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# Ardexus Sales Cycle Manager

## Version 2.0.0



This is a fully functional TRIAL  
VERSION. Currently you are on day 3  
of your free 30 day trial.

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# Ardexus Sales Cycle Manager – Palm Edition

## Introduction

Welcome to Ardexus Sales Cycle Manager for the Palm Computing Platform, the only sales opportunity-tracking application based on patented Intelligent Response Technology designed to help you sell better. Sales Cycle Manager lets you track and update your sales opportunities using your Palm handheld organizer.

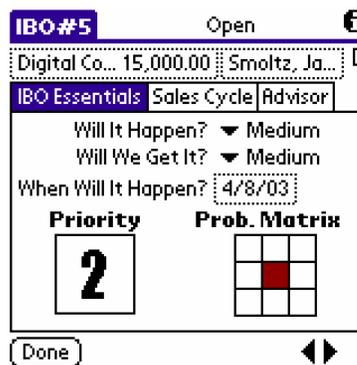
Sales Cycle Manager has three main screens. The first main screen is the IBO list, which lists all of your sales opportunities ranked by priority. This view allows you to list all of your Open, Won, Lost, or Cancelled sales opportunities by priority along with the reference number, weeks to close, company, contact, product, probability, or value (IBO is an acronym for Identified Business Opportunity and is used to refer to sales opportunities throughout SC Manager).

The second major screen is the opportunity screen, which displays the details of a specific sales opportunity. From this screen you can update the various items of information regarding the sale and review and feedback generated by the Intelligent Response.

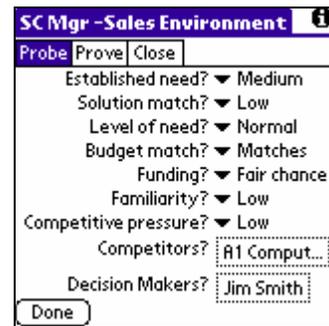
The third major screen is the Sales Environment screen, which displays the strategic details of the sales opportunity and various decision makers involved in the sale. From this screen you can record and reference the key elements of a sale, such as competitive pressure, funding status, decision makers, relationship, etc.



*SC Manager IBO list. List opportunities by priority or stage. Locate opportunities by company, contact, or product.*



*SC Manager opportunity screen. Display the summary information about the opportunity such as probability, close date, etc.*



*SC Manager sales environment screen. Displays strategic information about the opportunity such as competitors, decision makers, funding, etc.*

**Figure 1: Main Sales Cycle Manager areas on the Palm handheld device.**

## Additional Sales Cycle Manager Features

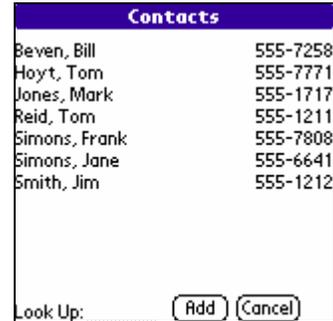
In addition to the functionality found in each of the three areas described Ardexus Sales Cycle Manager also provides customizable view displays, automatic lookup of contacts from the Palm address list, calendar display for selecting dates, ability to store notes on interactions, background information, etc.



*Calendar date lookup*



*Customizable view displays*



*Select contacts from Palm address list*

**Figure 2: A few of the additional lookup or customization screens**

### Integration with desktop PIMs/Contact Managers:

Ardexus Sales Cycle Manager integrates with the Palm Computing organizer address book.

Ardexus Sales Cycle Manager has been designed as a stand-alone opportunity manager based on patent-pending technology found in the T.A.S.C. sales automation package, and can be synced with Ardexus Sales Cycle Manager – Windows Edition. For more information on Windows Edition please visit the Ardexus web site (<http://www.ardexus.com>).

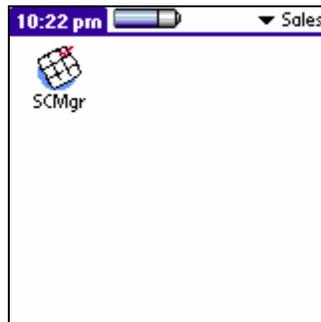
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## Installation

The Sales Cycle Manager application (scmgr.prc) requires 289 KB of space on the handheld device. This application will run on a PalmPilot Professional, PalmPilot Personal, Palm III, Palm IIIe, Palm IIIx, Palm V, Palm Vx, Palm VII, IBM Workpad, and Handspring Visor. The software requires any devices that run palm OS 3.1 or higher (including OS5).

### Windows Installation:

1. Verify that you have the necessary (PalmPilot, Palm III, etc.) Desktop application installed on your PC, which contains the PalmPilot, Palm III, or greater Install Tool.
2. Launch the Install Tool by selecting Start, Programs, Palm Desktop, Install Tool.
3. From the Install Tool dialog box choose your Palm user name from the drop down list.
4. Click the Add button, and browse your directory folders for the scmgr.prc file and click the Open button. Once back in the Install Tool screen click the Done button.
5. Perform a HotSync, first making sure that the Install conduit is enabled.
6. From your Palm handheld tap on the Applications Launcher and select the All category. You should now see the Sales Cycle Manager icon in the list of applications installed on your handheld.



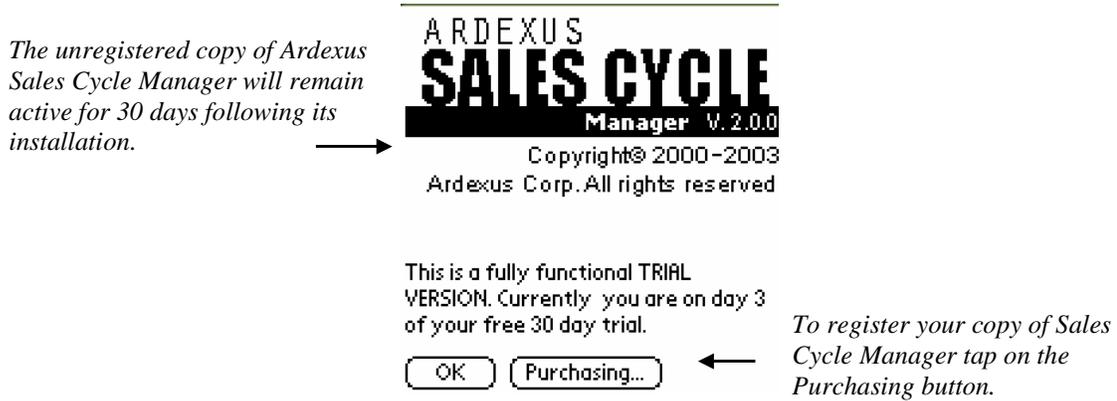
**Figure 3: The Sales Cycle Manager icon on the handheld**

7. Tap on the SC Manager icon to open the application.

If you are installing a trial version of Sales Cycle Manager, the application will operate without a license key for 30 days. At the end of the 30 day trial a permanent license will be necessary to continue to operate the software. To obtain a license key please go to the Ardexus web site (<http://www.ardexus.com>), select the Products section, and follow the links to the Sales Cycle Manager page, where you will find information on ordering a license key.

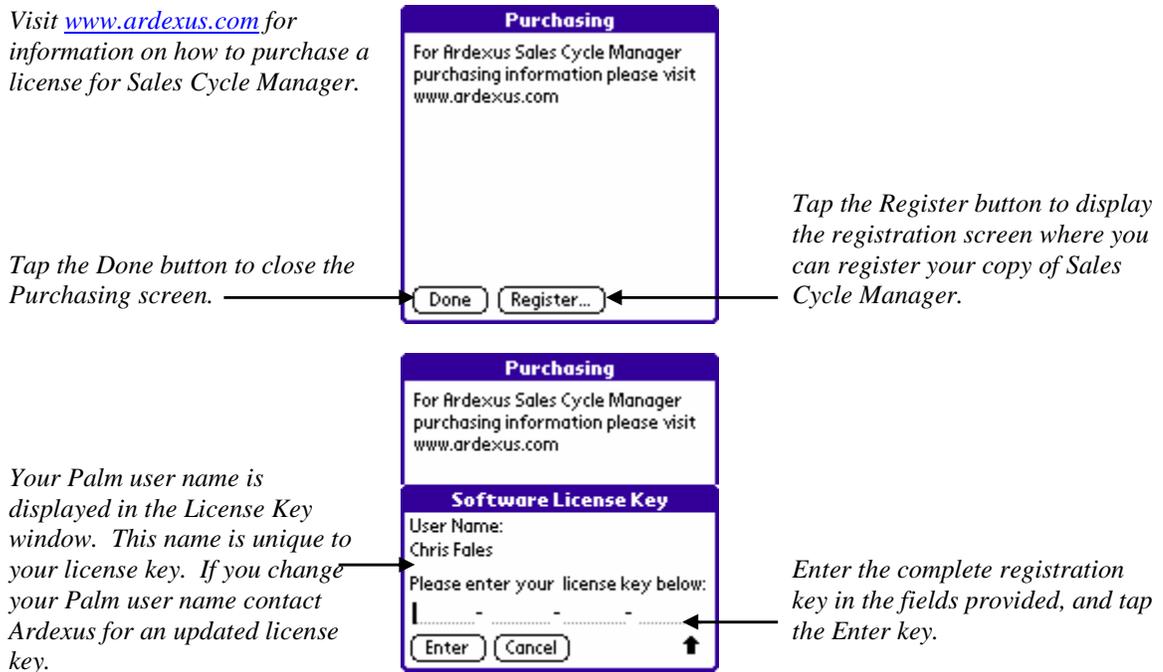
## Registering Sales Cycle Manager

Unregistered copies of Ardexus Sales Cycle Manager remain active for 30 days from the time that they are installed on your Palm device. These unregistered copies of the software have the complete functionality of the registered version. Any data entered using the unregistered copy will continue to be available when you complete the product registration.



**Figure 4: Registration Message**

To register your copy of Sales Cycle Manager tap on the Purchasing button at the bottom right of the splash screen displayed when you first open the application. The Purchasing information page will display next, pointing you to the Ardexus web site for information on how to purchase a license for your copy of Sales Cycle Manager.



**Figure 5: Registration Screen**

## IBO List

The first screen displayed once SC Manager is opened is the IBO list view. This screen displays a list of all of your sales opportunities, and can be used to prioritize your time and determine which opportunity to focus on.

The IBO list view displays the priority of the opportunity, the IBO reference number of the opportunity, the number of weeks until the opportunity is due to close, and two user definable columns that can be set to display any of the following values (Contact, Company, Product, Value, Probability).

The IBO list view displays the various opportunities sorted by priority, weeks to close, and value of the opportunity. The IBO list view also allows you to choose what category (Open, Won, Lost, Cancelled) of opportunities you wish to display.

*The IBO List screen in SC Manager displays all of your sales opportunities.*

*The list displays the opportunities sorted by priority, number of weeks to close and by opportunity value.*

*The list shows priority, IBO reference number, number of weeks to close, and two additional columns.*



*The two right most columns are customizable and allow you to display your choice of Contact, Company, Product, Value or Probability. (Learn how to adjust these headers in a later section of the manual)*

*View columns can be resized by tapping on the view column and dragging it left or right.*



*Select an IBO status from the list in order to view sales opportunities of a specific status (Open, Won, Lost, Cancelled)*

*Use the New button to create a new Open sales opportunity.*

**Figure 6: Open IBO List screen**

You can create a new sales opportunity (IBO) by tapping the New button. This will open the New IBO wizard screen that will walk you through the steps to enter a new sales opportunity.

To open an existing sales opportunity, tap on the line displaying that opportunity. The opportunity screen will open, displaying the information for that IBO.

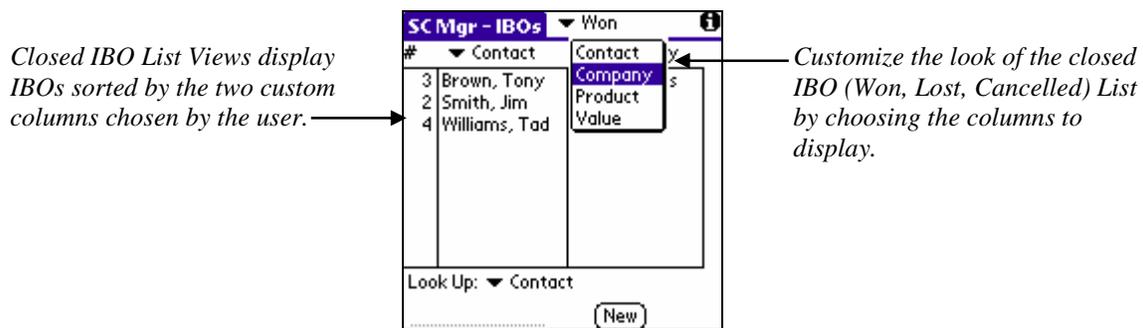
## Open IBO List View Columns

The following table describes each of the columns in the Open IBO List view. The first three columns in the view are fixed, while the last two columns are user definable.

	Heading:	Name:	Description:
1	P	Priority	Displays the priority of each IBO in the list 1 = first priority 2 = second priority 3 = third priority BN = Break Through Needed LA = Leave Alone
2	WTC	Weeks to Close	The number of weeks until the sales opportunity is due to be closed (ie. won, lost, cancelled). A negative value indicates that the opportunity is overdue and the close date has passed, but that the opportunity is still listed as open. If an IBO is equal or less than three days from closing an exclamation mark (!) will appear in the WTC column.
3	#	IBO Number	IBO reference number used to track specific sales opportunities.
4-5	Contact	Contact Name	The first and last name of the main contact you are trying to sell to.
4-5	Company	Company Name	The company name of the organization you are trying to sell to.
4-5	Product	Product Name	The name or category of product that the opportunity is for.
4-5	Value	Opportunity Value	The total value of the sales opportunity.
4-5	Prob%	Probability	The probability percentage that you will win the sale. (eg. 80% chance of winning the order)

## Closed IBO List View

The Won, Lost, and Cancelled IBO List views have a slightly different display than the Open IBO List. Closed IBOs are not sorted by Priority and Weeks to Close. Instead the two custom columns chosen by the user sort them.



**Figure 7: Closed IBO List**

## Customizing IBO List Columns

The two right most columns of the IBO List view are user definable and allow the user to choose what information about the opportunity they wish to display in the list. These two customizable columns can be used to present your IBO information in a number of different ways.

The default display for the IBO List view is to display the Contact name in the fourth column and the Company in the fifth column, but you can change these columns to display any one of Contact, Company, Product, Value, or Probability.

To change the display preferences for the two custom columns tap once on the black arrow to the left of the column that you wish to change and select a new column display option from the list that pops up.

The width of view columns can also be adjusted by tapping on the view column edge and dragging it left or right to expand or reduce the width.

*Tap once on the black triangle to the left of the two right most view columns to change the display options for the column*

*Column widths can be resized by tapping on the column edge and dragging the column left or right..*



*A pop-up window will display letting you choose the information that you want to display in the column.*

*You can choose to display Contact, Company, Product, Value or Probability in the custom columns.*

**Figure 8: Customizable IBO List Columns**

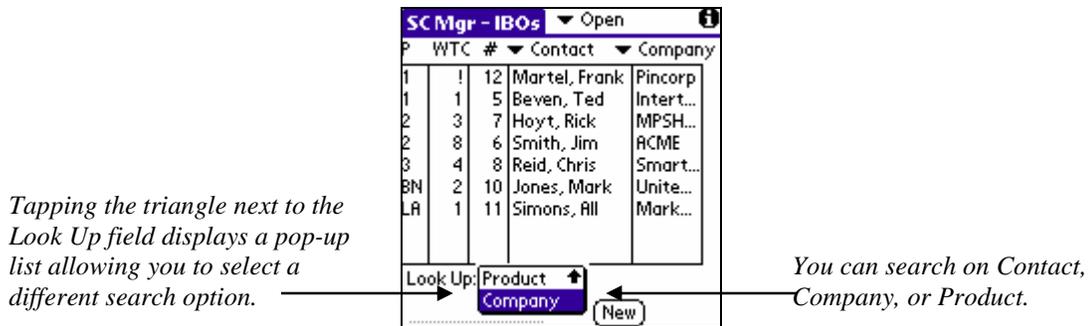
## Using Look Up in IBO List

From the IBO List view you can search for specific opportunities using the Look Up feature at the bottom left of the screen. Using the Look Up feature you can quickly find a specific IBO in a large list without having to scroll up and down using the side scroll bar.

*To locate a specific IBO quickly within the IBO List enter the search value in the Look Up field line. (eg. Smith) SC Manager will automatically highlight the first IBO found for Smith in the list.*



*The default search is on Contact. To change the search option tap on the black triangle to the right of the Look Up field.*



**Figure 9: Look Up Feature**

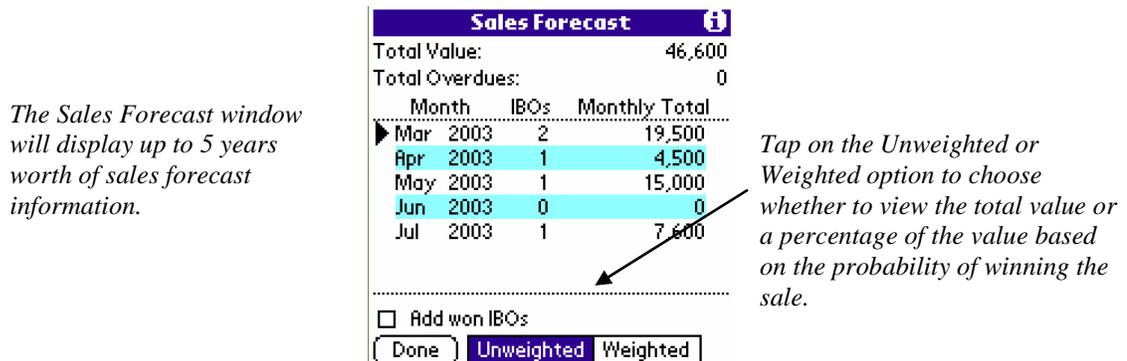
**Sales Forecast**

The Sales Forecast screen allows you to view up to a five year summary of all of your IBOs by expected close data. Open the sales forecast screen by selecting Sales Forecast from the View menu.



**Figure 10: Sales Forecast**

The Sales Forecast screen will display up to five years of summary forecast data. You can choose to view the total value or the weighted value (percentage of value based on probability) by tapping on the appropriate button.



**Figure 11: Weighted vs. Unweighted Forecast**

The Sales Forecast screen will display up to five years of summary Sales data. You can choose to view the total value of won IBO's, the last months, the last two months, the last three months, or the total value of won IBO's by tapping on the appropriate button.

*The Sales Forecast window will display up to 5 years worth of actual Sales information.*

Sales Forecast		
Total Value:		46,600
Total Overdues:		0
Month	IBOs	Monthly Total
▶ Mar 2003	2	19,500
Apr 2003	1	4,500
May 2003	1	15,000
Jun 2003	0	0
Jul 2003	1	7,600

<input checked="" type="checkbox"/> Add won IBO's	This month
	Last 2 months
	Last 3 months
Done	Unweig All

*Tap on the arrow beside the Add won IBO's box to choose whether to view only this months, the last 2 months, or the last three months, the total value of sales history to date (IBO's marked with the status "won").*

**Figure 12: Add won IBO's to Forecast**

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## Creating a New Opportunity (IBO)

To create a new sales opportunity tap on the New button from the IBO List view. This will display the new IBO wizard, which will walk you through the creation process.

### Contact Screen

The contact screen is used to enter the name and address of the person you are selling to. You can enter the name and address manually or look up information from your Palm handheld address book. To look up information from the Palm address book tap the black diamond to the left of the First Name field. This will display a list of contacts in your Palm address book for you to choose from. Tap a name in the list in order to retrieve their name, address, telephone, and e-mail information and have it entered automatically into SC Manager.

Tap on the black diamond symbol to the left of the First Name field in order to look up contact information from your native Palm address list.

A contact will not appear if the information in the Palm Address book is incomplete.

Cancel button closes the Contact screen without saving changes.

The screenshot shows a form titled "SC Mgr - Contact" with the following fields: First Name: Jim, Last Name: Smith, Address: 123 Main St. Unit 212, Company: ACME, Phone: 555-1212, and E-mail: Smith@acme.com. At the bottom are "Cancel" and "Next" buttons. A black diamond symbol is visible to the left of the First Name field.

Enter the contact information for the person you will be selling to when dealing with this opportunity.

Next button navigates to the next screen in the new IBO wizard.

Figure 13: New IBO Wizard - Contact Screen

If you look up an existing contact from your Palm address list you may edit the retrieved information without fear of it modifying the information in your Palm address list. SC Manager stores a copy of the contact information retrieved from the Palm address book and does not update the address book information.

Highlight a contact name from the look up Contacts screen and tap the Add button to retrieve their information from the Palm Address list and enter it into SC Manager.

The screenshot shows a list titled "Contacts" with the following entries: Beven, Bill (555-7258), Hoyt, Tom (555-7771), Jones, Mark (555-1717), Reid, Tom (555-1211), Simons, Frank (555-7808), Simons, Jane (555-6641), and Smith, Jim (555-1212). At the bottom are "Look Up:", "Add", and "Cancel" buttons. A black diamond symbol is to the left of the name "Reid, Tom".

Tap the Cancel button to close the Contacts screen without selecting a contact.

Figure 14: Lookup Palm Address List Contacts

## Products Screen

**Product Screen** The product screen is the second screen in the new IBO wizard. It allows you to enter information on the products or services you are attempting to sell as part of this sales opportunity, as well as the value of the opportunity.

*This view displays a list of all products that belong to this particular IBO.*

*Enter the product or service that this new sales opportunity deals with by tapping on the Add button.*

The screenshot shows a table with the following data:

#	Product	Qty	Ext Price
1	Color Copier	3	6,840.00
2	Digital Copier	1	12,000.00

Below the table, there is a total value of 18,840.00. At the bottom, there are three buttons: Add, Previous, and Next. An arrow points to the Add button with the text: "Tap the Previous button to move back to the Contacts screen."

**Figure 15: Lookup Palm Address List Contacts**

There are two available methods for entering Products into an IBO. The default method that appears depends on whether you are syncing with Sales Cycle Manager window edition or if you are using the Sales Cycle Manager for Palm as a stand-alone application. Both methods will be explained below:

### Using the Sales Cycle Manager

The product screen has a multi-line product screen for entering multiple products or services. Once you select a product from product or service list that is being synced in Sales Cycle Manager begin adding a product, the following fields will be made available: product, part #, unit price, quantity, and discount. In addition, you may also record any extra detailed description of the product or service in the Note's Area. This field is multi-line and will scroll to allow additional text.

*Enter the product or service that this new sales opportunity deals with in the Products field. Fill out the part, unit price, qty, and discount fields if applicable.*

The screenshot shows the following fields:

- Product: Color Copier
- Part #: CC1002
- Unit Price: 2,400
- Qty: 3
- Disc %: 5
- Ext Price: 6,840

At the bottom, there are three buttons: Done, Note, and Delete. An arrow points to the Done button with the text: "Tap the Done button to move back to the Products screen." Another arrow points to the Note button with the text: "Add any additional comments or product description in the Description field available once you tap on the Notes button."

**Figure 16: New IBO Wizard – Products Screen**

After entering the product and value information you can tap on the Next button to move to the next screen of the new IBO wizard process. If you need to go back to the Contact screen to modify any information you can tap on the Previous button. To quit the new IBO wizard without saving any of your changes tap on the Cancel button.

### Integration with Sales Cycle Manager for Workgroups or Windows Edition

The product lookup feature is available for those who are syncing with Ardexus Sales Cycle Manager. The product screen has a multi-line product screen for entering multiple products or services. Once you select a product from the list created in Sales Cycle Manager for Workgroups or Windows Edition, the following fields will be populated and made available: product, part #, unit price, quantity, and discount. In addition, you may also record any extra detailed description of the product or service in the Note's Area. This field is multi-line and will scroll to allow additional text.

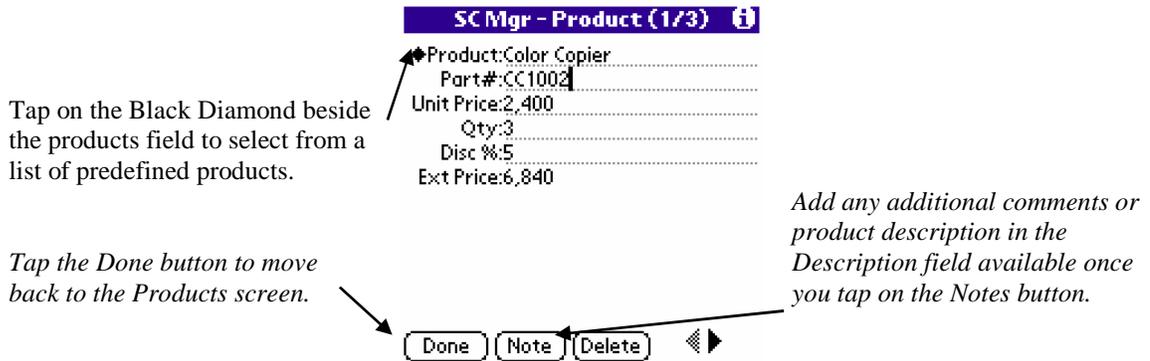


Figure 16: New IBO Wizard – Products Screen

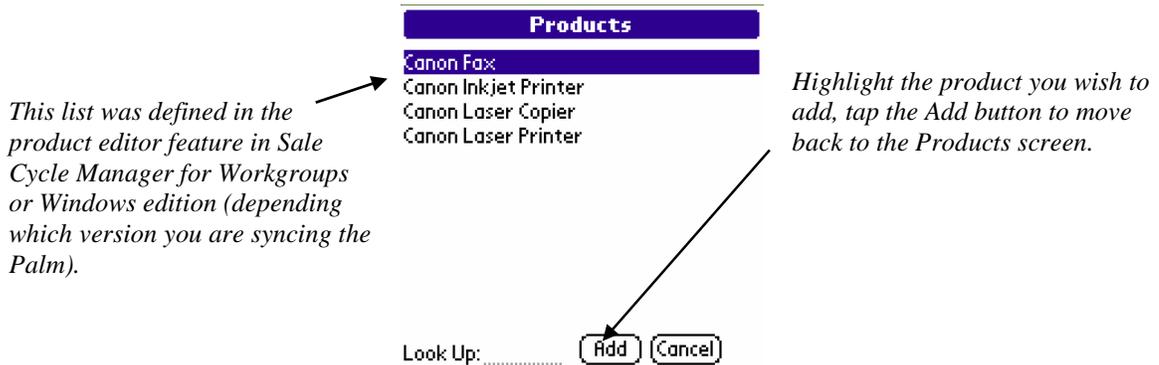


Figure 16: New IBO Wizard – Products Screen

For information on the Workgroup edition or Windows edition of Sales Cycle Manager please visit the Ardexus web site (<http://www.ardexus.com>).

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## IBO Essentials

The IBO Essentials screen allows you to enter key pieces of information about the new sales opportunity that will allow you to determine its probability, as well as its expected closing date.

SC Manager allows you to assess the probability of winning the opportunity by answering two simple questions - “Will It Happen?” and “Will We Get It?”. The answers to these two questions are then combined to provide you with a single probability of you winning the sale.

The IBO Essentials screen also allows you to set the sales cycle length of the new opportunity. The sales cycle length is determined from the start date (typically the date that you enter the new opportunity) and the close date. These two dates set the time window in which you have to sell your solution to the customer.

*IBO Essentials screen allows you to enter the key elements of the sales opportunity.*

*Probability Matrix displays the combined answers to Will it Happen and Will We Get It.*

SC Mgr - IBO Essentials

Start date? [5/11/01]

Will It Happen? ▼ Medium

Will We Get It? ▼ High

When Will It Happen? [17/4/02]

**Probability Matrix**


Use Sales Advisor Expert

Cancel Previous Done

*IBO Essentials are -  
Will It Happen?  
Will We Get It?  
When Will It Happen?*

*These are three of the most important pieces of information about the opportunity.*

*Done button saves the new opportunity.*

**Figure 17: New IBO Wizard – IBO Essentials Screen**

### Setting the Start Date

The Start Date field is used to set the beginning of the sales cycle and indicates when this sales opportunity first came to be. The start date defaults to the current date and is usually best left as the current date. However, in some cases you may want to change the start date if you are entering the new IBO some time after you first become aware of it.

You can change the default start date by tapping once in the box to the right of the Start Date field.

### Answering Will It Happen

The Will It Happen field has three possible answers of High, Medium, and Low. The answer to this question establishes the chances of the customer making a purchase, from you or some other vendor. You can choose an answer to Will It Happen by tapping once on the black triangle to the right of the label and choosing one of the options in the pop-up list.

### Answering Will We Get It

The Will We Get It field has three possible answers of High, Medium, and Low. The answer to this question establishes the chances of the customer buying from you rather than the competition. You can choose an answer to Will We Get It by tapping once on the black triangle to the right of the label and choosing one of the options in the pop-up list.

What are the chances that the customer will make a purchase from anyone?

What are the chances that you will win the sale if it happens?

SC Mgr - IBO Essentials

Start date? 5/11/01

Will It Happen? Medium

Will We Get It? Low  
Medium  
High

When Will It Happen?

Probability Matrix


Use Sales Advisor Expert

Cancel Previous Done

Tap on the black triangle to the right of either the Will It Happen or Will We Get It labels to select an answer of Low, Medium or High.

Figure 18: Answering “Will It Happen” and “Will We Get It”

### Answering When Will It Happen

The When Will It Happen field sets the end date of the sales cycle for this opportunity. The value of this field is your best estimate of when this sale is going to close (ie. the customer has made their purchasing decision).

Choosing an accurate date for “When Will It Happen” is important, as it sets the time window in which you have to sell your solution to the customer. However this date can (and most likely will!) change over the lifetime of this opportunity.

You can enter your best estimate of the closing date by tapping once in the box to the right of the When Will It Happen field.

Tapping next to the When Will It Happen field displays the calendar screen where you can choose an expected close date for this opportunity.

Tap on the Cancel button to close the screen without choosing a date.

When Will It Happen

2002

Jan	Feb	Mar	Apr	May	Jun	
Jul	Aug	Sep	Oct	Nov	Dec	
M	T	W	T	F	S	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Cancel Today

Use the left and right arrows to change the year

Tap on a month to change the month displayed.

Tap on any day to select a date.

Figure 19: Choosing When Will It Happen

### Sales Advisor Expert

The Use Sales Advisor Expert check box displayed at the bottom of the IBO Essentials screen allows you to choose what type of opportunity you wish to create. SC Manager provides you with two types of feedback for each opportunity (Sales Advisor Pro or Sales Advisor Expert).

Both Sales Advisor Pro and Sales Advisor Expert provide you with feedback on areas to focus on or watch out for regarding a given sale. The difference between the two types of feedback comes in the level of detail. Sales Advisor Expert provides much more detailed feedback on potential problem areas in a given sale. Sales Advisor Expert is useful in strategic sales that may involve competition or multiple decision makers. Sales Advisor Pro is useful in simpler sales where you may not need the extra feedback provided by Sales Advisor Expert.

To choose between Sales Advisor Pro (basic feedback) and Sales Advisor Expert (advanced feedback) options simply select or deselect the check box next to the “Use Sales Advisor Expert” field. Leaving

the check box empty will set the opportunity to use the basic feedback. Place a check mark in the box will set the opportunity to use the advanced feedback.

### Done Button

The Done Button saves information you have entered into the new IBO wizard and presents the Opportunity screen where you can review and update the information on the new IBO.

## Opportunity Screen

The opportunity screen displays all of the recorded information about an IBO and allows you to update it, as necessary. The opportunity screen is divided into multiple tabbed pages. Each tab displays a different set of information about the opportunity.

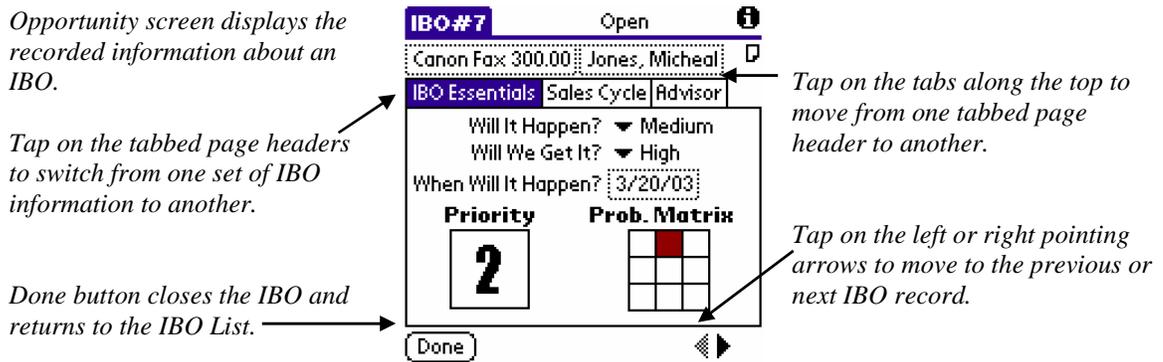


Figure 20: Opportunity Screen

### Product and Value field

The product and pricing information is displayed at the top of the opportunity screen for quick and easy reference. To modify either the product or value tap once on the product and value field.



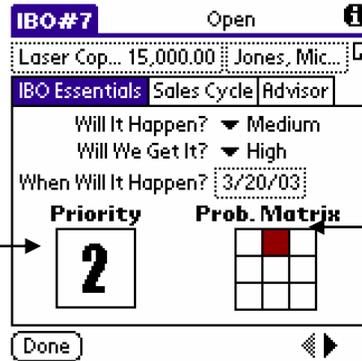
Figure 21: Opportunity Screen – Edit Products

## IBO Essentials Tab

The IBO Essentials tab displays key information about the opportunity. The three items Will It Happen, Will We Get It, and When Will It Happen make up the IBO Essentials. These three items are the main determinants of the probability and priority of the sales opportunity.

*IBO Essentials tab displays the three essential questions along with the calculated Probability and Priority.*

*Priority is calculated to be -  
 1 = first priority  
 2 = second priority  
 3 = third priority  
 BN = break through needed  
 LA = leave alone*



*Probability Matrix displays the combined probability of getting the sale based on Will It Happen and Will We Get It.*

**Figure 22: IBO Essentials Tab**

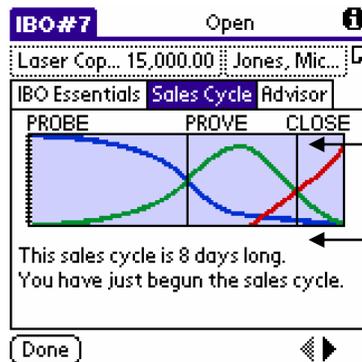
In addition to plotting the probability of winning the sale on the probability matrix the IBO Essentials tab also displays the priority of the IBO. Based on Will It Happen, Will We Get It, and When Will It Happen, the SC Manager can also calculate the priority of this opportunity.

## Sales Cycle Tab

The Sales Cycle tab displays a graphical representation of the sales cycle and the different phases of Probe, Prove, and Close. A vertical bar displays your current position in this IBO's sales cycle.

The current length of the sales cycle is displayed along with your position and stage in the sales cycle.

*Sales Cycle tab displays the current sales cycle along with your current position in the sales cycle and the length of the sales cycle.*



*Graphical display of sales cycle and Probe, Prove, Close phases.*

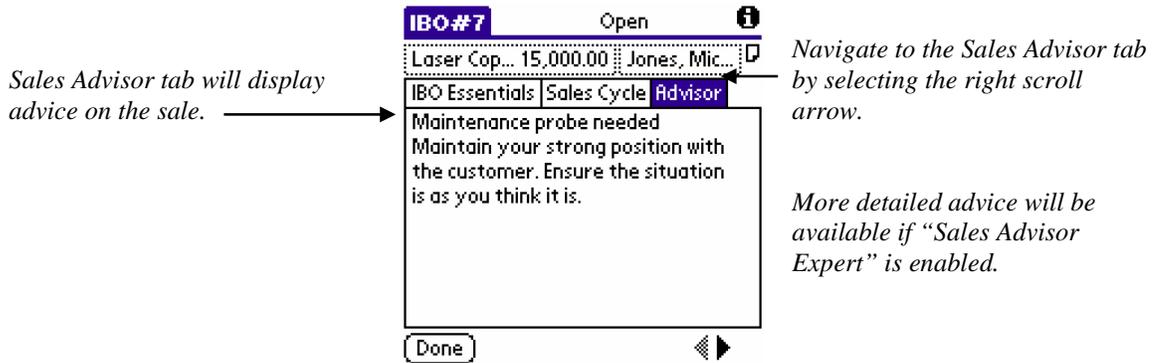
*Length and current stage of the sales cycle.*

**Figure 23: Sales Cycle Tab**

---

## Sales Advisor Tab

The Sales Advisor tab displays current feedback from the Sales Advisor. Based on the information entered for this opportunity the Sales Advisor displays feedback on the sale and advice on how to proceed with the sale.



**Figure 24 Sales Advisor Tab**

Sales Advisor will provide you with personalized advice and feedback regarding this specific sales opportunity. Depending upon where you are in the sales cycle (Probe, Prove, Close), and the probability of getting the sale (Will It Happen, Will We Get It), Sales Advisor will give you specific advice or feedback on how to proceed with the opportunity and potential problems to watch out for.

The level of feedback on the Sales Advisor tab varies, depending on whether the opportunity is set to use Sales Advisor Expert. Sales Advisor Expert will display more detailed information on the progress of the sale and will provide you with specific advice.

More information on Sales Advisor Expert can be found in the Sales Advisor Expert section later in the manual.

## Contact Section

The Contact Section (once entered) displays the name, address, company, phone and email address of the person you are selling to. You can enter the name and address manually or look up information from your Palm handheld address book. To look up information from the Palm address book tap the black diamond to the left of the First Name field. This will display a list of contacts in your Palm address book for you to choose from. Tap a name in the list in order to retrieve their name, address, telephone, and e-mail information and automatically enter it into SC Manager.

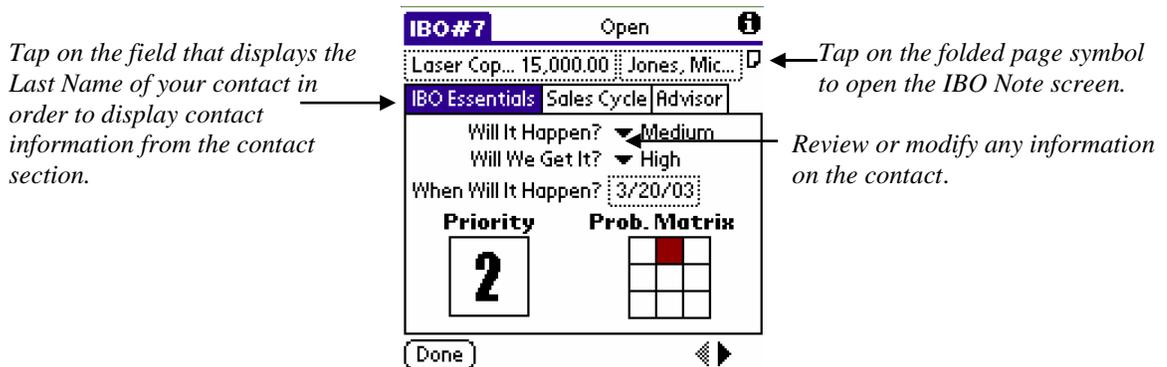


Figure 25: IBO main page



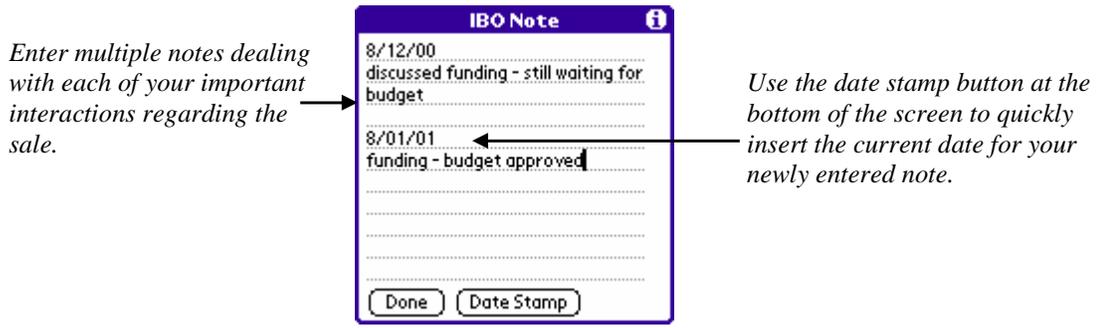
Figure 26: Contact Section

---

## IBO Note

The notepad feature in SC Manager allows you to record any important interactions or comments regarding the sales opportunity. Using the IBO Note screen you can keep records of important meetings or phone calls dealing with the current sales opportunity.

To access the IBO Note screen tap on the folded page symbol at the upper right of the opportunity screen. Once the IBO Note screen opens you can append any notes to the list.



**Figure 27: IBO Note Screen**

The IBO Note screen is an ideal area to record information on your important interactions with the customer for later review and reference.

To include a date stamp with each new note you can make use of the date stamp button at the bottom of the screen.

## Sales Advisor Expert

Sales Advisor Expert is a more extensive version of Sales Advisor feedback and coaching technology. Sales Advisor Expert provides detailed feedback regarding the sales opportunity and allows the tracking of strategic sales information relating to the sales opportunity.

When an opportunity is set to use Sales Advisor Expert the display of various screens is altered to display extra information or options that are available through Sales Advisor Expert.

*Enabling the Sales Advisor Expert feature for a sales opportunity changes the display of various screens to provide additional information and options.*

*Sales Environment button appears when Sales Advisor Expert is enabled.*

The screenshot shows a software window titled 'IBO#6' with a sub-header 'Open'. Below the header, there is a list of items including 'Imaging System 3,000.00' and 'IBO Essentials Sales Cycle'. There are several dropdown menus: 'Will It Happen?' set to 'Medium', 'Will We Get It?' set to 'High', and 'When Will It Happen?' set to '1/2/02'. Below these are two sections: 'Priority' with a large number '2' in a box, and 'Prob. Matrix' with a 3x3 grid where the top-right cell is red. At the bottom, there is a 'Done' button and a 'Sales Environment' button with left and right arrow icons.

*Advisor button appears when Sales Advisor Expert is enabled.*

*Sales Advisor tab displays detailed advice and feedback regarding the sale. The level of advice is much more detailed with Sales Advisor Expert than with a standard opportunity.*

The left screenshot shows a 'Sales Advisor' tab selected, displaying text: 'Advisor thinks more work is needed in the Prove phase, despite your positive intuition.' Below this is a section 'Possible strategies:' followed by a list: '1. Probe more on these issues: Identify the technical decision maker'. The right screenshot shows the same 'Sales Advisor' tab with a list of instructions: '1. Probe more on these issues: Identify the technical decision maker', '2. Configure your solution better with the customer's requirement.' Both screenshots have a 'Done' button and a 'Sales Environment' button at the bottom.

**Figure 28: Sales Advisor Expert – Display Differences**

If an IBO does not currently display the Sales Environment button then Sales Advisor Expert is not enabled. To enable Sales Advisor Expert select the Upgrade to Advisor Expert option from the menu. Please see the section on Menu commands for more information on upgrading an IBO to Sales Advisor Expert.

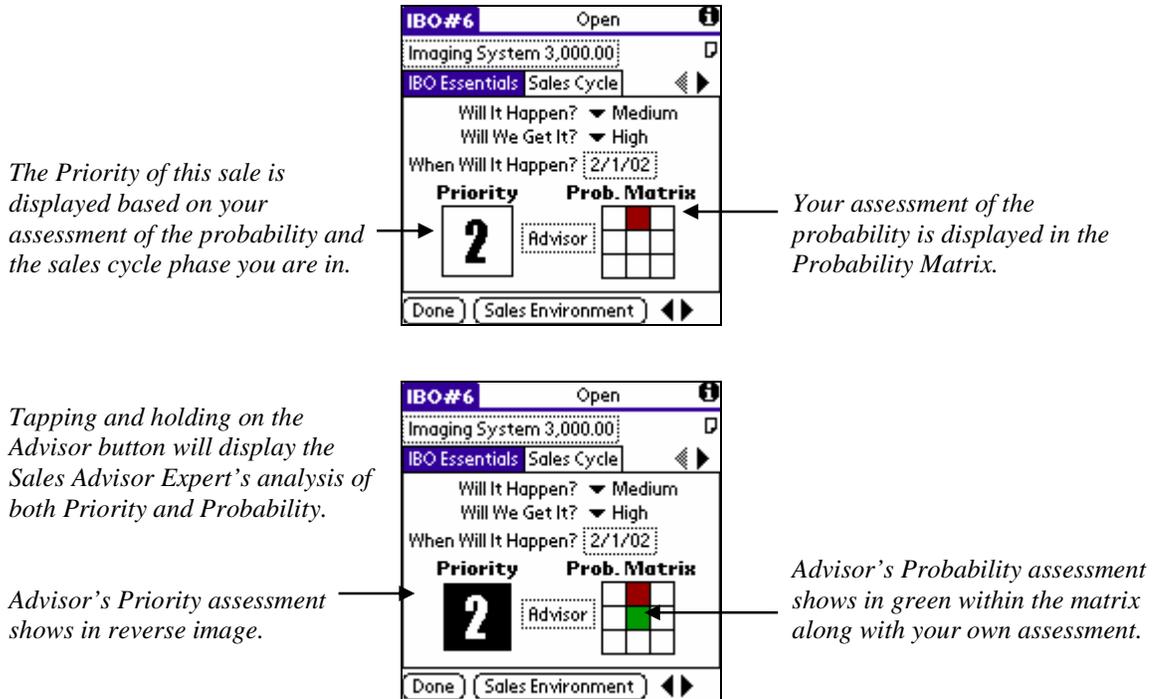
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## Advisor Expert and IBO Essentials

In addition to providing extra feedback about the sales cycle on the Sales Advisor tab Sales Advisor Expert also provides you with a double check of your own assessment of the opportunity's probability and priority on the IBO Essentials tab.

The IBO Essentials tab always displays a matrix of the current probability of your winning the sale along with the priority ranking of the sale.

By pressing on the Advisor button located between the priority box and the probability matrix the SC Manager will display the Sales Advisor Expert's assessment of both the priority and probability.



**Figure 29: Sales Advisor's Assessment of Priority and Probability**

Sales Advisor Expert's assessment of the probability will be displayed in the probability matrix using a green block. This allows you to compare your assessment of the probability against Sales Advisor and provides a good double check of your intuitive understanding of the sale.

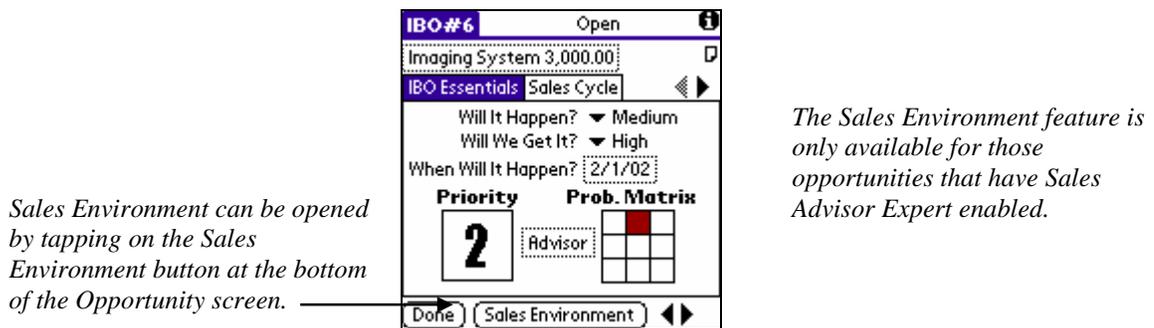
Sales Advisor Expert will also display its assessment of the priority of the sale in the priority box on the IBO Essentials tab. The priority determined by Sales Advisor Expert may match or differ from yours depending on the level of difference between your two probability assessments.

## Sales Environment

The first question people always have when they first learn about Sales Advisor Expert and its Intelligent Response is “How does it know?”. The answer is that we have taught it using the Sales Environment feature. The Sales Environment feature allows a user to record strategic information about the sales cycle, such as decision makers, competitive pressure, relationships, funding, etc. All of this information is then analyzed and examined by the Sales Advisor Expert in order to generate some intelligent feedback on how the sale is progressing and what strategies we might want to employ.

The Sales Environment feature is only available when Sales Advisor Expert is enabled for the current opportunity.

To access the Sales Environment tap once on the Sales Environment button at the bottom of the Opportunity Screen.

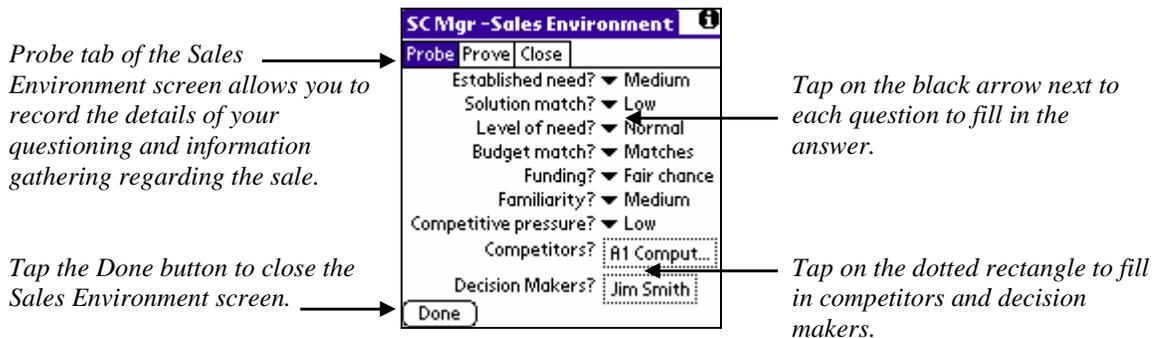


**Figure 30: Sales Environment button**

The Sales Environment screen is divided into three main sections corresponding to the phases of the sales cycle (Probe, Prove, Close).

### Probing Information:

The Probe tab of the Sales Environment screen prompts you for various items of information related to your probing skills. The information on the sales environment probe screen represents standard information typically gathered during any sale. Recording the information in the probe screen provides you with a central repository of your probing information and also provides information for use by Sales Advisor.



**Figure 31: Sales Environment Probe Screen**

The following list describes each of the questions on the Probe page and the possible answers to each question.

Questions:	Description:	Possible Answers:
Established need?	To what degree have you established the customer's need for your product or service?	Unknown Low Medium High
Solution match?	How well does your product or solution match the customer's requirements?	Unknown Low Medium High
Level of need?	How great is the customer's need for your product or service?	Unknown Low Normal Urgent
Budget match?	How well does the price of your solution match the customer's budget?	Unknown Matches Higher >> Higher
Funding?	What are the chances that the customer will receive funding for this purchase?	Unknown Low chance Fair chance Very high
Familiarity?	What is your familiarity with the customer and their organization?	Low Medium High
Competitive pressure?	How strong is the competitive pressure in this sale?	Unknown Low Medium High
Competitors?	Who are the competitors in this sale?	... (free form text)
Decision makers?	Who are the key decision makers in this sale?	... (free form text)

To enter or edit the answer to one of the questions tap on the black arrow to the right of the question. A menu with a list of possible answers for the question will pop up. To select an answer simply tap on it once.

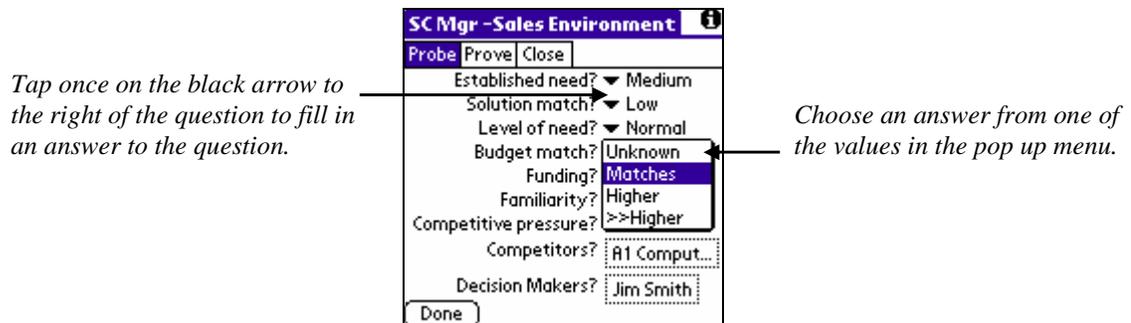
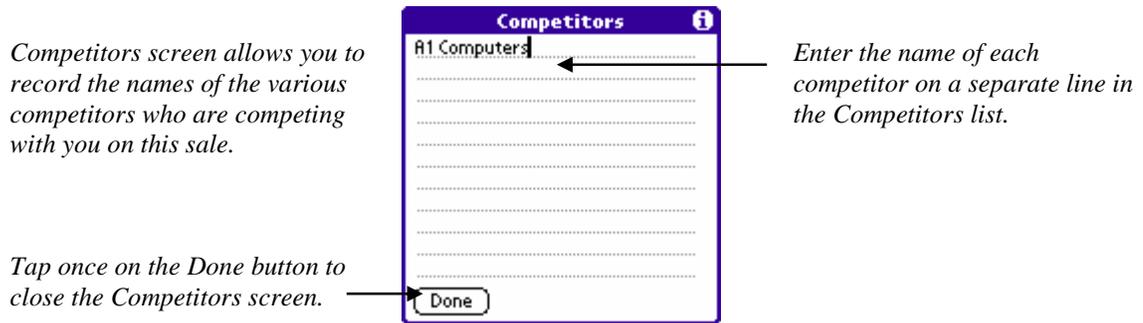


Figure 32: Answering Probing Questions

## Competitors

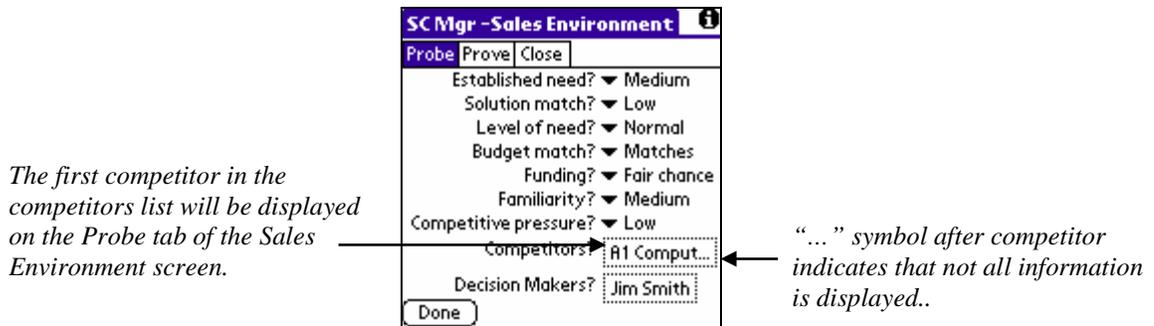
The competitors question allows you to enter the names of the various competitors who are competing with you on this sale. You can enter multiple competitors for any given sale.

To modify the list of competitors tap once on the dotted rectangle to the right of the competitors field. This will display the Competitors screen where you can enter the names of one or more competitors. Enter the name of each competitor on a separate line.



**Figure 33: Competitors Screen**

The first competitor that you enter into the competitors list will appear on the Probe information page of the Sales Environment screen. If you enter more than one competitor, or a long competitor name in the competitors screen a “...” symbol will appear after the name of the competitor to indicate that there is more information than can be displayed on the main screen.



**Figure 34: Display of Multiple Competitors**

## Decision Makers

The decision makers question allows you to enter the names of the three main decision makers who are affecting the outcome of this sale.

The three decision makers are classified as one of three types (Economic, Technical, and User).

Decision Maker Type:	Description:
Economic	This is typically the individual who is most concerned about whether your product or solution matches the purchasing budget.
Technical	This contact is responsible for ensuring that your solution matches technical or performance requirements.
User	This decision maker is typically the person who will most regularly use your product or service.

It is important to remember that these various decision making roles may be filled by the same person. A single customer contact may be responsible for all three roles, or alternately the roles may be filled by different contacts within the organization.

To modify the list of decision makers tap once on the dotted rectangle to the right of the decision makers field. This will display the Decision Makers screen where you can enter the names of the Economic, Technical, and User Decision Makers, along with their influence and interests.

*Decision Makers screen is divided into three different tabbed pages. (Econ, Tech, User)*

*Select the name of the decision maker by tapping on the black diamond.*

*What is most important to this decision maker?*

*Choose the Economic, Technical or User decision maker by tapping once on the Econ, Tech, or User tab.*

*What is this decision maker's level of influence on the sale?*

**Figure 35: Decision Makers Screen**

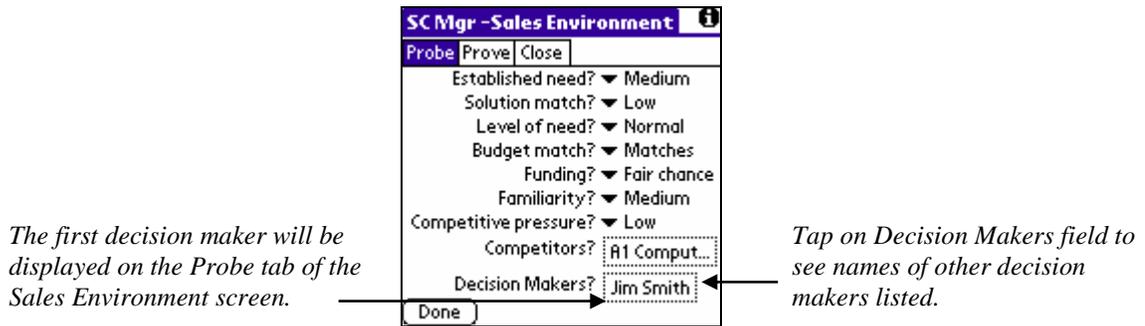
You may enter the name of the decision maker either by typing it into the Name field or by performing a look up to the Palm address list by tapping on the black diamond to the left of the Name field.

**Note:** If you use the look up feature to select a decision maker only those contacts with both a first and last name are listed (ie. if a contact in the Palm address list only has a first name and no last name they will not appear in the look up list for decision makers). You may still enter the name manually.

Choose a level of influence that this decision maker has on the overall sale by tapping on the black arrow next to the Influence field. This will display a pop up menu where you can select one of the following options - Unknown, Low, Medium, High.

In the Importance field enter a word or phrase that describes what feature or aspect of the product or service is most important to this decision maker. (eg. Price, Performance, Delivery, Specifications, Ease of Use, etc.)

The first decision maker that you enter in the Decision Makers screen will appear on the Probe information page of the Sales Environment screen.

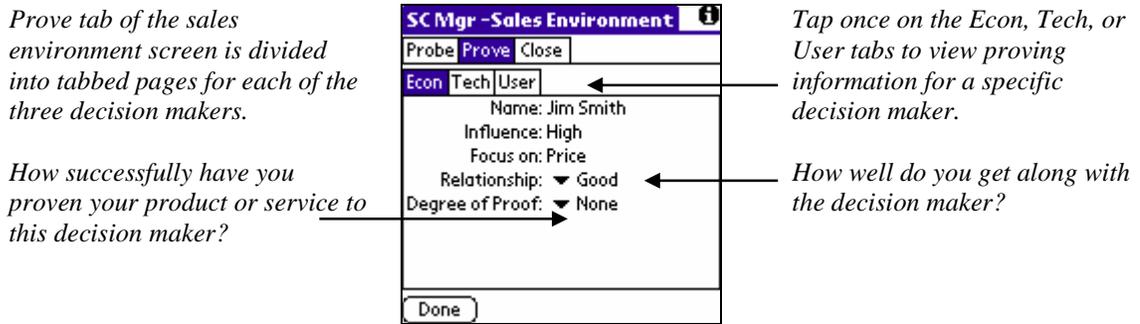


**Figure 36: Display of Decision Makers**

**Proving Information:**

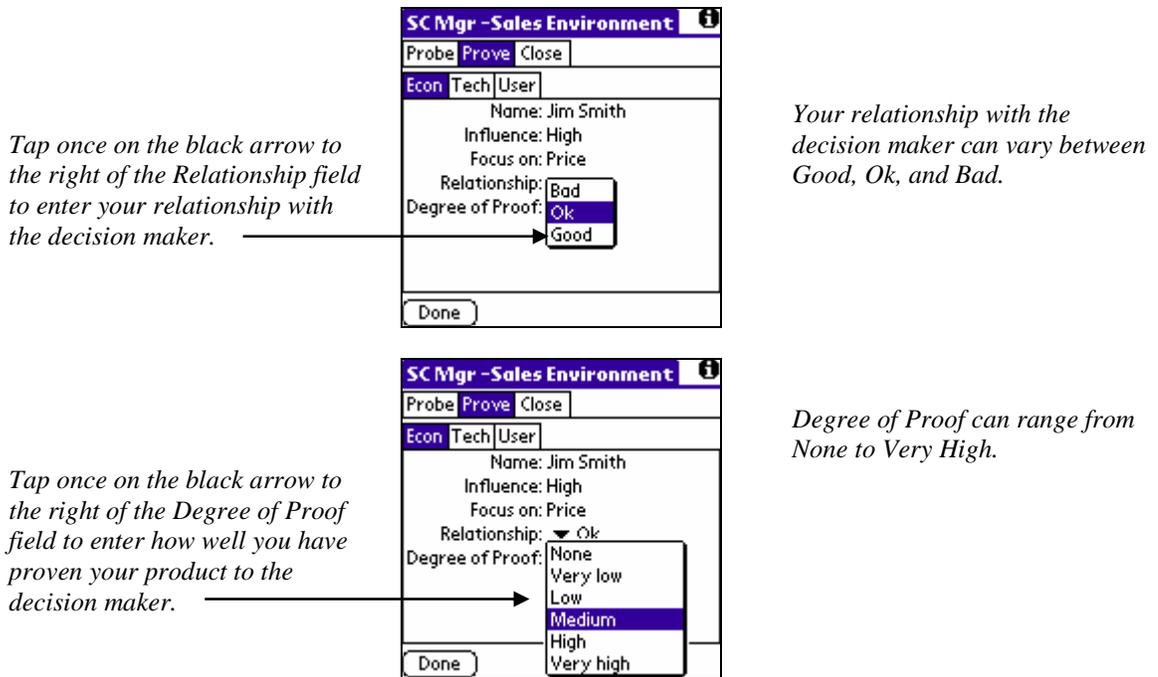
The Prove tab of the Sales Environment screen prompts you for information related to your proving skills. The information on the prove tab allows you to monitor your relationship with each decision maker and your degree of success in proving specific functionality to them.

The Prove tab is further divided into a separate tabbed page for each of the three decision makers. Each of the three tabs displays the name, level of influence, and important areas to prove determined during the probing phase. In addition the tab also allows you to record your relationship with the decision maker and the degree to which they are convinced of your solution.



**Figure 37: Sales Environment Prove Screen**

To update the information on your relationship with the decision maker or the degree of proof tap once on the black arrow to the right of both the “Relationship” field and the “Degree of Proof” field. This will display a pop up menu with various options for you to select from.



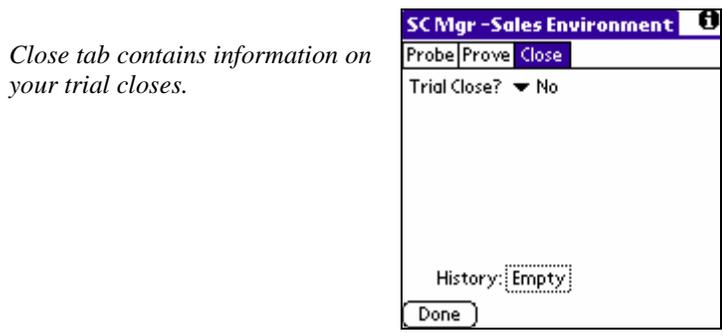
**Figure 38: Relationship and Degree of Proof**

**Closing Information:**

The Close tab of the Sales Environment screen prompts you for information related to your closing skills. The information on the close tab allows you to monitor your closing effort and closing strategies regarding the current sale.

The Close tab also contains a running history of your closing activities that you can review.

The Close tab only displays information during the late stages of the sales cycle. In earlier stages of the sales cycle the message “It is too early to close” will display.



**Figure 39: Sales Environment Close Information**

### Trial Close?

The Trial Close question asks whether or not you have attempted to close the sale. The default answer is “No” indicating that you have not attempted a trial close. If you change the answer to “Yes” another set of questions appear to record the outcome of the trial close.



Figure 40: Trial Close

### Decided?

The Decided question appears if you answer “Yes” to Trial Close. This question is asking whether or not the customer has made their purchasing decision. The default answer is “No” indicating that the customer is still making up their mind. In the case where the customer has still not made their decision you are presented with additional fields to record the barriers to closing, your potential closing strategies, and whether or not you have enacted your strategy.



Figure 41: Customer's Decision Made

If you change the Decided answer to “Yes” another question appears asking for the outcome of the customer's decision.

---

### Result?

The result field allows you to record the outcome of the customer's decision and close the sales opportunity. The two possible answers for the Result field are Won and Lost.

If the customer has made their decision and opted to purchase from the competition then you select Lost as the result.

If the customer has made the decision to purchase from you then you select Won as the result.

In either case the sales opportunity will be closed and marked as either Won or Lost depending upon the option selected.

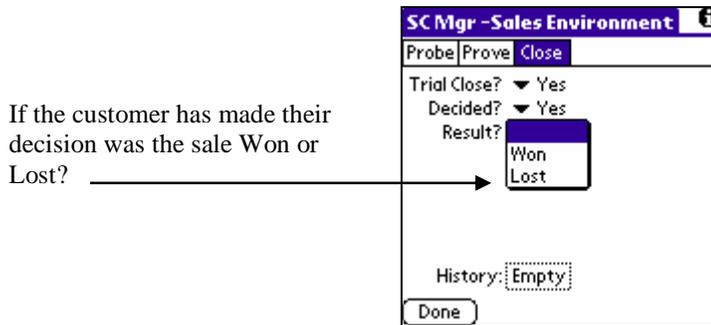


Figure 42: Win or Lose Result

### Date Won/Lost

The date field allows you to record the date that the opportunity was either Won or Lost. The date field only appears when the opportunity has been either Won or Lost.

Enter the date that the opportunity was Won or Lost by tapping once on the dotted rectangle to the right of the Date field.

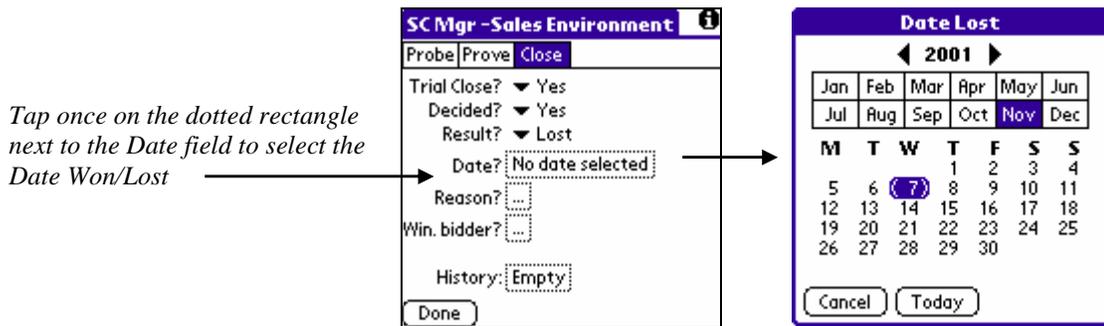
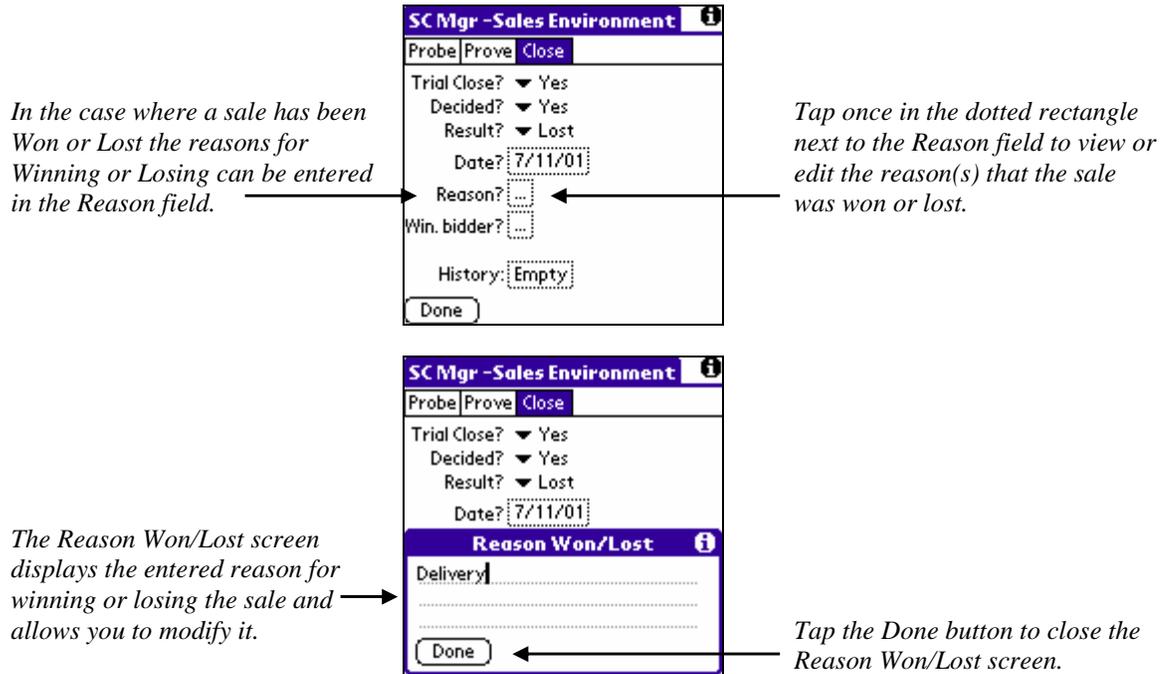


Figure 43: Date Won/Lost

### Reasons for Win/Loss

The reason field allows you to enter the reason(s) why you Won or Lost the sale. The Reason field only displays when the opportunity has been either Won or Lost.

Enter the reasons for winning or losing by tapping once on the dotted rectangle to the right of the Reason field.



**Figure 44: Reason Won/Lost**

### Winning Bidder

The Win. bidder field allows you to record the name(s) of the winning bidder(s) in the event that you lost the sale. The winning bidder field only displays when the opportunity has been Lost.

To edit or modify the list of winning bidders tap once on the dotted rectangle next to the Win. bidder field. The Winning Bidder screen will display allowing you to enter the name(s) of the winning bidders.

You can also choose to enter any product or pricing information for the competition at this point if you wish.

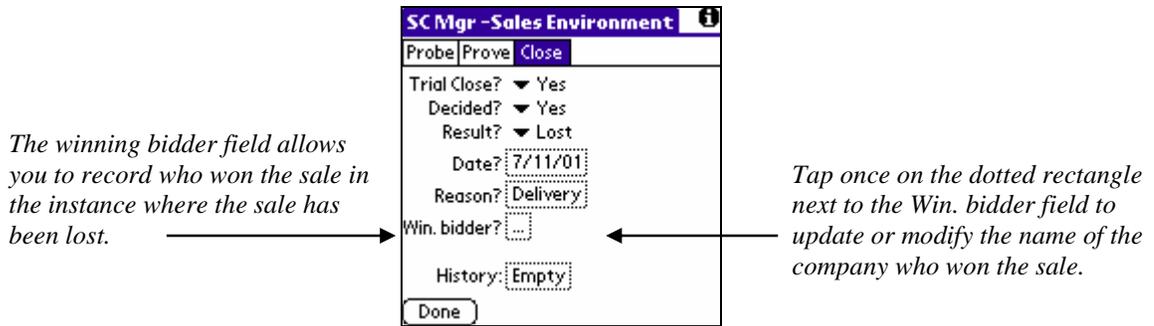


Figure 45: Winning Bidder

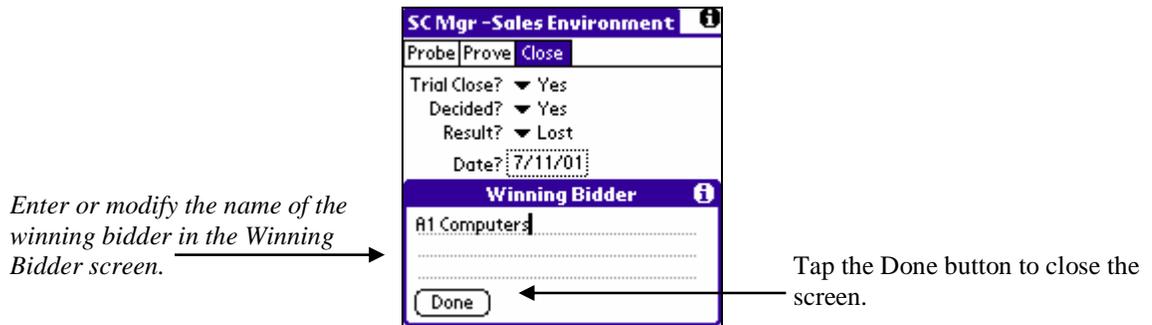


Figure 46: Winning Bidder screen

### Barriers to Close

The Barriers field allows you to record any barriers that are affecting your ability to close the sale in your favour. The Barriers field only displays in cases where the customer has not yet made their purchasing decision.



Figure 47: Barriers to close

To edit or modify the list of closing barriers tap once on the dotted rectangle next to the Barriers field. The Barriers screen will display allowing you to enter a list of barriers hampering your ability to win the sale.

### Strategy

The Strategy field allows you to record your strategy for overcoming any identified barriers and winning the sale. The Strategy field only displays in cases where the customer has not yet made their purchasing decision.



Figure 48: Strategy

To edit or modify your strategy for closing the sale tap once on the dotted rectangle next to the Strategy field. The Strategy screen will display allowing you to enter your strategy for closing the sale in your favor.

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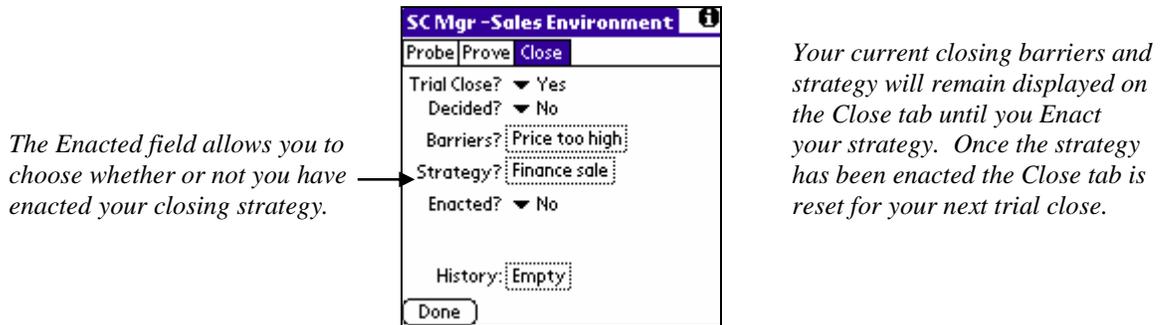
### Strategy Enacted

The final question on the Close page in cases where the customer has not yet made up their mind is whether or not you have enacted your strategy. The default answer to the Enacted field is “No”, meaning you have not yet enacted your strategy.

In the case where you have not yet enacted your strategy leave the answer to Enacted? as No. This will keep your barriers and strategy information available from the Close screen for later reference or further refinement.

In the case where you have already implemented your strategy you can choose the Yes option. Choosing Yes will save your trial close information to the Close History and reset the Close screen for the next trial close.

Both a Barrier and Strategy need to be entered before you can answer Yes to the Enacted question.



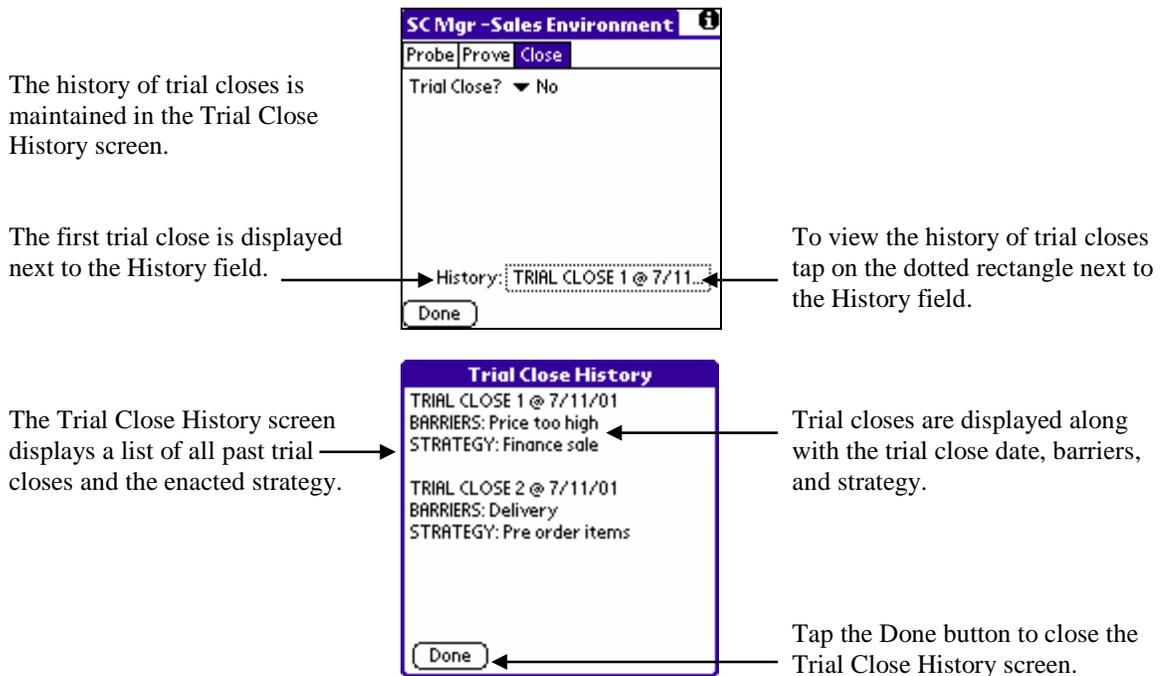
**Figure 49: Enacted strategy**

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### Trial Close History:

The Trial Close History field contains a summary of all your previous trial closes and enacted strategies. The Trial Close History is a useful tool for reviewing your past barriers and strategies for a given sale.

The History field at the bottom of the Close tab displays your first trial close. To view a complete history of all of your trial closes, or see more information on the most recent trial close, tap once on the dotted rectangle next to the History field. This will display the Trial Close History screen, which contains a list of your enacted trial close strategies.



**Figure 50: Trial Close History**

## Using Menu Options

The majority of activities in Sales Cycle Manager can be performed directly from whatever screen you find yourself. There are however a few activities that require the use of a menu option to carry out.

To open the menu bar tap once in the “menu” option in the bottom left silk screen area of the device. In Palm OS v3.5 or higher you can tap once on the title bar at the top of any SC Manager screen to display the menu.



Figure 51: Menu Bar

## IBO Menu

### Upgrade to Expert

The Upgrade to Expert menu option allows you to change a Sales Advisor Pro situation to a Sales Advisor Expert situation in order to take advantage of the extra strategic feedback provided by Sales Advisor Expert.

To convert a regular IBO to a Sales Advisor Expert IBO select the Upgrade to Expert option beneath the IBO menu option.



Figure 52: Upgrade to Expert

## Change Start Date

The Change Start Date menu option allows you to modify the starting date of the sales cycle. The start of the sales cycle is entered when the IBO is first created, however in some cases you may want to modify the start date at a later time.

To modify the start date of the sales cycle for an existing IBO select the Change Start Date option from the IBO menu.



Figure 53: Change Start Date

## Change Status

The Change Status menu option allows you to modify the status of the IBO. The current status of the IBO is displayed in the upper right corner of the Opportunity screen.

To modify the status of an existing IBO select the Change Status option from the IBO menu and choose a new status from the pop up menu.



Figure 54: Change Status

## New IBO

The New IBO menu option allows you to create a new IBO entry, the same as clicking the New button.

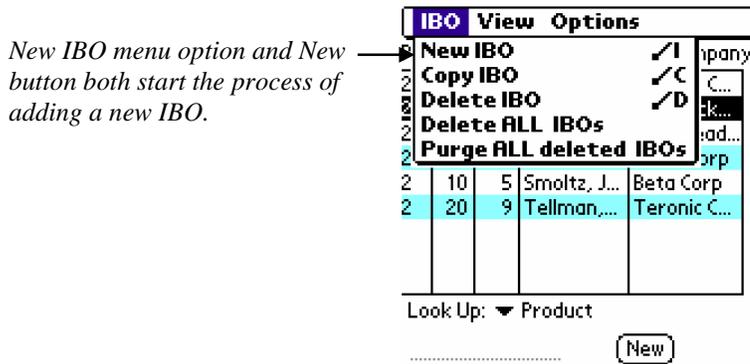


Figure 55: New IBO

## Copy IBO

The Copy IBO menu option allows you to copy an existing IBO entry.

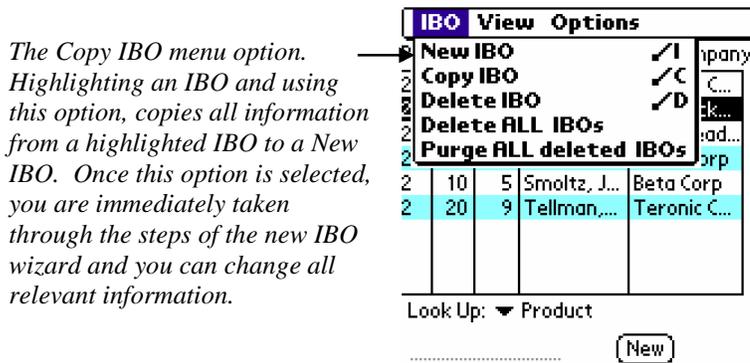
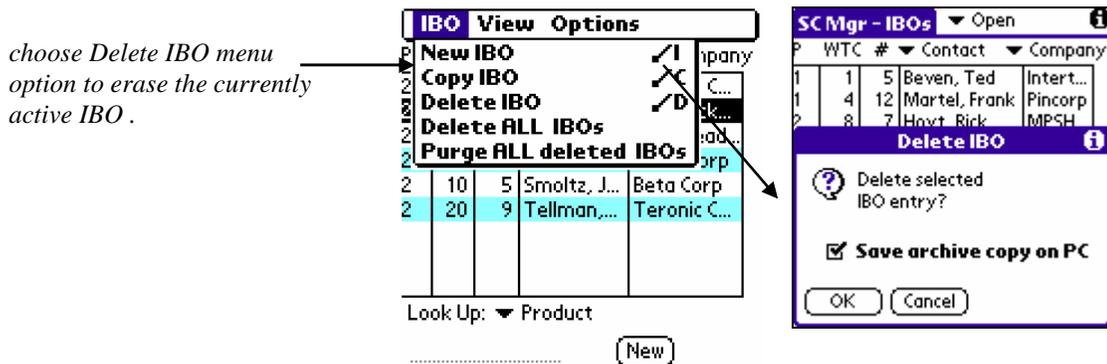


Figure 56: New IBO

## Delete IBO

The Delete IBO menu option allows you to erase the currently open sales opportunity. To delete the currently open IBO select the Delete IBO option from the IBO menu.



---

**Figure 57: Delete IBO**

The “Save archive copy on PC” option is used in conjunction with the desktop version of Sales Cycle manager. Selecting this option will remove the IBO from the Palm device but leave a backup copy on the desktop version of Sales Cycle Manager. This option has no effect if you are not synchronizing the Palm Sales Cycle Manager application with a desktop version.

## Delete All IBOs

The Delete All IBOs menu option allows you to delete all of the opportunities in the Sales Cycle Manager database. This option is useful for removing any test or old information that you have entered but no longer need.

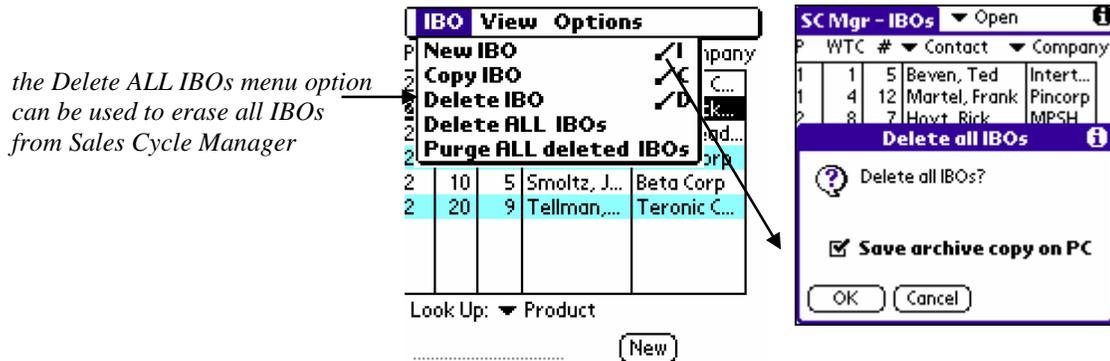


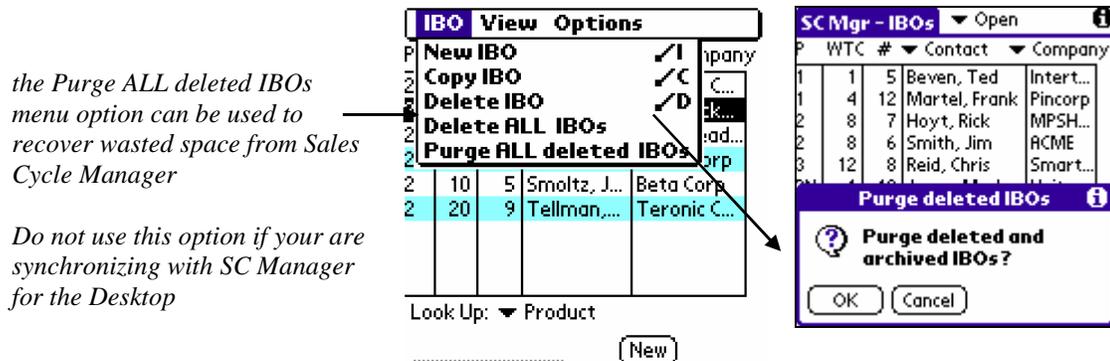
Figure 58: Delete ALL IBO records

The “Save archive copy on PC” option is used in conjunction with the desktop version of Sales Cycle manager. Selecting this option will remove the IBO from the Palm device but leave a backup copy on the desktop version of Sales Cycle Manager. This option has no effect if you are not synchronizing the Palm Sales Cycle Manager application with a desktop version.

## Purge ALL deleted IBOs

The Purge ALL deleted IBOs menu option allows you to recover unused space by removing all references to any previously deleted IBO records. By default SC Manager keeps copies of deleted IBO records for use in synchronizing with your PC. Purging the deleted records will recover wasted space in your SC Manager database.

**Note:** This option should not be used if you are synchronizing your SC Manager for the Palm with SC Manager for the Desktop. Doing so will result in inconsistent data between your Palm and the SC Manager Desktop application.



*the Purge ALL deleted IBOs menu option can be used to recover wasted space from Sales Cycle Manager*

*Do not use this option if your are synchronizing with SC Manager for the Desktop*

Figure 59: Purge ALL deleted IBOs

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## Edit Menu

The Edit menu lists a variety of standard Palm Computing organizer features.

*Edit menu contains a number of standard editing and navigation tools.*

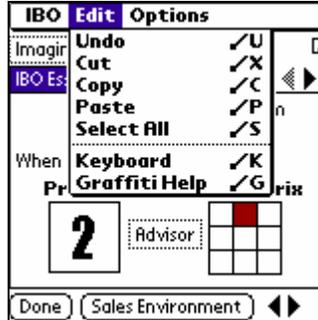


Figure 60: Sales Forecast Menu Option

## View Menu

### Sales Forecast

The Sales Forecast menu option opens the Sales Forecast screen where you can view up to a five year sales forecast. The sales forecast screen displays a weighted or unweighted total of your monthly sales based on the expected dates of all the IBOs entered into your Palm device.

*The View menu provides access to the Sales Forecast screen.*



Figure 61: Sales Forecast Menu Option

## Default Column Widths

The Default Column Widths menu option resets IBO list view column widths to their default.

*The Default Column Widths option resets the column widths to their standard sizes. Column widths can be customized by tapping on the column dividers and dragging them left or right.*



Figure 62: Default Column Widths

## Options Menu

### Preferences

The Preferences menu option allows you to select which telephone number you want retrieved from the lookup contact feature.

Each contact record in the Palm address list can contain multiple telephone numbers (eg. Home, Work, Fax, etc.). When you look up a contact using the lookup feature (black diamond icon) the name, address, e-mail, and phone number of the contact is retrieved into the current IBO. The Preferences menu option allows you to select which telephone number to retrieve.

Note: contacts that do not have the phone number type entered will not appear in the look up list.

*Preferences menu option allows you to select which telephone number to retrieve during a look up to the address list.*

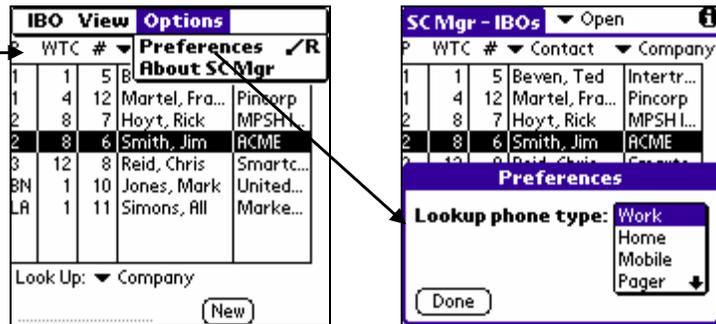


Figure 63: Preferences



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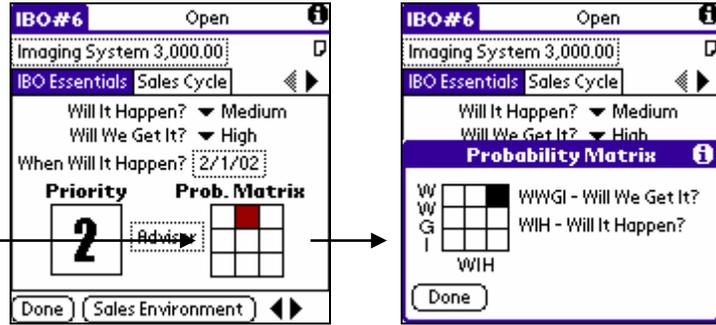
### Help Enabled Fields

In addition to using the Information icon to get help information certain fields in SC Manager are help enabled to provide you with more information on the item in question. To get more information on a specific field tap once on the field label. If the field is help enabled a window will appear displaying help information on the field and its meaning.

When in doubt try clicking on the field or image. Chances are good that pop up help will appear.

*Many fields and images in SC Manager are Help Enabled.*

*Tap on the field or image to display field level help providing more detail on the field.*



**Figure 66: Help Enabled Fields**

### Technical Support

If you have any questions or concerns regarding Ardexus' Sales Cycle Manager for the Palm Computing Platform, please contact us by e-mail at [scmgrsupport@ardexus.com](mailto:scmgrsupport@ardexus.com)

For more information on Ardexus' support offerings please see our web site at <http://www.ardexus.com>

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## **Glossary**

### **Close**

Close is a term used to denote the last phase in the Sales Cycle, as well as the action of completing a sale.

### **Contact**

A contact is a person or individual. Contact typically refers to one of the people you are trying to sell to.

### **Decision Maker**

A decision maker is a person who holds influence over the buying decision of a given sale.

### **IBO**

IBO is an acronym for Identified Business Opportunity. An IBO is a sales opportunity.

### **Phase**

Phase refers to one of the three parts of a Sales Cycle. Every Sales Cycle is divided into three segments corresponding to the dominant selling skill active during that period.

### **Priority**

Priority is a method of ranking opportunities in the order that they should be reviewed or worked.

### **Probability**

Probability is an assessment of how likely a salesperson is to win a given sale.

### **Probe**

Probe is a term used to denote the first phase in the Sales Cycle as well as the process of inquiry in order to learn more about a given sale.

### **Prove**

Prove is a term used to denote the middle phase of the Sales Cycle as well as the demonstration of a solution to the customer.

### **Sales Cycle**

Sales Cycle is the duration from when the salesperson first learns of a potential sale until the sale is completed, as well as the various activities that occur throughout that time period.

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