

MARCH 2023

# eValuePrompter<sup>®</sup>

Presented by Scott Reynolds  
ValueSelling Associates, Inc.



Keep it simple. Drive results.



This document contains proprietary information of ValueSelling Associates. Its receipt or possession does not convey any rights to reproduce or disclose its contents or to manufacture, use, or sell anything it may describe. Reproduction, disclosure, or use without specific written authorization of ValueSelling Associates is strictly forbidden.

## What's New?

---

- Native in Microsoft Dynamics
- Data Management in Power Apps
- New Opportunity Assessment Tool
- New ValuePrompter® Playbooks
- New Mutual Plan Letters, Reverse Timeline and Templates
- New Power Map and Power Map Templates
- New Pipeline Analysis and Impact Dashboards

Launch from four  
places

Dynamics 365 | eValuePrompter®

# SANDBOX

Home Recent Pinned eValuePrompter®

Opportunities Contacts Leads

Show As Show Chart Focused view New Delete Refresh

### All Opportunities

Launch eValuePrompter from Opportunity, Lead, Power Map, or Contact

			Actual Cl...	Actual R..
<input type="checkbox"/>	Topic 1			
<input type="checkbox"/>	1000 Widg			
<input type="checkbox"/>	Closed Opportunity		Lost	2/29/2024 \$0.00
<input type="checkbox"/>	CreatePM		Open	
<input type="checkbox"/>	LB Opp		Open	
<input type="checkbox"/>	Mike Opty 1	MS Test 1	Open	
<input type="checkbox"/>	MS AAA		Open	
<input type="checkbox"/>	Parker Industries		Won	2/29/2024 \$0.00
<input type="checkbox"/>	Scott Test		Open	
<input type="checkbox"/>	Test	Testing Co.	Open	

New ValuePrompter®

Contact  
Andy Apple

Opportunity  
1000 Widgets for Acme

ValueSelling® Role  
Influencer

Playbook  
Pre-Call Planning ValuePrompter®

OK

Start with Blank or  
Import Data from Template

Lookup Contact from Microsoft  
Dynamics

Assign ValueSelling Role

Import ValuePrompter®  
Playbook

← + Import Playbook + New Mutual Plan Save Save & Close Deactivate Delete Share

1000 Widgets for Acme John Constantine ValuePrompter<sup>®</sup> Import a ValuePrompter<sup>®</sup> Playbook Create a Mutual Plan Letter Power ValueSelling<sup>®</sup> Role

General Plan Related

ValuePrompter<sup>®</sup> LIO | Contact Us | Support

Name 1000 Widgets for Acme John Constantine ValueSelling<sup>®</sup> Role \* Power

Contact John Constantine x Owner \* Scott Reynolds (Offline) x

Opportunity 1000 Widgets for Acme x

Business Issue

Business Issue Questions

Describe the high-level strategic goal that the individual you are calling on must achieve this year to contribute to the corporate objective. Could be more than one goal. Must have a struggle associated with it, or they won't need your solution. Typically what the individual is measured on at review time.

Font Size B I U A- A+ [Rich Text Editor Icons]

Business Issue Response

Increase revenue by 20% in 2023

Add client responses to each ValuePrompter<sup>®</sup> box

1000 Widgets for Acme John Constantine - Saved

ValuePrompter®

General Plan Related ▾

Font

Business Issue Response

Increase revenue

Segoe UI

Anxiety Question

Anxiety Questions

1000 Widgets for Acme Opportunity

New Mutual Plan

Name

Acme CEO March 2024

Template

Generic Mutual Plan ▾

Include all Opportunity ValuePrompter® Records

This ValuePrompter® Only

Populate Mutual Agreed Actions from:

Plan Response

OK

Import Mutual Plans from templates or start with a new Plan

Choose from a list of Mutual Plan templates created by your Marketing or Enablement team

Select existing Opportunity tasks or Plan box response text to be included in the Plan Timeline part of your Mutual Plan Letter

Acme CEO March 2024 - Saved  
Mutual Plan

1000 Widgets for Acme  
Opportunity

John Constantine  
Contact

---  
Lead

1000 Widgets for Acme John Constantine  
ValuePrompter®

General Related ▾



LIO | [Contact Us](#) | [Support](#)

Mutual Plan is editable  
with Rich Text formatting

Name \*

Acme CEO March 2024

Plan

Dear John,

Thank you for taking the time to meet with me on **[DATE]**. I enjoyed meeting you and appreciate your candor in sharing some of the challenges you are currently facing, the changes you are looking to implement, and most importantly, the results you are looking to achieve. I look forward to working with you to make those results a reality.

The purpose of this note is to summarize our conversation and have it serve as a starting point for creating expectations moving forward. Please feel free to make any edits or additions to ensure accuracy.

The primary challenge you face is:

Increase revenue by 20% in 2023

To achieve this, you need to address the following:

- High reliance on discounting to win deals
- No common sales framework across the team
- Poor forecast accuracy

You mentioned several solutions that you considering in overcoming these challenges:

- Proven process/ framework for all sales reps to follow
- Focus on the value of products rather than the cost

# Opportunity Assessment Tool

1000 Widgets for Acme - Saved  
Opportunity

Acme Account | --- Est. close date | --- Est. revenue | SR Scott Reynolds Owner

Sales Process: Active for 19 hours

Qualify (19 Hrs) | Develop | Propose | Close

Summary | **ValueSelling** | Power Map | Product line items | Quotes | Files | Related


1000 Widgets for Acme John Constantine | 1000 Widgets for Acme John Constantine | Power | False | SR Scott Reynolds | 3/1/2024 1:00 PM | 2/29/2024 4:30 PM

Rows: 2

Mutual Plans

<input type="checkbox"/> Name ↑	Contact ↓	Opportunity ↓	ValuePrompter® ↓	Modified On ↓
<input type="checkbox"/> Acme CEO March 2024	John Constantine	1000 Widgets for Acme	1000 Widgets for Acme John Constantine	3/1/2024 10:39 AM
<input type="checkbox"/> Plan for John	John Constantine	1000 Widgets for Acme	1000 Widgets for Acme John Constantine	2/29/2024 4:30 PM

Rows: 2

Opportunity Assessment  1000 Widgets for Acme

Launch an Opportunity Assessment from the ValueSelling tab



# Opportunity Assessment Tool

Who makes the decision to buy?

1000 Widgets for Acme - Saved  
Opportunity Assessment

General Related ▾

## Opportunity Assessment Tool

LIO | [Contact Us](#) | [Support](#)

Name \* 1000 Widgets for Acme Last Reviewed by Manager ---  
Owner \* SR Scott Reynolds ×

### Qualification Status

$$QP = VM_0 \times V \times P \times P^*$$

Qualified Prospect Formula® updates as each section of the Opportunity Assessment is completed

### DIFFERENTIATED VISIONMATCH™



Do Problems align to Solutions? Yes

What is their Business Issue?

Andy Apple - Category Manager:  
John Constantine - CEO:  
Increase revenue by 20% in 2023

# Opportunity Assessment Tool

## Value



Was Personal Value uncovered?

Yes

Is Business Value quantified?

Yes

Was Personal Value stated by your prospect?

Yes

Value Confirmed in Writing?

Yes

If all answers in each section are “Yes”, the Qualified Prospect Formula® updates

1000 Widgets for Acme - Saved  
Opportunity

Acme Account | Est. close date | Est. revenue | Scott Reynolds (SR) Owner

Sales Process: Active for 19 hours | Qualify (19 Hrs) | Develop | Propose | Close

Summary | ValueSelling | **Power Map** | Product line items | Quotes | Files | Related

Opportunity information

Topic \*  
1000 Widgets for Acme

Account  
Acme

VSA\_Strategy  
valueselling-opportunity-evalueprompter

Up next  
**Manage your activities**  
See upcoming activities by connecting the opportunity to a sequence or by creating an activity. [Learn more](#)  
Connect sequence | Create activity

Timeline  
Search timeline

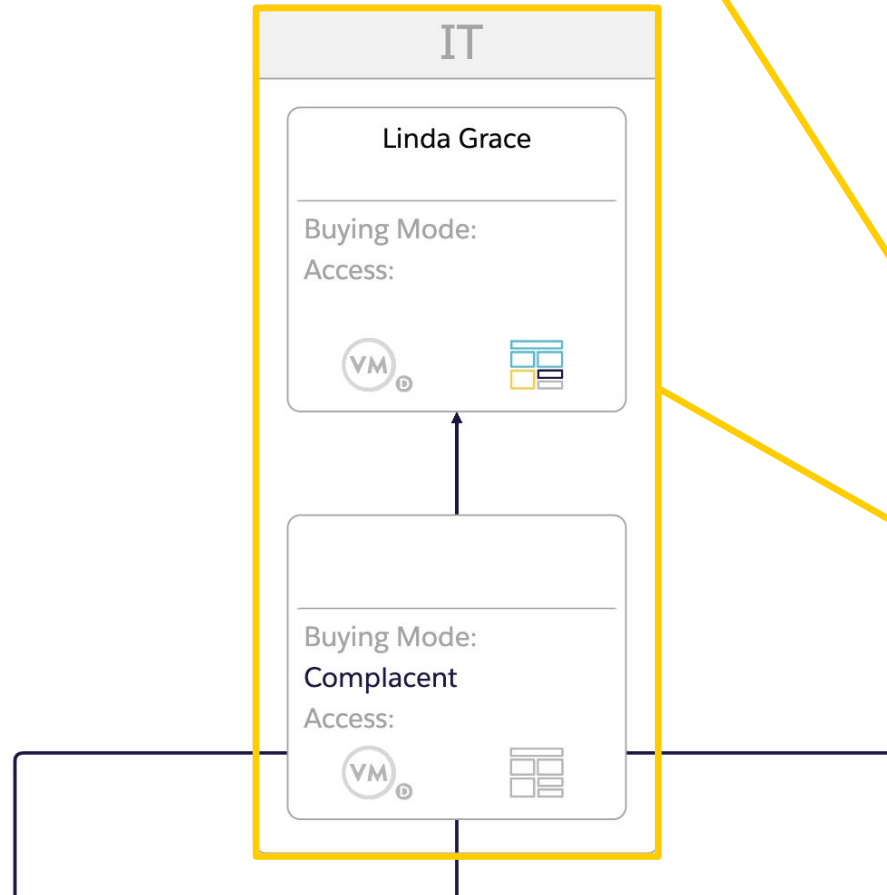
Notifications  
No notifications or suggestions  
Check back later to see what's new and stay up to date.

Launch Power Map,  
a powerful org chart feature

Legend



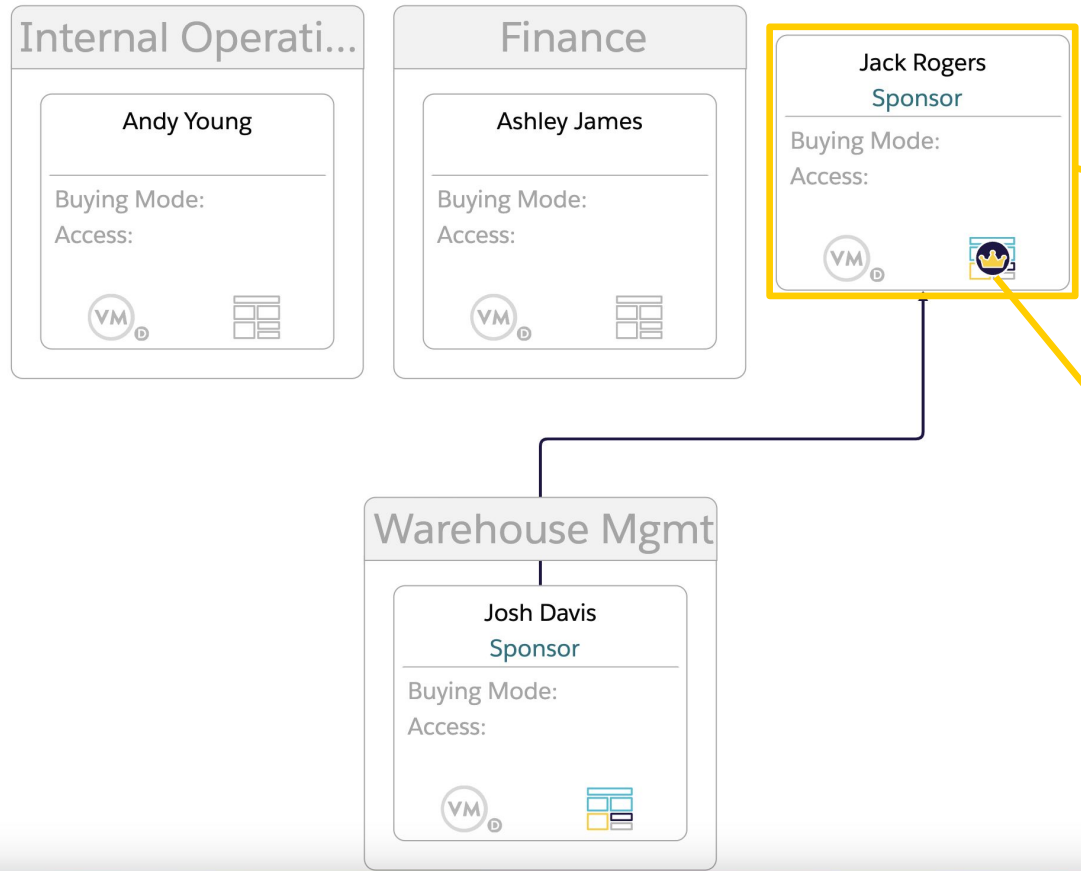
Add Contact | Add Department | Import Contacts | Import Template | Clear All



Import custom configurations as templates

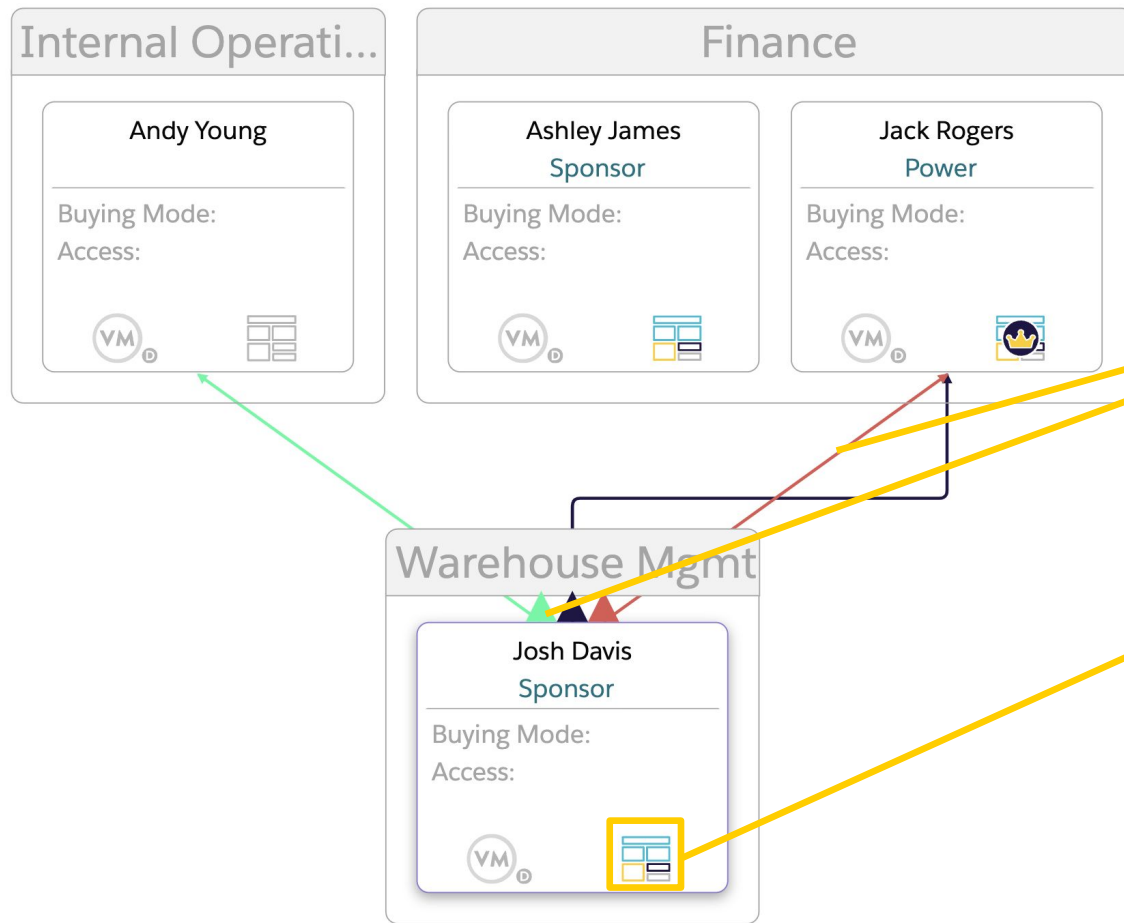
Add or Import Contacts from Microsoft Dynamics and Add Custom Departments

Zoom in and out to view different departments or the entire organization



Drag and drop Contacts into Departments

View Buying Mode, Access Level,  
VisionMatch Status, and ValuePrompter Status



Show Reporting and Influence lines

Create ValuePrompter® from Contact Tile

Edit Contact [X]

\* Contact: [Jack Rogers](#) [Search]

---

Master ValuePrompter®:

Role: Power [Dropdown]

Buying Mode: Please Select... [Dropdown]

Access: Please Select... [Dropdown]

VisionMatch™: Confirmed Differentiated VisionMatch [X] [Dropdown]

Notes: [Rich Text Editor]  
Confirmed VMD 25 Jan 23 [Refresh]

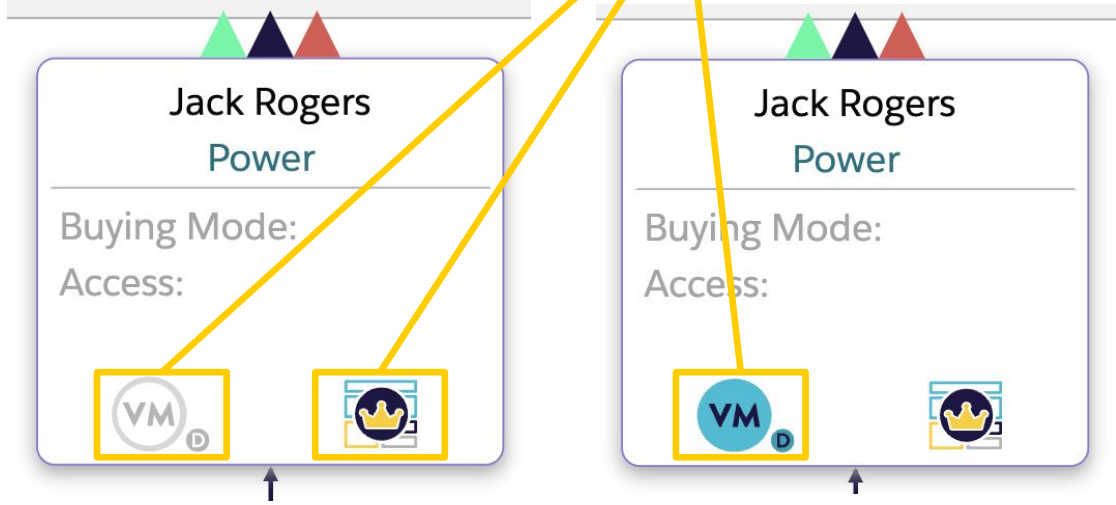
---

Remove  
Remove from Department

Cancel OK

Assign ValueSelling Role, Buying Mode, Access Level, VisionMatch Status, and Notes in Edit mode

View VisionMatch and ValuePrompter® status from the Contact tile



# Power Map Templates

Legend

Add Contact Add Department Import Contacts **Import Template** Clear All

The screenshot displays the 'Business Unit Power Map' interface. At the top, there is a search modal titled 'Power Map Template Search' with a search bar and a list of templates. The 'Business Unit Power Map' template is highlighted in green. Below the search modal, a hierarchical diagram shows the structure of the power map. The root node is 'Power' (Buying Mode: Growth, Access: None). It branches into three nodes: 'Sponsor', 'Coach', and 'Saboteur'. 'Coach' further branches into 'Influencer' and 'User'. Each node has fields for 'Buying Mode' and 'Access'.

Pre-build Power Maps to support strategic goals and prompt teams to include desired roles

Edit imported Role tiles to add Contacts and ValuePrompters®

The 'Edit Contact' modal shows the following details for a contact:

- \* Contact: **Andy Young**
- Role: Power
- Buying Mode: Growth
- Access: None
- VisionMatch\*: No VisionMatch
- Notes: (Rich text editor with bold, italic, and list options)

At the bottom, there is a red 'Remove' button and 'Cancel' and 'OK' buttons.

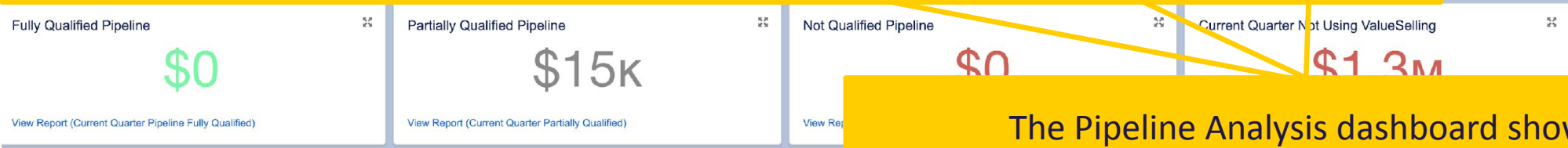
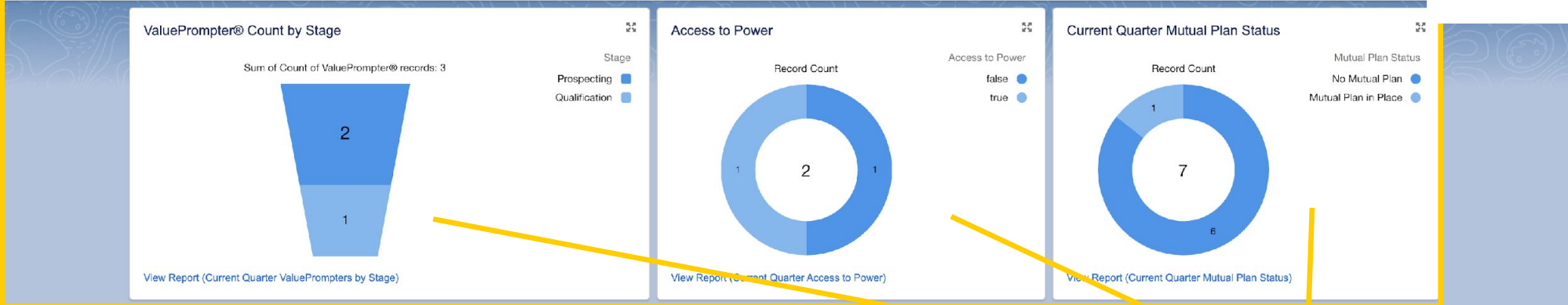
©1993-2023 ValueSelling Associates, Inc. All rights reserved. ValueSelling Associates is the creator of the ValueSelling Framework®



# Pipeline Analysis Dashboard

Dashboard **ValueSelling Pipeline Analysis**  
 As of Feb 14, 2023, 8:48 AM Viewing as User User

Refresh Ec



The Pipeline Analysis dashboard shows ValuePrompter® Count by Stage, Access to Power, and Current Quarter Mutual Plan Status

We can't draw this chart because there is no data.

View Report (Current Quarter Pipeline Fully Qualified)

Current Quarter Partially Qualified

Opportunity Owner	Account Name	Opportunity Name	Amount	Stage	Close Date	Qualification Status	ValuePrompter®	Mutual Plans	What is their Business Issue?
User User	Dickenson plc	Dickenson Mobile Generators	\$15,000.00	Qualification	2/14/2023	QP = VMo X V X P X P	1		-
User User	-	MS Test 1	-	Prospecting	2/14/2023	QP = VMo X V X P X P	2		Avi Green: 1234 Jane Grey: cv vzgf nzfgn

Cloud icon | Search... | Sales | Home | Accounts | Opportunities | Contacts | Leads | Dashboards | Chatter | Tasks | Files | \*VP0012 | \*More

The Pipeline Analysis report shows the status of ValuePrompters®, Qualified Prospect Formula® qualifications, and Mutual Plans created; can be customized

[View Report \(Current Quarter Partially Qualified\)](#)

### Current Quarter Not Qualified

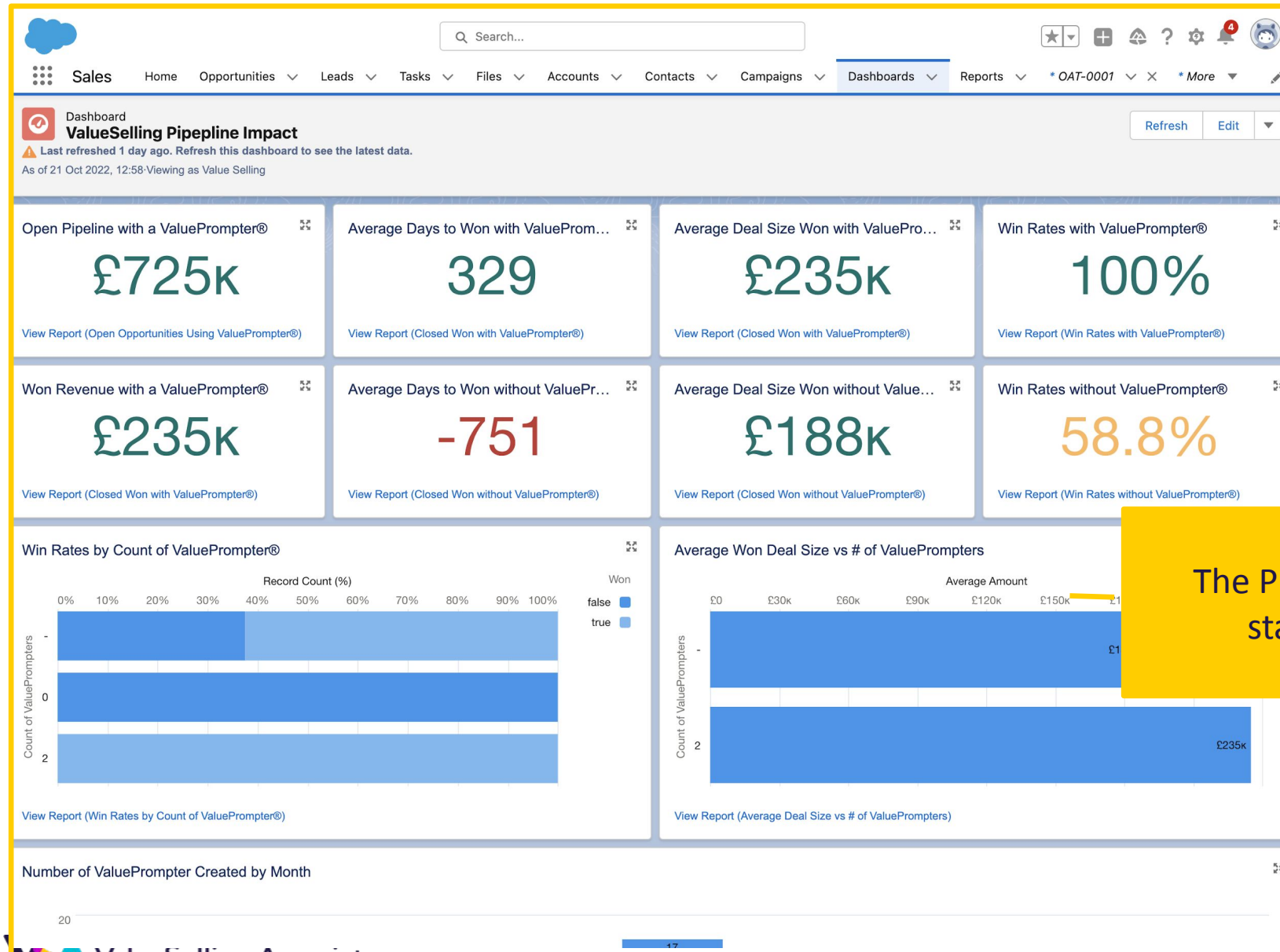
Opportunity Owne...	Account Name	Opportunity Name	Amount	Stage	Close D...	Qualification Sta...	ValuePrompt...	Mutual PI...	What is their Business Issue?
User User	Test Account	Test Opp	-	Prospecting	11/24/202:	QP = VM <sub>D</sub> × V × P × P			Joe Root: ABC 123 Joe Root: ABC 123
User User	Acme Inc. EMEA	Recruitment Platform	\$100,000.0	Proposal/Price Quot	11/23/202:	QP = VM <sub>D</sub> × V × P × P			Sanaya Wilkinson: We need to increase our workforce by 20% by the end of 2023

[View Report \(Current Quarter Not Qualified\)](#)

Not Using ValueSelling

Opportunities are sorted by fully qualified; partially qualified; not qualified; and not using the VS Framework

# Pipeline Impact Dashboard



The Pipeline Impact dashboard shows the status of various close/win metrics

Dashboards can be designed and customized by client to help drive manager coaching as well as measuring adoption and compliance.