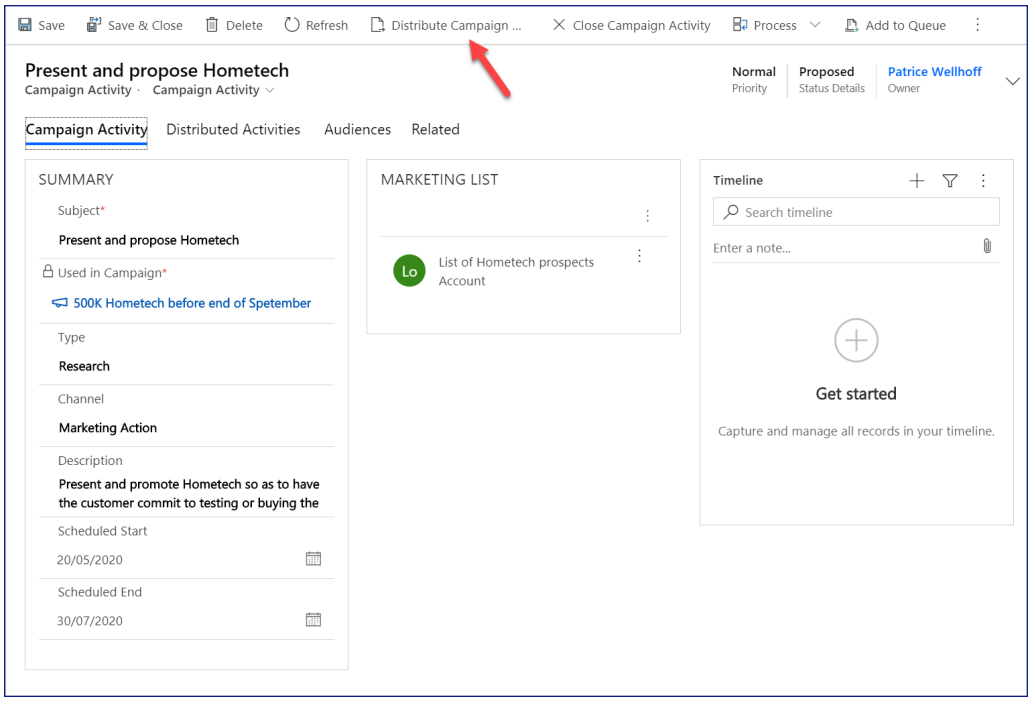


Figure 98: Click on button

Step 4 : fill the assistant. it is a two-stage process. The first stage is to describe the desired action, and the second stage is to describe who is to take that action.

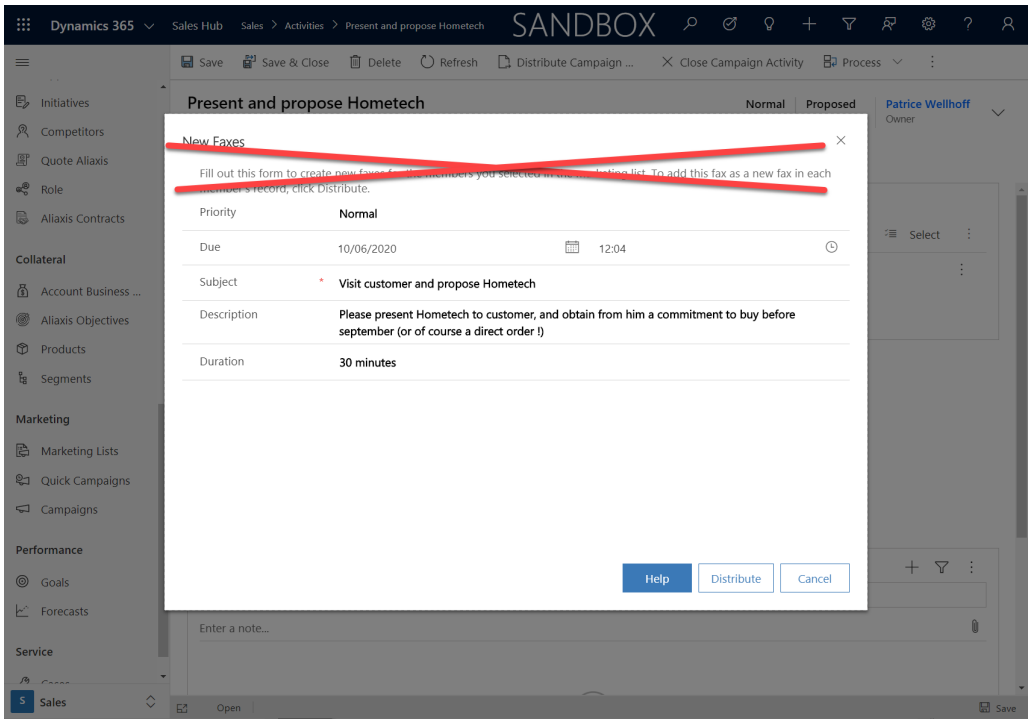


Figure 99: Assistant screen 1

Note: we recycled the fax into a Marketing action. Unfortunately the Microsoft assistant cannot be changed and will state the description of a fax.

- **Subject:** that is the subject of the marketing action that the person in charge of the marketing action will see in his list of activities. *Note: This field is different from the campaign activity subject, which is intended for the creator of the campaign activity oly. In contrast, the former is intended for the salesperson.*
- **Description**: additional information for the person in charge of the action. It is prefilled with the offer field of the marketing campaign in case this field is filled.
- **Duration:** not used at Aliaxis. it is originally intended to calculate the cost of the campaign.

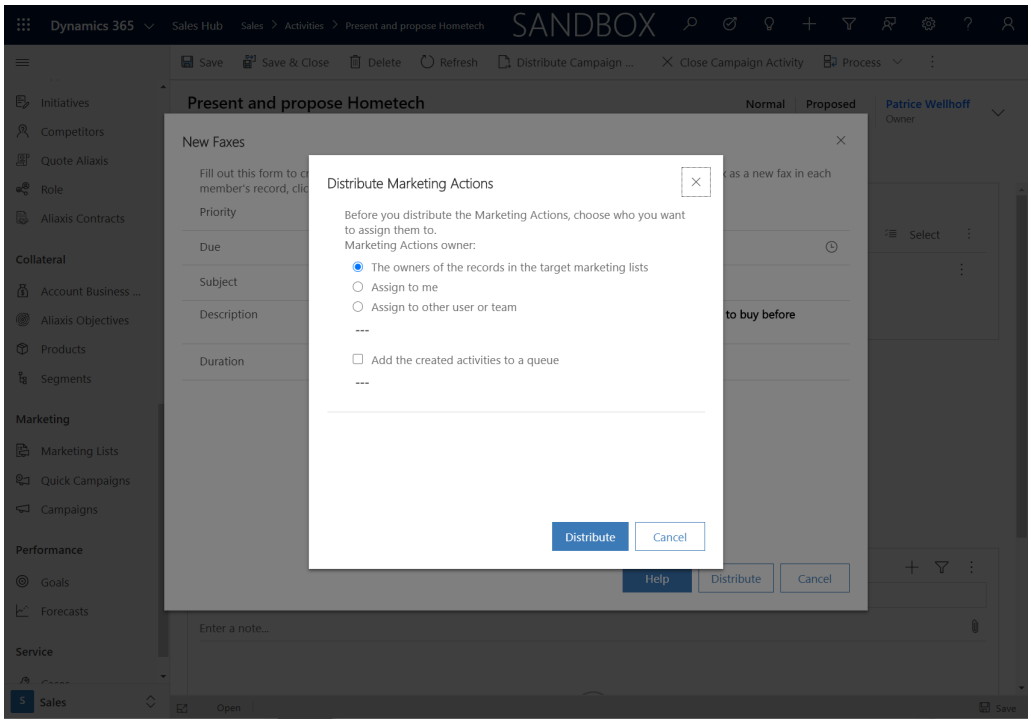


Figure 100: Assistant screen 2

Choose here who is in charge of the action : it can be the owner of the record (the sales person in charge of the customer), or "me" meaning the person filling this form, or somebody else that needs to be defined.

Add the created activities to a queue: not used at Aliaxis.

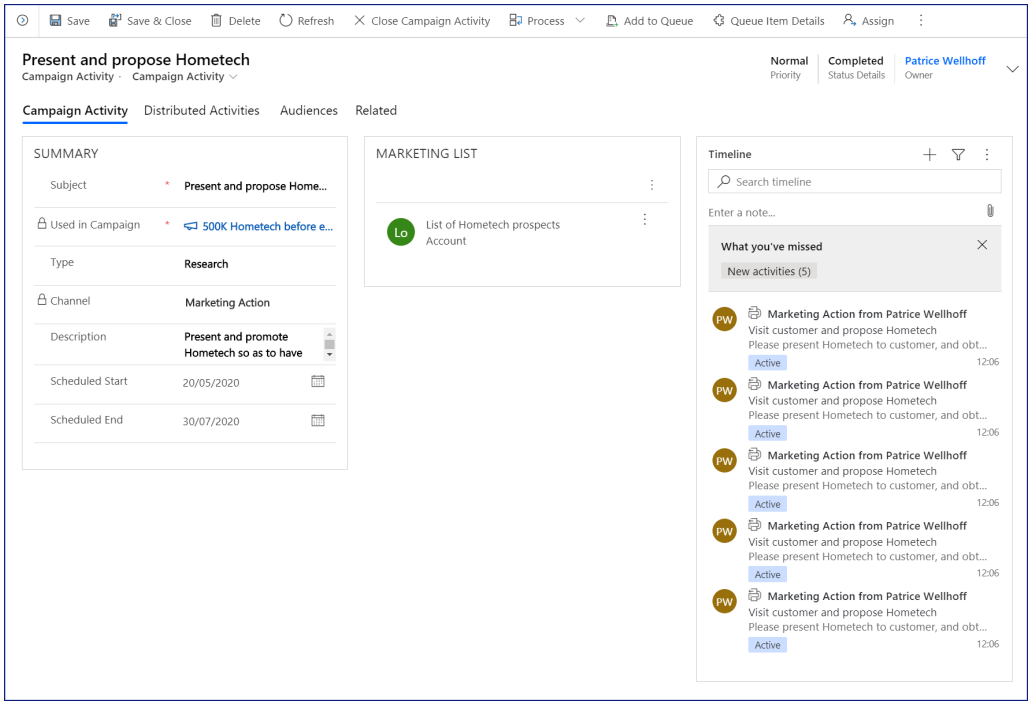
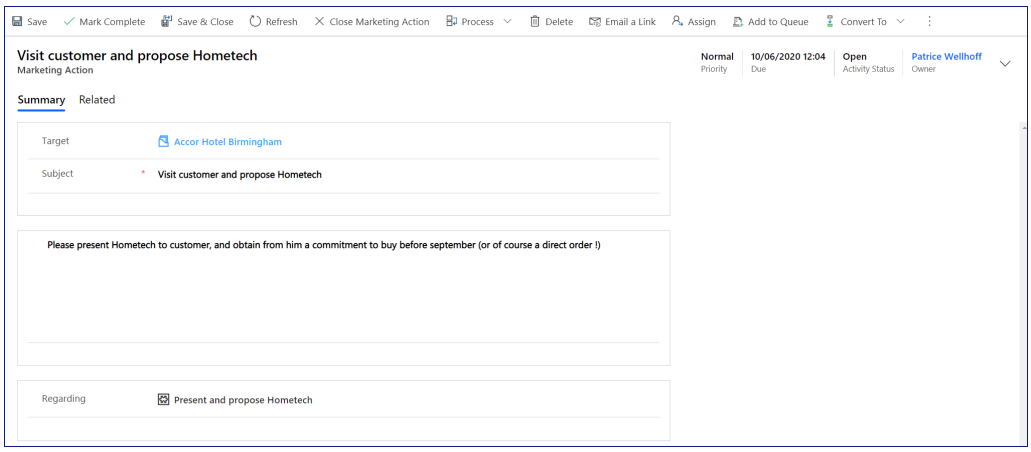


Figure 101: Campaign activity tab once the marketing actions have been generated

Here is the information that each person in charge of each campaign activity will see:



4.17 Marketing Action

A marketing action is a task generated from a campaign activity.

Note : to better understand the relationship between all the marketing entities go to page 11

It is a simple form

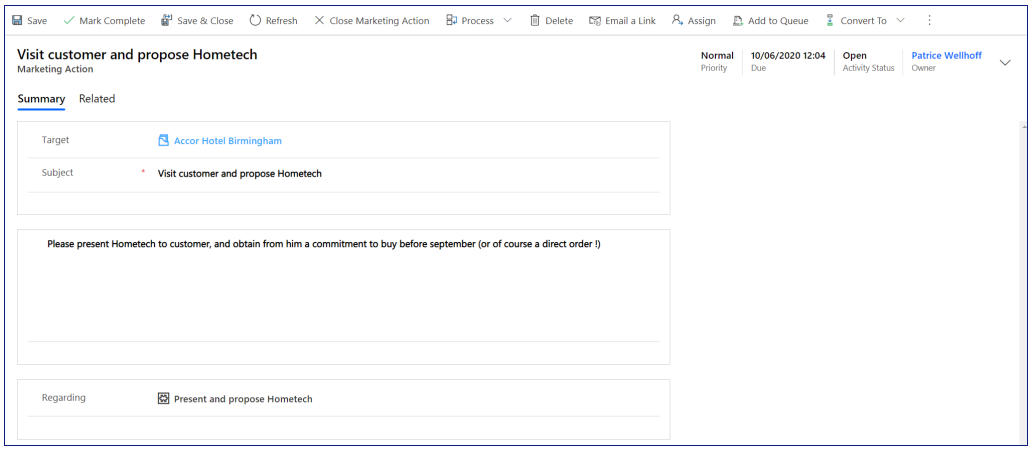


Figure 102: Marketing Action

Description:

all these fields have been generated from the campaign activity, and nothing needs to be entered in this form.

- **Priority**: low, normal or high
- **Due**: when is this action due
- **Activity Status**: Open, completed or cancelled
- **Owner**: person assigned to doing the action<

- **Target**: this is the contact or account where the action described in the central part of the form is to be carried out.
- **Subject**: action summary
- **Text zone**: action description
- **Regarding**: name of the campaign activity

To enter the customer response to this action, click on the button Convert To, then Promote to Response (see Campaign Response page 113)

4.18 Campaign Response (Results)

When a marketing action has been performed, one is supposed to enter the results of the action.

These results will be gathered automatically at the Marketing Campaign level.

Note : to better understand the relationship between all the marketing entities go to page 11

Entering a result is fast and simple. Two answers need to be provided: the response code and the potential revenue. These 2 fields are described below in the form.

How to enter a result?

On the marketing action form, click on the button Convert To, then Promote to Response

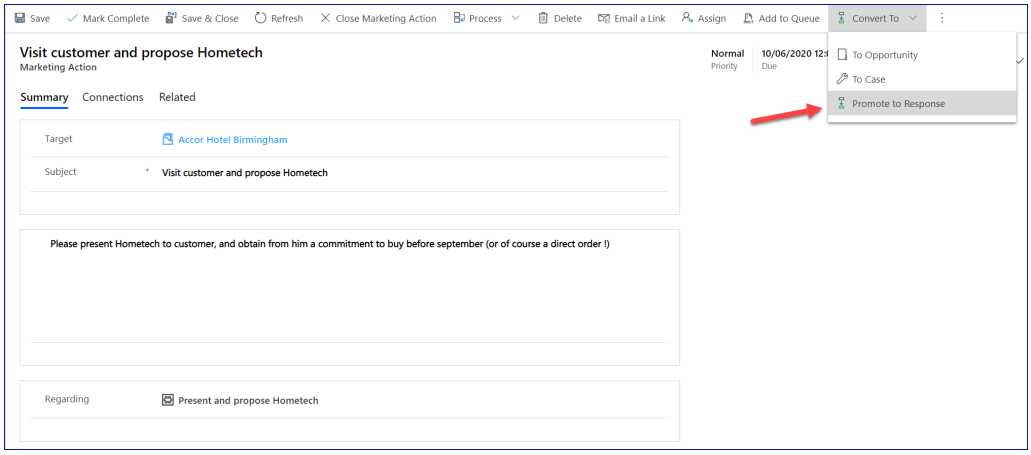


Figure 103: Promote to response

A new form appears to enter the results:

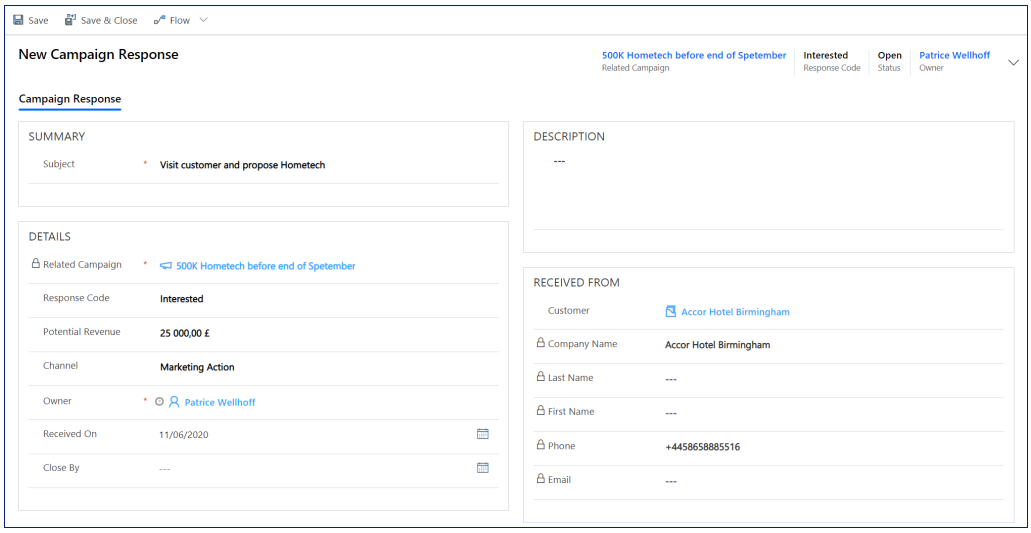


Figure 104: The Campaign Response form

All the fields are calculated. One only needs to enter

- **Response code:** Is the customer interested or not by our proposal? Enter Interested or Not Interested.
- **Potential Revenue:** Self explanatory.

4.19 Task

A task is one of the type of activities that you can find in Dynamics. In the CRM, an activity is something that has been done or that should be done. There are many types of activities: phone call, visits, letters, emails, etc. Task are any activity that one should do and that is logged to not forget it. It is similar to a "to-do".

A CRM task is similar to an Outlook task, except that you can link it to one CRM record thanks to the Regarding field. You can also, if needed, assign the action to someone else than you.

A task can be created from an entity form using the timeline. In this case it will be automatically linked to this record. It can also be created from the task button on top of the activities vies, or thanks to the + button to open a quickcreate form.

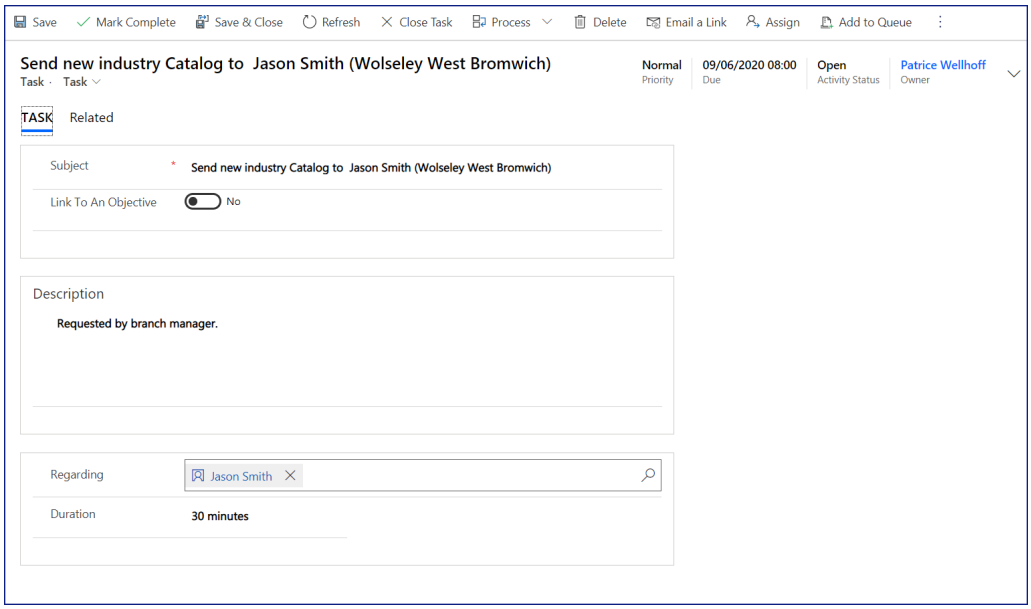


Figure 105: A task

Top of form

- **Priority:** you can prioritize your tasks using this field
- **Due**: indicate when this task is due. This date will make it possible to select the task in different views (e.g. "Next 7 days or earlier" as shown below:)

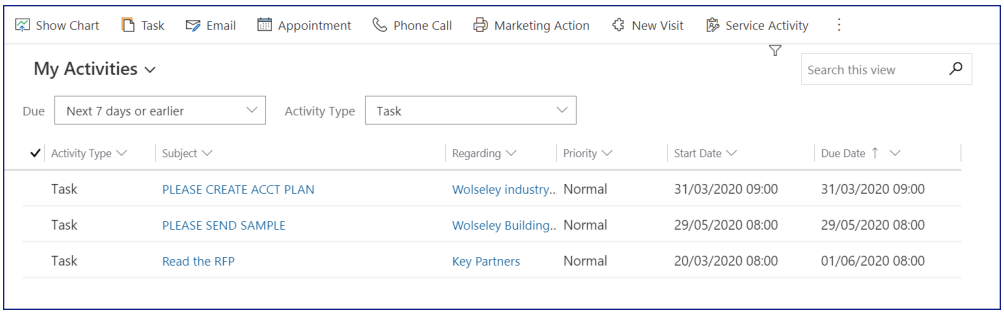


Figure 106: My tasks due in the next 7 days or earlier

- **Activity Status**: a taks is either Open, or Closed as completed, or Closed as canceled. To close a task, use the Close Task button, and choose completed or canceled. Or directly click on Mark Complete to close it as completed.
- **Owner**: person in charge of performing the task. It can be changed thanks to the Assign button

Main form

- **Requestor**: who is the person in the organization that requested the task to be done. If not filled, it is the person entering the task.
- **Subject**: self explanatory
- **Link to an Objective**: In an Account plan, in the Deployment tab, we have a Task section to indicate which tasks need to be carried out to achieve the expected result. Those are the tasks linked to an objective.

- **Aliaxis Objective:** if a task is linked to an objective of the account plan, indicate the objective this task is related to here.
- **Description**: self explanatory
- **Regarding**: link to a CRM entity
- **Duration**: optional ; self explanatory

How to assign a task to someone else

Click on the Assign button on top of the screen. The person will have this task in his activities section. A good practice could also be to send an email with a link (see page 29)to the assigned person to let him know that a task has been assigned to him.

Outlook Synchronization

A task is automatically synchronized with Outlook tasks (please allow 10 minutes for synchronization) It works with the Outlook tasks module or the new To Do module as you can see below:

Old Outlook task module:

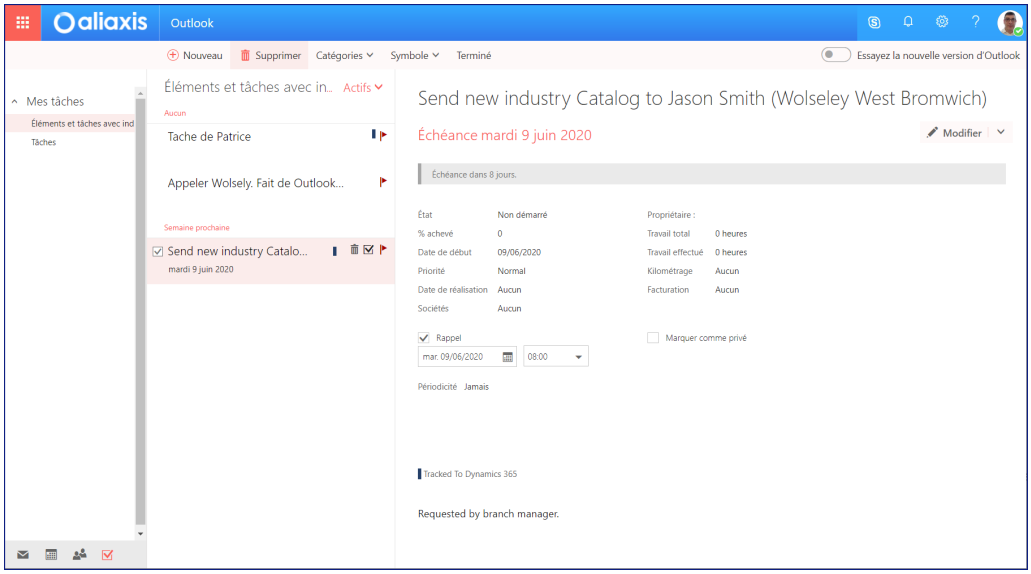


Figure 107: Outlook task

New To do module:

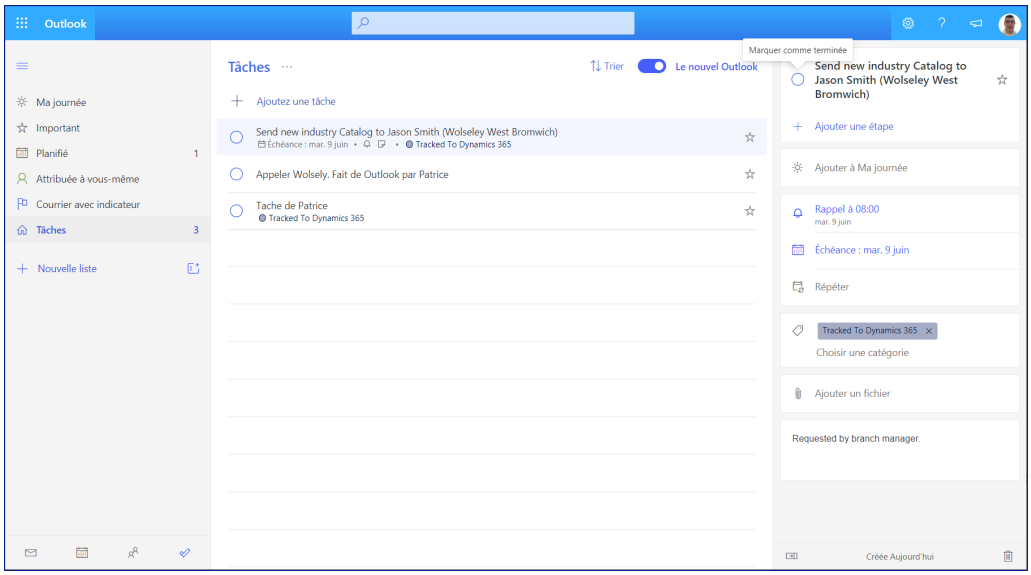


Figure 108: New to do module

5. CRM Processes

5 CRM Processes

In this chapter we will not explain the forms anew, as they are all explained in the List of Entities chapter. Please refer to it when needed.

5.1 Visit planning, preparation & report

In the CRM we have separated 2 concepts: the visit and the appointment:

- An appointment, is the similar to an Outlook Appointment. it has the same fields and can be synchronised. It's purpose is to block a given date and time in your agenda and possibly of your customer if you invite him.
- Visit, is the record that contains the content of the visit and the visit report.

We separated this into 2 entities for few reasons :

- One can enter much details in the visit form without the risk of sending confidential data to a customer if you invite him
- One can create the visit form before the appointment
- One can create an appointment first and a visit later.

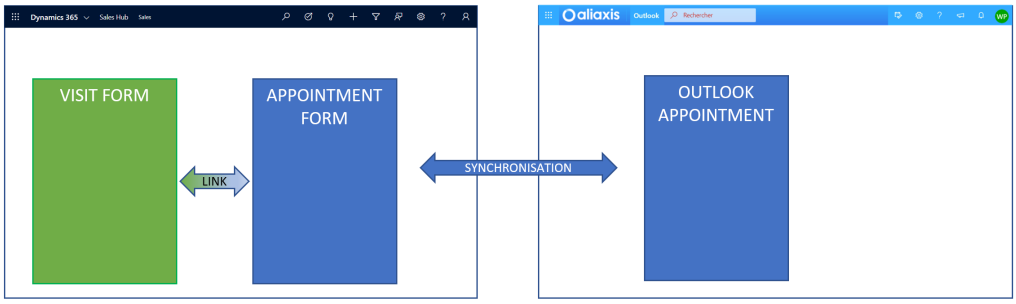
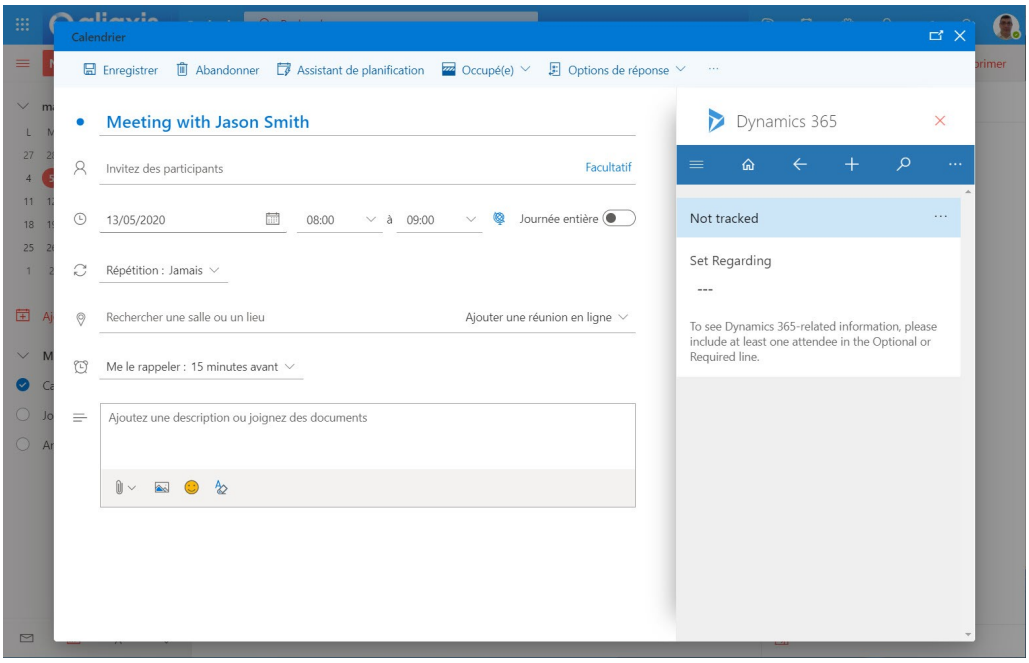
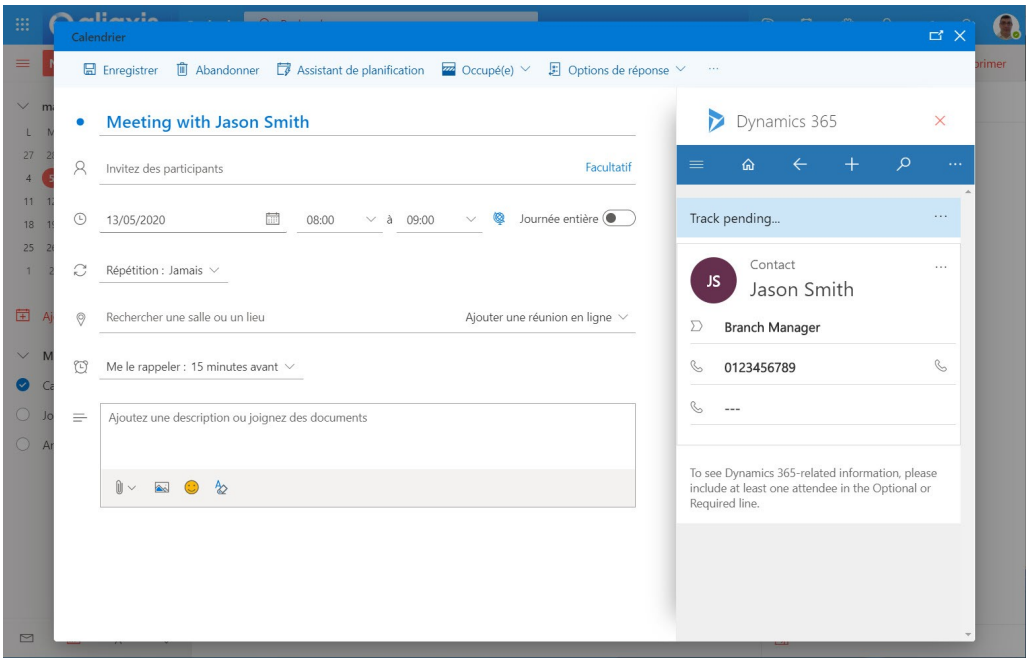


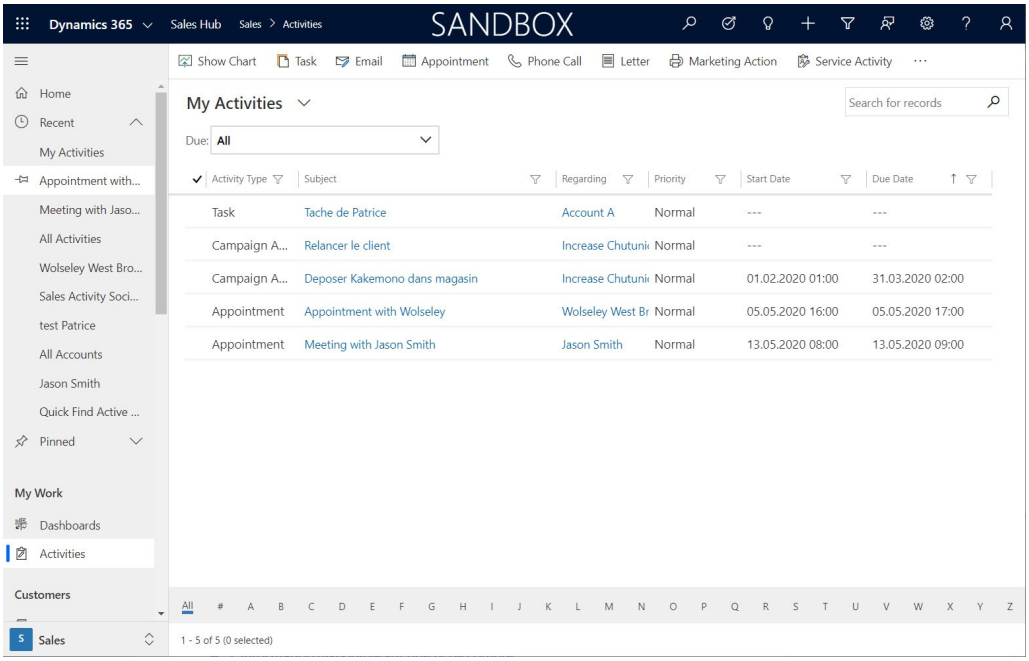
Figure 109: Appointments and Visits

1. Create an appointment with Outlook



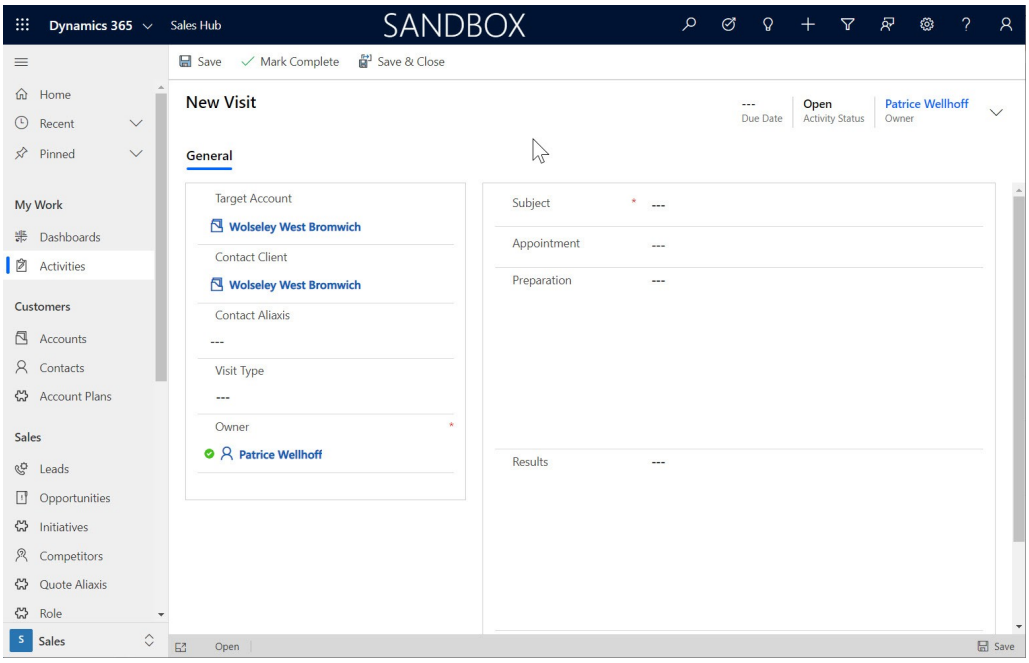


The CRM will Sync with Outlook (may take 10 minutes)

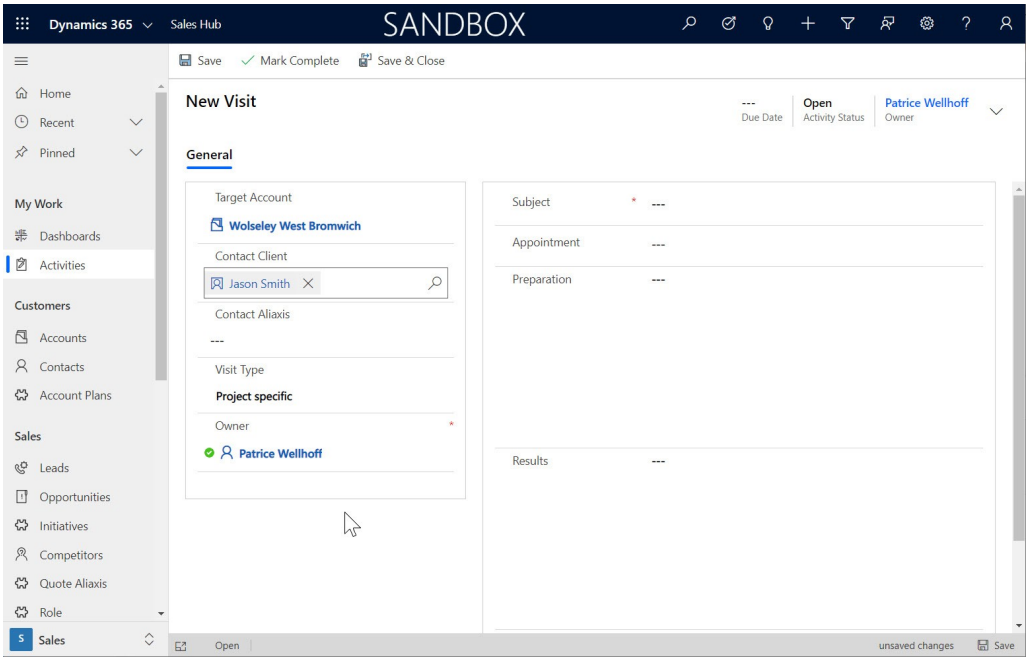


Appointment is in the contact and Account form

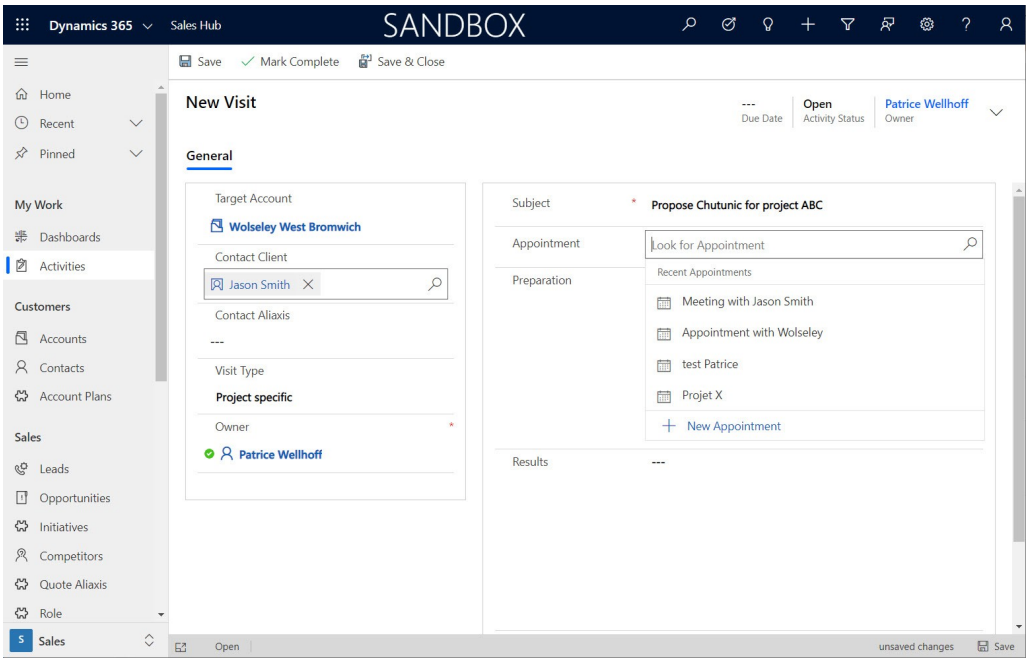
2. Create visit



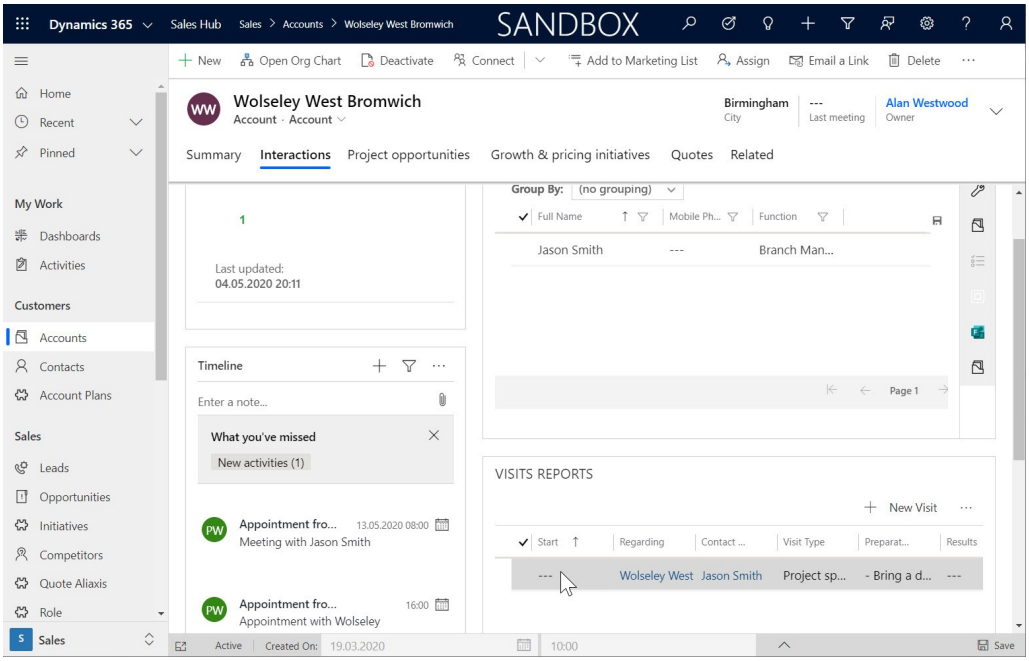
Change contact



Link Appointment



Visit in the Account form



5.1.1 How to create an appointment and prepare a visit

How to create an appointment and prepare a visit in one operation ?

The easiest way is to do it in Outlook.

Create your appointment in Outlook. While creating it open the Dynamics panel and relate it to a visit. Create a new visit and fill the form in Outlook. Both will be transmitted to the CRM.

How to prepare a visit before taking the appointment ?

1. In the CRM, create a visit, and fill all the necessary information in the form
2. Later, create your outlook appointment and link it to your visit

How to create an appointment before preparing the visit ?

1. Create your appointment in Outlook
2. Later, create your visit. In the visit form, link it to your appointment form.

5.2 Lead & Opportunity lifecycle

The lead to opportunity lifecycle is a process detailing all steps to take from detecting a lead to winning an opportunity.

The lead is the very early stage where it has not yet been decided if it is or not worth working on the project. If it is worth investing time, then the lead will be transformed into an opportunity. This is the qualification phase.

Note: a lead is an optional step. If an opportunity is worth working on, there is no benefit to creating a lead and then to qualify it as an opportunity. It is more simple to create an opportunity directly.

5.2.1 Lead Entry and Qualification

On fills all the possible fields depending on the information he has. Most of the fields that are not mandatory will become mandatory in the opportunity.

Concerning the account, the account to which

Specification phase

Contractor tendering phase

Installer tendering phase

Execution phase

Leads and opportunities: An opportunity is a situation in which it seems possible to make a sale, based on a set of indications or clues. The further the opportunity progresses, the higher the likelihood that the deal will take place. The very first step to take is to identify if an opportunity is a real opportunity worth investing time. This is what we call to qualify an opportunity.

Because we do not need much information at the initial phases, and that we will need more and more data as the process progresses, we have two forms in the CRM:

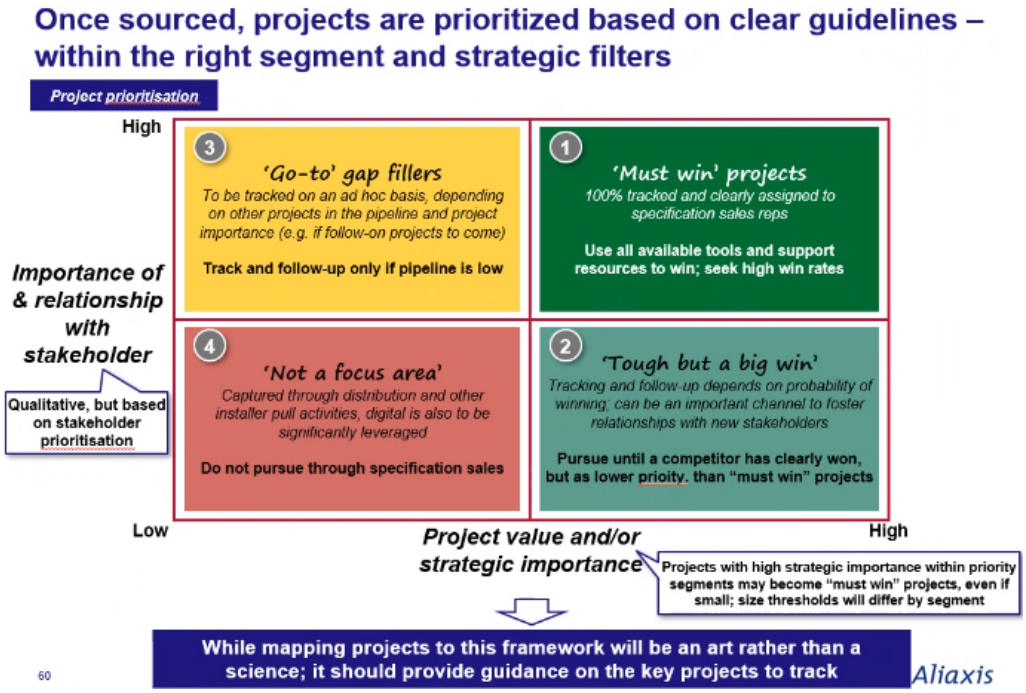
- The first form is called a **lead**. It is an opportunity that has not yet been qualified. It has a specific form, similar to an opportunity with fewer fields to fill.
- The **opportunity** starts after qualification. When the lead is qualified, all the data are automatically transferred from the lead to the opportunity form.

Figure 110: Lead - Opportunity process

Enter topic text here.

Subsegment obligatoire. Ce sous segment sera reporté dans l'opportunité et permettra de signifier les sous segments dans lesquels chaque compe qui a un rôle est actif (tester ajouter un role, supprimer un role et l'action sur le compte)

Project priority a expliquer (e fournir par Emmanuel



Condition pour qualifier : On a décider que cela vaut le coup d'investir l'énergie nécessaire - a t on les éléments pour que le système propose le commercial (sous segment/Zip code du site du projet)

Bouton pour qualifier

Remarque : si on crée une nouvelle opportunité, le BPF démarre à qualifier, et bascule à l'étape suivante lors de la sauvegarde

5.2.2 Specification Phase

Phase durant laquelle on souhaite influencer toutes les parties prenantes pour que nos gammes de produit soient explicitement écrites ou proposées dans le document technique (technical spec documents) afin de se mettre dans la meilleure position possible pour gagner l'opportunité.

Nos actions principales sont vis a vis des planners ou investisseurs selon les segments.

Essayer d'obtenir le document technique de spécification

Specified/Not specified = if at least one product is specified the opportunity is marked specified.

Créer les child opportunities : je peux cliquer dès que je connais les gammes de produit pouvant être intéressantes pour le projet. NE pas appuyer tôt. Le bouton n'est pas la seule manière d'en ajouter ou d'en enlever. Son usage est optionnel, il est toujours possible d'ajouter ou supprimer des opportunités produit. Peut évoluer dans le temps

5.2.3 Contractor Tendering Phase

Enter topic text here.

5.2.4 Installer Tendering Phase

Enter topic text here.

5.2.5 Execution Phase

Expliquer le process de case study (qui peut démarrer à tout moment du case stufy)

Peut être demandé par le marketing ou toute autre personne

Les statuts

- Requested : an internal request was issued to the sales representative to carry out a case study.
- In progress: the study is ongoing
- Ready to publish: The commercial has completed its work on the case study and provided it to the applicant.
- Published: Published by marketing and available to sales people.

How to

5.3 Account Creation

1. Process compte parent

Celui qui crée le compte peut le rattacher à un compte parent.

Il devra être validé par le directeur des ventes de mon équipe (ex : directeur industrie, directeur building régional, etc. selon le pays)

Le responsable du compte tout en haut de la hiérarchie est responsable de la validation de la hiérarchie. (international, national ou régional)

Comment est il prévenu ? a tester

2. Le type de compte et la nature d'activité doivent être remplis correctement ; l'un dépend de l'autre. Utile pour pouvoir segmenter nos actions marketing et pour toutes les statistiques et analyses éventuelles.

Explication de l'account prioritisation (voir PPT)

Responsable de compte : expliquer le multiple account manager et la prioritisation

Expliquer la partie Key Account team, à quoi ca sert et quand (voir avec Jerome/emmanuel)

3.noter que une fois que le compte aura été sauvegardél les segments/Sous segments où le compte opère seront automatiquement remplius par les opportunités. On peut aussi en ajouter à la main

Règle : comptes ERP : quand je crée un compte ERP je dois aller dans le CRM indiquer le code ERP du compte.

Faire une vue pour le back office de tous les comptes marqués Direct customer et qui n'ont aucun compte ERP, ou les comptes non direct qui ont au moins un compte ERP (pas logique)

Un seul compte CRM peut avoir plusieurs comptes ERP; contraire pas possible : Exemple : en UK, j'ai un compte facturé par Durapipe et un compte GPS, voir plusieurs comptes GPS : ex : un compte bénéficie de plusieurs framework agreement, et donc à plusieurs conditions pour un même produit, il faut ouvrir plusieurs comptes ERP pour la même societeté)

Account hierarchy validation

When one adds an account to a parent account, it is the job of the person in charge or the parent account to validate that the hierarchy

5.4 Quote follow up

Enter topic text here.

5.5 Account Plan lifecycle

Enter topic text here.

5.6 Initiative lifecycle

Enter topic text here.

5.7 Marketing Campaigns

We have several entities concerned with marketing. They are all explained in this section of the manual as they are all interrelated.

A Bird's eye view:

Marketing campaign: a campaign is a planned set of activities that people carry out over some time in order to achieve something.

A marketing campaign always has a target public (WHO) and something to do (WHAT)

Once the WHO and the WHAT are defined, the system will distribute a certain number of marketing actions (number of WHO x number of WHAT = number of marketing actions distributed) to the different salespeople in order to perform these actions.

The different people who have been assigned the actions will perform them and will be able to enter a result of their actions.

All the results will be aggregated and displayed in the marketing campaigns.

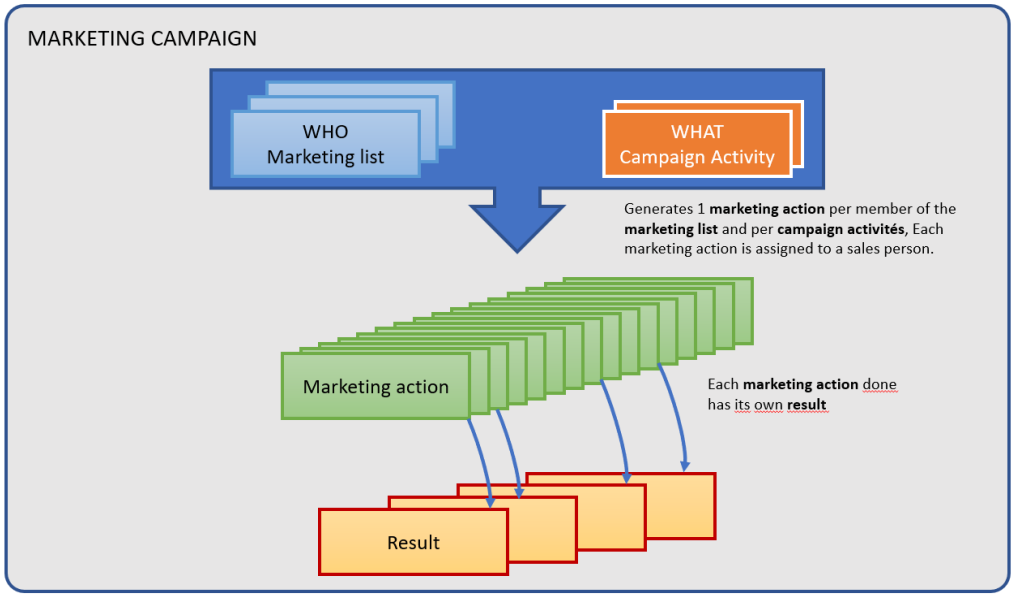


Figure 111: Marketing diagram

How the system works

- The WHO are gathered in one or several **marketing lists**. A marketing list is simply a list of target accounts, or target contacts, or target leads. They cannot be mixed in the same list (as they have different fields) but one campaign can address several lists. Each one
- The WHAT are **campaign activities**. A campaign activity is a description of the required action to do. One marketing campaign can have several campaign activities, but it is advised to only create one activity per campaign to keep the system and the screens easy to understand.
- When all this has been defined, one click on the distribute button that will generate one **marketing action** per marketing list member and per action. For example, if we create a campaign with 1 campaign activity and 2 marketing lists, the first containing 200 members, and the second containing 50 members, the system will generate 250 different marketing actions, one per member, and will assign the action to perform to someone, most of the time to the salesperson in charge of the account.

A video "marketing campaigns" explains how to create and run a marketing campaign.

6. Dynamics and Outlook

6 Dynamics and Outlook

There are 2 main Outlook clients on a personal computer

a) the Outlook client

b) the web client.

Both clients work alike and offer the same functionalities with Dynamics. Their interface is slightly different.

The main difference is that the Outlook client stores all the content of Outlook (emails, appointments...) on your PC, enabling you to access earlier emails, even without internet connection, whereas the web client does not store this on the PC, but allows an access from any PC anywhere.

The way Dynamics work in Outlook is:

- for the mails, the calendar and the tasks, the content can be synchronized on demand between the 2 systems.
- for all the rest of the CRM data, a direct access is possible via Outlook.

In the full **Outlook client**, there is a button on the ribbon that activates Dynamics:

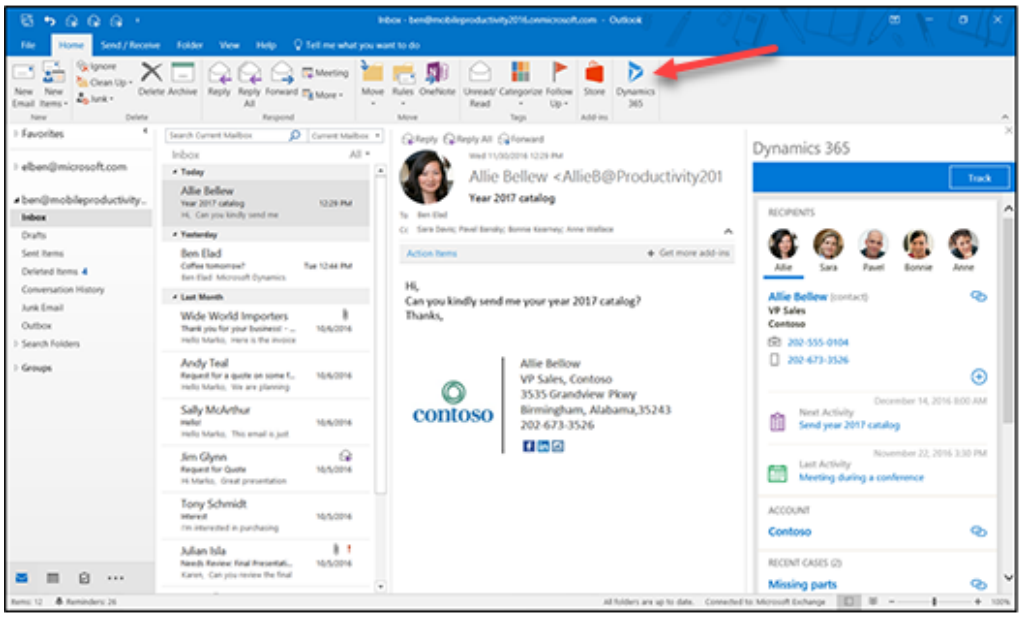


Figure 112: Dynamics in Outlook full client

In the **web client**, there are suspension points set vertically that enable access to Dynamics.

They indicate that there is a continuation of the menu, but there is no room to display it horizontally on the screen. The 3 dots are put vertically, and the continuation of the menu will also be presented vertically.

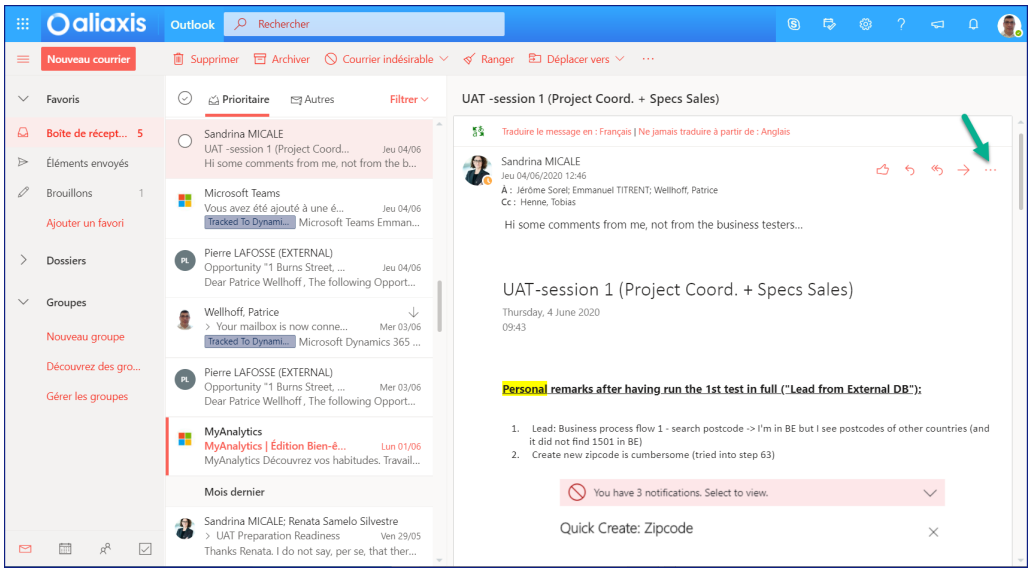


Figure 113: Opening Dynamics in Outlook Web Client - 1

Browse the menu till you see Dynamics 365

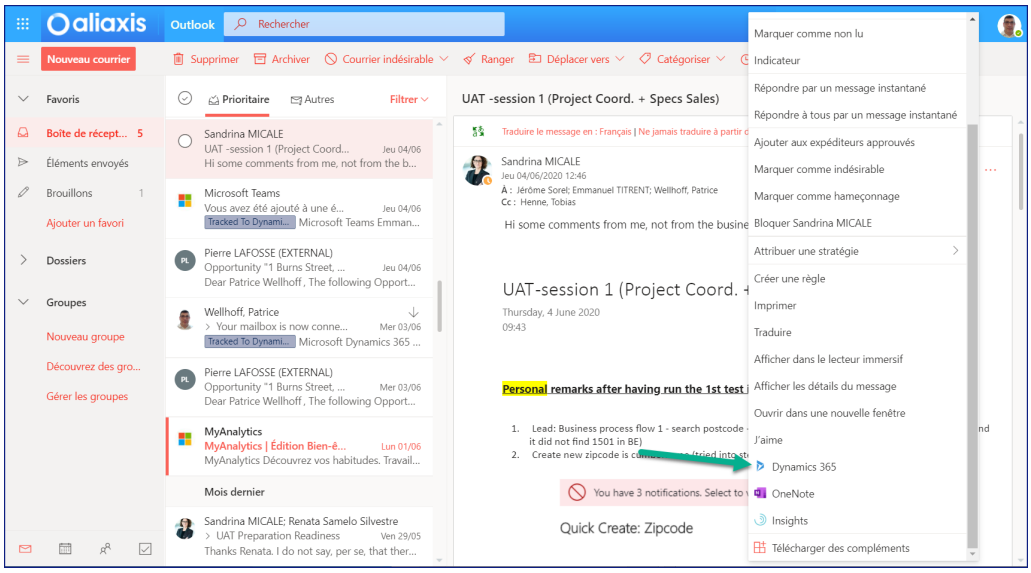


Figure 113: Opening Dynamics in Outlook Web Client - 2

Click on the link ; Dynamics open. You can pin it so it stays visible:

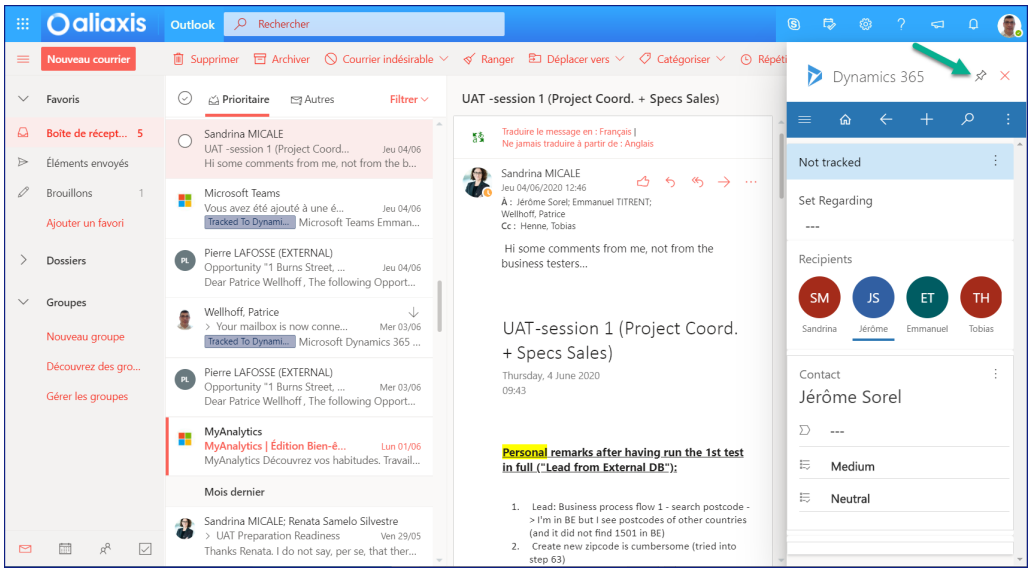


Figure 113: Opening Dynamics in Outlook Web Client - 3

6.1 Dynamics Pane in Outlook

When opening Dynamics in Outlook, there is a pane to the right that appears.

One interesting features is the ability of Dynamics to offer documents and information if it is mentioned in Outlook thanks to Artificial Intelligence. Dynamics 365 will present a link to the relevant item. If you click on this link, you will have instant access to the Dynamics information.

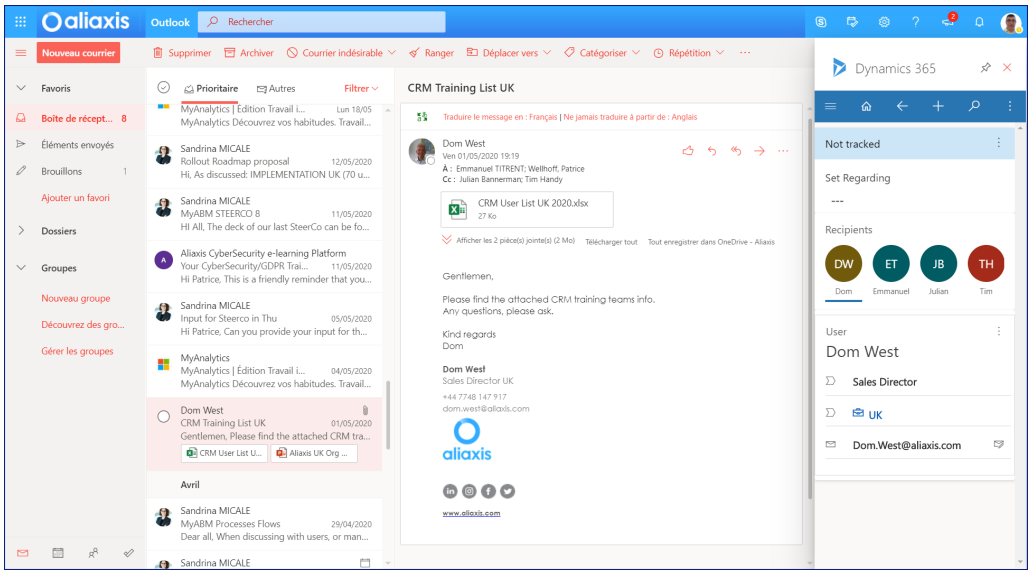
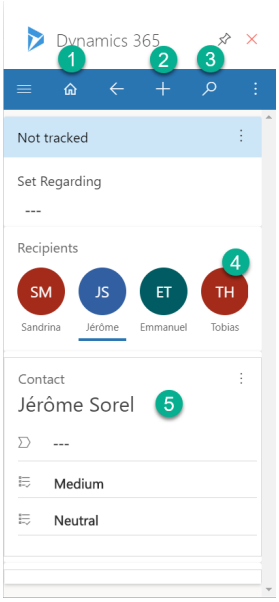


Figure 114: CRM pane in Outlook web client

The Dynamics pane allows direct access to any record of the CRM

This pane allows you to work in Dynamics without opening the dynamics client. Anything you create or change here will appear directly in the CRM



1. Returns to the information of the current record (email, appointment, etc.)
2. Opens a Quick Create form
3. Searches record in all the CRM
4. Lists known recipients
5. Displays summary information about the selected recipient

Figure 115:

To create information directly in Dynamics, you can use the Quick Create form. They are accessed via the **+** icon (2)

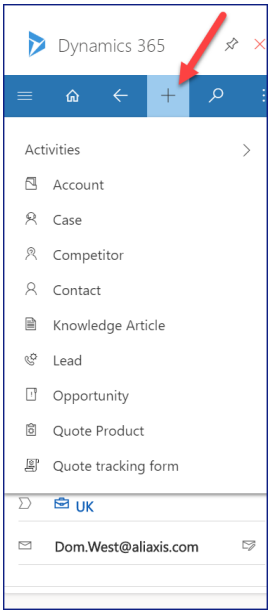


Figure 116: Quick Create in Outlook

To search for any record, the easiest way is to click on the magnifying glass (3)

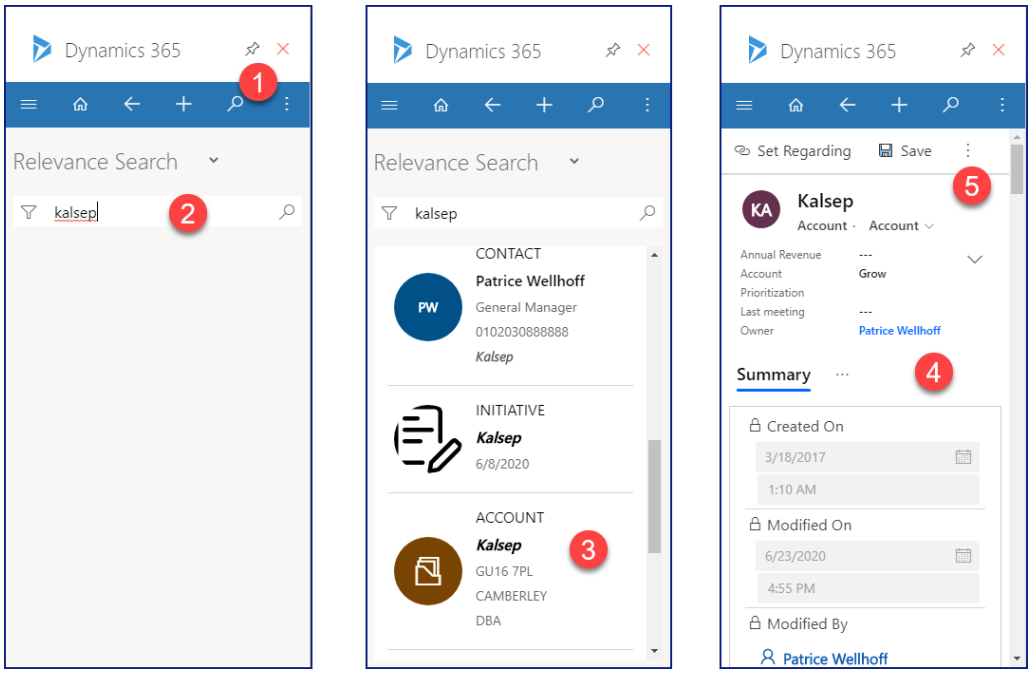


Figure 117 : Outlook - Searching a record in Dynamics

1. Click on the magnifying glass
2. Enter your search
3. Open the proper record
4. Read the record in Outlook
5. By clicking on the 3 dots, you can request to access the record in full screen:

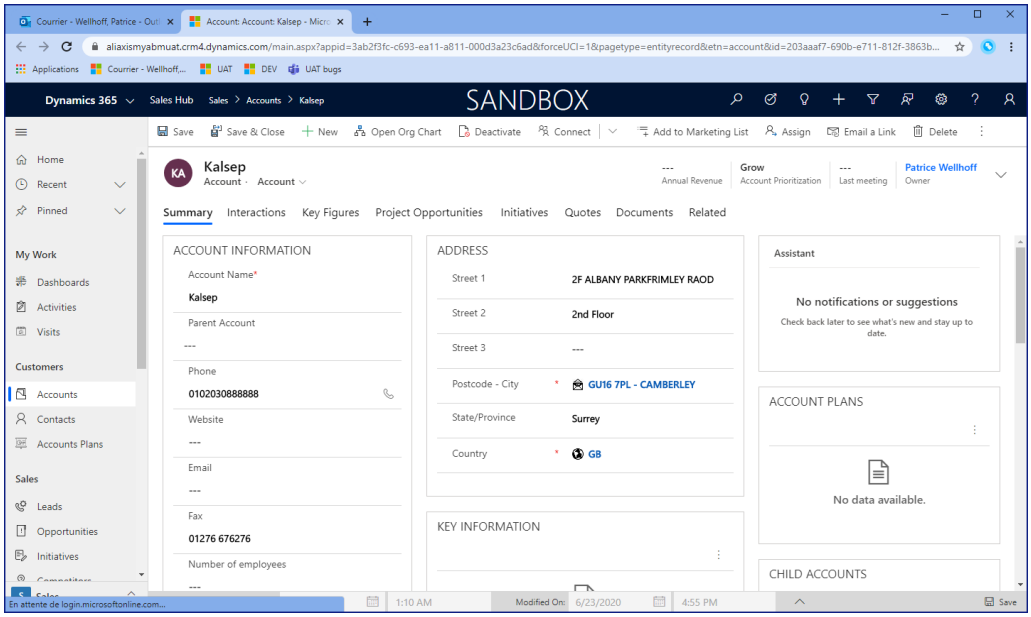


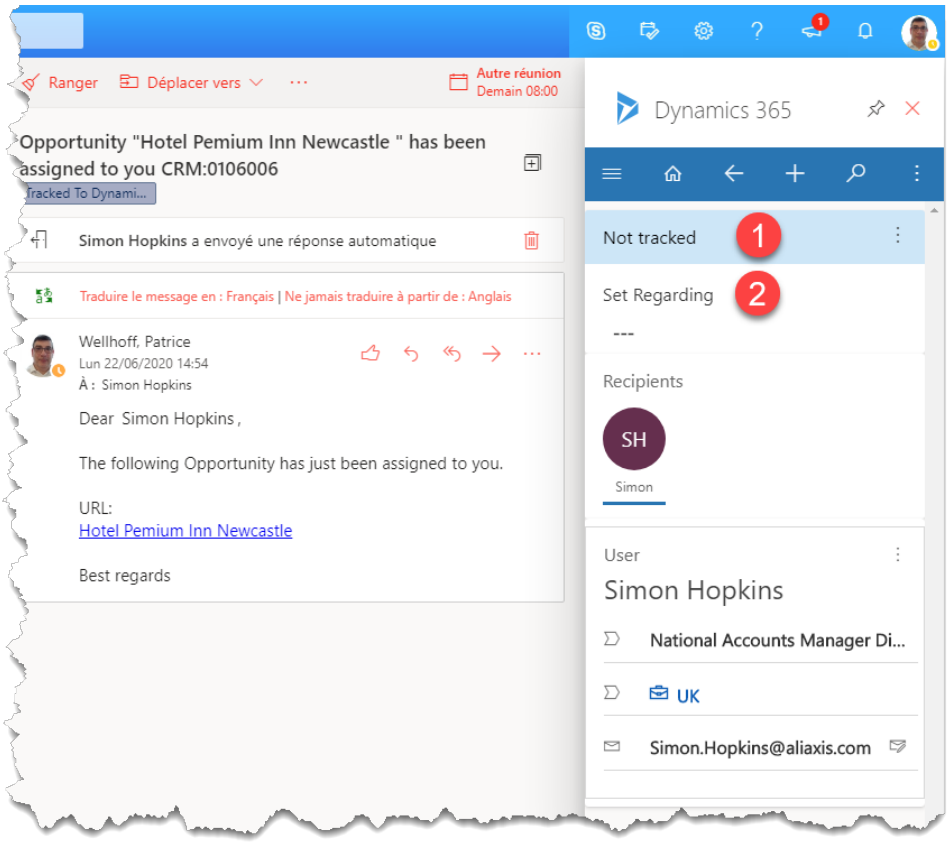
Figure 118 : Enlarging Dynamics

6.2 Tracking and Regarding

The content that is synchronized from Outlook to the CRM is decided by the end user, as not every mail or appointment needs to be synchronized. This is done through 2 types of links, "Tracking" and "Regarding".

Using these links will synchronize the mail or appointment in the CRM.

1. **Tracking** creates a copy of the email or appointment in Dynamics 365, and links the email to the different contacts to which the mail is addressed. If a contact is missing in the CRM, he will automatically be created in the CRM
2. **Regarding**: does the same as tracking, and in addition, links the email to another record in Dynamics. It is the same field as the Regarding field in Dynamics. Most of the time, Regarding is useful to relate the mail to an opportunity or to an initiative, as tracking is enough to relate to a contact, which in turn relates it to an account.



Tracking and Regarding links

6.3 email synchronisation

Any email, sent or received can be linked to a Dynamics entity. When attached, the email is visible in the CRM.

Any sent or received email of some importance or that should be shared amongst sales teams should be attached to the CRM.

email tracking (see page 136):

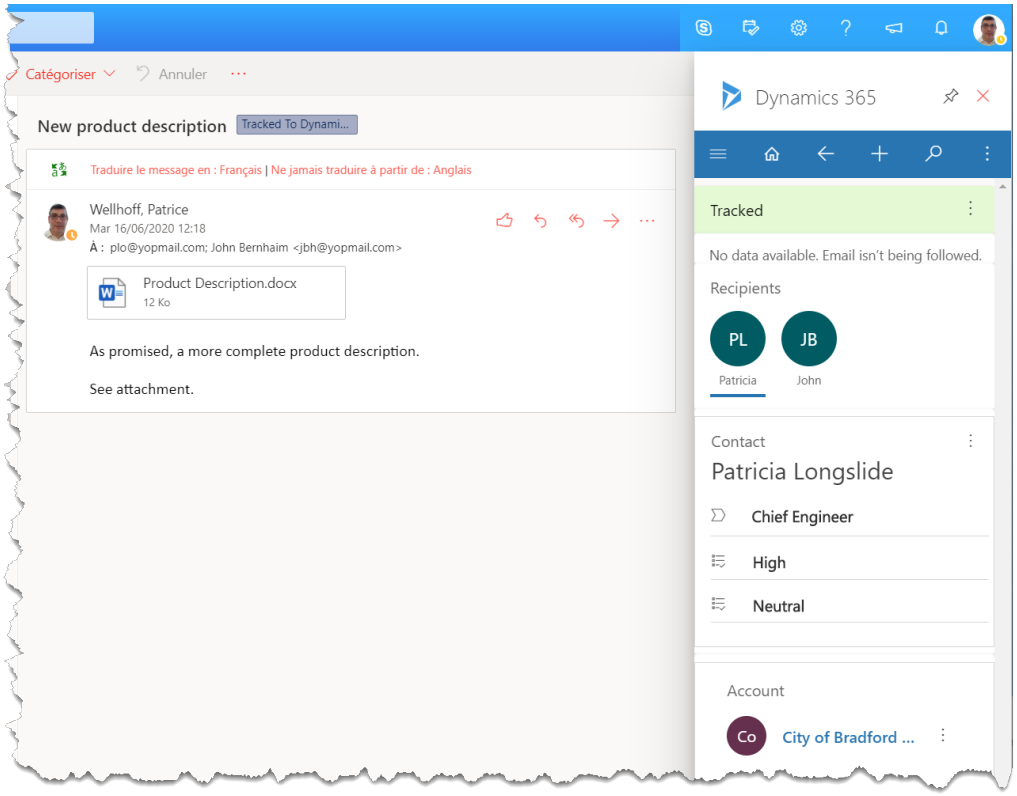
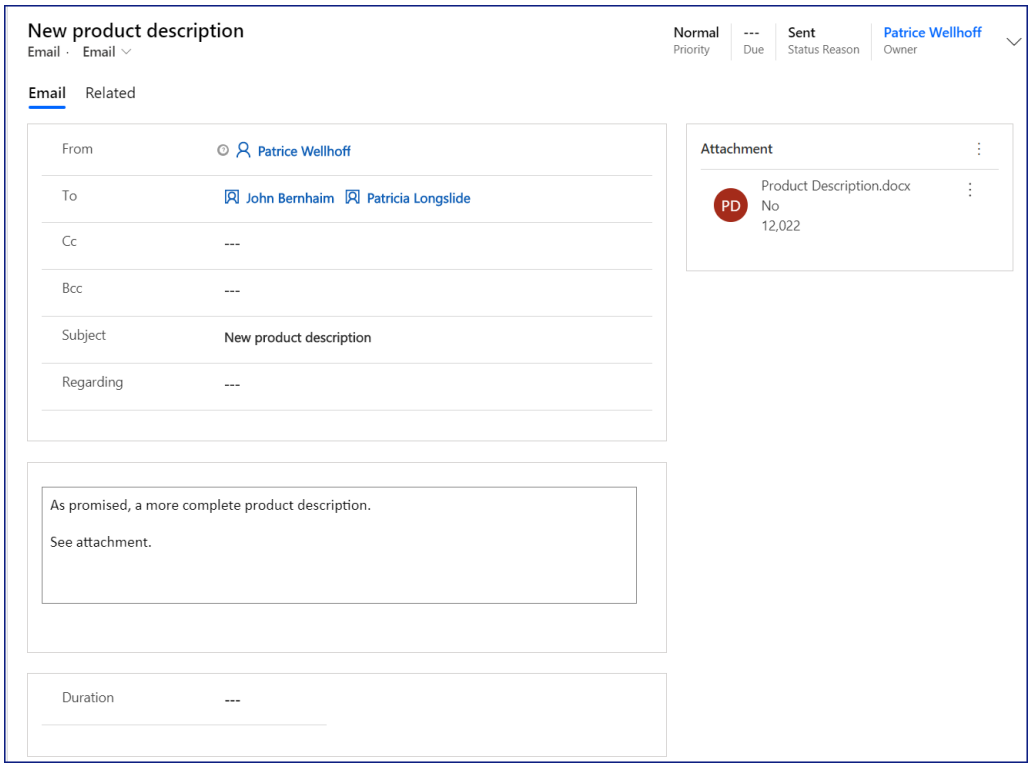


Figure 119: email tracked in Outlook

email tracking will synchronise the Outlook mail with the CRM email record



Same email in Dynamics

The above email will be visible in the timeline of John Bernhaim, Patricia Longslide and the account they belong to:

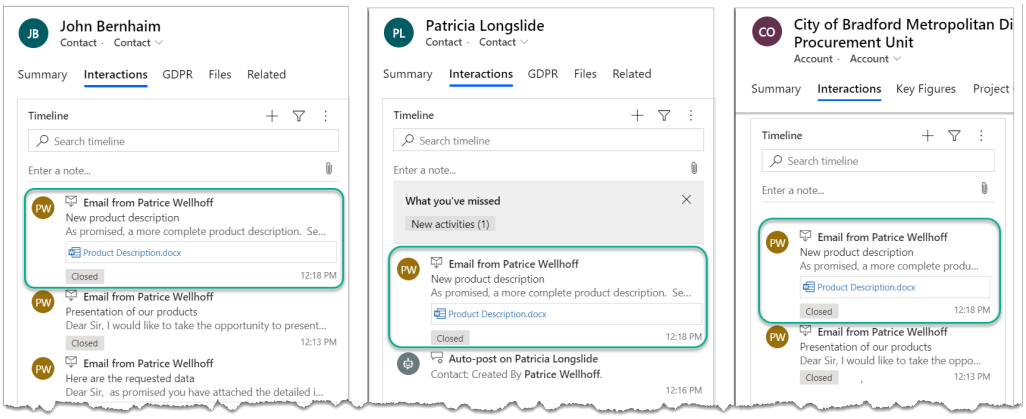


Figure 120

Regarding (see page 136):

Regarding will do exactly the same, and in addition will make the mail visible in the timeline of the entity related to.

To do that, on clicks on the Set Regarding button and find the record to relate to (opportunity, initiative, other account, etc.)

Note: a mail may have many recipients, but only one Regarding record.

emails sent from the CRM

One can create a mail from the CRM directly. It will be synchronised with Outlook and sent to the recipient.

The subject of the mail will be suffixed with CRM:XXXXXXX where XXXXXXX represents a number.

When the email recipient responds to the mail, this suffix will allow Dynamics to link the response to the original email.

6.3.1 Sending Quotes from Outlook

Quotes are generated by the ERP and sent by email to the customers by customer service. Some quotes should be logged in the CRM:

- Quotes with special prices
- Any other quote that the customer service wants to make available to others via the CRM.

Quotes have 2 elements:

- The document itself, generated by the ERP and sent by email as an attachment
- A Quote record that stores the key data of the quotes.

To send a quote:

1. Create and send the email with the attachment to the customer as usual. Then use the Set Regarding link

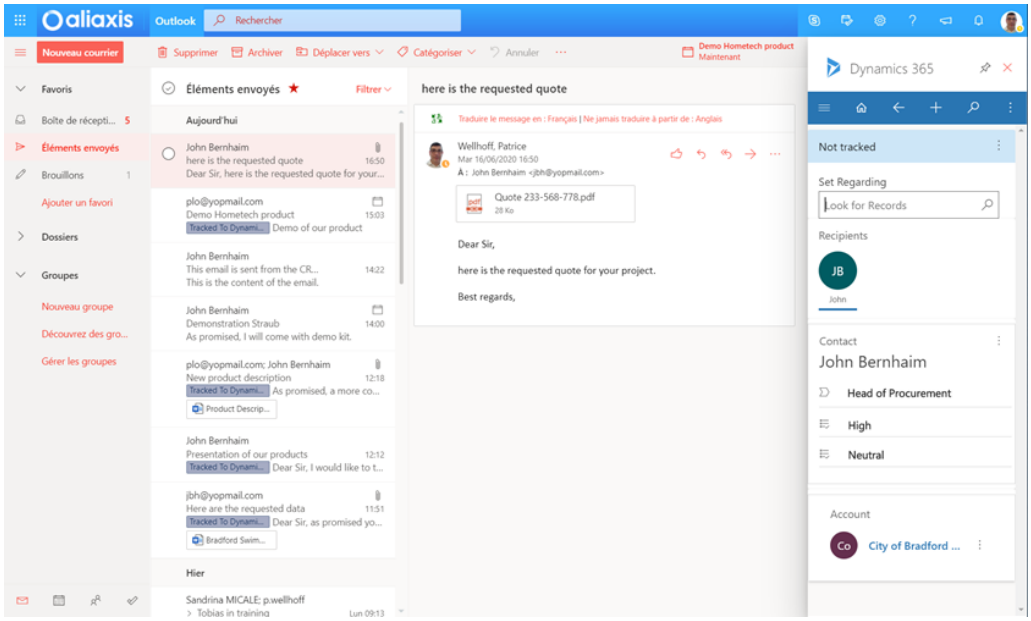


Figure 121 :

2. Indicate that you want to relate to a new quote document and fill the quote document

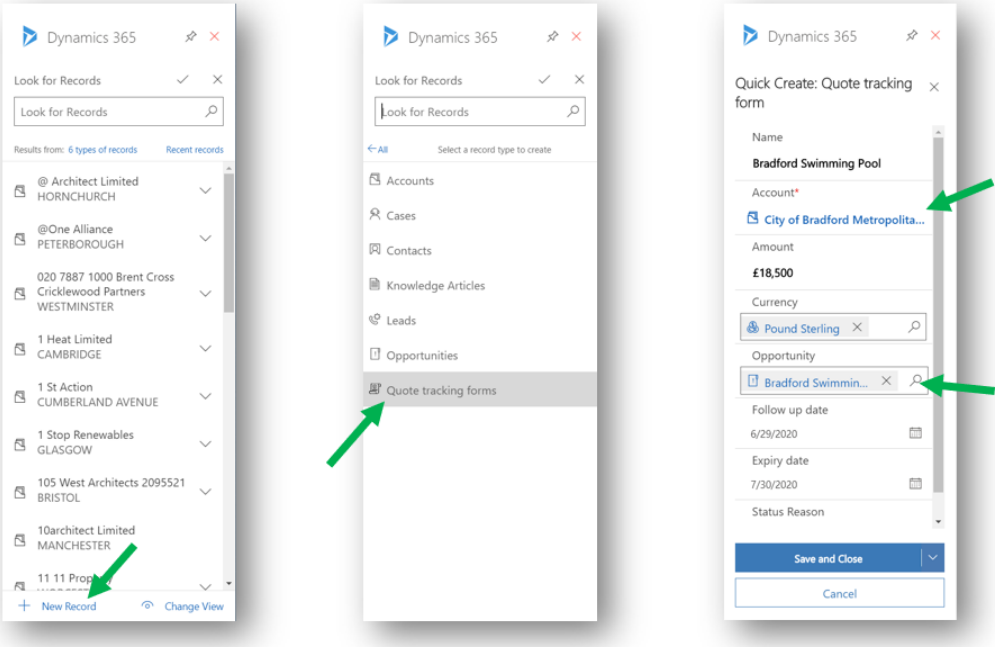


Figure 122 : this quote will be visible in the account and in an opportunity

3. Your quote is now shared in the CRM.

6.4 Appointments

Appointments work similarly to emails. They have the Tracking and Regarding links (see page 136)

Appointments and visits

Appointment and visits can be created at the same time directly from the CRM, as shown below:

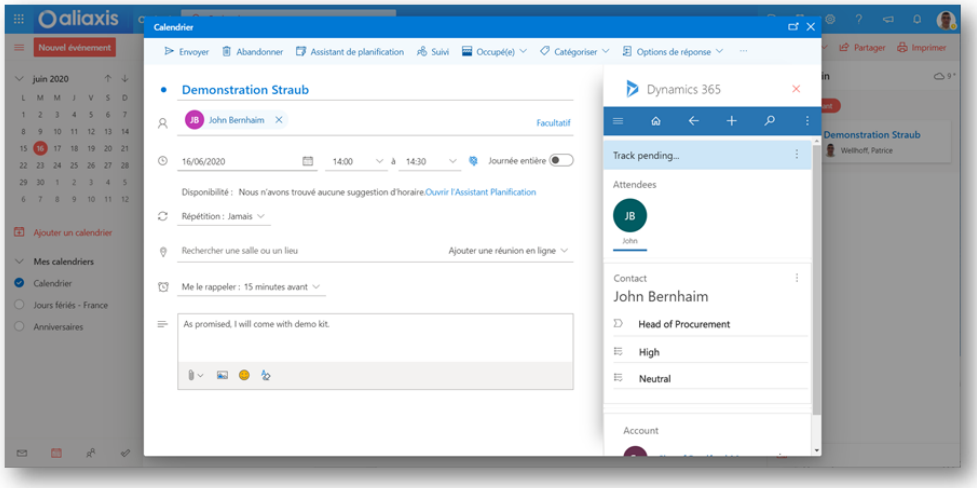


Figure 123 : Step 1: Create the Appointment in Outlook

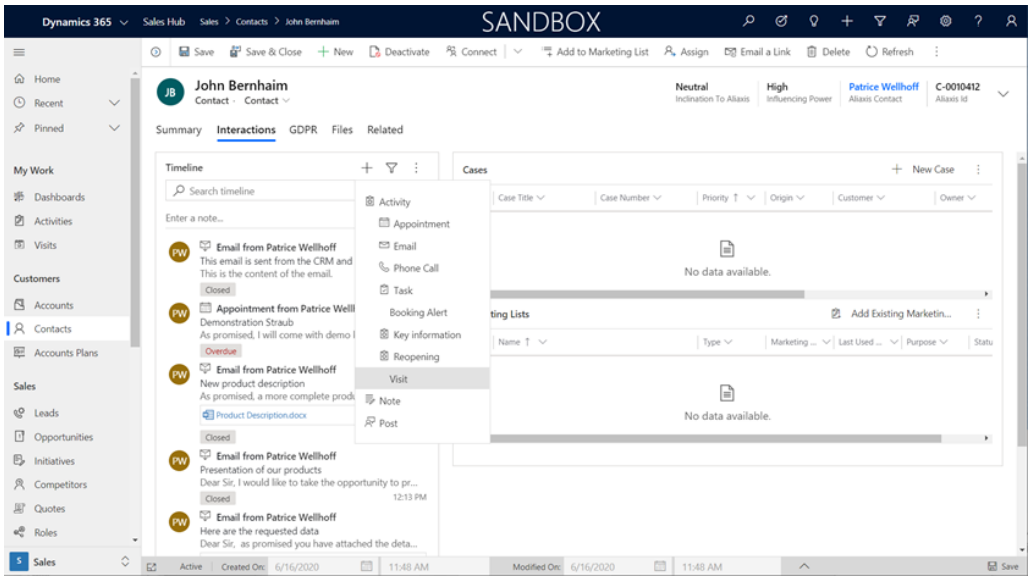


Figure 124 : Step 2: When it is time, create your visit in Dynamics

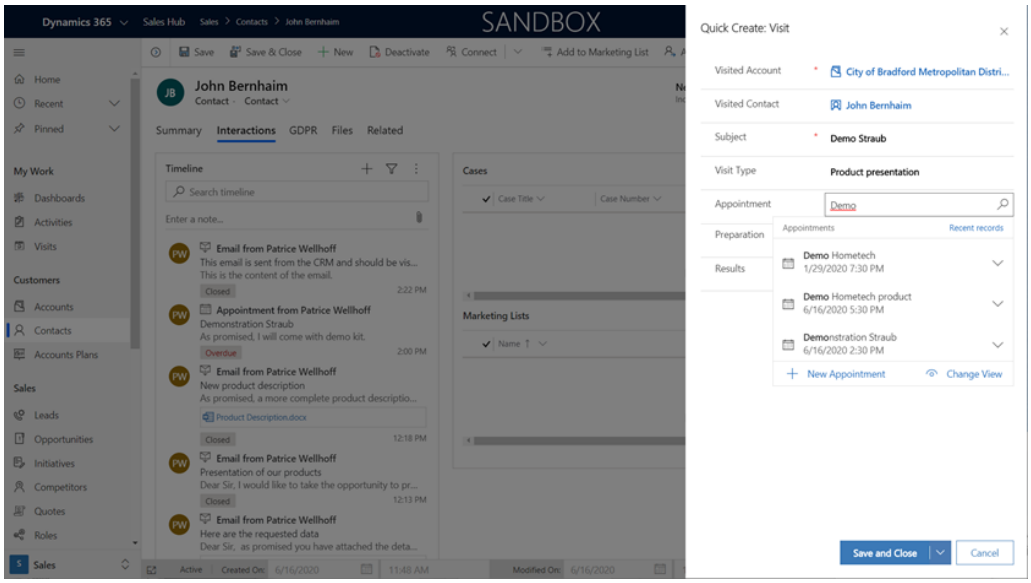


Figure 125 : In the Quick Create form, Relate the visit to the appointment

6.5 Task Synchronisation

Tasks can be used with the old Outlook tasks module or with the new Outlook todo module

Rules of synchronisation:

- Any CRM task is sent to Outlook (see A, B below)
- Outlook tasks tagged with « Tracked To Dynamics 365 » are synced with Dynamics (see 1 below). The other remain in Outlook only (see 2 below)

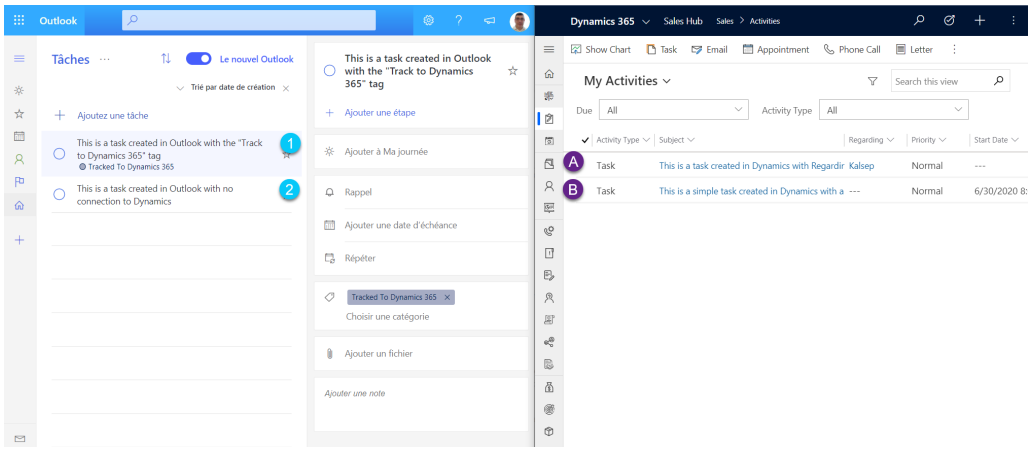


Figure 126: Before synchronisation

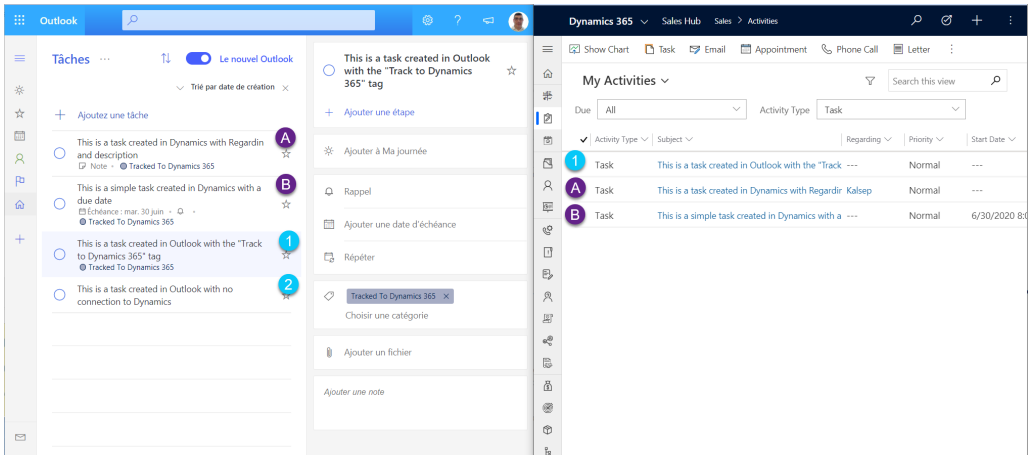


Figure 127: After synchronisation

7. Dynamics on mobile

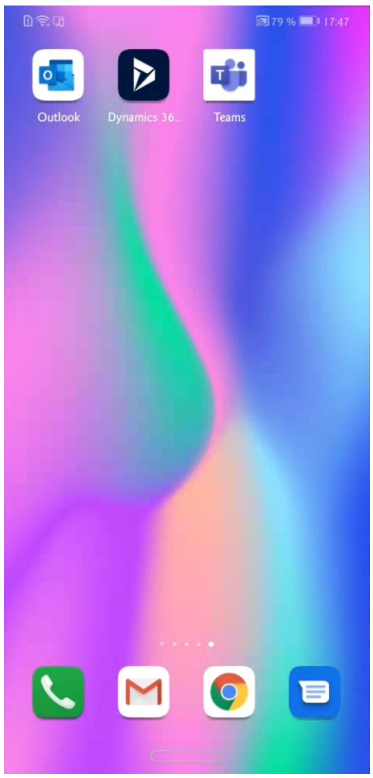
7 Dynamics on mobile

Dynamics work on mobile the same way as it works in Dynamics, but in a smaller screen.

In addition, the application works off-line, so you will be able to use Dynamics, even without network access.

7.1 The Dynamics App

The Dynamic App can be downloaded and installed as any other App on you mobile:



The application works identically on mobile and on a PC.

The bottom menu

The menus are on the bottom of the screen and on the left of the screen

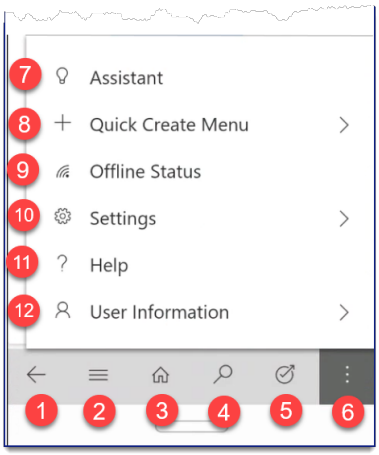


Figure 128 : The bottom menu

1. Returns to the previous page (as the "back" button on a browser)
2. Displays the left menu
3. Returns to the home page
4. Search for any record
5. Task floxs (not used)
6. Continues the menu
7. Check for notifications from the Dynamics assistant (not used)
8. Quick Create menu that allow creation of the different records
9. Offline status: displays entity by entity when it was last synchronized. in addition a button makes it possible to force the offline mode (to economize on your data plan)
10. You can update the settings of Dynamics and of the app here.
11. Your identity (same as in the web client)

The left menu

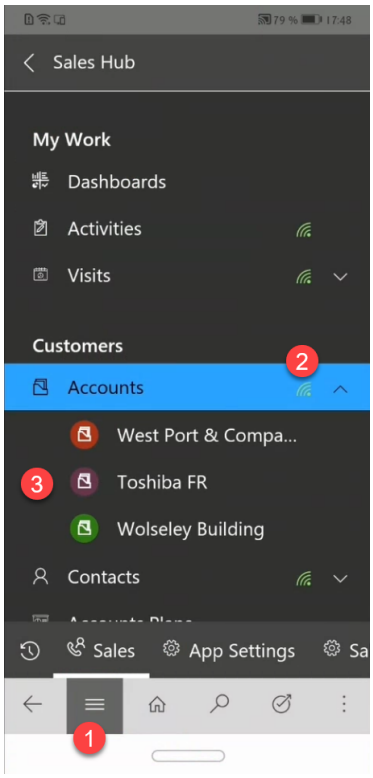


Figure 129 : The left menu

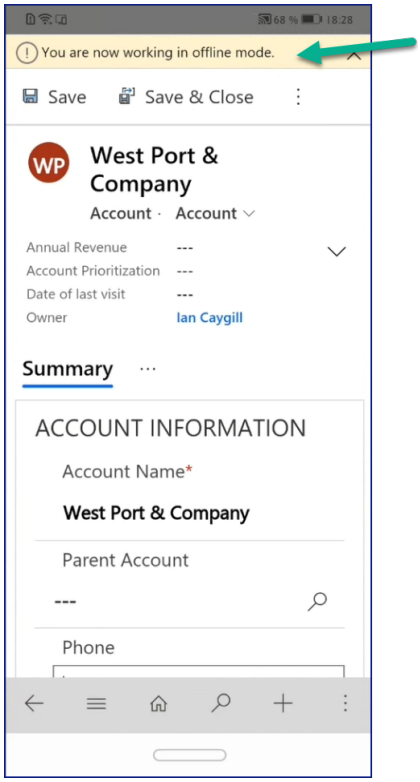
1. To access the left menu
2. the network sign indicates that the entity is available off line.
3. These are the recent records displayed. Works as "Recent" in the PC except that it is designed entity by entity. In this example, the last 3 records diplayed are West Port and Company, Toshiba and Wolseley Building.

7.2 Off line access

When you are on line, Dynamics regularly check if the off line data needs to be refreshed, and when this is needed it will synchronize its data, as seen below. It is totally automatic and nothing needs to be done.

Figure 130 : Updating the local database

In case the network is down, you will work in off line mode,



Dynamics working off line

As soon as the network is back, the server will be synchronized with the latest updates: All is done in the background and you do not need to do anything.

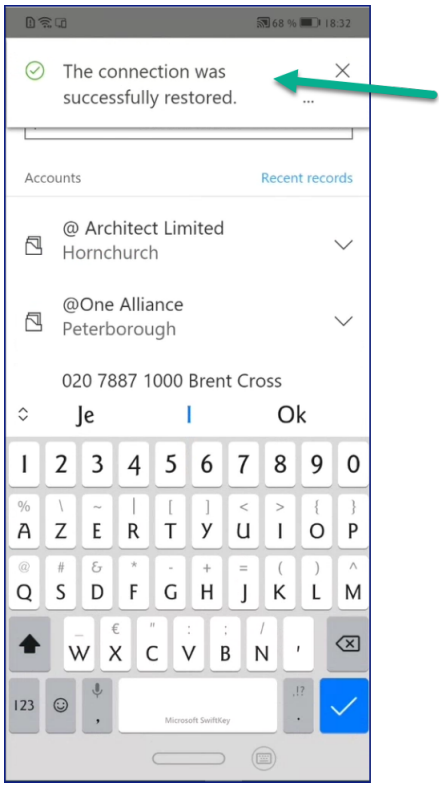


Figure 131 : Connection Restored