upland

Altify

Opportunity Manager User Guide

Fall '20 (9.7) - 10/5/2021

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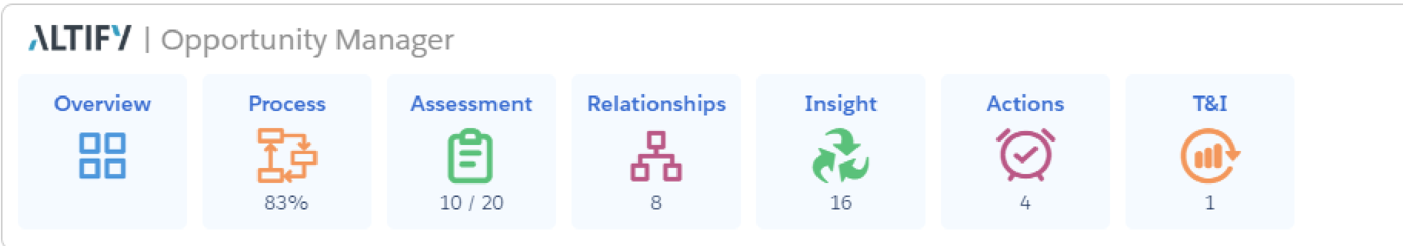
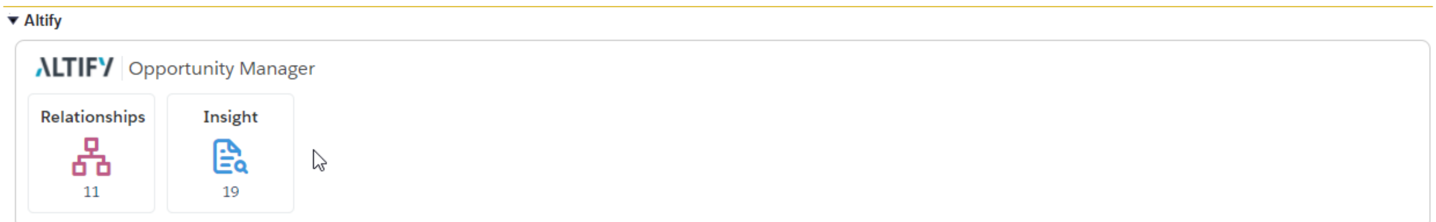
1 Opportunity Manager

Opportunity Manager helps you to win the deals that matter by delivering valuable insight to your buyers, building the right relationships, aligning your revenue team, and leveraging your collective experience.

To open the Altify opportunity plan in a Salesforce opportunity record, click a tile on the Altify launchpad.



For customers with a People & Problems launchpad, only the Relationships and Insight tiles are displayed:



And with a relationship map only license, just the Relationships tile is displayed.

- **Overview**: This tab shows you the opportunity's key information at a glance.
- **Process**: Use best-practice sales processes to effectively lead your opportunity pursuit team to a successful win.
- **Assessment**: Discover whether this opportunity is worth your time and effort.
- **Relationships**: Build the right relationships using a relationship map to focus your team on the relationship strategies needed to win.
- **Insight**: Deliver insight to your buyer using an insight map to articulate what your customer needs to achieve.
- **Actions**: Add actions to the opportunity plan to manage what needs to be done to move the opportunity forward.
- **Test & Improve**: Collaborate on a Test & Improve to help the revenue team win more business.

You can also get insights about the current state of the opportunity from Altify Max.

1.0.0.1 Altify Learning Web Site

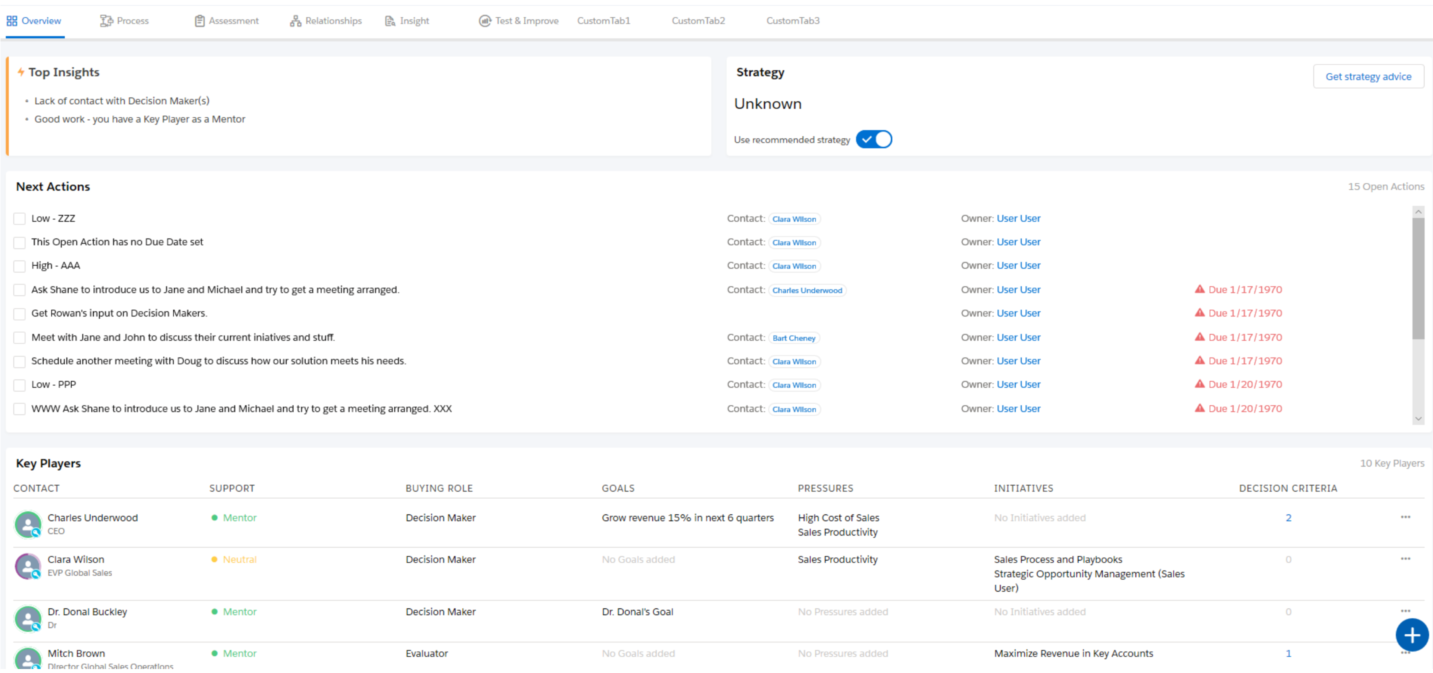
The Altify Learning web site is a highly engaging, guided way to find out about:

- Altify's proven best practices in opportunity management.
- How to apply these practices to your opportunity plans.

2 Overview

The **Overview** tab shows you the opportunity's key information at a glance. You get:

- The opportunity's top Max insights.
- A Strategy section, where you can select the most appropriate competitive strategy for your opportunity.
- Current open actions, with priority on overdue actions. Click the appropriate check box to mark an action as completed. Completed actions are automatically removed from the Next Actions view.
- Key player contacts on the relationship map, with key details about each one. These details are hyper-linked for quick access to the relevant areas of the opportunity.



2.1 Selecting a Competitive Strategy

To win an opportunity, you're typically competing against:

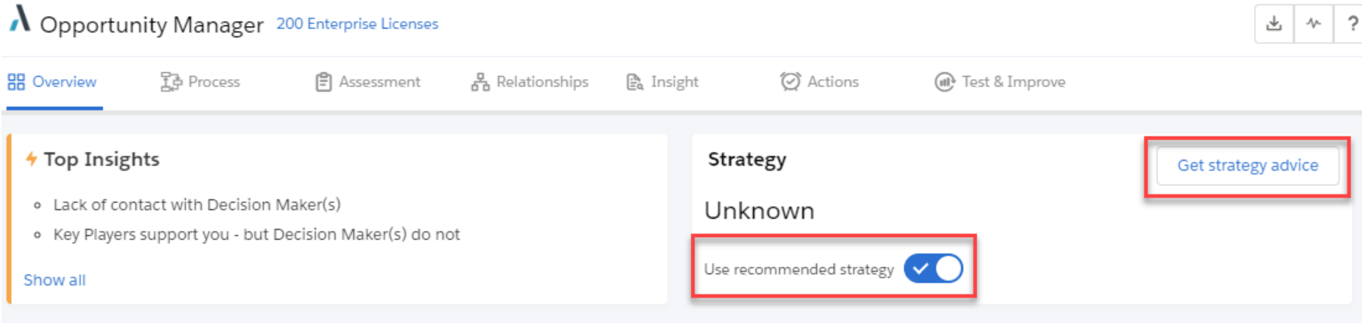
- Other suppliers.
- The customer's priorities and budgets (which may tend to push them away from this particular deal).

You need to develop a strategy to overcome these factors.

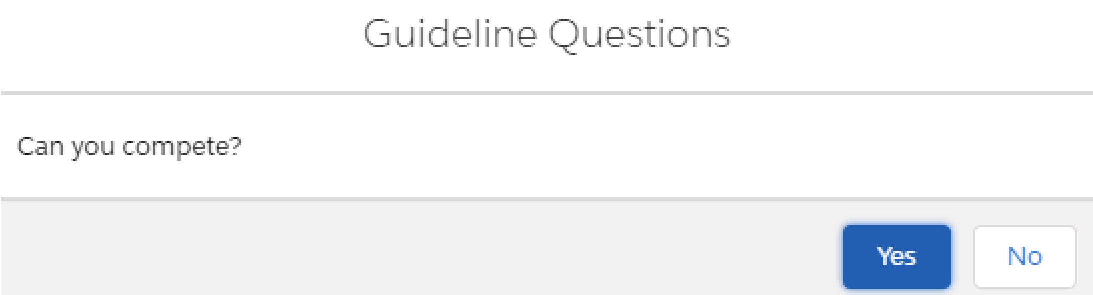
2.1.1 Discover Altify's Recommended Strategy

Altify can help you to determine the best type of strategy to follow for this opportunity.

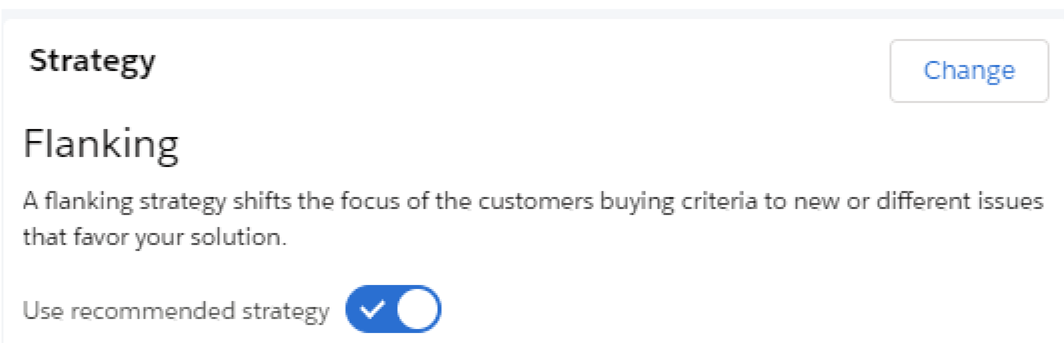
1. Select **Use recommended strategy**.
2. Click **Get strategy advice**.



3. You're guided through a series of questions about the opportunity.



Based on your answers, Altify applies one of the strategy types.

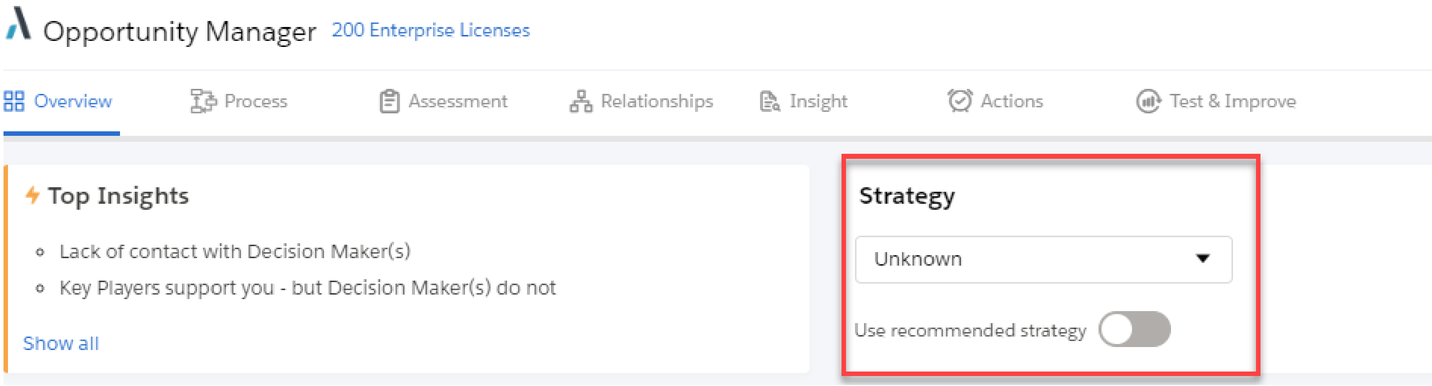


Subsequently, if something of high impact occurs in the opportunity, you may suspect that the strategy needs to be reassessed. To do this, you can click **Change** to run through the questions again.

2.1.2 Selecting a Strategy Manually

On the opportunity's **Overview** tab, you can select a strategy type manually.

1. Switch off **Use recommended strategy**.
2. Select a drop-down option.


Opportunity Manager
200 Enterprise Licenses
Overview
Process
Assessment
Relationships
Insight
Actions
Test & Improve
Top Insights
Lack of contact with Decision Maker(s)
Key Players support you - but Decision Maker(s) do not
Show all
Strategy
Unknown
Use recommended strategy

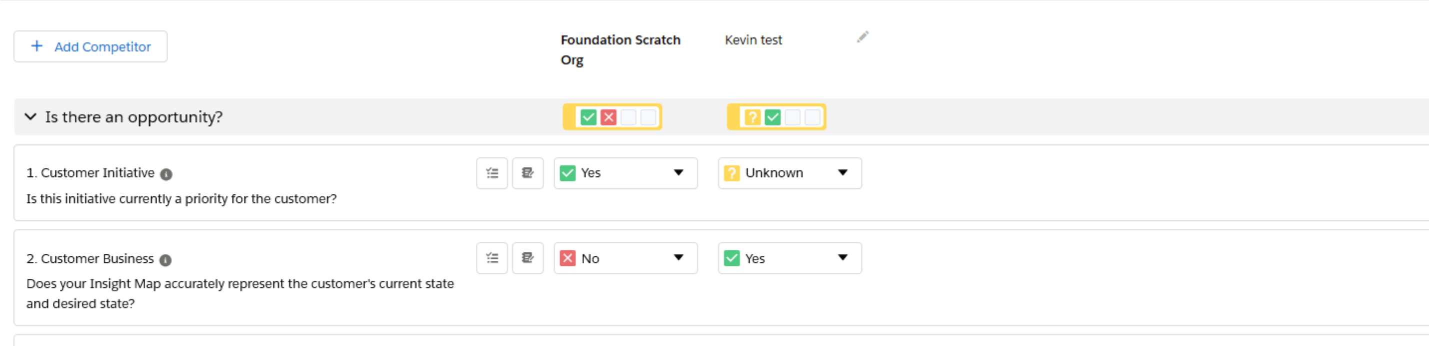
3 Assessment

The **Assessment** tab helps you to see whether this is a viable opportunity worth your time and effort.

By answering sets of questions, you discover:

- Is there an opportunity?
- Can we compete?
- Can we win?
- Is it worth winning?

You can also add competitors to the page and answer the same questions for them.



You can also add notes to provide more detail with your answer.

And you can add actions relating to a question. This can be useful when the question prompts you to do some research.

Some questions may have Quicklinks - resources that can help you to understand how to answer the question.

3.1 Color Coding

The summary icons at the top of each section show the answers currently selected

Based on the answers you have selected, the whole section is automatically 'scored' by the software. The border surrounding the summary icons is color-coded accordingly.

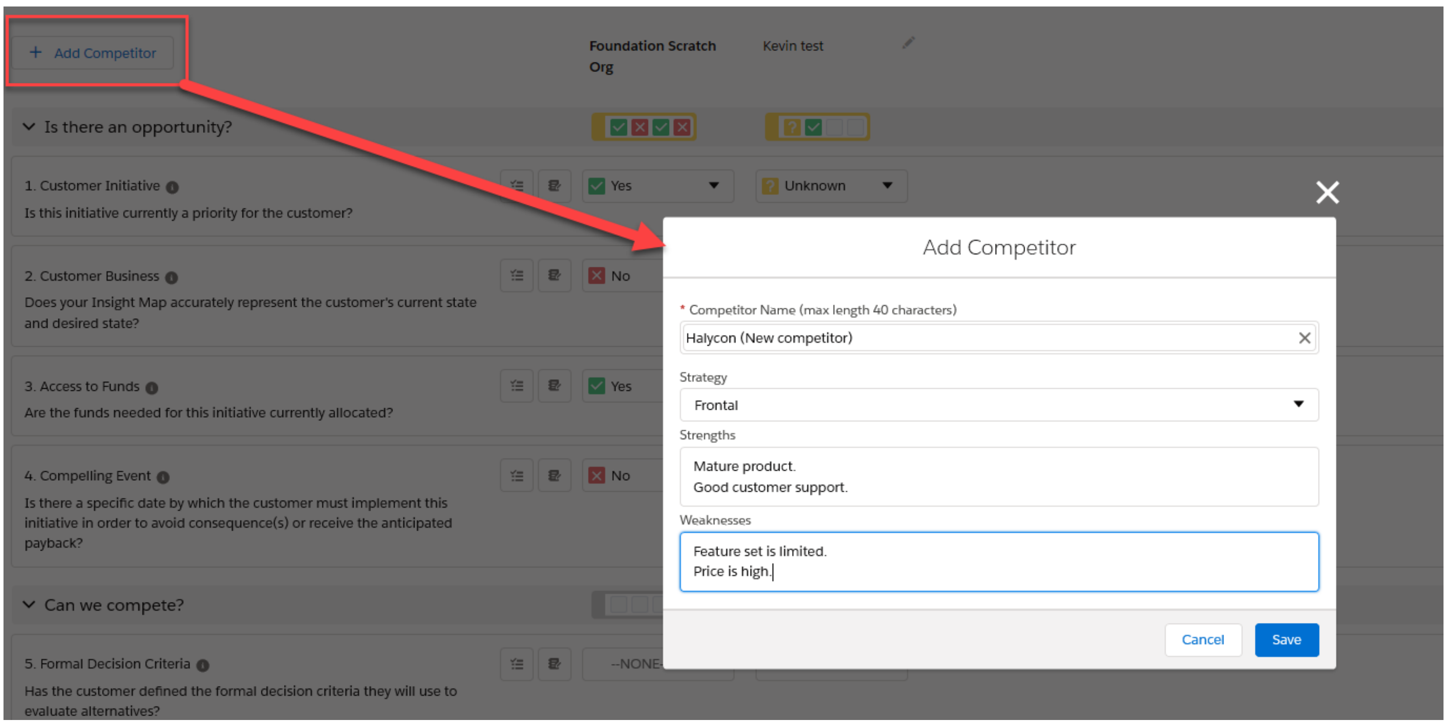
In this example, the summary icons border is green:

- Green indicates positive overall score.
- Red indicates negative overall score.
- Yellow indicates a neutral overall score.

> **Note:** Questions can have different weightings in the software's scoring calculation. This gives some questions a greater impact than others. Your administrator can adjust the weightings.

3.2 Adding a Competitor

To add a competitor to the page, click **Add Competitor**, and then specify the competitor's details, including their strengths and weaknesses.



To edit a competitor, click the pencil button in the heading of the relevant column.

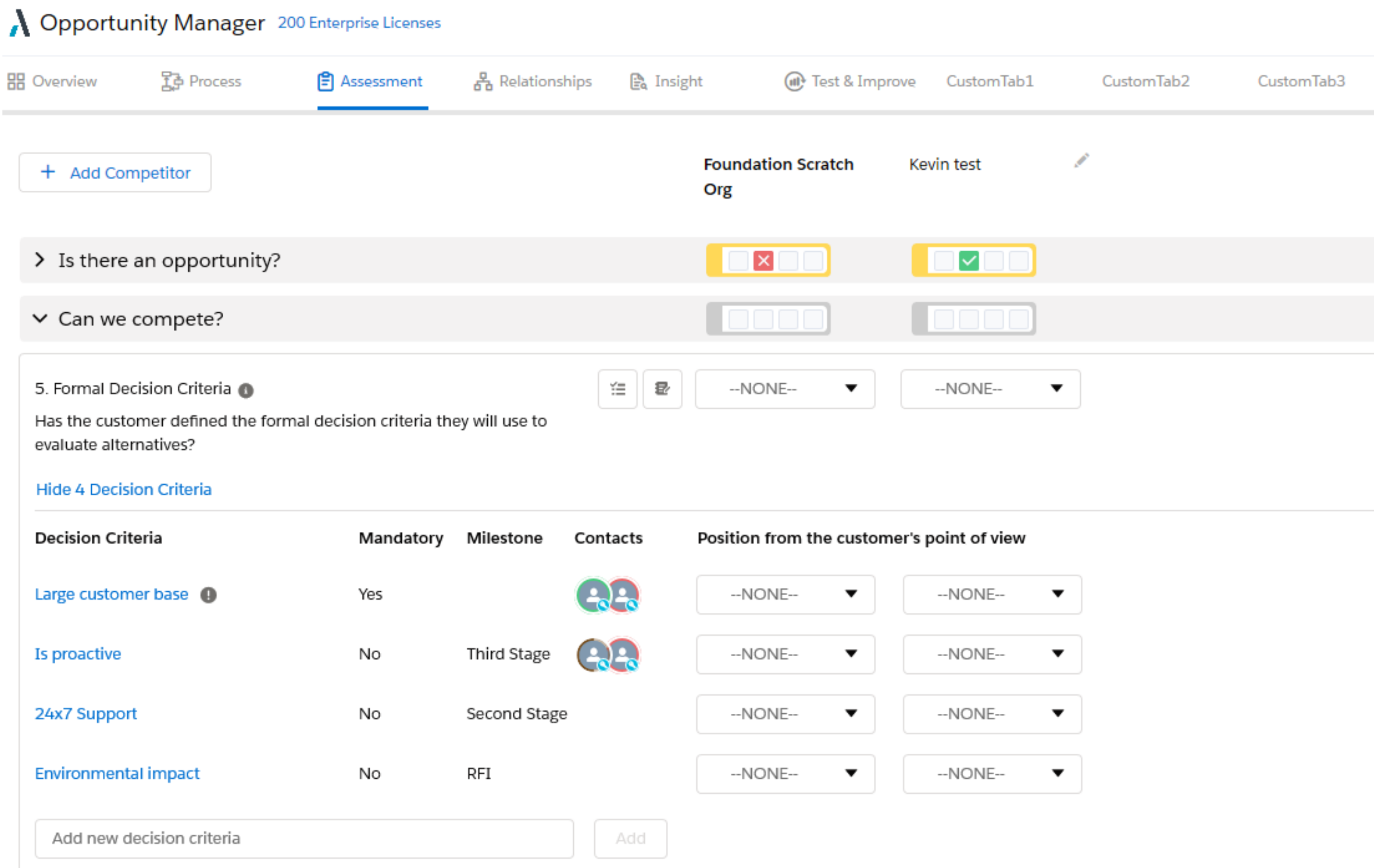
3.3 Assessing Decision Criteria

Decision criteria are the criteria that are important to the customer when they are making a buying decision. On the Assessment tab, decision criteria are automatically displayed next to the following questions:

- Formal Decision Criteria in the section **Can we compete?**
- Informal Decision Criteria in the section **Can we win?**

> **Note:** Decision criteria functionality can be disabled by an administrator.

In the example displayed below, four formal decision criteria are created on the opportunity.



- The Mandatory column indicates the decision criteria that are of particular importance to the customer. If set to Yes, the deal can only progress if the criterion is met by your organization's solution.
- A Milestone is a stage in the customer's buying process to which the criterion is particularly relevant.
- The Contacts column displays the contacts who attach importance to a decision criterion. Hover over a contact's image to view their details from the associated relationship map.
- Under the heading 'Position from the customer's point of view', you can record how well your organization's solution, and your competitors' solutions, fit the decision criteria.

To edit any of the above, or view any insight map obstacles that the criterion is associated with, click the name of the criterion. For more information, see "Editing a Decision Criterion" on the next page.

> **Note:** Formal and informal decision criteria are displayed in order of their importance. Mandatory criteria are listed first. Thereafter, criteria are ranked according the number of contacts that are linked to them. The ranking is automatically updated as you make changes to decision criteria such as setting a criterion to mandatory, or adding more contacts.

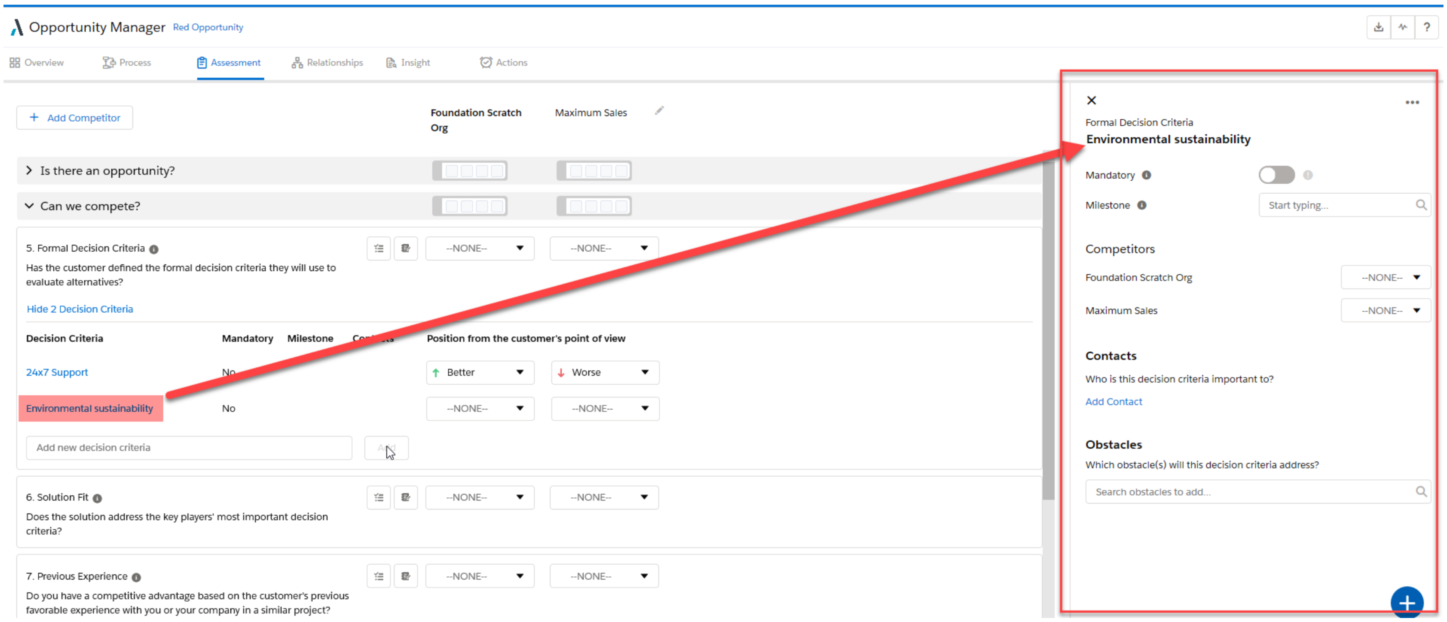
Creating a Decision Criterion

Before adding a criterion, consider whether it is formal or informal:

- Formal: tangible, objective and measurable criteria, e.g. 24/7 support.
- Informal: intangible and subjective criteria, e.g. User-friendly.

1. Click **Add/Show Decision Criteria** under the Formal Decision Criteria or Informal Decision Criteria question.
2. Enter the name of your decision criterion in the text field provided.
3. Click the **Add** button.

A panel is displayed on the right-hand of the screen where you can add more information about the criterion, such as a contact to whom it is important.

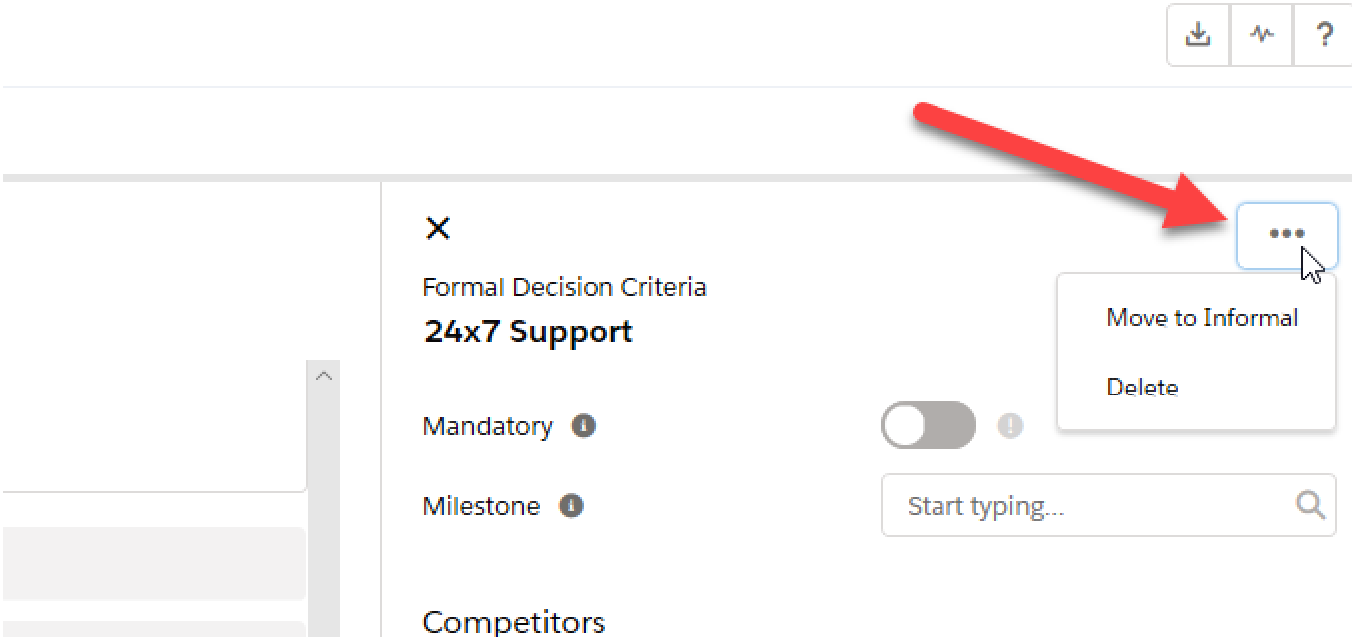


For more information, see Editing a Decision Criterion.

Editing a Decision Criterion

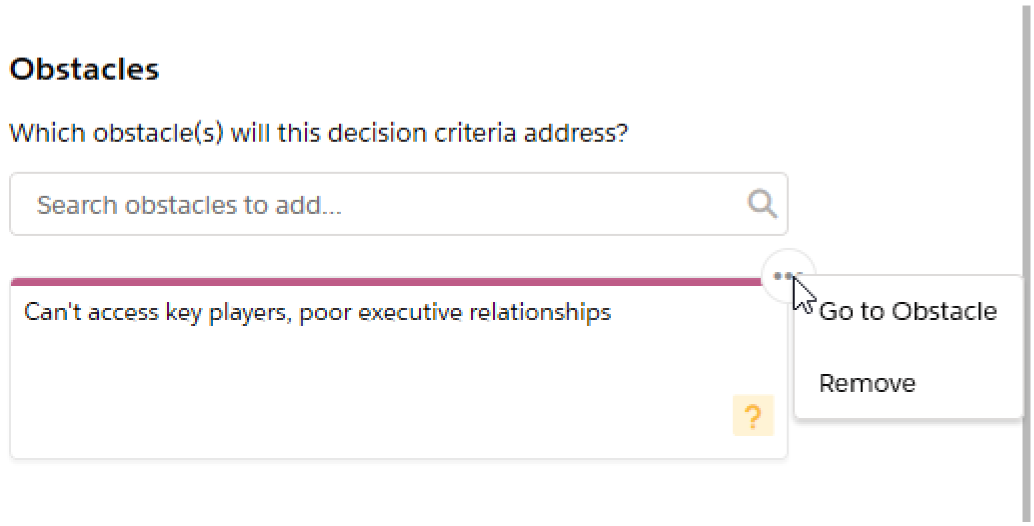
A right-hand panel is displayed when you click the name of a decision criterion. Here you can edit the criterion as follows:

- Change the criterion to formal or informal, or delete the criterion, by clicking the ellipsis icon in the upper right-hand corner - as shown below:



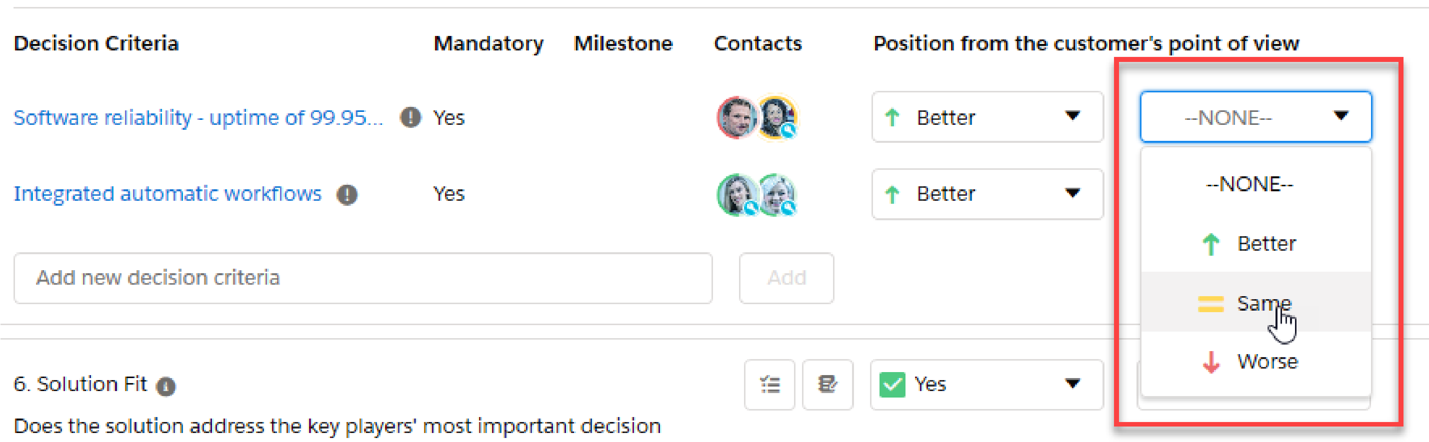
- Rename the criterion or set it to **Mandatory**.
- Enter a **Milestone** for the criterion, or associate it with a Milestone that has already been created on the opportunity. Milestones are stages in the customer's buying process for the current opportunity. By doing this, you are indicating that the criterion needs to be met at a particular stage, such as an initial RFI.
- Under **Competitors**, record how well your organization's solution, and your competitors' solutions, fit the decision criterion.
- Under **Contacts**, add or remove contacts for whom the criterion is of importance. When you are adding a contact, the system automatically suggests contacts who are on the relationship map for the associated account.
- The **Obstacles** section allows you to link a decision criterion with an obstacle from the opportunity's insight map. In this way you can map how challenges faced by the customer directly impact upon their buying decision. Click the ellipsis icon in the upper right-hand corner of an obstacle card, as shown

below, to remove it from the decision criterion or go the insight map.



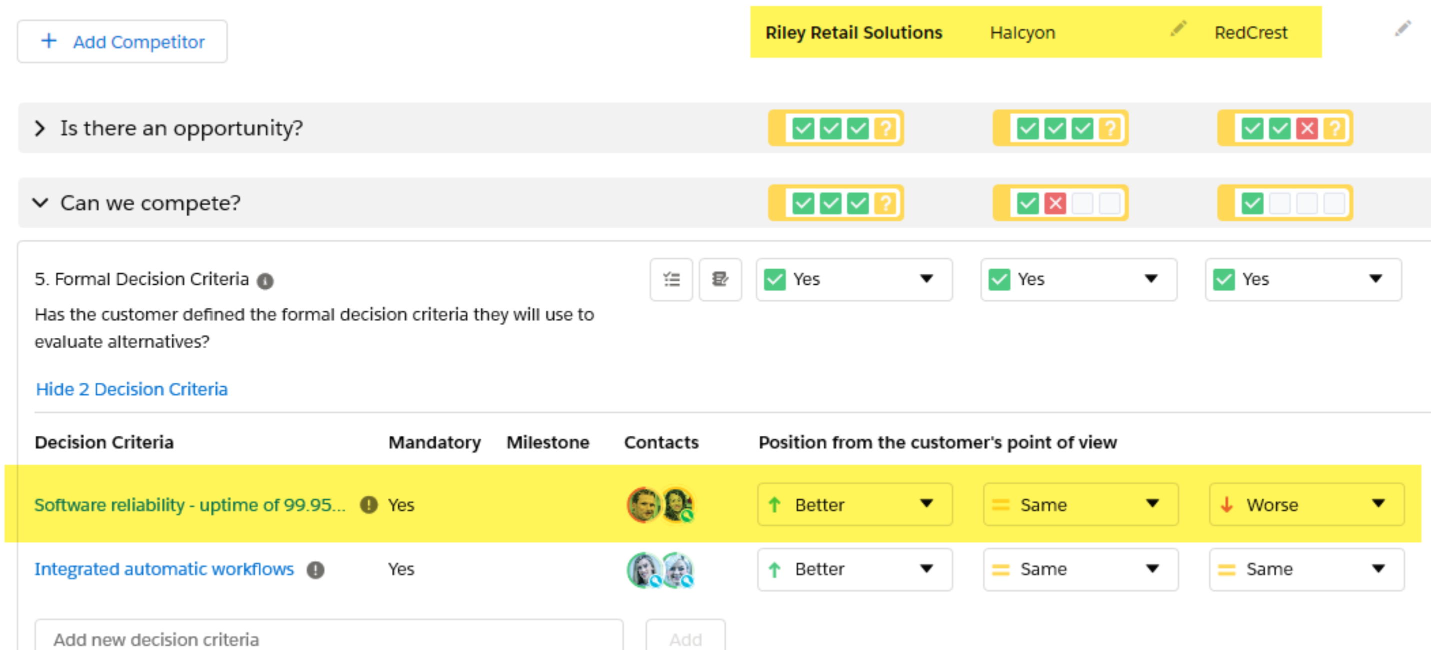
Inline Editing of Decision Criteria

You can adjust how your organization, and your competitors, rate against each criterion using inline editing - as shown below.



In the example shown below, the scoring indicates the following:

- The user's organization (Riley Retail Solutions) exceed the customer's expectations on software reliability.
- The competitor Halcyon meet the customer's expectation on software reliability.
- The competitor RedCrest do not meet the customer's expectation on software reliability.



3.3.1 More About Assessments and Decision Criteria

- Altify Learning

  The Altify Learning web site is an engaging way to learn how to get the most out of [assessments and decision criteria](#).

4 Relationship Map

Building opportunity and account relationships is all about understanding the people and the politics involved in the customer's buying decision.

With this understanding, you can devote your time to the right people, and talk to them about the right issues. It also helps you to avoid unwelcome surprises during the course of the sales cycle.

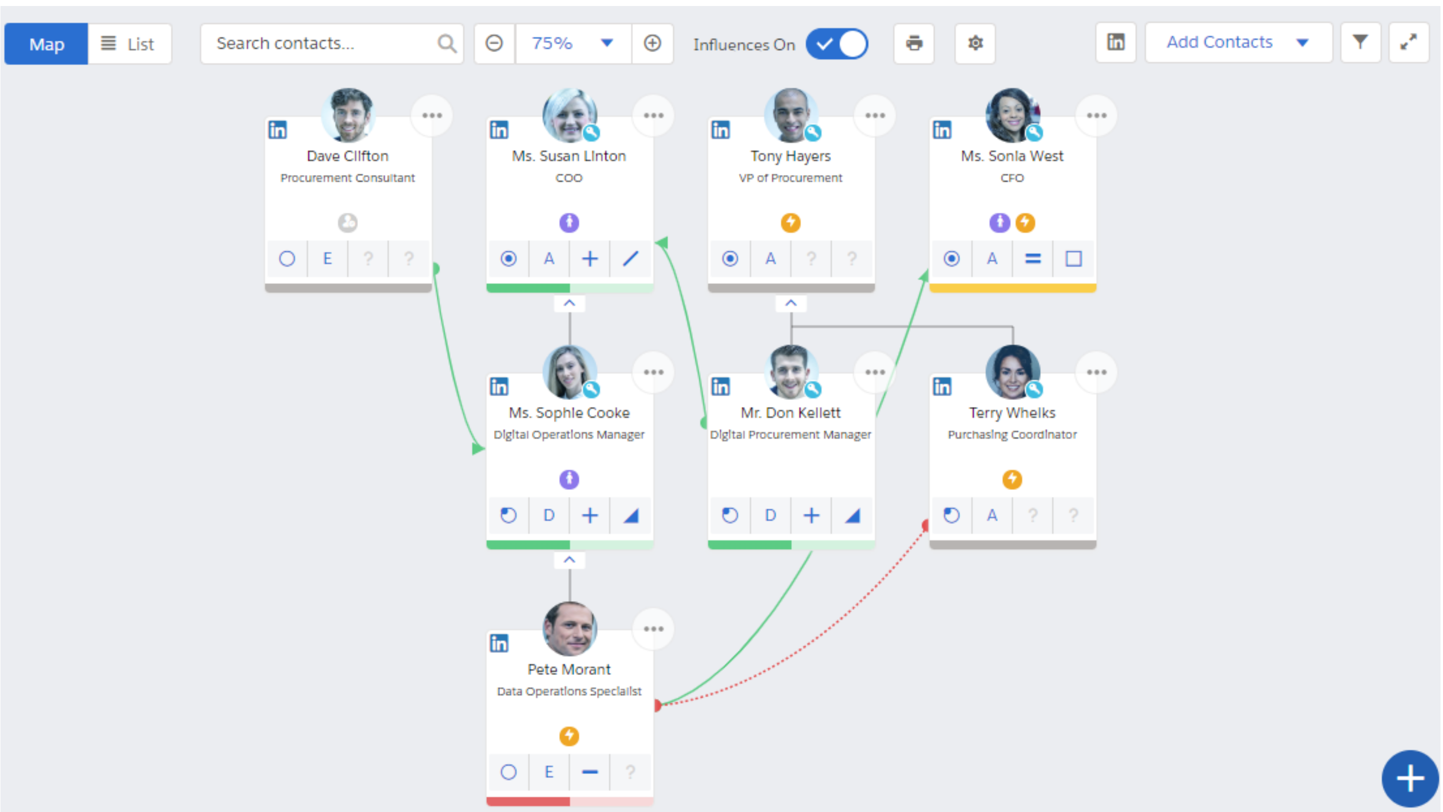
That's where relationship maps come in. The map provides a visual representation of:

- The people in the buyer's organization who are involved in your opportunity or account.
- Important information about each one, including their relationships with each other.

Each account or opportunity can have a single relationship map.

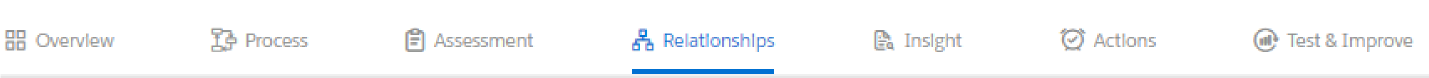
Each person on the map has a contact card. This makes it easy to see how everyone is connected, formally and informally, with other contacts involved in buying decisions.

You can also see each person's level of support for you and your coverage with them.



4.1 Opening a Relationship Map

To open an opportunity's relationship map, click the **Relationships** tab.



4.2 More About Relationship Maps

- Altify Learning

  The Altify Learning web site is an engaging way to learn how to get the most out of account relationship maps and opportunity relationship maps.

- Relationship Map Knowledge Base

  For some of the finer points of relationship maps, you can check out the relationship map knowledge base.

5 Insight Map

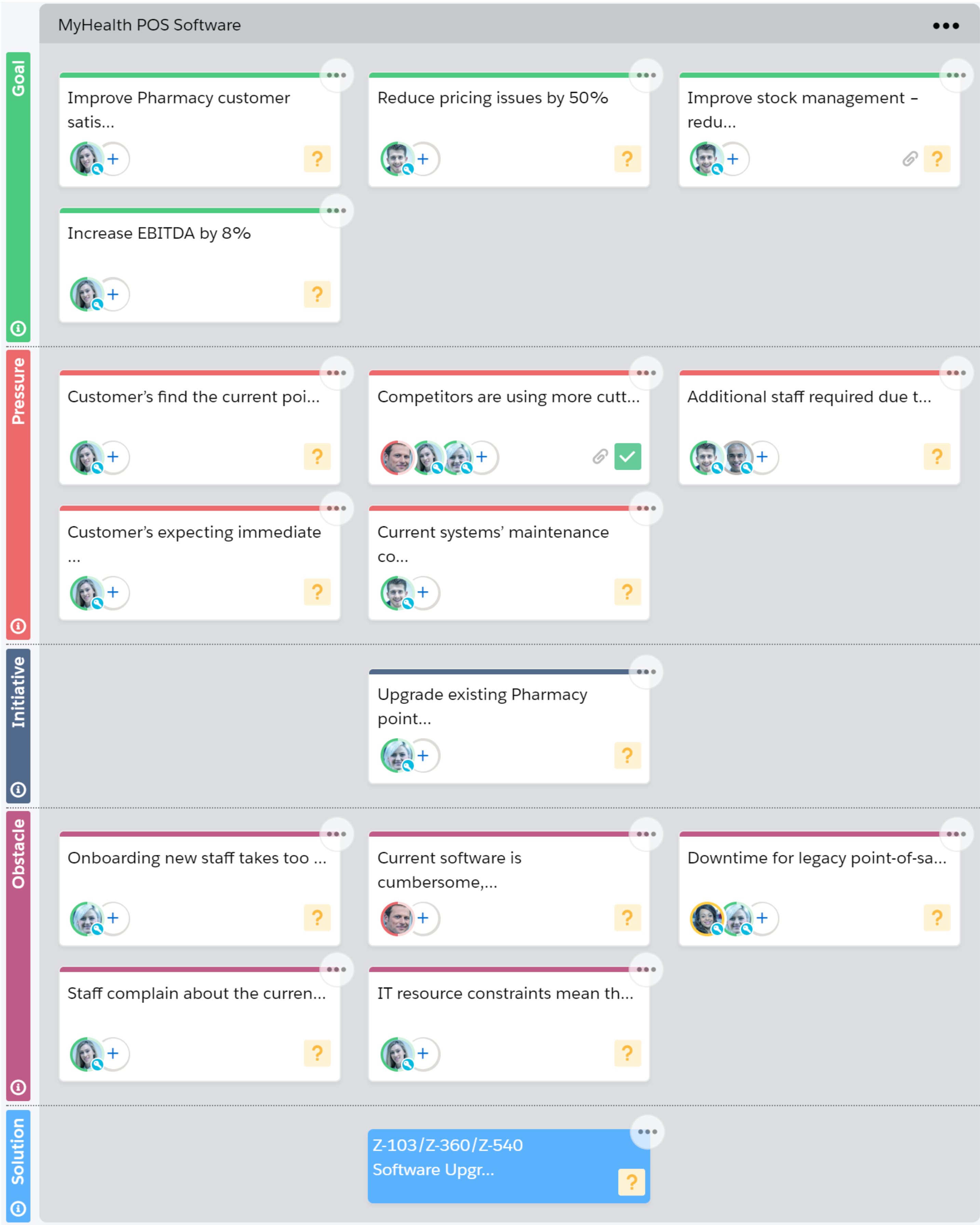
Today's buyers are more informed than ever before.

In a crowded field where buyers can easily learn about many potential suppliers, you need ways to stand out from the competition. Often, that requires your team to fully understand the customer’s business problems, what they must achieve, and why.

This understanding puts you in a position to propose solutions that will help the customer to look beyond features and functions, boosting your chances of winning the deal.

An opportunity insight map is the perfect tool to:

- Gather and organize information received from the customer's decision makers about the goals of their initiative.
- Capture the problems that affect their ability to achieve their goals.
- Communicate how your solutions can help them.


MyHealth POS Software
Goal
Improve Pharmacy customer satis...
Reduce pricing issues by 50%
Improve stock management – redu...
Increase EBITDA by 8%
Pressure
Customer's find the current poi...
Competitors are using more cutt...
Additional staff required due t...
Customer's expecting immediate ...
Current systems' maintenance co...
Initiative
Upgrade existing Pharmacy point...
Obstacle
Onboarding new staff takes too ...
Current software is cumbersome,...
Downtime for legacy point-of-sa...
Staff complain about the curren...
IT resource constraints mean th...
Solution
Z-103/Z-360/Z-540 Software Upgr...

The insight map helps the revenue team to start conversations with the customer that show not only product expertise but also business expertise.

Collaborating with your customer on an insight map gives you a way of providing insights into their business they wouldn't get anywhere else, which helps you increase your value to them.

The customer sees that your focus is on their success, and not just on selling them something.

Above is a typical opportunity insight map. It's made up of cards of various types:

- Goals
- Pressures
- Initiatives
- Obstacles
- Solutions

Together, these tell a story about the customer's business problems and how they plan to address them.

5.1 Opening an Insight Map

To open an opportunity's insight map, click the **Insight** tab.

5.2 More About Insight Maps

- Altify Learning

  The Altify Learning web site is an engaging way to learn how to get the most out of account insight maps and opportunity insight maps.

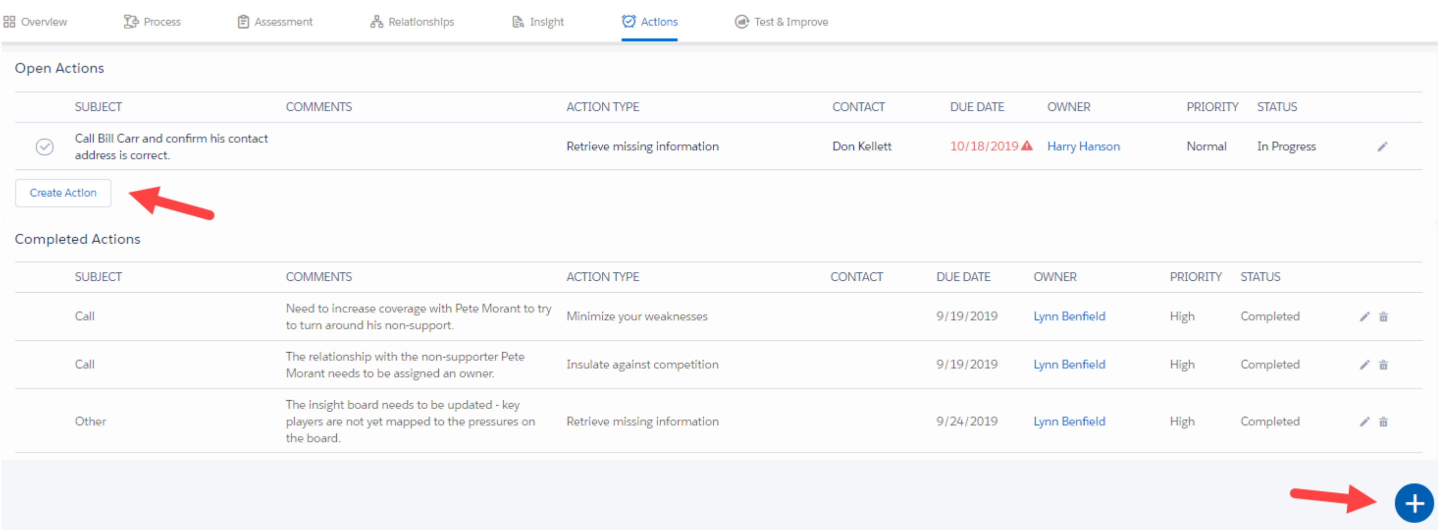
- Insight Map Knowledge Base

  For some of the finer points of insight maps, you can check out the insight map knowledge base.

6 PRIME Actions

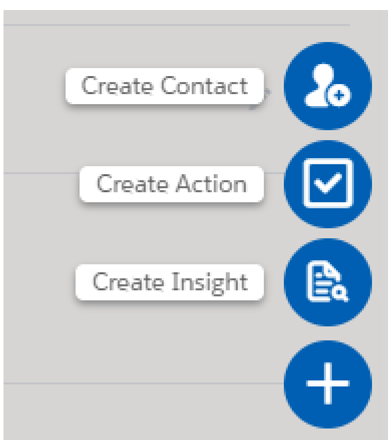
The **Actions** tab is where you maintain the ongoing list of 'to-do' actions that keeps the revenue team aligned with the opportunity plan.

- **Open Actions**. These are actions the team has yet to complete. The due date for an overdue action is shown in red.
- **Completed Actions**. These are actions the team has completed.



To add a new action:

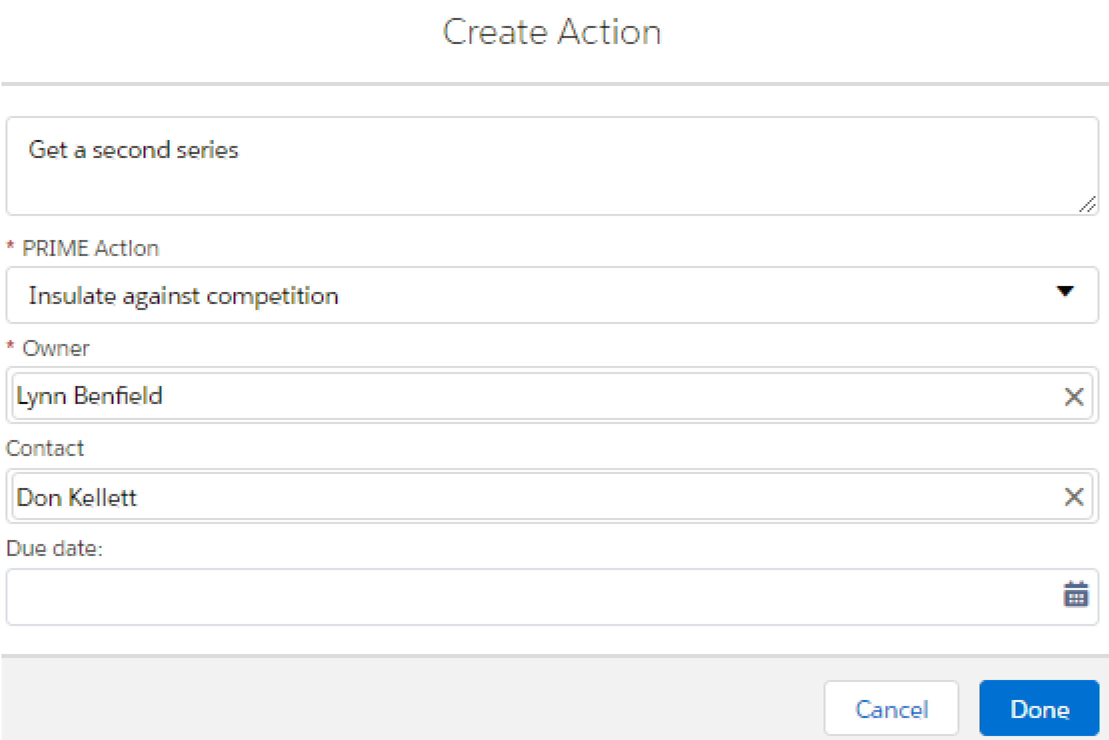
- On the **Actions** tab, you can click the **Create Action** button.
- On any tab, you can click the **Quick Add** button in the bottom right and then select **Create Action**.



Then specify the action's details. In line with best practice, it's mandatory to include details such as:

- Who the action is assigned to on the revenue team.
- The action's due date.

- A PRIME type (unless your administrator has disabled this field).



If PRIME Action categories are disabled

Your administrator can disable PRIME Action categories. This means that when you add an action, it is not associated with a PRIME Action category.

Your administrator may need to adjust the software to include actions without a PRIME Action category in the Open Actions list.

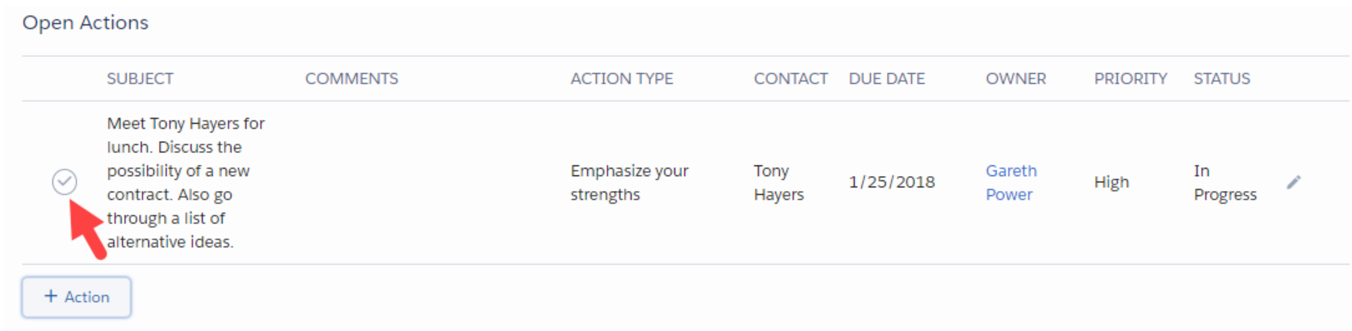
An Altify action has a corresponding Salesforce Task record.

If your Altify software is set to **Salesforce Shield Compatibility** mode, the Name field's search mechanism matches your search text against several fields, instead of just the person's name. So the results you get may be broader than would otherwise be the case.

6.1 Completing an Action

All current actions are shown in the Open Actions list. You can mark an action Complete in the list.

1. Click the **checkmark** icon to the left of the action.



2. The Edit Action opens. Set the action's Status to **Completed**.
3. Click **Save**.

The action is now shown in the Completed Actions list.

6.2 PRIME Action Categories

Opportunity Manager has five 'PRIME Action' categories.

Each of the actions you add to an opportunity belongs to one of these categories.

You select the category when you create the action. These categories are:

Prove your value

'Prove your value' actions have the following purpose:

- Demonstrate how your solution addresses or accelerates the customer’s compelling event
- Prove your ability to deliver unique business value
- Confirm the value you have delivered to this customer in the past
- Address the business and personal agendas of the key players

Retrieve missing information

'Retrieve missing information' actions have the following purpose:

- Question your supporters and mentors in the customer organization
- Use your peers, your network and your sales team
- Involve business partners and consultants
- Access publicly available information

Insulate against competition

'Insulate against competition' actions have the following purpose:

- Connect your solution to the personal agenda of key players
- Broaden your support inside the organization
- Leverage your relationships with key players to other areas within the organization
- Test your plan with your supporters and mentors

Minimize your weaknesses

'Minimize your weaknesses' actions have the following purpose:

- Test your weaknesses against the customer's formal and informal decision criteria
- Determine how to influence the weight and ranking of each criterion to your advantage
- Utilize business partners and alliances to enhance your solution
- Validate your weaknesses with your mentors and supporters to understand their impact

Emphasize your strengths

'Emphasize your strengths' actions have the following purpose:

- Test your strengths against the customer's formal and informal decision criteria
- Compare your strengths to alternative solutions (internal and external)
- Embed your strengths within the customer's formal and informal decision criteria
- Validate your strengths with your mentors and supporters

7 Test & Improve

Test & Improve is a best-practice meeting cadence facilitated by Altify in your opportunities.

As the name suggests, it helps revenue teams collaborate on opportunities by providing a structured approach to getting the most out of each person's knowledge and experience.

Regular Test & Improve meetings **test** the team's opportunities for vulnerabilities and gather recommendations of the most effective actions to **improve** them.

When you've established a regular Test & Improve cadence, and people participate fully, everyone on the revenue team benefits:

- They develop a better understanding of the current opportunities, the business value you're delivering to customers, and relationship-development priorities.
- They coach each other. This often leads to better anticipation of competitors' moves, and more effective strategies to block them.
- They're better prepared to discuss their plans with their customers.
- They knows how to focus investments and align resources in a way that helps them to win.
- And because people from across the business can participate, the whole company benefits from the way the process helps people to share ideas and best practices.

7.1 Access to Test & Improve Presentations

In order to access a T&I conducted in Altify, an invitee must have access to the relevant Opportunity records. Therefore, you may need to share the Opportunity records with invitees who do not already have access.

7.2 Learn about Test & Improve

The Altify Learning web site offers a highly engaging way to learn how to get the most out of Test & Improve.

7.3 Test & Improve Knowledge Base

These knowledge-base topics explain some of the finer points of Test & Improve:

- Best Practice for Presenters
- Best Practice for Reviewers
- Test & Improve on Your Phone
- Dealing with Test & Improves Conducted Outside Altify
- Deleting a Test & Improve

7.4 Best Practice for Presenters

This topic helps you to follow Altify's recommended best practices to get the most out of Test & Improve.

Meeting Format

- Altify's recommended Test & Improve format is shown on the Test & Improve entry page, and also in the right-hand panel's **Process** tab when you're actually in the Test & Improve. This format is equally applicable to every deal stage and deal size.

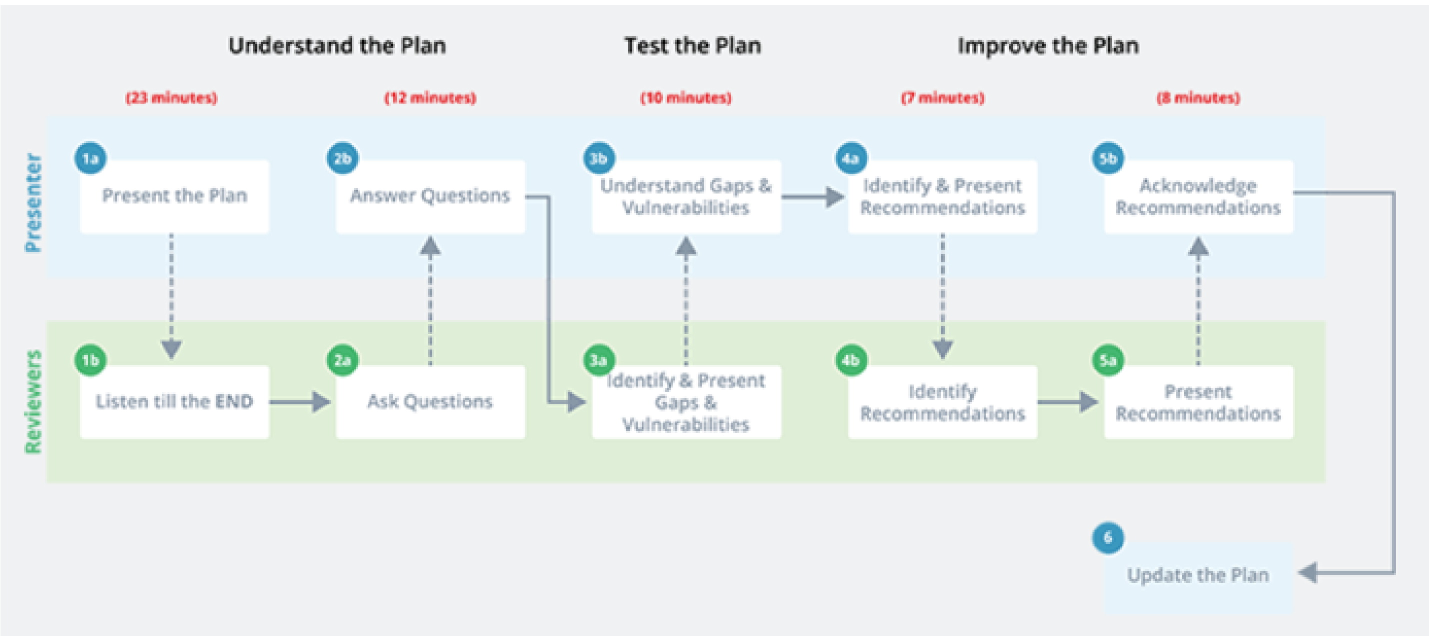
  If you don't already have your own established Test & Improve format, we suggest that you initially follow the recommended format.

  Then, after you've followed it a few times, you'll be in a good position to judge whether you need to tailor it to your own business needs.

- The recommended Test & Improve duration is 90 minutes.

  If you don't have that much time, stick with your proven Test & Improve process, but reduce the amount of time you spend on each stage.

  Equally, if it makes sense to take extra time, do so.



Preparing for the Meeting

- In advance of the meeting, it's a good idea to review the Altify opportunity plan and make sure it's up to date.

  The best way to do this is to enter the Test & Improve in *preview* mode. This enables you to look at the plan in Test & Improve format without actually starting the meeting.

  To do this, select **Preview (as Presenter)** on the Test & Improve entry page.

  While in *preview* mode, it can be useful to check out the advice given in the right-hand panel's **Checks** tab.

- If there will be more than one presenter, agree which plan areas each person should cover.

Each of these people should enter the Test & Improve as a Presenter.

The first presenter selects the **Start (as Presenter)** option, and each additional presenter selects **Resume (as Presenter)**.

- Who will serve as facilitator/coach? That person must select the **Coach** role in the right-hand panel. It's their responsibility to:
    - Moderate the meeting, ensuring that the correct process is followed.
    - Assign roles to the reviewers, and prompt each person to select that role in the right-hand panel. (Not all reviewers necessarily need to have an assigned role.)
    - Keep an eye on time elapsed during the meeting to make sure everything gets covered in the time available.
- As presenter, it's a good idea to use a conferencing application to share your view of the Test & Improve.

  That way, in addition to having their own personal view of the plan in the Test & Improve tool, each person can see what you're currently looking at.

  (On their own devices, each presenter and reviewer can navigate around within the tool without affecting anyone else.)

Presenting the Plan

- When you're beginning your presentation, it's a good idea to hide the right-hand panel, so that no areas of the plan are obscured from your view.

  (Each participant has their own individual control over the Test & Improve. So hiding the panel won't affect anyone else at the meeting.)
- Avoid looking at the **Feed** while the presentation stage is in progress.
- We find that it's best to present the opportunity plan tabs in this order:
    - A general introduction to the opportunity, including where you are in the **Sales Process**, and what you know and don't know.
    - On the **Relationship Map**, show who you know in the customer's organization, and which relationships you need to develop.
    - On the **Insight Map**, explain the current extent of your understanding of the customer.
    - Use the **Assessment** and **Actions** tabs to explain your current plans to win the deal.
- We find that it's best to present the account plan tabs in this order:

Questions

Following your presentation, the reviewers can contribute their clarifying questions to the meeting's feed. This helps to ensure that everyone has a correct understanding of the plan.

- Use the feed's **FROM** filter to filter the questions per reviewer. This enables you to address each person's questions in turn.
- If you don't know the answer to a question, add an action to the plan to research it.
- If some reviewers don't have an assigned role, prioritize the questions of those who do.
- Each question has a **Mark as Answered** option. This is available both in the **feed** tab and on the Test & Improve's summary page.

Potential Vulnerabilities

When the clarifying questions have been dealt with, the reviewers contribute any potential vulnerabilities they've spotted.

- As with questions, use the feed's **FROM** filter to filter the vulnerabilities per person. This enables you to address each person's contributions in turn.
- If some reviewers don't have an assigned role, prioritize the contributions of those who do.
- If you're short on time during the meeting, it may be more efficient to combine the vulnerabilities and recommendations stages.

Recommendations

In this phase of the meeting, participants offer Recommendations to address the potential vulnerabilities they have identified.

- As with questions and vulnerabilities, use the Feed's **FROM** filter to address the recommendations of each reviewer in turn.
- If some reviewers don't have an assigned role, prioritize the contributions of those who do.
- If you're short on time during the meeting, it may be more efficient to combine the vulnerabilities and recommendations stages.

After the Meeting

When the recommendations stage is complete, the meeting is done. The reviewers can leave the Test & Improve.

The feed is now populated with the participants' contributions. The Test & Improve's summary page collates all of these contributions into a format that makes it easy to deal with them.

- Even though the meeting is complete, it's still possible for people to make additional contributions. This is useful when, for example, a person who couldn't attend the meeting wants to contribute, or a reviewer has additional thoughts after the meeting.

  (Only users with Salesforce access to the opportunity plan can enter the Test & Improve.)
- On the **Summary** page, make sure every good idea is turned into a PRIME action.

- It can be useful to identify the top three recommendations, and create actions based on these.

7.5 Best Practice for Reviewers

This topic helps you to follow Altify's recommended best practices to get the most out of the Test & Improve tool.

Preparing for the Meeting

We recommend that you review Altify's Test & Improve guidelines document before the meeting, so that the general aims and format of a Test & Improve are fresh in your mind.

As a reviewer, you start by listening to the full presentation (ideally without interrupting the presenter).

Then you're invited to ask clarifying questions to make sure you understand the opportunity plan.

Once you've gained a full understanding of the plan, you'll be in a position to spot potential vulnerabilities, and make recommendations.

During the Plan Presentation

The meeting begins in the "Present" stage, during which the presenter takes you through the various areas of the opportunity plan.

- Usually, the presenter shares their view of the Test & Improve tool with you through a conferencing application. This ensures that you can always see what they're looking at.

  Meanwhile, you also have the Test & Improve tool open on your device.
- It’s a good idea to hide the right-hand panel during the presentation, so that no areas of the plan are obscured from your view. (This won't affect what anyone else sees.)
- Allow the presenter(s) to complete the presentation without interruptions.
- Wait until afterwards to look things up in the plan or think about recommendations.

Asking Questions

When prompted by the presenter, click the **Questions** chevron.

- The coach invites the reviewers to add their clarifying questions to the Feed.

  Keep your questions concise, and avoid 'leading the witness' by adding commentary. The presenter is not looking for a critique of the plan at this stage. Your questions should be aimed at making everyone's view of the plan clearer.
- The coach calls each person in turn to ask their clarifying questions.
- Don't think about vulnerabilities or recommendations during the questions stage. It's still too early to consider those.
- If someone else asks a question that you were going to ask, **like** their question in the Test & Improve feed, and delete your own.

Sharing Potential Vulnerabilities

When prompted by the presenter, click the **Vulnerabilities** chevron.

- The Coach invites the Reviewers to add their vulnerabilities to the Feed.

  For vulnerabilities, your perspective should be: 'What's the worst thing that could happen?'

  Embody the role you are playing in the meeting. Use phrasing like "As the customer, I think...", for example.
- Other people's shared potential vulnerabilities may give you ideas for recommendations. When this happens, add these to the feed.
- If someone else shares a potential vulnerability that you were going to share, **like** it in the Test & Improve feed, and delete your own.

Making Recommendations

When prompted by the presenter, click the **Recommendations** chevron.

- Have a recommendation to share to address every vulnerability you shared earlier.
- Express the recommendations in a way that is SMART (Specific, Measurable, Achievable, Realistic, and Time-Bound).
- If someone else shares a recommendation that you were going to share, **like** it in the Test & Improve feed, and delete your own.

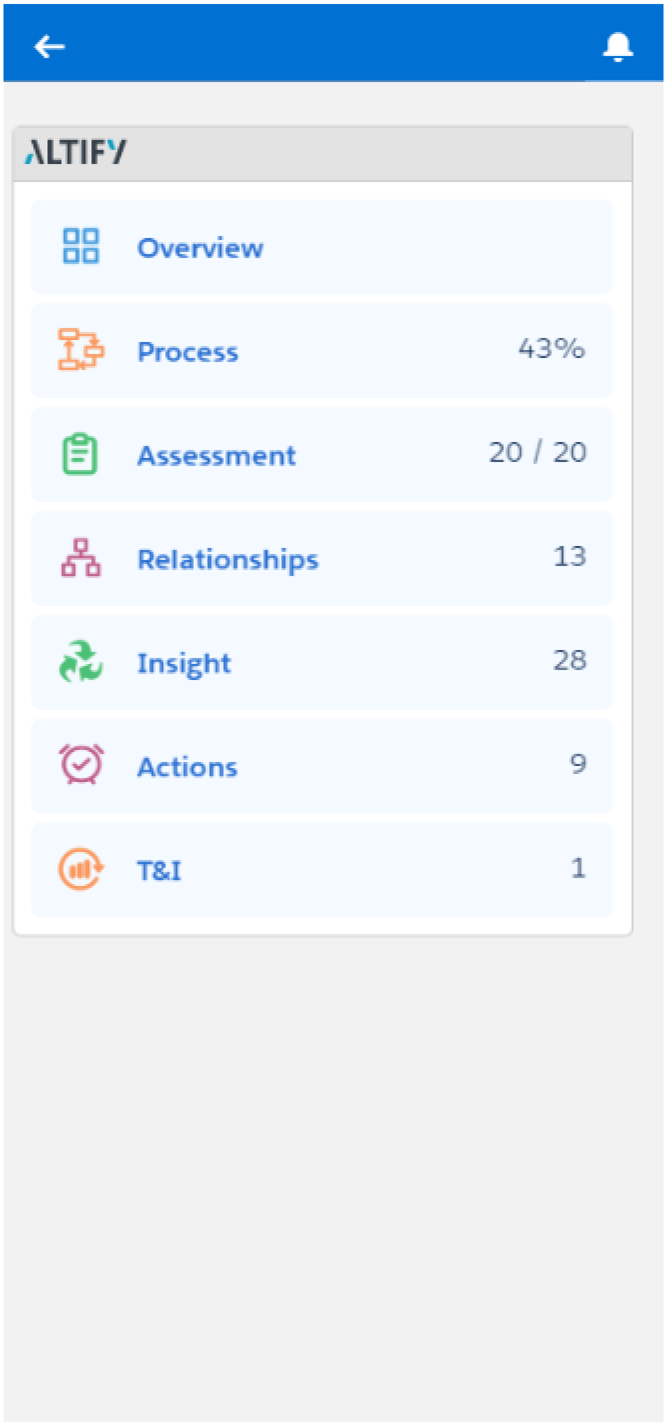
7.6 Test & Improve on Your Phone

You can enter a Test & Improve event on a phone as a reviewer (but not as the presenter).

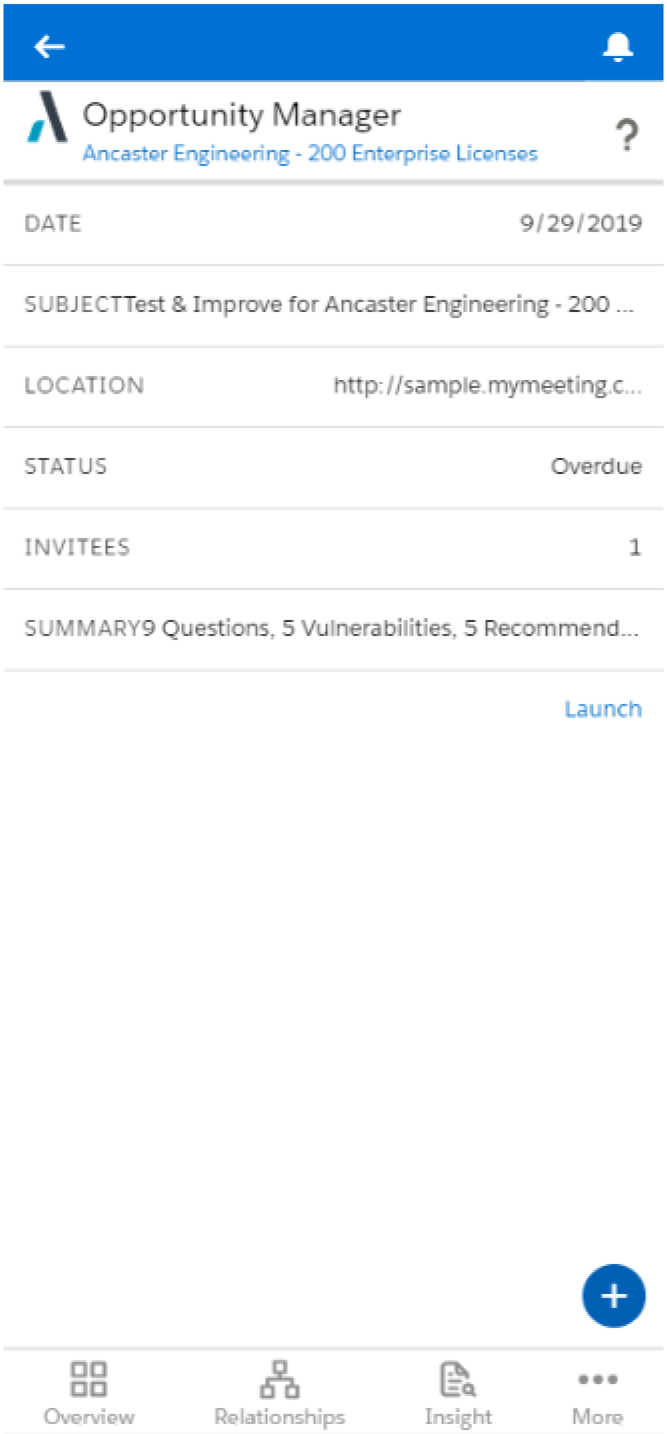
On your phone you get the Text & Improve's right-hand panel only. This means that you can contribute to the feed on your mobile device, but you can't see the rest of the presentation.

So Test & Improve on mobile is best suited to a participant who is viewing the presentation on a desktop computer, and using their mobile device to add contributions to the feed.

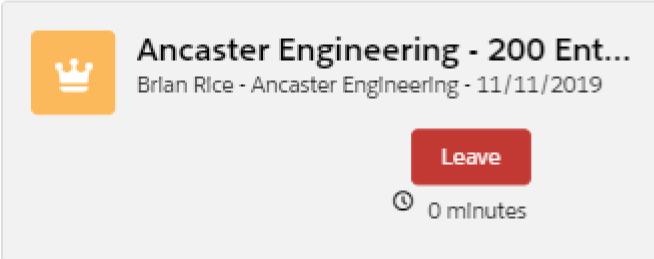
1. Click Opportunity Manager's **T&I** icon.



2. The opportunity's T&I page opens. Scroll to the Test & Improve you want to participate in, and click **Launch**.

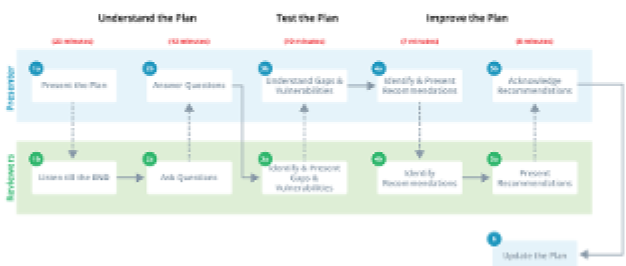


3. Click **Enter as Reviewer** to enter the Test & Improve. (Or, if this is a completed Test & Improve, click **Review**.)



Test & Improve
9/29/2019

Opportunity: Ancaster Engineering - 200 Enterprise Licenses
Account: Ancaster Engineering

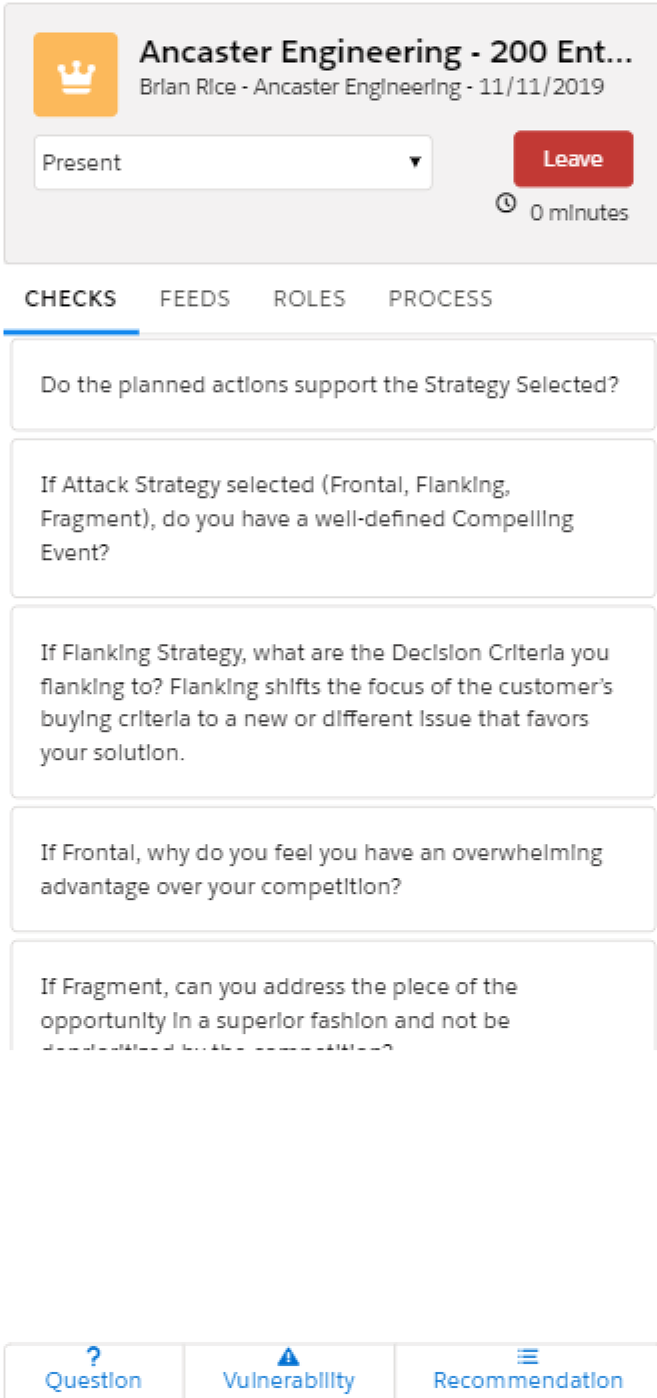


Start (as Presenter) Preview (as Presenter) Enter as Reviewer

4. The Test & Improve opens. On mobile, you see only the Test & Improve's right-hand panel.

   You can contribute questions, vulnerabilities, and recommendations to the feed.

   Use the drop-down to navigate between Test & Improve stages.



7.7 Dealing With Test & Improves Conducted Outside Altify

Occasionally, it makes sense to hold a Test & Improve meeting without using Altify's Test & Improve software. This is common when all the relevant people are on site in a room together.

Best practice in this situation is to designate a 'scribe' who notes down the vulnerabilities and recommendations.

The scribe should subsequently create a Test & Improve in Altify and populate it with these contributions. (To do this, they will need *Read-Write* access on the relevant Altify opportunity plan.)

1. In the Altify opportunity plan record, open **Test & Improve** and click **Schedule New**.
2. Set the meeting to today’s date. (You can't choose a date in the past.)
3. Click **Launch**.
4. Click **Start as Presenter**.
5. Add the vulnerabilities and recommendations to the Test & Improve.
6. Click **End as Presenter**, so that this Test & Improve is immediately marked as *Completed*.

The opportunity plan owner can now see the Test & Improve in the list, and can **Review** it.

7.8 Deleting a Test & Improve

If you have *Read-Write* access on an opportunity plan, you can delete a Test & Improve that is *Scheduled* or *Overdue*.

(You don't get this option for sessions that are *Started* or *Complete*.)

1. Open the opportunity plan's **Test & Improve** tab.
2. Click the event's **Trashcan** icon

3. Click **Delete** to confirm that you want to carry out the deletion.

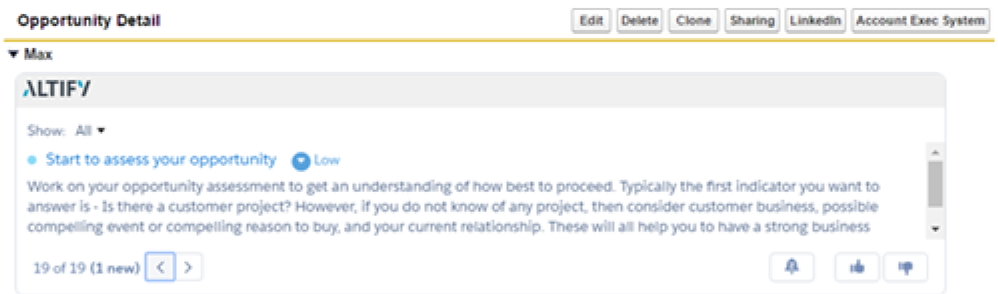
If there are invitees, they are automatically sent a calendar event update to ensure that the Test & Improve is removed from their personal calendars.

8 Altify Max

Altify Max gives you insights – real-time coaching – about the current state of your opportunity.

These insights reflect best practice in sales, honed from experience across a million sales engagements, along with specific insights from your own business. These are brought together to identify potential vulnerabilities, and guide you on what to do next.

The insights update dynamically as the opportunity ages and as you take action. For example, when you add contacts to the relationship map, or move the opportunity to the next Stage, the insights you get will update.

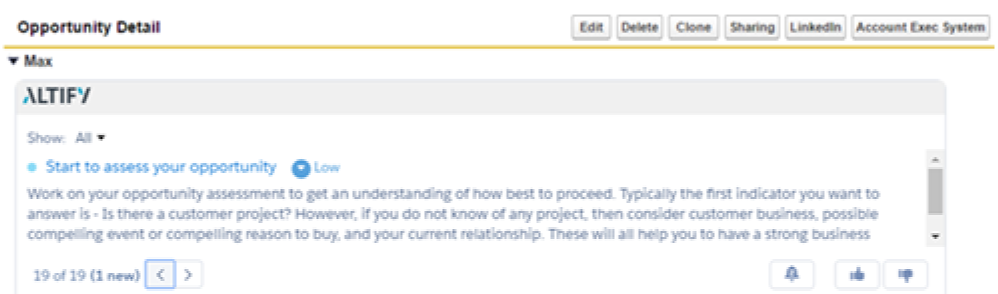


You see Max insights in two places:

- Max Launchpad on Opportunity Records
- Max Drop-Down in Opportunity Manager

8.1 Max Launchpad on Opportunity Records

When you open an opportunity record, the Max launchpad shows you all the insights currently associated with the opportunity.



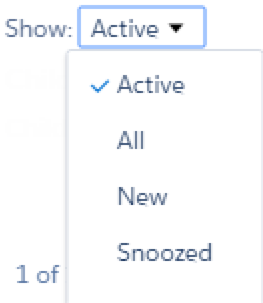
You can browse through current insights on the opportunity.

Use the arrow buttons to move from one to another.

Filtering the insights

Use the 'Show' filter to control which insights are available in the launchpad.

- Only active (non-snoozed) insights
- All insights
- Only new insights
- Only snoozed insights



Note: You only see the **New** option if there are new insights. Similarly, you only see the **Snoozed** option if there are snoozed insights.

Directly access the relevant opportunity area

To navigate directly to the area of the opportunity the insight relates to, simply click the insight's title.

Importance

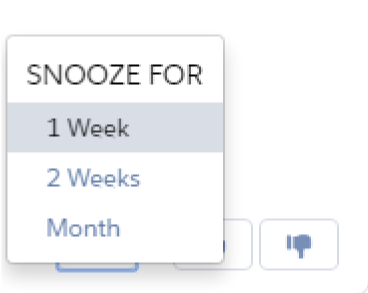
You can see the current insight's level of importance:

'Helpful' and 'Unhelpful'

Use the thumb icons to indicate whether you find the insight helpful or unhelpful.

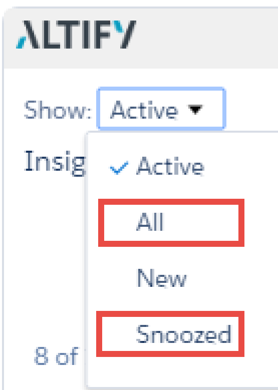
'Snoozing' insights

If you are the opportunity's owner, you can click the snooze icon on the current insight. This means that the insight won't be 'active' again in the opportunity until the selected amount of time has elapsed.

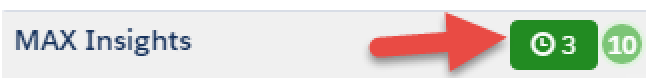


However, you can still access a snoozed insight. There are two ways to do this:

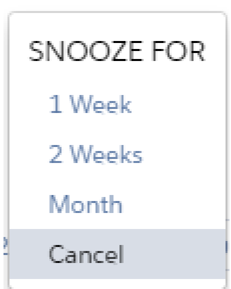
- Select the **All** or **Snoozed** option in the Max launchpad's 'Show' filter.



- Click the snooze toggle in the Max drop-down. This toggle shows/hides snoozed insights.



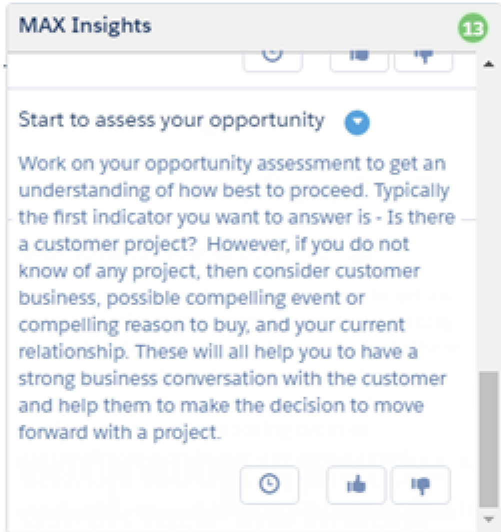
To unsnooze a snoozed insight, simply click its bell icon and select **Cancel**.



8.2 Max Drop-Down in Opportunity Manager

The Max icon on an Opportunity Manager page shows you the number of insights currently associated with that area of the opportunity.

When you click the icon, a drop-down opens that shows you those insights.



Importance

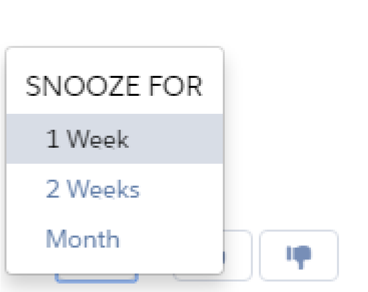
You can see the current insight's level of importance:

'Helpful' and 'Unhelpful'

Use the thumb icons to indicate whether you find the insight helpful or unhelpful.

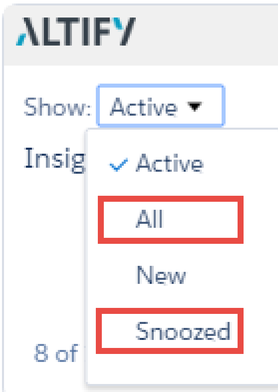
'Snoozing' insights

If you are the opportunity's owner, you can click the snooze icon on the current insight. This means that the insight won't be 'active' again in the opportunity until the selected amount of time has elapsed.

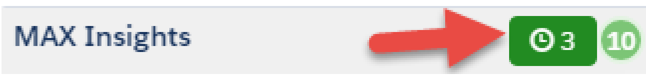


However, you can still access a snoozed insight. There are two ways to do this:

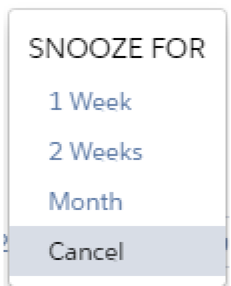
- Select the **All** or **Snoozed** option in the Max launchpad's 'Show' filter.



- Click the snooze toggle in the Max drop-down. This toggle shows/hides snoozed insights.



To unsnooze a snoozed insight, simply click its bell icon and select **Cancel**.



9 Collaborate via Chatter

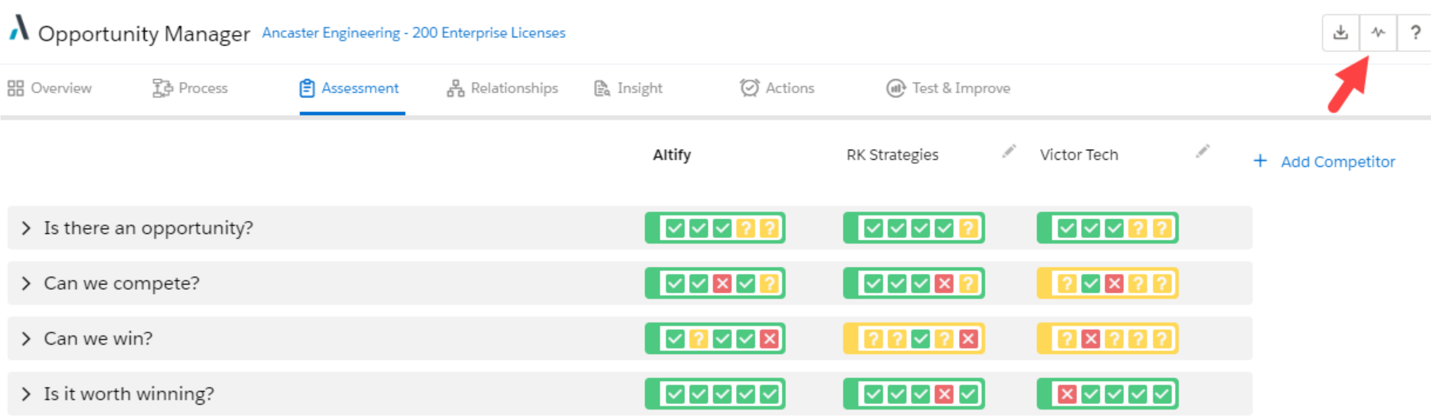
Chatter enables you to post updates on opportunities and view its message feed. You can share files and links with other users.

To see the Chatter feed, click the **Show Feed** icon at the top right of the screen.

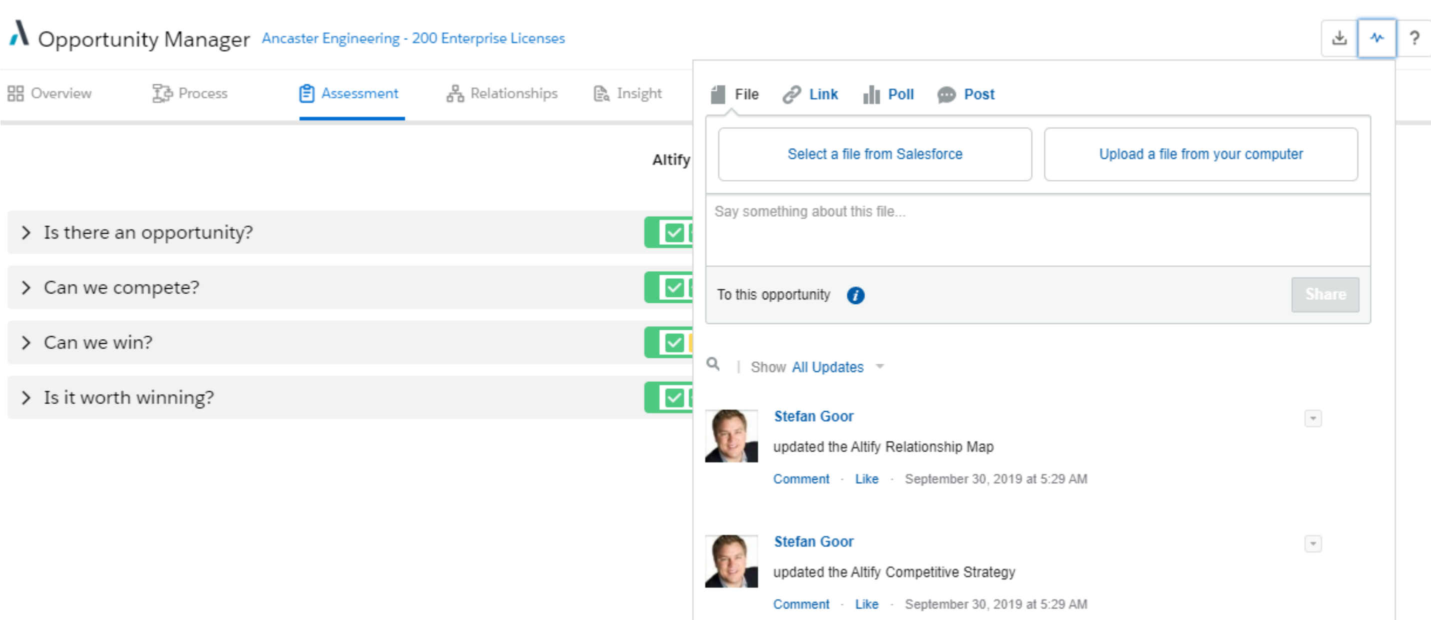
The feed is updated when someone posts a comment, shares a file, link or post, or creates a poll question.

> **Note:** This button is disabled when the Chatter group is archived.

To access the Chatter feed, click the **Show Feed** icon at the top right of the screen.



In the inline Chatter window, you can post updates, share files, links and polls and view all updates for a particular item.



10 Generating Outputs

You can export information from your opportunity to:

- A Powerpoint file
- An 'Executive Briefing' document

  (This is an editable Microsoft Word document if the Altify Output Extension App is installed in your org. Otherwise, it's a PDF.)

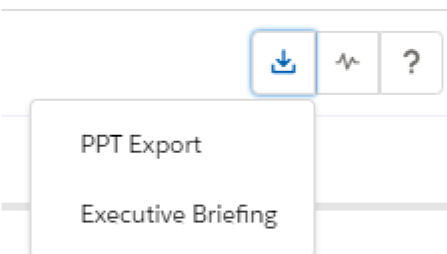
  Note: Exported data does not include the data from any custom tabs.

10.1 Exporting to Powerpoint

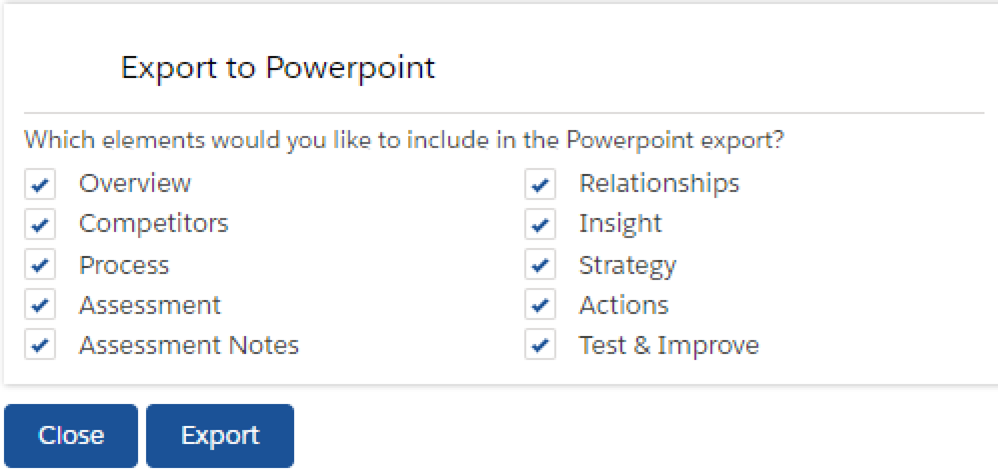
You can export the contents of an Altify opportunity to a Powerpoint (.pptx) file. This provides you with the basic materials to prepare a presentation showing what the opportunity contains.

To generate the Powerpoint file:

1. Open the opportunity.
2. Click the **Exports** button the opportunity's top right, and select **PPT Export**.

3. The Export Plan to PPT page opens. Here you can select which elements of the opportunity plan you want to include in the Powerpoint file. (The set of options you get depends on the configuration of your org.)



4. When the Powerpoint export file is ready, click the **Click to save**.

Powerpoint Export File Name Format

The software names Powerpoint export files as follows:

- For Powerpoint exports from any tab in Opportunity Manager, including the **Process** tab, the format of the Powerpoint file name is:

  'OM_[*Opportunity Name*].pptx'

  Example: 'OM_Ancaster Engineering - 200 Enterprise Licenses.pptx'

- Account relationship maps

  For Powerpoint exports from an account relationship map, the format of the Powerpoint file name is:

  'AccountMap[*Account Name*].pptx'

  Example: 'AccountMap_Ancaster Engineering.pptx'

Configuring Powerpoint export options (Admin only)

An administrator can configure which options are available for selection in a Powerpoint export. This involves enabling and disabling settings as appropriate in **Altify Powerpoint** custom settings.

The options available for Powerpoint export also depend on which features of the software have been enabled for users.

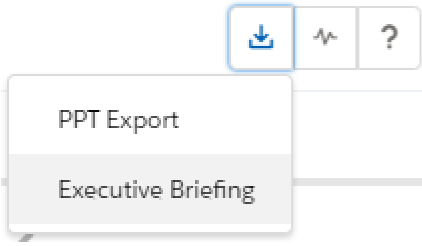
For more information, see the *Opportunity Manager Administration Guide*.

10.2 Generating an Executive Briefing

An Executive Briefing document can help a senior member of your team to get up to speed in advance of discussions with a customer.

In Opportunity Manager, you can generate an Executive Briefing document that contains selected information from your opportunity.

1. Click the **Exports** button in the top right and select **Executive Briefing**.



2. The Executive Briefing wizard opens. This guides you through the process of selecting details to include in the briefing.

   Initially, you move through the wizard pages sequentially.

   You can **Skip** a page if you don't want to make any selections right now.

   You can always return to a visited page later by clicking it in the progress bar at the top of the wizard.

3. On each page, make your selections and click **Next** to proceed.

   Or if you want to skip a wizard page without making any selections, use the **Skip** option.

4. On the final page of the wizard, review the selections you have made.

   If you need to return to any of the wizard pages to change your selections, click it in the progress bar at the top of the wizard.

   Depending on which features your administrator has enabled, the **Download** button can offer up to three output options:

   - **Export to Word**

     This export option generates an editable Word file containing the Executive Briefing content.

- **Export to PDF**

  This export option generates a PDF file containing the Executive Briefing content.

- **Export to Quip**

  In a Quip document, teammates can collaborate on projects online in real time.

  This export option generates an online Quip document file containing the Executive Briefing content.

  > **Note:** Unlike the other export options, the **Include Organization Structure** option does not add a relationship map to the Quip document. Instead, it provides a link to an Altify 'live app', which the user can embed in the document and use to manually add a relationship map.

11 Insight Map Knowledge Base

The Altify Learning web site is an engaging way to quickly learn how to get the most out of opportunity insight maps and account insight maps.

The following knowledge-base topics go into some of the finer points of insight maps.

- Overview of an insight map

  This topic explains:

  - Creating and importing insights
  - Adding sections
  - How to structure an insight map
  - Presentation view and narrative view

- Insight details panel

  There are five types of insight, and each one has specific types of details you can add.

- Hiding solutions

  It's not always appropriate to show your possible solutions when you're presenting the insight map to the customer. In these situations you can hide the map's solutions layer.

- Private insights

  Sometimes, certain insights on the map are not ready for the customer to see, and you want to keep them hidden when you're presenting the insight map to the customer. You can make these insights private.

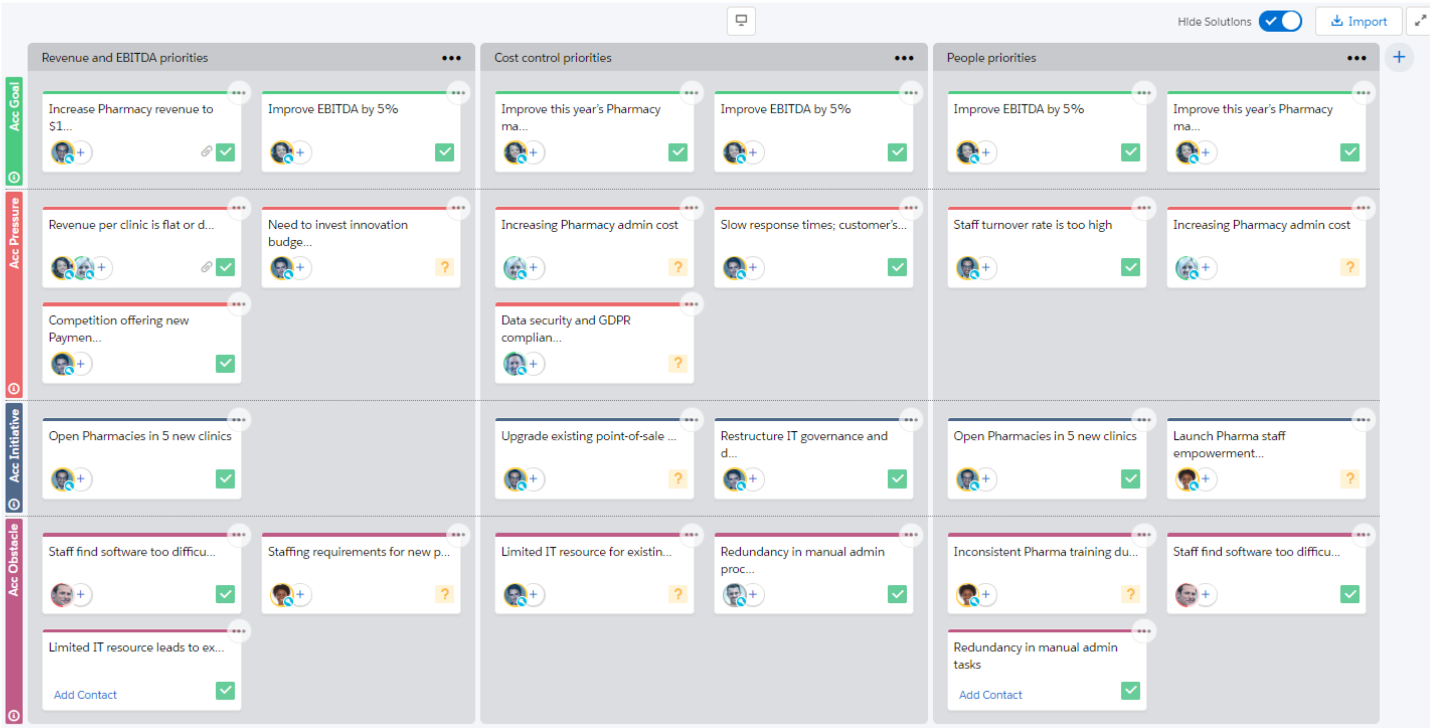
11.1 Overview of an Insight Map

An insight map gives you an easy way to develop a compelling story about the customer's business issues. It works like sticky notes on a physical board. You can:

- Quickly add ideas to the insight map as insight 'cards'.

  > **Tip:** It’s okay to use assumptions at first but the map should be updated as insights are validated or discounted.

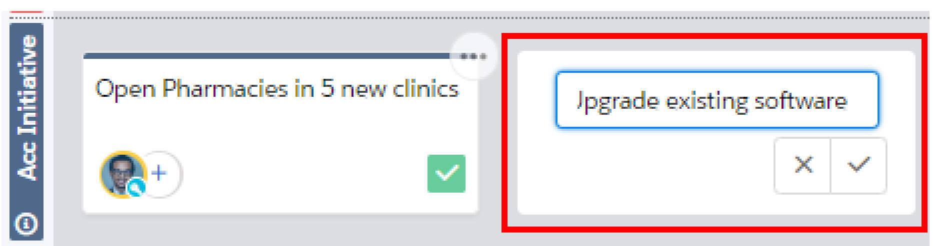
- Add further details to the cards as your ideas mature.
- Import insights from other insight maps.
- Share your insights with colleagues working on similar opportunities.
- Structure the insights into a coherent story of the customer's business issues.
- Organize the insights into sections that tell substories.
- Switch to presentation mode to show the board in slideshow format. (This is useful when you're presenting it to the customer.)



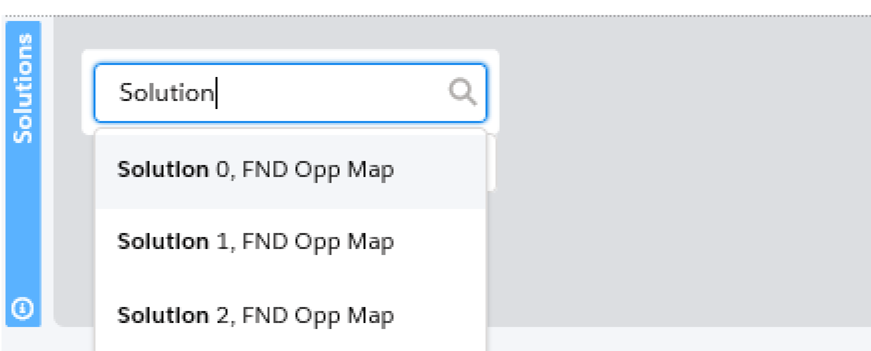
Adding an insight

The insight map has five levels: **Goals**, **Pressures**, **Initiatives**, **Obstacles**, and **Solutions**.

You can quickly add an insight to any level by clicking the workspace and typing its name. In this example, you're adding a new initiative:



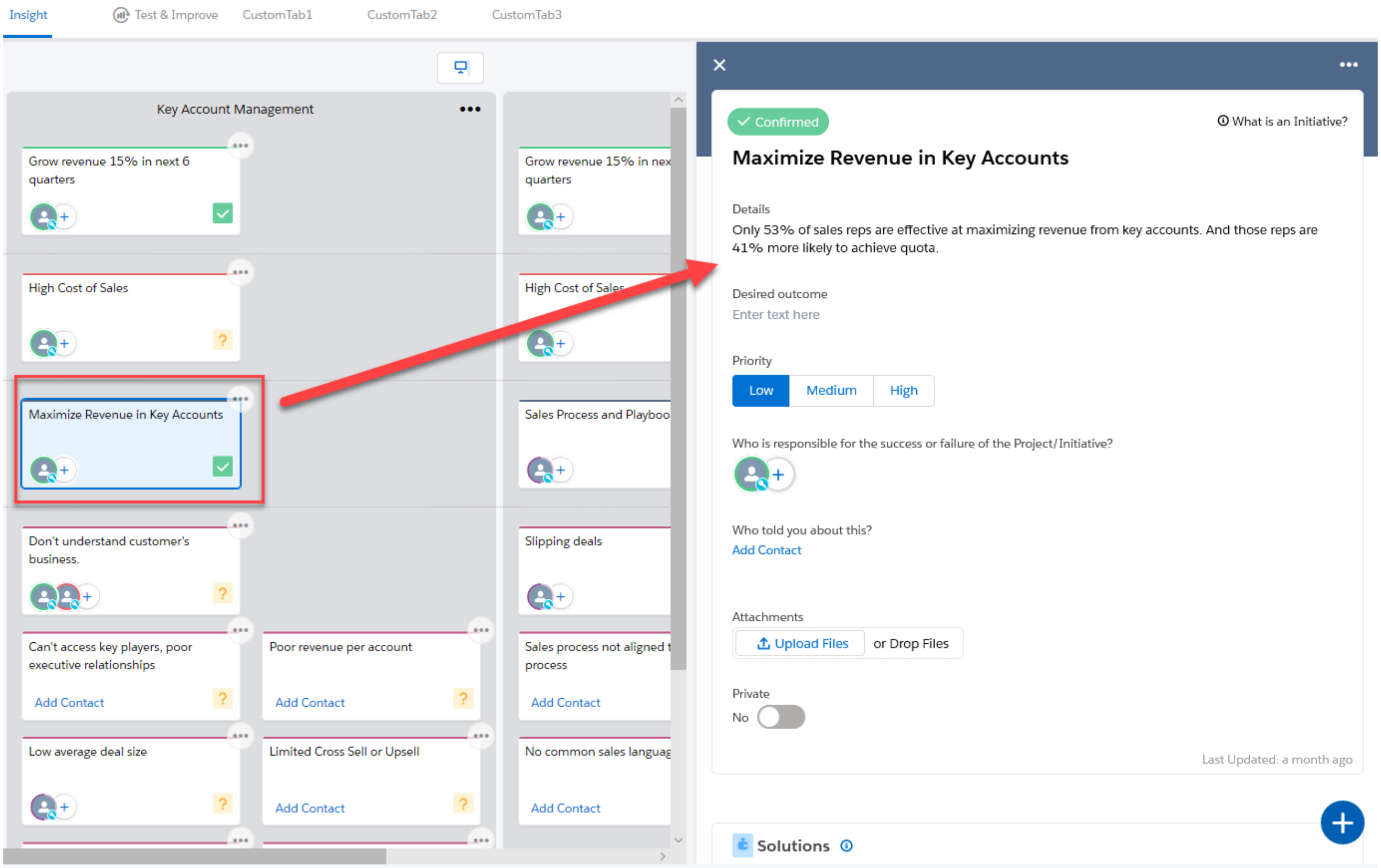
If you are adding a solution, you have the option to select a template solution (as shown below). These are created by your administrator.



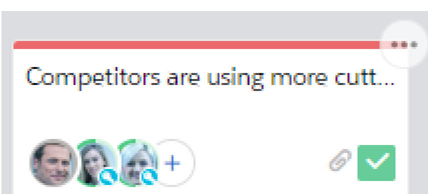
Adding details to an insight

When you click an insight's card on the board, its details panel opens on the right. As your understanding of the customer's business issues matures, you can add information to insights using the details panel.

Each insight type has its own particular set of details.



A fully-developed insight card looks like this:

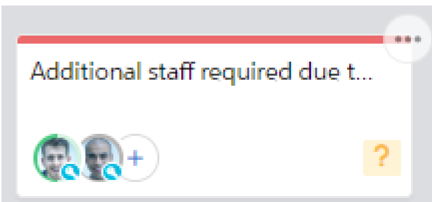


- The card shows the contacts who have been specified as its **owners** (the people who are responsible for or are impacted by the business issue). You can hover over the image to see a summary of the contact's key details.

> **Tip:** Add a variety of key players on your insight map who are in a position to validate your insights.

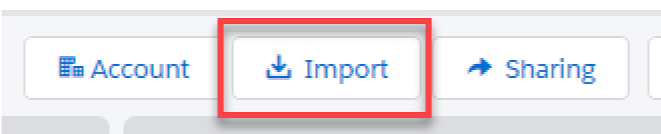
- The paperclip icon indicates that **files are attached** to the card. For example, you can attach sales resources that support the story you're developing about the customer's business, and files containing your research about the customer.
- A green tick icon indicates that the details of this card have been **confirmed** by key players at the customer's business as being correct and complete.

  When the icon is yellow, the details of the insight are not yet confirmed by the customer:

Importing cards from another insight map

Sometimes there can be cards on another map that would be useful on your current map. To import these, click the **Import** button:

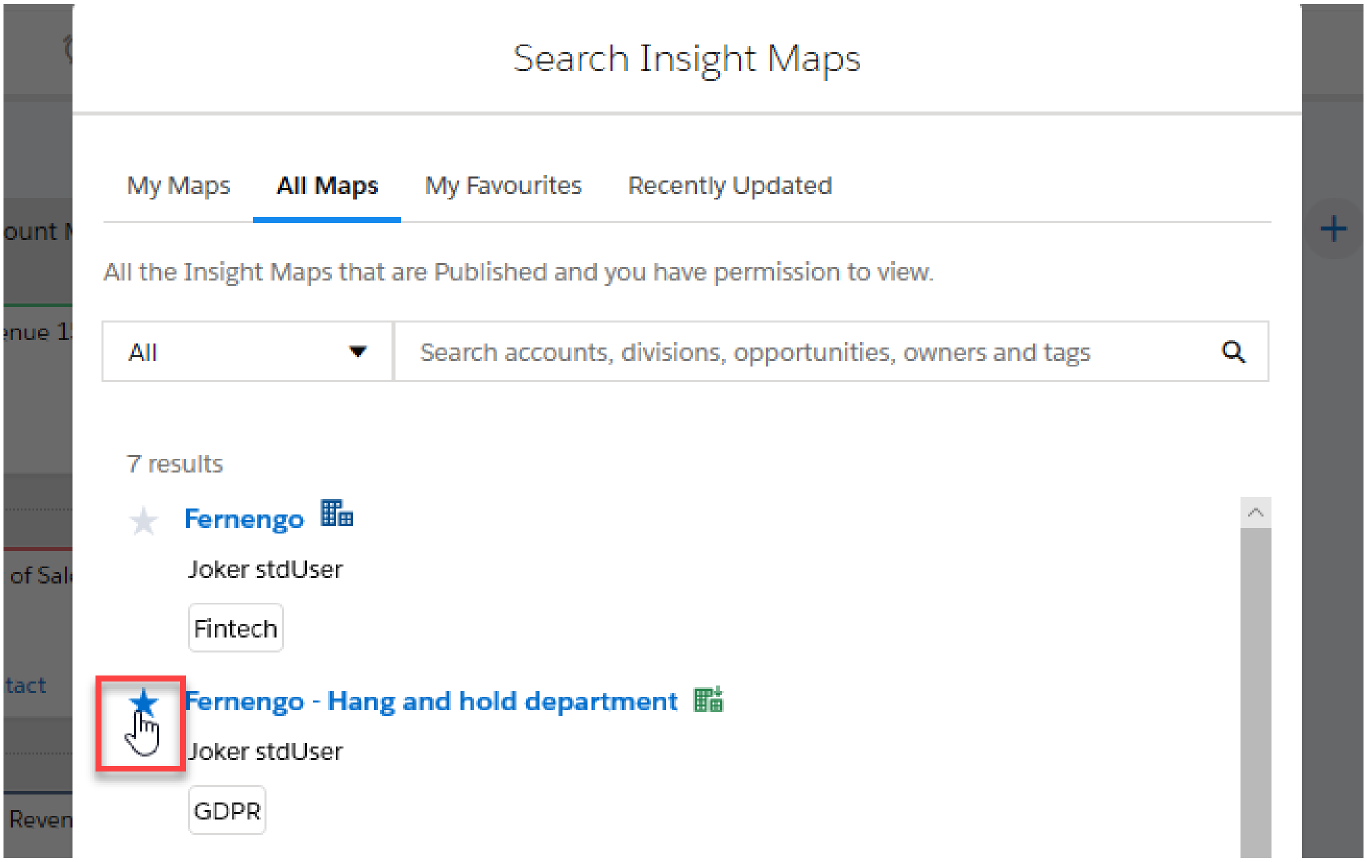


On the displayed dialog, Search Insight Maps, you can add insights from the following maps:

- **My Maps**: all account, division or opportunity insight maps that you are the owner of.
- **All Maps**: all account, division or opportunity insight maps that are published and which you have permission to view.

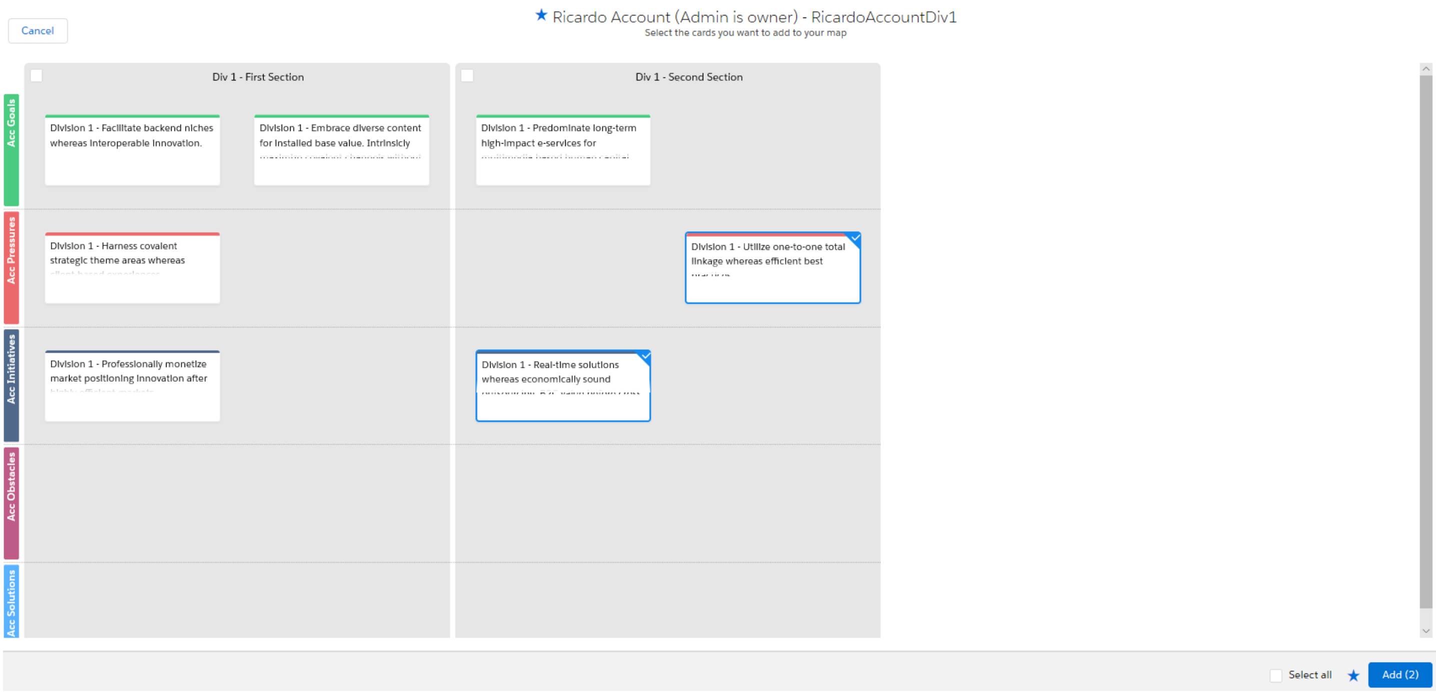
  > **Tip:** If you search all maps and no results are returned, you should check that the map you are searching for is published, and enter more specific criteria to help locate it.

- **My Favorites**: all insight maps that you have marked as a favorite. To mark a map as a favorite, click the star next to the map (as shown below).



- **Recently Updated**: all account, division or opportunity insight maps (published or unpublished) that you have recently changed.

On the preview screen, select the insights or sections that you want to import and click **Add**. You can also mark the import map as a favorite on this screen.

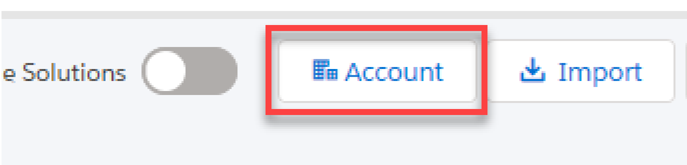


Imported insights are added to the section with the same name on your map. Otherwise, a new section is created on your insight map.

Importing cards from the account's insight map

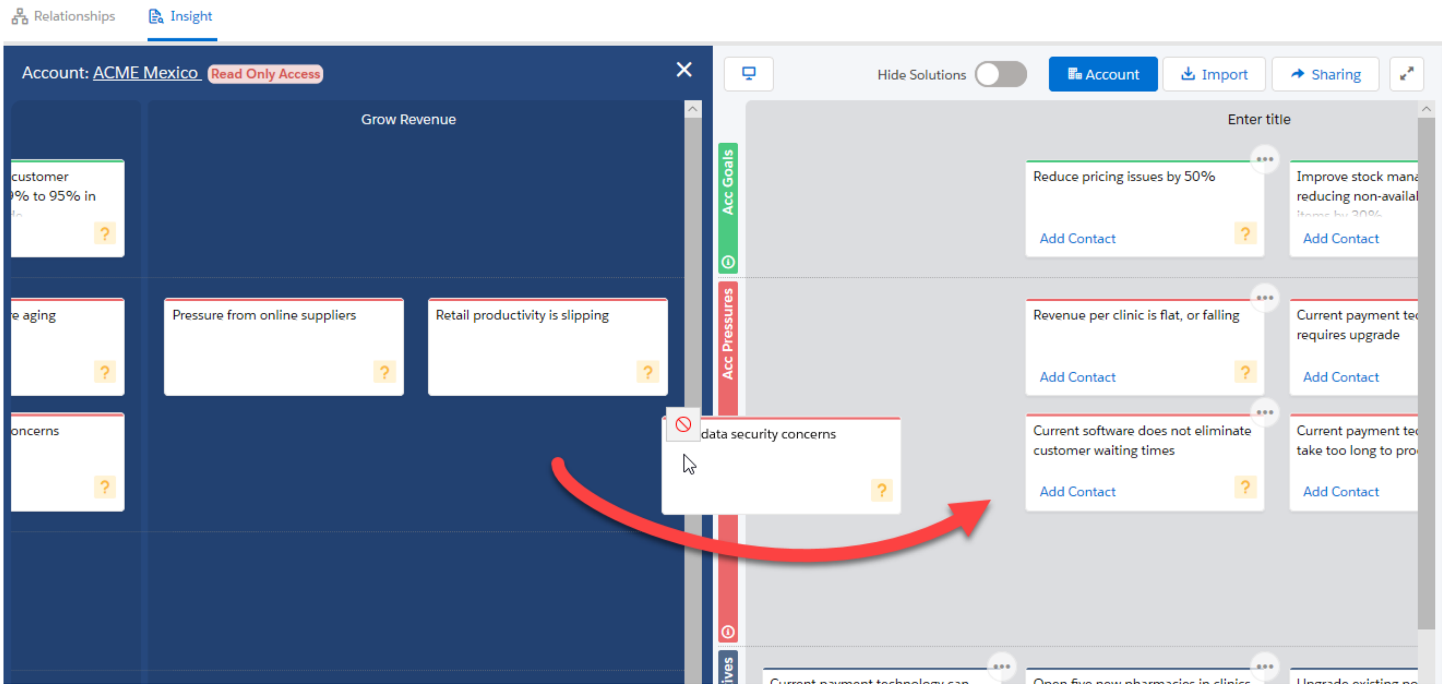
When you're working on an opportunity or account division's insight map, there's a quick way to copy cards from the related account's insight map.

Click the **Account** button.



Note: On opportunity insight maps, this button is only displayed if your organization has an Account Manager license.

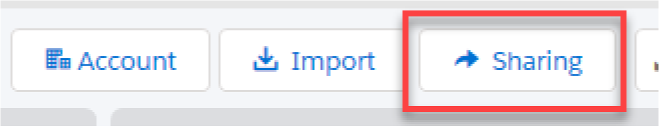
This opens the account's insight map in a panel on the left. You can simply drag cards from that board into your opportunity or division's insight map.



Sharing your map

You can share your insight map so that colleagues can find and import cards from your map to theirs. This is useful if they are building a map based on a similar industry, region or company type.

To share your map, click the **Sharing** button (indicated below).



When set to **Published**, all users that have viewing permissions for the relevant account or opportunity can import your map.

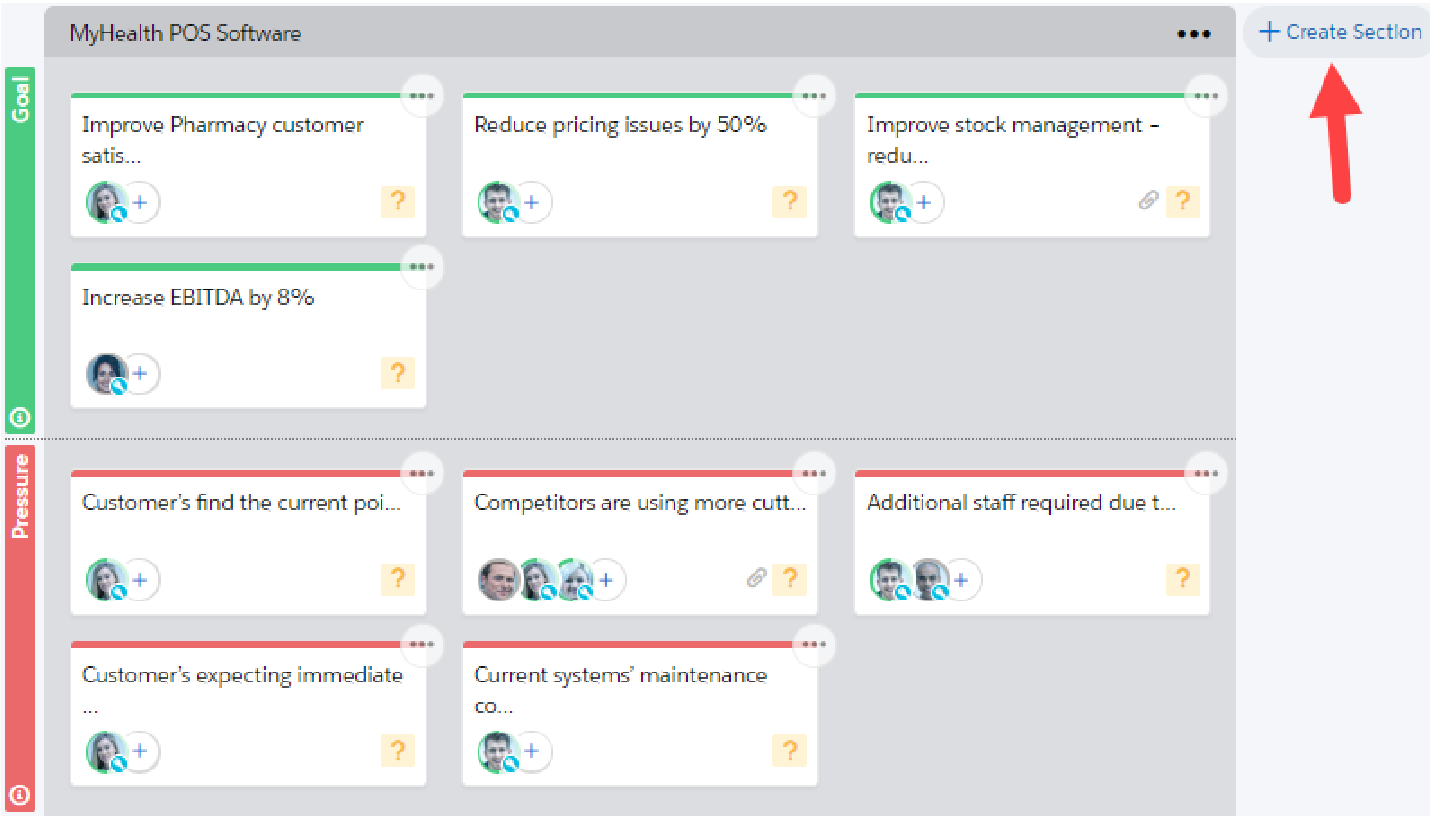
Apply **Tags** so that your insight map can be easily found. Your administrator configures the tags that can be applied to insight maps.

Click **Done** to share your published map.

> **Note:** Users with read-only access to the associated account/opportunity cannot add tags to your insight map or publish it.

Adding Sections

When you start a new insight map, it has a single section. To add another section, click the **Create Section** icon and then type the name of the new section.

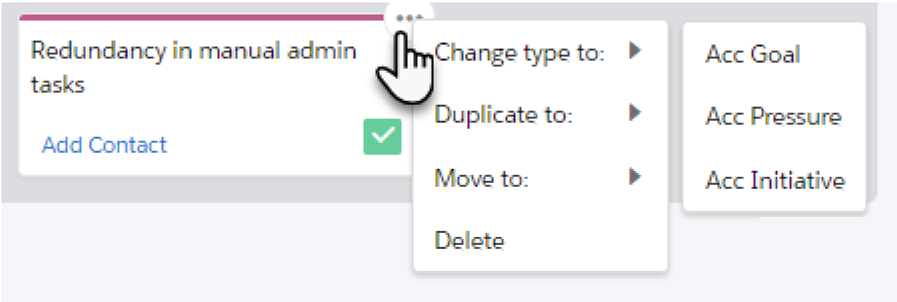


Structuring the insight map

To structure the insights on the insight map into a coherent story about the customer's business issues, you can drag them between sections and layers.

Each insight card also has a power menu that gives you various options. You can:

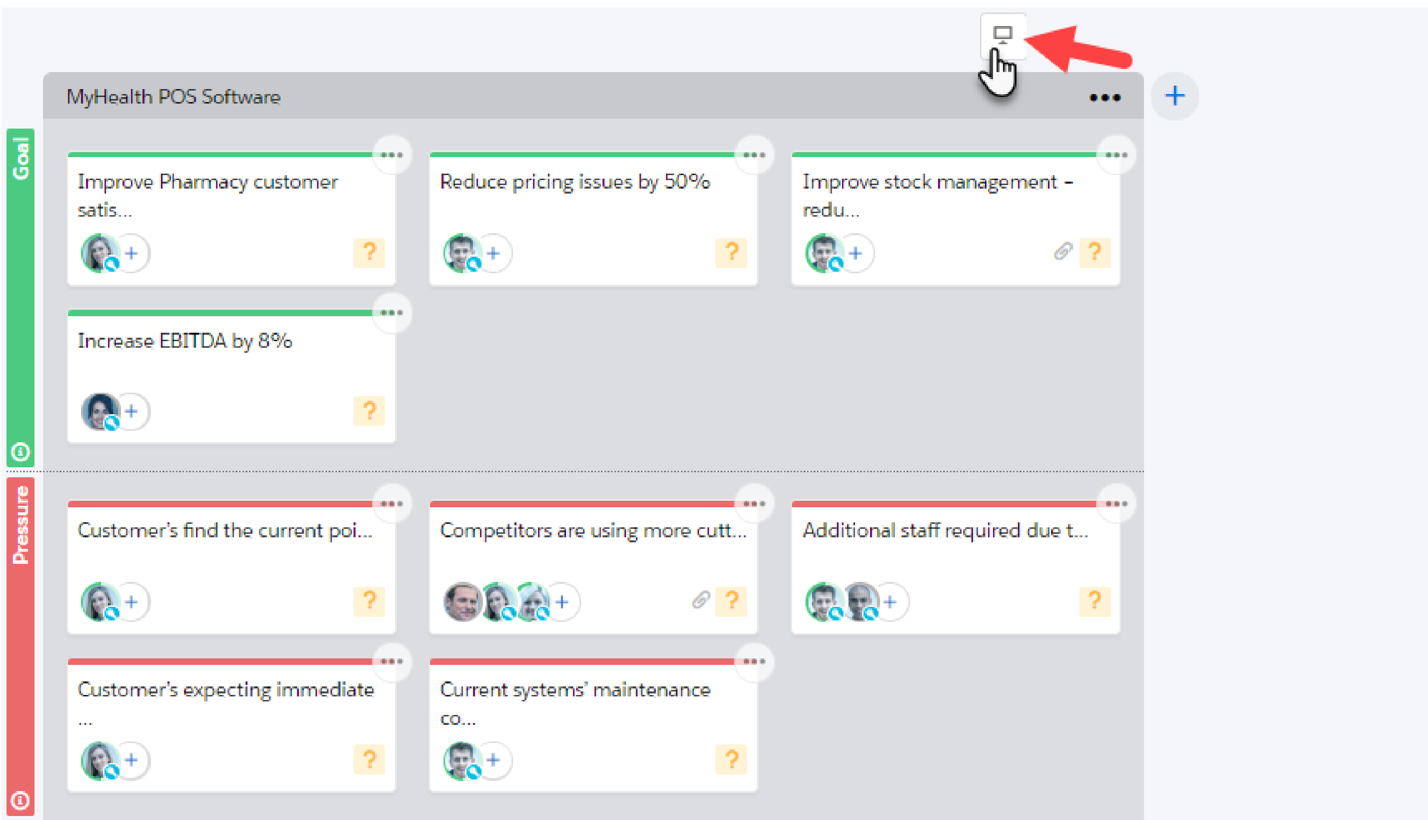
- **Change the insight's type**. This moves it to a different layer of the board. (This is an alternative to dragging it.)
- **Duplicate an insight to another section**. This means the same insight is in more than one section, and a change made to it in one section is reflected in every other section that includes it.
- **Move an insight to another section**. (This is an alternative to dragging it.)
- **Delete an insight**. This removes it from the map. If you decide the insight belonged on the map after all, you'll need to create it again.



Switching to slideshow mode

When you're presenting your insight map to the customer, it can be useful to switch to a slideshow view. This has options that help you to prepare for a presentation to the customer, and then present the insight map to them sequentially, section by section.

Click the view mode icon.



The insight map switches to slideshow mode. You can select either **Presentation View** or **Narrative View**.

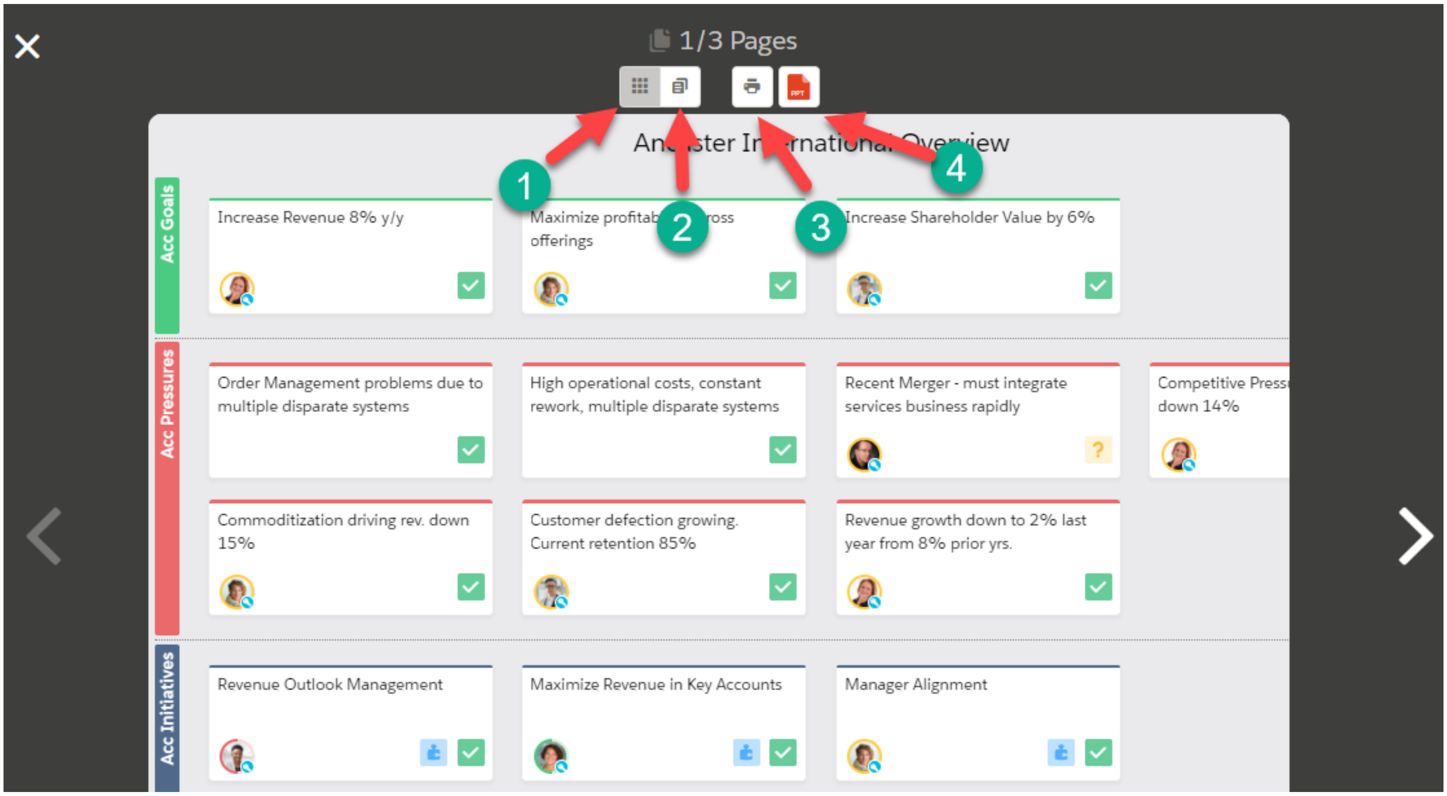
- **Presentation View** [1]

  This enables you to present the board section by section in slideshow format.

- **Narrative View** [2]

This shows you the insight map in text form, which can help you to prepare your talk track for a presentation to the customer.

- You can also print [3] or generate a PowerPoint file [4] for the insight map section that is currently displayed.



11.2 Insight Details

Each type of insight card – goal, pressure, initiative, obstacle, and solution – has its own particular set of details.

Insight Type	Details
Goal	• Confirmed/Unconfirmed. An insight whose details have been verified by the customer can be marked as confirmed. • Description. • Who is the decision maker responsible for this goal? This is the contact who ‘owns’ the insight. (There can be more than one.) • Who told you about this? • Attachments. Files containing supporting information.

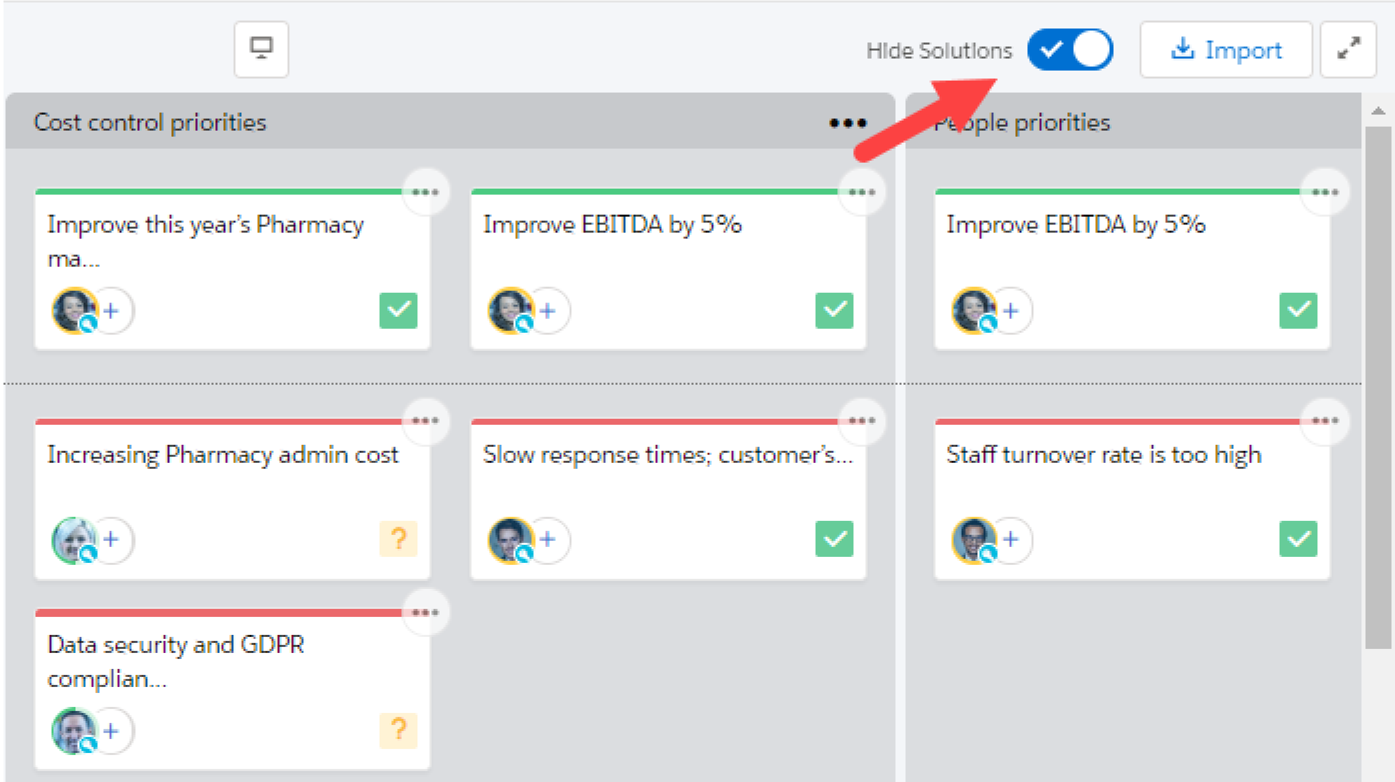
Insight Type	Details
Pressure	• Confirmed/Unconfirmed. An insight whose details have been verified by the customer can be marked as confirmed. • Pressure Type. • Description. • How does this pressure impact the goal(s)? • Who is impacted by this pressure? This is the contact who ‘owns’ the insight. (There can be more than one.) • Who told you about this? • Attachments. Files containing supporting information.
Initiative	• Confirmed/Unconfirmed. An insight whose details have been verified by the customer can be marked as confirmed. • Description. • Desired outcome. • Priority. (Low, Medium, or High) • Who is responsible for the success or failure of the initiative? This is the contact who ‘owns’ the insight. (There can be more than one.) • Who told you about this? • Attachments. Files containing supporting information. • Solutions. (Solutions can be linked to an specific initiative so that they form part of any insight map the initiative is added to.) **Tip:** Goals and Initiatives are often confused. A goal is what the customer wants to achieve. An initiative is how they are thinking of achieving the goal.

Insight Type	Details
Obstacle	• Confirmed/Unconfirmed. An insight whose details have been verified by the customer can be marked as confirmed. • Description. • Who is impacted by this obstacle? This is the contact who ‘owns’ the insight. (There can be more than one.) • Who told you about this? • Attachments. Files containing supporting information. • Solutions. (Solutions can be linked to an specific obstacle so that they form part of any insight map the obstacle is added to.) **Tip:** Dig deep to uncover obstacles. If your solution can address more than one customer obstacle, it increases the value your organization can deliver.
Solution	• Confirmed/Unconfirmed. An insight whose details have been verified by the customer can be marked as confirmed. • Description. • Attachments. Files containing supporting information.

11.3 Hiding the Insight Map's Solutions

When you're presenting your insight map to the customer, it's often better to keep the solutions hidden. This means you can focus on the customer's business issues rather than the solutions you may be able to sell them. Until you're confident you have a full understanding of their issues, you're not in a position to talk to them credibly about your solutions.

To hide the solutions layer of the map (both in normal viewing mode and when you're in presentation mode), select **Hide Solutions**.



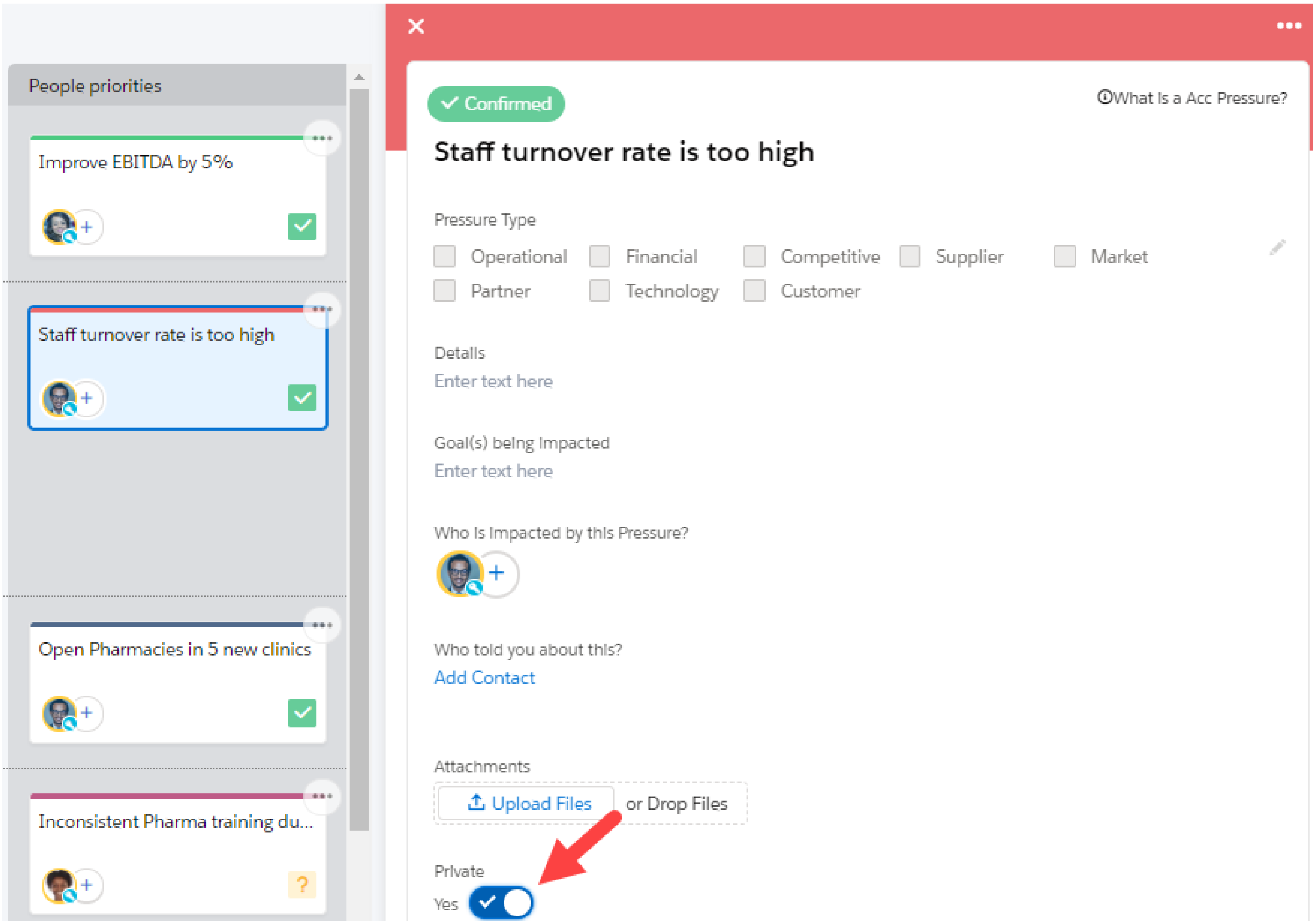
11.4 Hiding Private Insights

When you're presenting your insight map to the customer, you may feel that certain insights on the map are not yet ready to be seen by the customer.

You can mark these insights as private. Private nodes are not shown when you're in presentation mode. (However, you do see them on the map in normal viewing mode.)

To mark an insight as private:

1. Click the insight card on the map to open its details panel.
2. In the details panel, select the **Private** switch.


People priorities
Improve EBITDA by 5%
Staff turnover rate is too high
Open Pharmacies in 5 new clinics
Inconsistent Pharma training du...
Confirmed
What Is a Acc Pressure?
Staff turnover rate is too high
Pressure Type
Operational
Financial
Competitive
Supplier
Market
Partner
Technology
Customer
Details
Enter text here
Goal(s) being Impacted
Enter text here
Who is impacted by this Pressure?
Who told you about this?
Add Contact
Attachments
Upload Files
or Drop Files
Private
Yes

12 Relationship Map Knowledge Base

The Altify Learning web site is an engaging way to quickly learn how to get the most out of opportunity relationship maps and account relationship maps.

The following knowledge-base topics go into some of the finer points of relationship maps:

- Overview of a relationship map
- List view
- Understanding a contact card
- "Setting Relationships between Contacts" on page 67
- Contact details panel
- Adding contacts and placeholders to a map
- Relationship attributes for contacts
- Contact color coding
- Filters
- Integration with social media
- Contact photos

12.1 Overview of a Relationship Map

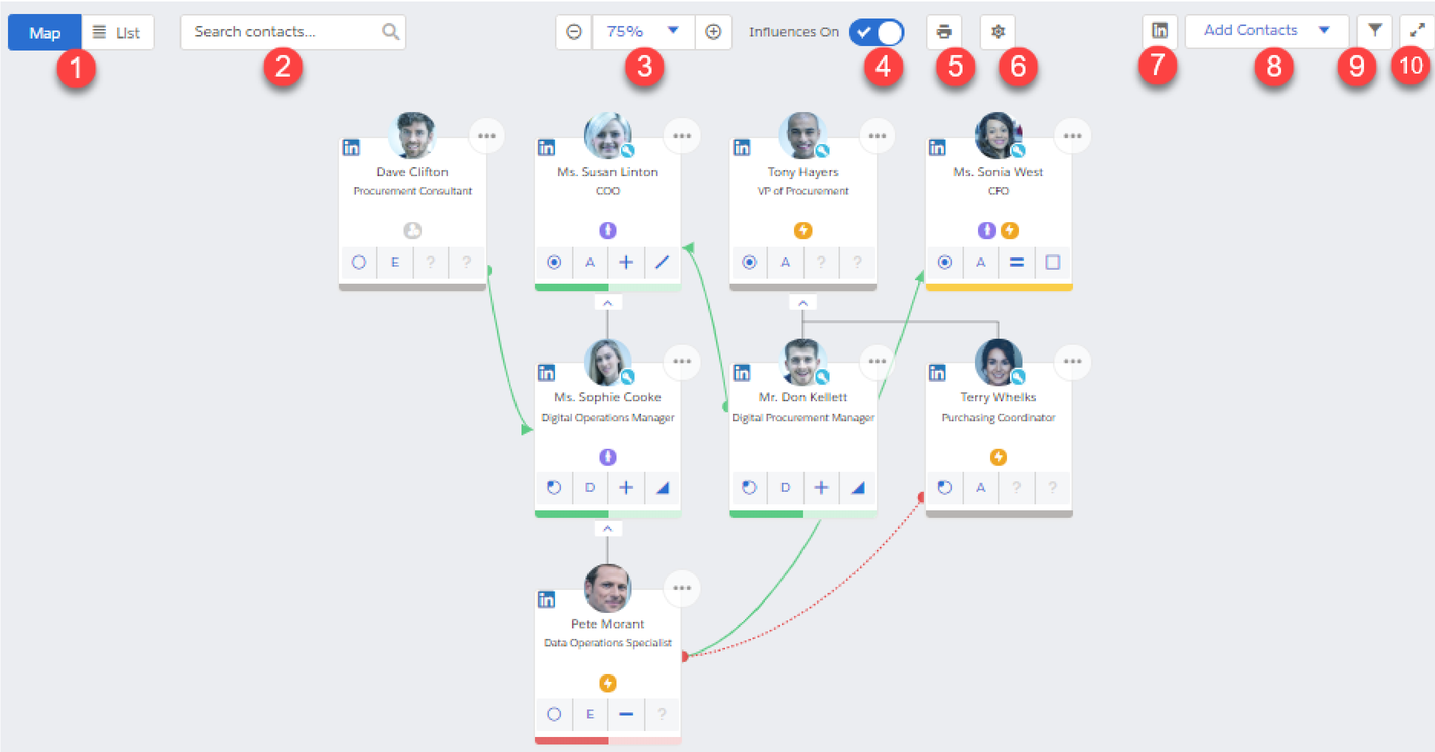
A relationship map consists of contact cards with relationship lines between them.

> **Tip:** Relationship maps will evolve. It is rare for a team to know from the outset all key pieces of data about every key player. Maps should be updated regularly as new contacts and relationships are discovered.

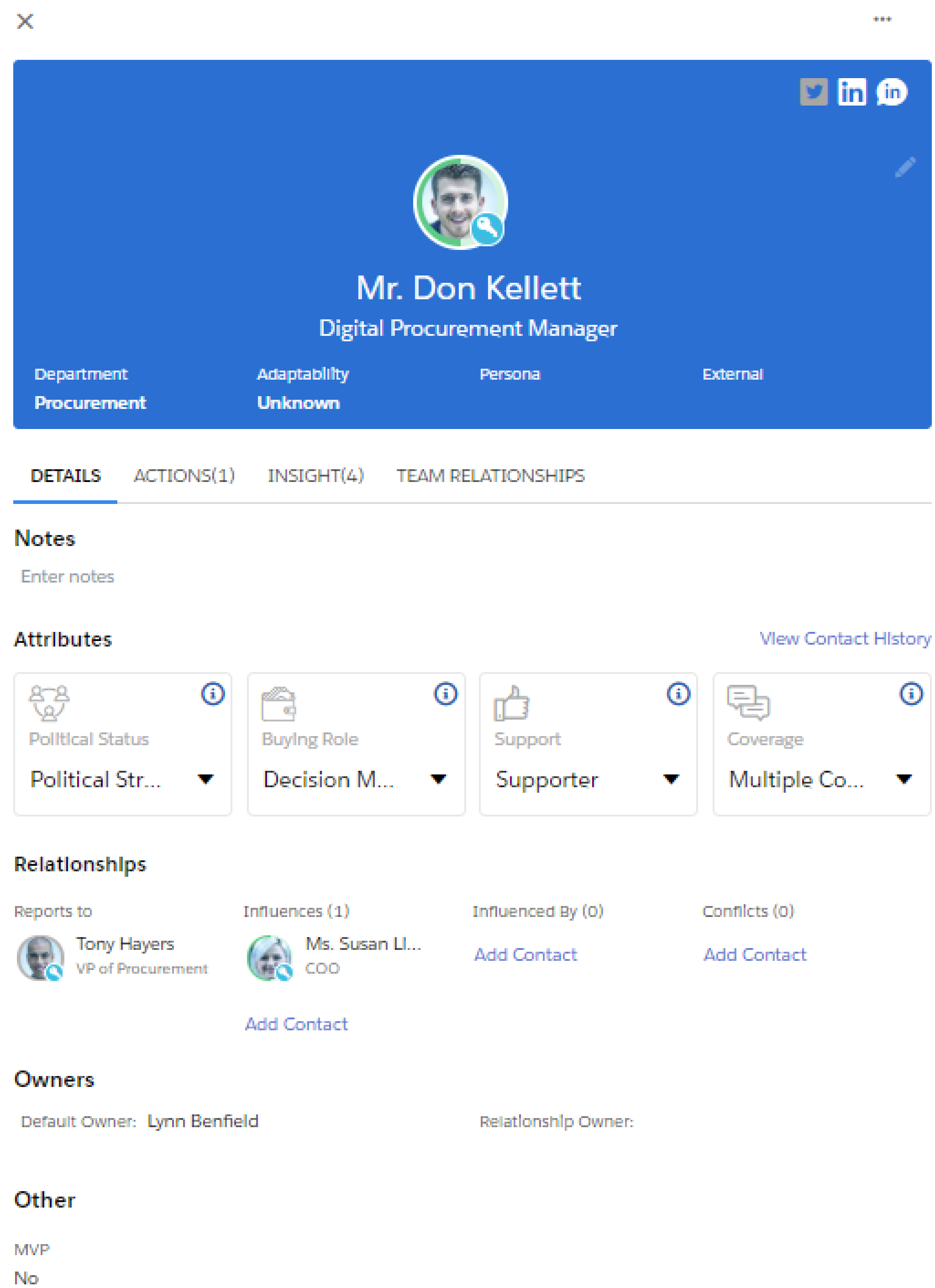
At the top of the map are various options. You can:

1. Switch to list view to see the maps' contacts in a detailed list.
2. Type a contact's name to quickly find them on the map.
3. Zoom in and out.
4. Show/hide influence lines and conflict lines.
5. Print out the visible area of the map.
6. Select an extra field to include on contact cards.
7. Access social media, if this is integrated with your relationship maps.
8. Add a new contact or import existing contacts.

9. Apply filters to the map to focus on particular contacts.
10. Go to fullscreen mode.



When you click a contact card, the contact's full details are shown.



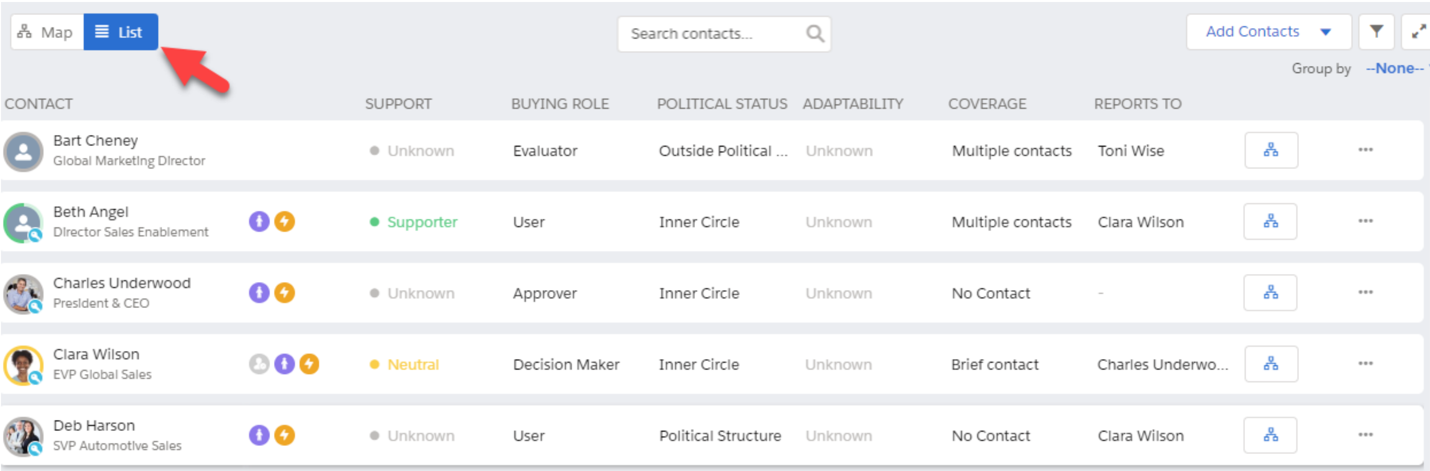
12.2 List View

You can toggle a relationship map between **map view** and **list view**. Map view is the normal relationship map view.

List view shows a list of the contacts on the map, along with their key relationship information. It gives an alternative way of considering the relationships on the map that may help you to spot gaps in your knowledge.

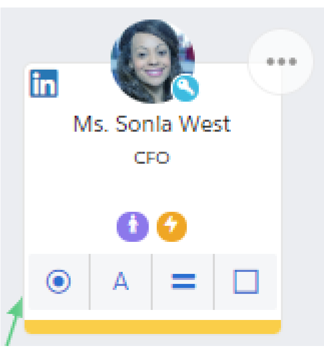
In list view, as in map view, clicking a contact opens the contact details panel on the right.

The list includes a number of "group by" options in the top right. You can use these to organize the list in ways that can help you to focus on certain contacts.



12.3 Understanding a Contact Card

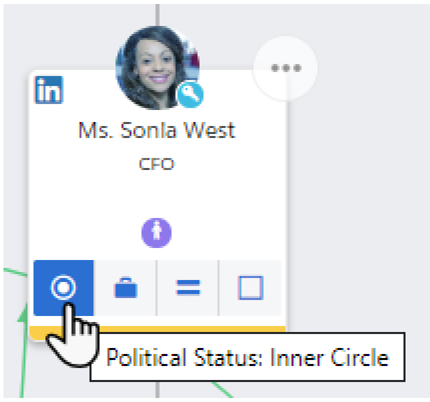
Each contact card on your relationship map shows you the contact's key details at a glance.



Relationship attributes

A contact card shows four relationship attribute indicators. You can hover over an indicator to see what it means.

These attributes are specific to this particular map only. They may be set to different values on other relationship maps that include the contact.



The attributes are:

- Political Structure
- **Buying Role**[1] (opportunity relationship maps only)
- **Decision Orientation**[2] (account relationship maps only)
- Support
- **Coverage**[3]

Each attribute can have one of several values.

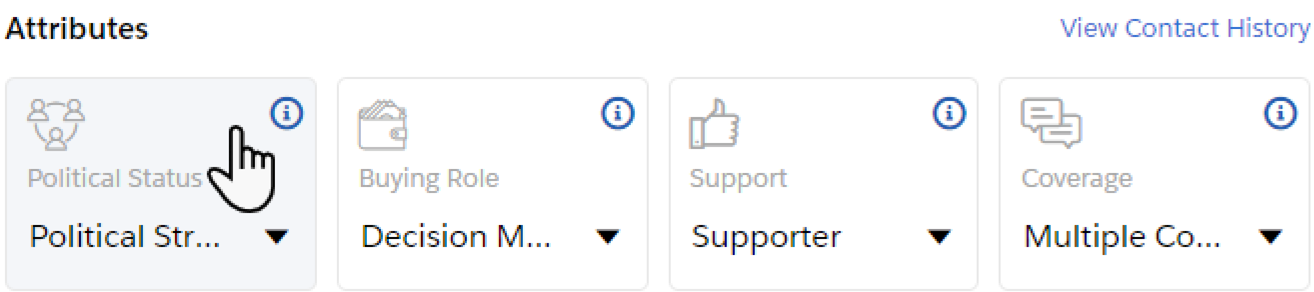
> **Tip:** When setting the Support attribute, consider the following:
>
> - Realistically, not every key player is a mentor or supporter.
>
> - Typically, an accurate relationship map includes non-supporters.

Getting Help Setting an Attribute

The software can help you choose the right setting for an attribute.

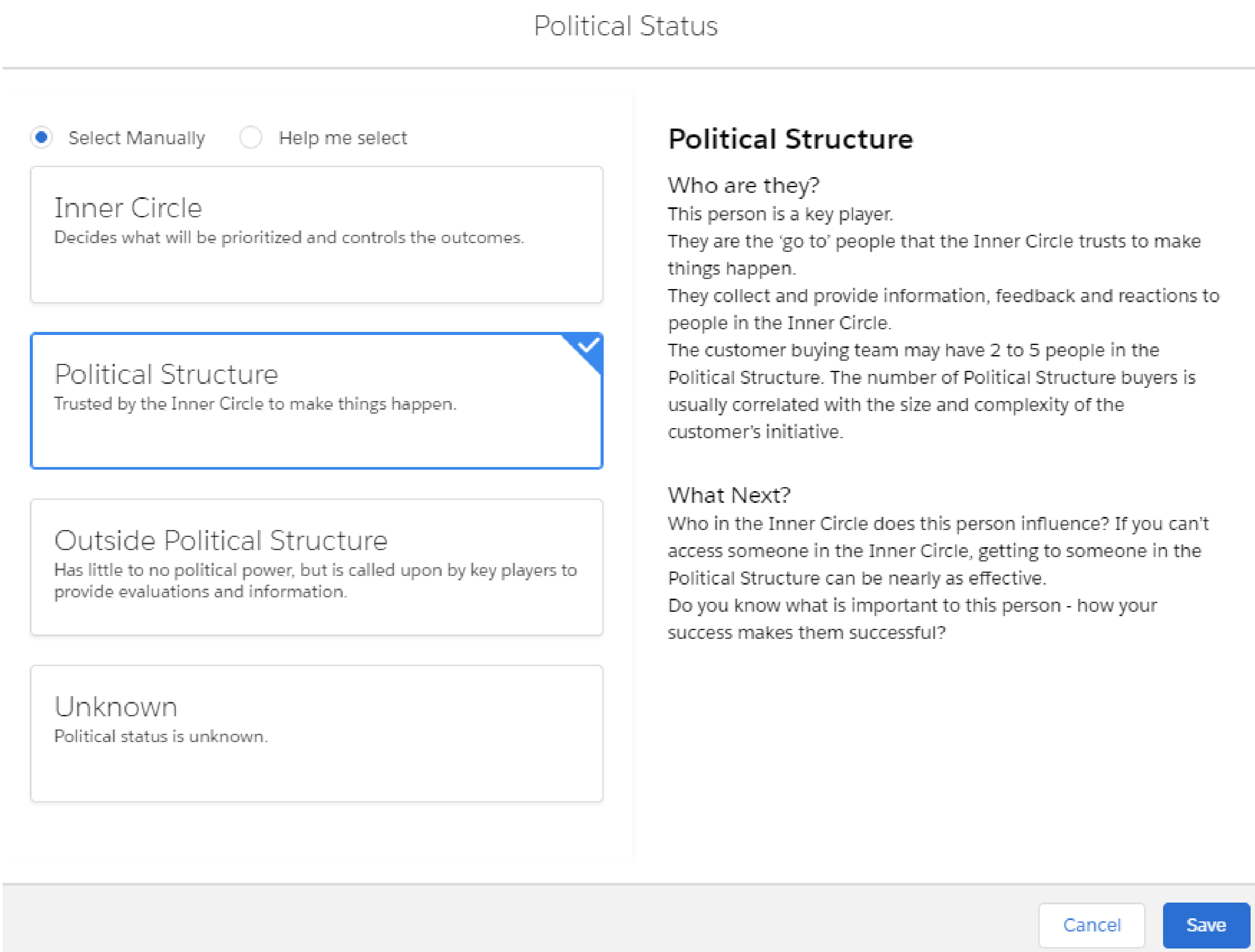
With the contact selected on the map, click the attribute's tile in the details panel on the right.

[1] Buying Role is a relationship attribute for contacts on an opportunity relationship map. The default options shipped with Opportunity Manager are: 'User', 'Evaluator', 'Decision Maker', and 'Approver'. Additional roles can be created, if necessary, but the software only uses the default values for scoring calculations.
[2] Decision Orientation is a relationship attribute for contacts on an account relationship map. It indicates what will influence the contact's decision-making process. The default values aailable for this attribute are: 'Financial', 'Technical', 'Relationship', and 'Business'.
[3] Coverage is a relationship map attribute that indicates how much you've been in touch with a contact. There are several possible Coverage values: Unknown, No Contact, Brief Contact, Multiple Contacts, and In Depth.



In the dialog that opens, you get detailed information about each attribute option.

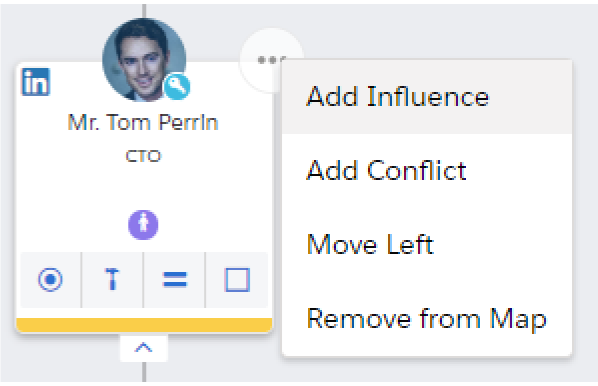
And you can select **Help me select** if you want the software to guide you through a set of questions that help you discover the right setting.



Power menu

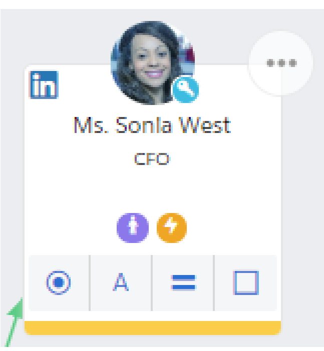
The card's top right icon opens its power menu.

- You can set the contact's influence relationships and conflict relationships. For more information on adding relationships to your map, see "Setting Relationships between Contacts" on page 67.
- Use the **Move left** and **Move right** options to rearrange the horizontal order of contacts below the same manager.
- Each contact also has a **Remove from map** option. (This doesn't delete the contact from Salesforce.)



LinkedIn icon

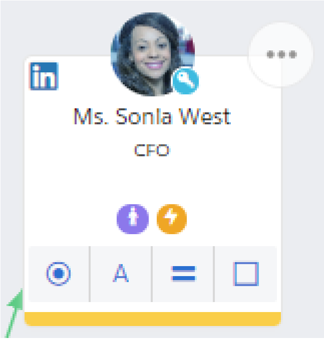
If you see a LinkedIn icon in the top corner of the card, your Altify software is integrated with LinkedIn and the contact's LinkedIn handle is recorded on their Salesforce Contact record. Click the icon to open the contact's LinkedIn page in a new browser window.



Key players

A contact is a **key player** if their Political Status attribute has been set to either **Inner Circle** or **Political Structure**.

A blue key icon is shown on the contact card to make it easy to spot who the key players are for the relevant account or opportunity.



A key player has a blue icon in the bottom right of their profile image.

Tip:

- A good relationship map has at least three key players, and usually no more than 12-15.

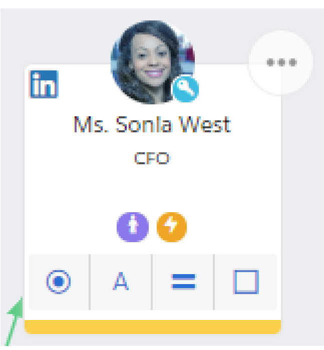
- Check to ensure that all key players are included, and whether or not your team has met with or has a relationship with each key player.

Note: Your administrator can change the criteria that determine whether someone on the map is a key player.

Suggested targets

The software may highlight a particular contact on the map as a 'suggested target' – someone who looks like they're probably important to build a relationship with.

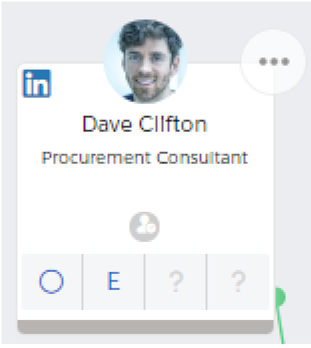
Suggested target contacts have an orange icon on their card.



External contacts

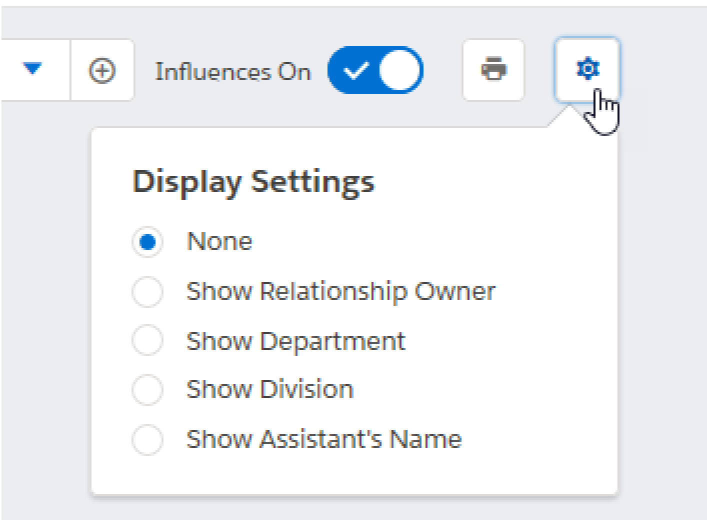
A contact on a relationship map is **external** if they belong to an account other than the account directly associated with the relationship map.

An external contact's card includes a gray icon.



Optional information on contact cards

In the **Display Settings** menu, you can select an extra item of information to include on contact cards.

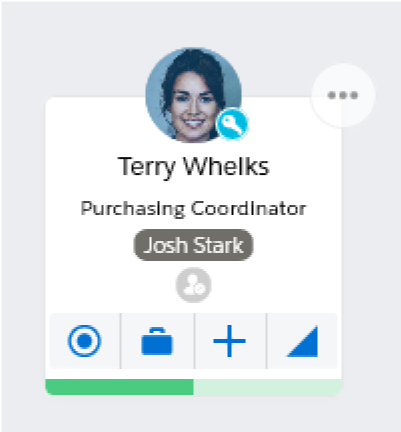


By default, three items are available for selection:

- Each contact's relationship owner (**Show Relationship Owner**).
- Each contact's department (**Show Department**).

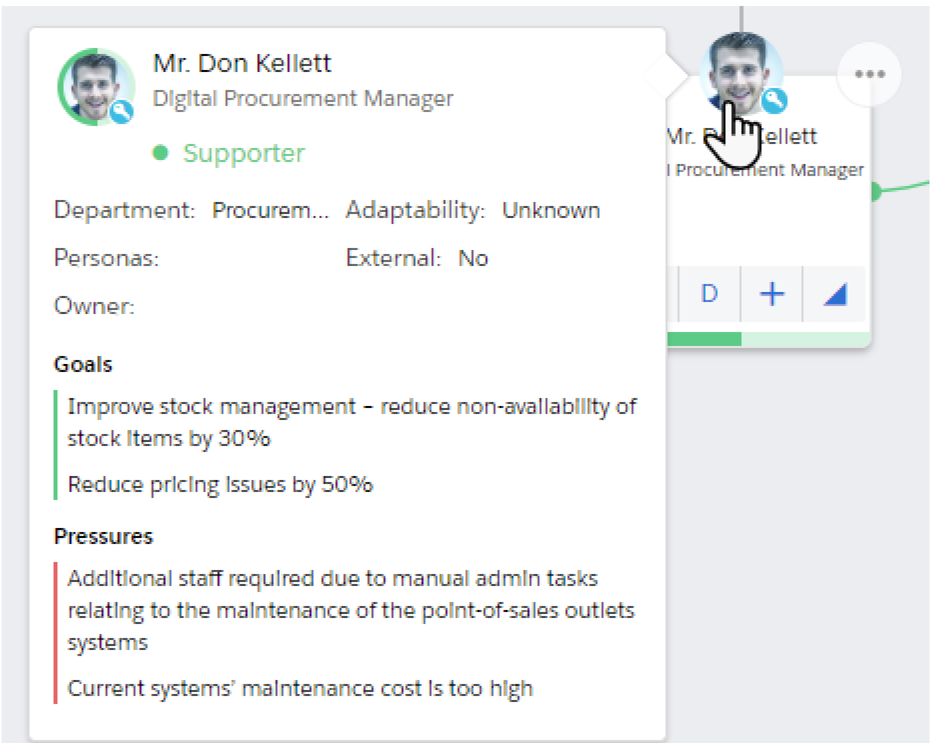
Your administrator can also make other contact details available in the menu. In the example above, a field called **Assistant's Name** has been added.

With this option selected, the name of an Assistant who is on the contact's Salesforce Contact record is displayed on their contact card.



Hover over the contact for more details

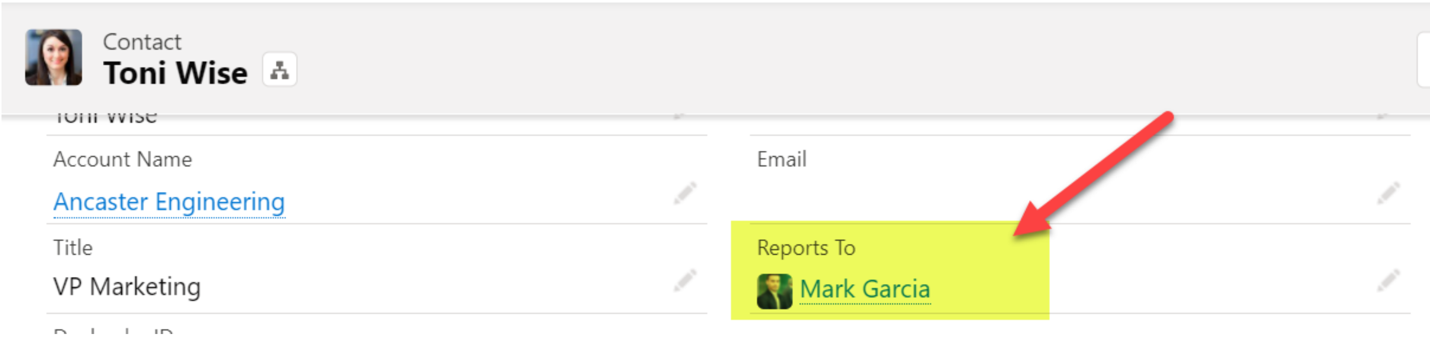
When you hover your cursor over a contact's image, a summary of their relationship details is shown.

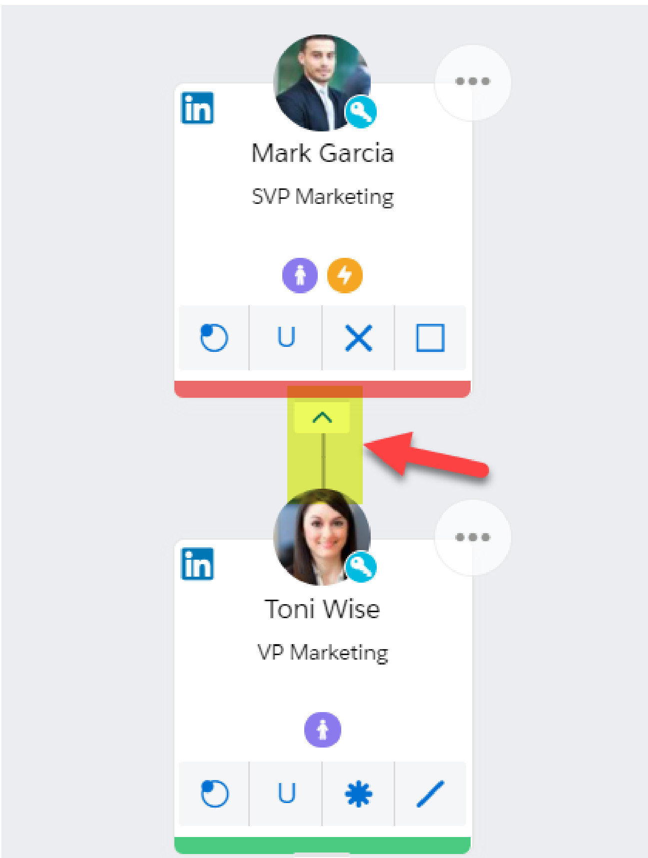


12.4 Setting Relationships between Contacts

12.4.1 Set a reporting relationship

By default, contacts automatically display their reporting relationship when they are imported into a relationship map (if the contact and the person they report to are imported). This relationship is defined by the 'Reports To' field on the Salesforce Contact record.

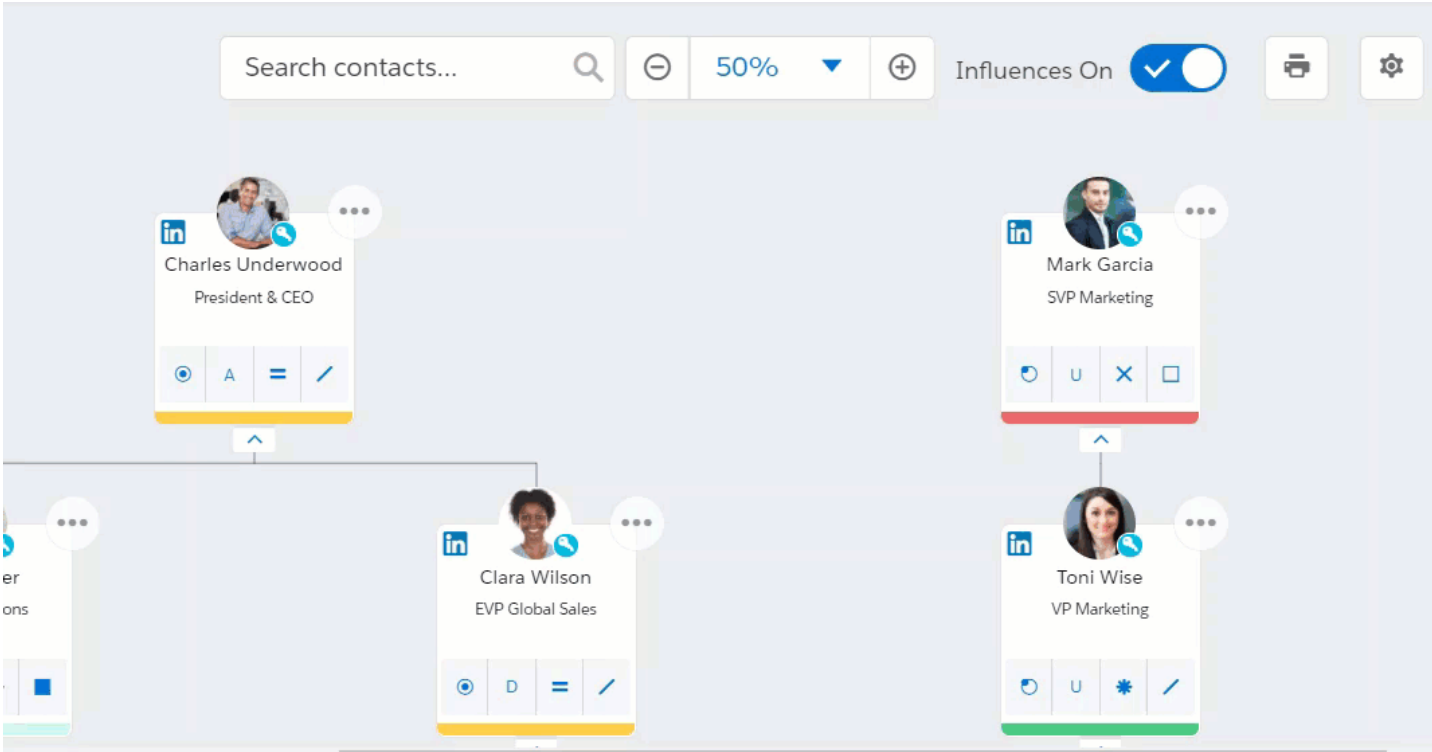




On a relationship map, you can quickly create a new reporting relationship by clicking on a contact's card and dragging it to the card of the contact they are reporting to.

In the example shown below, we want to show that the contact Mark Garcia reports to Charles Underwood.

Hover your cursor over the image to view the video.



This action also updates the *Reports To* field on the relevant Salesforce Contact record.

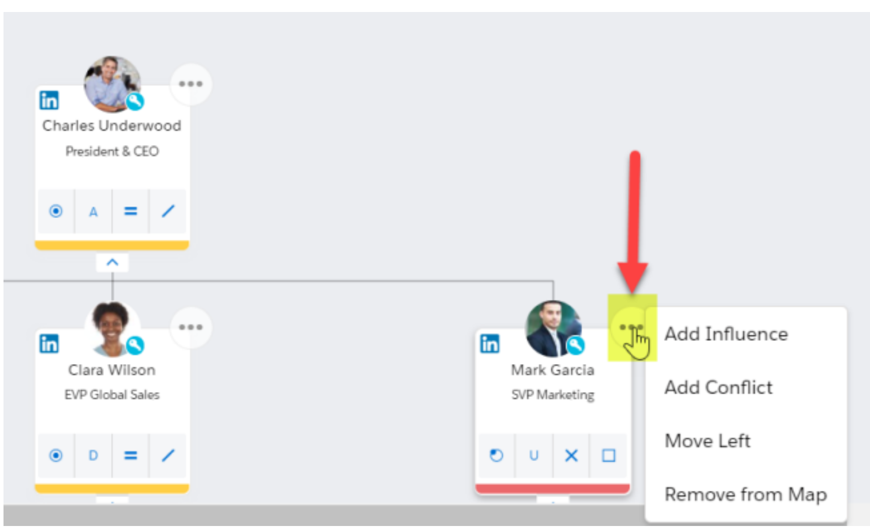
To remove a reporting relationship from your map, see "Removing Relationships from the Map" on page 71.

12.4.2 Set a relationship of influence

Adding lines of influence in a relationship map gives users an instant overview of which contacts have influence on others in the customer organization.

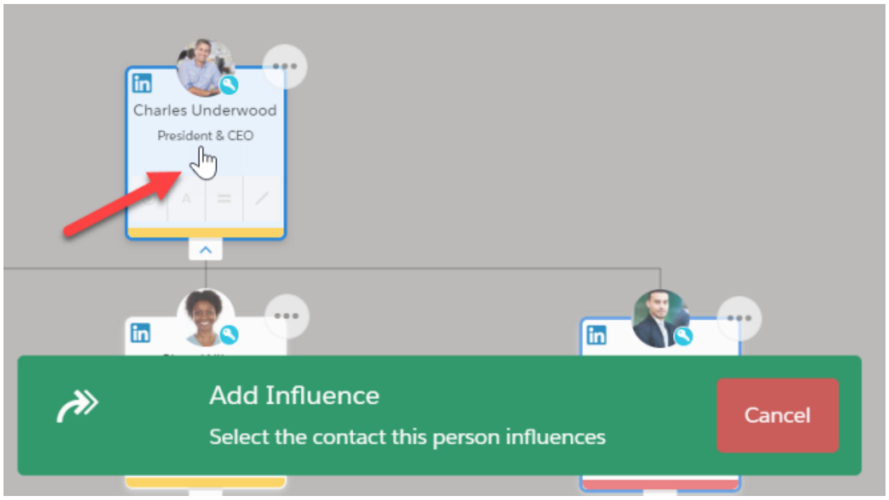
In the example below, we want to show that the contact Mark Garcia influences Charles Underwood.

1. Click the power menu for the contact who exerts an influence.



2. Select the menu option **Add Influence**.

3. You are prompted to select the contact who is influenced: click the relevant contact card.



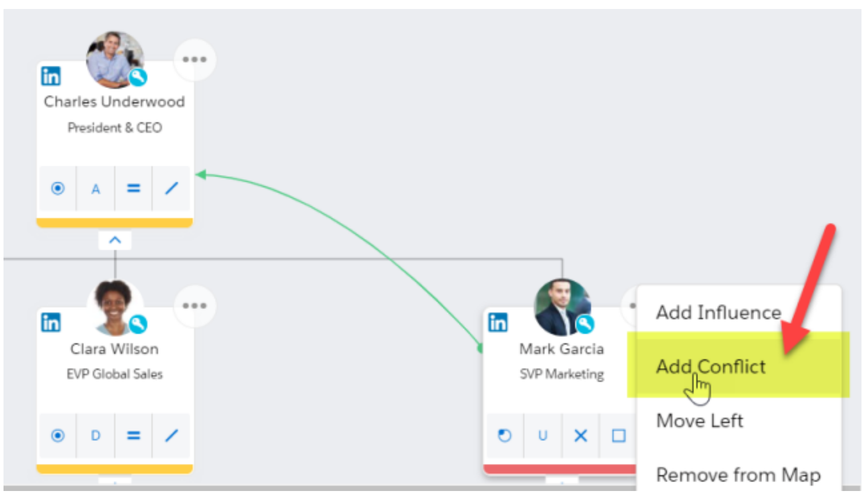
The influence is displayed as a green line with the direction of influence indicated by an arrow.

To remove a reporting relationship from your map, see "Removing Relationships from the Map" on the next page.

12.4.3 Set a relationship of conflict

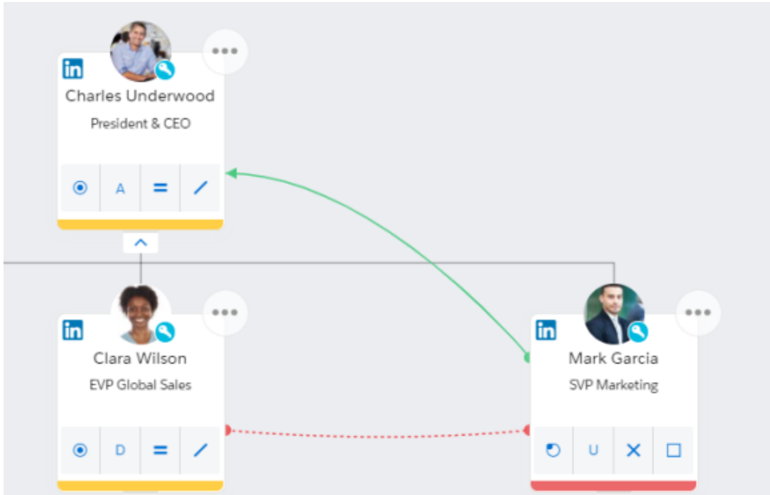
Capturing a conflict between contacts is very similar to the process of recording an influence.

1. Click the power menu for either of the contacts who are conflicting.
2. Select **Add Conflict** in the power menu.



3. You are prompted to select the other contact in the conflicting relationship: click the relevant contact card.

The conflict is displayed as a red line - as shown between Clara Wilson and Mark Garcia below.



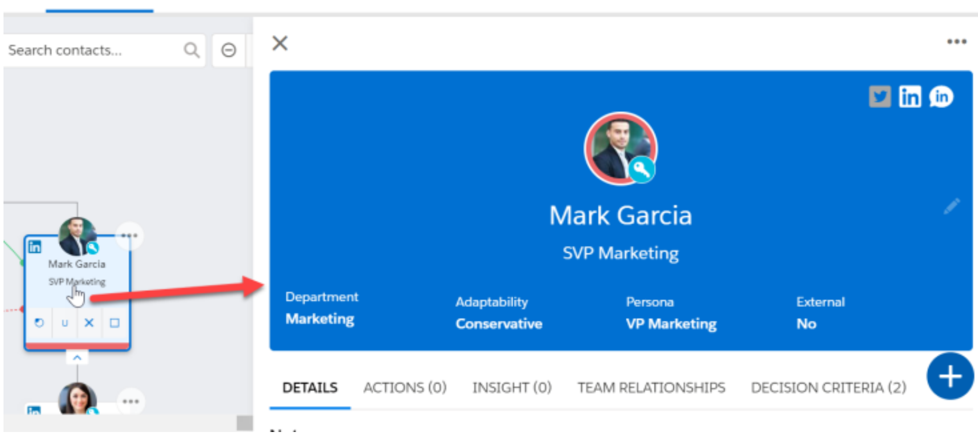
To remove a reporting relationship from your map, see "Removing Relationships from the Map" below.

12.4.4 Removing Relationships from the Map

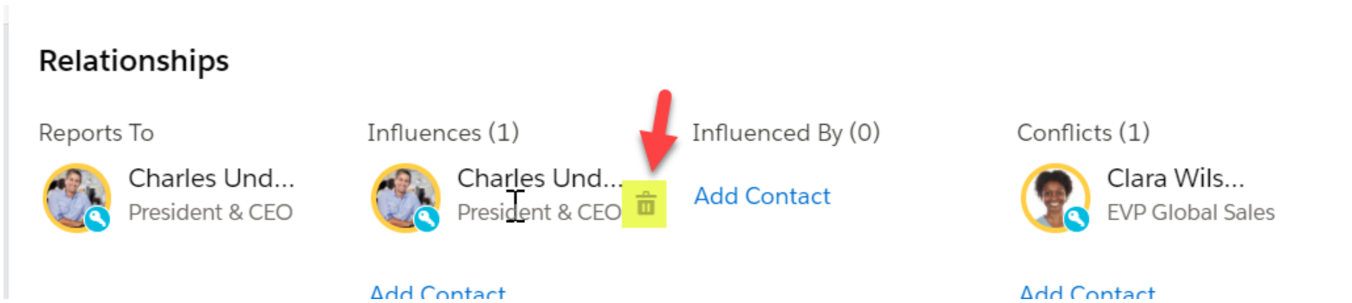
Removing relationships (of reporting, influence or conflict) from the maps is performed on the relevant contact's details panel.

To remove a relationship, do the following:

1. Click a contact to open their details panel.



2. In the details panel, scroll down to the Relationships section.
3. Hover your cursor over the relationship that you wish to remove and click the trashcan icon (highlighted below) to remove it from the map.

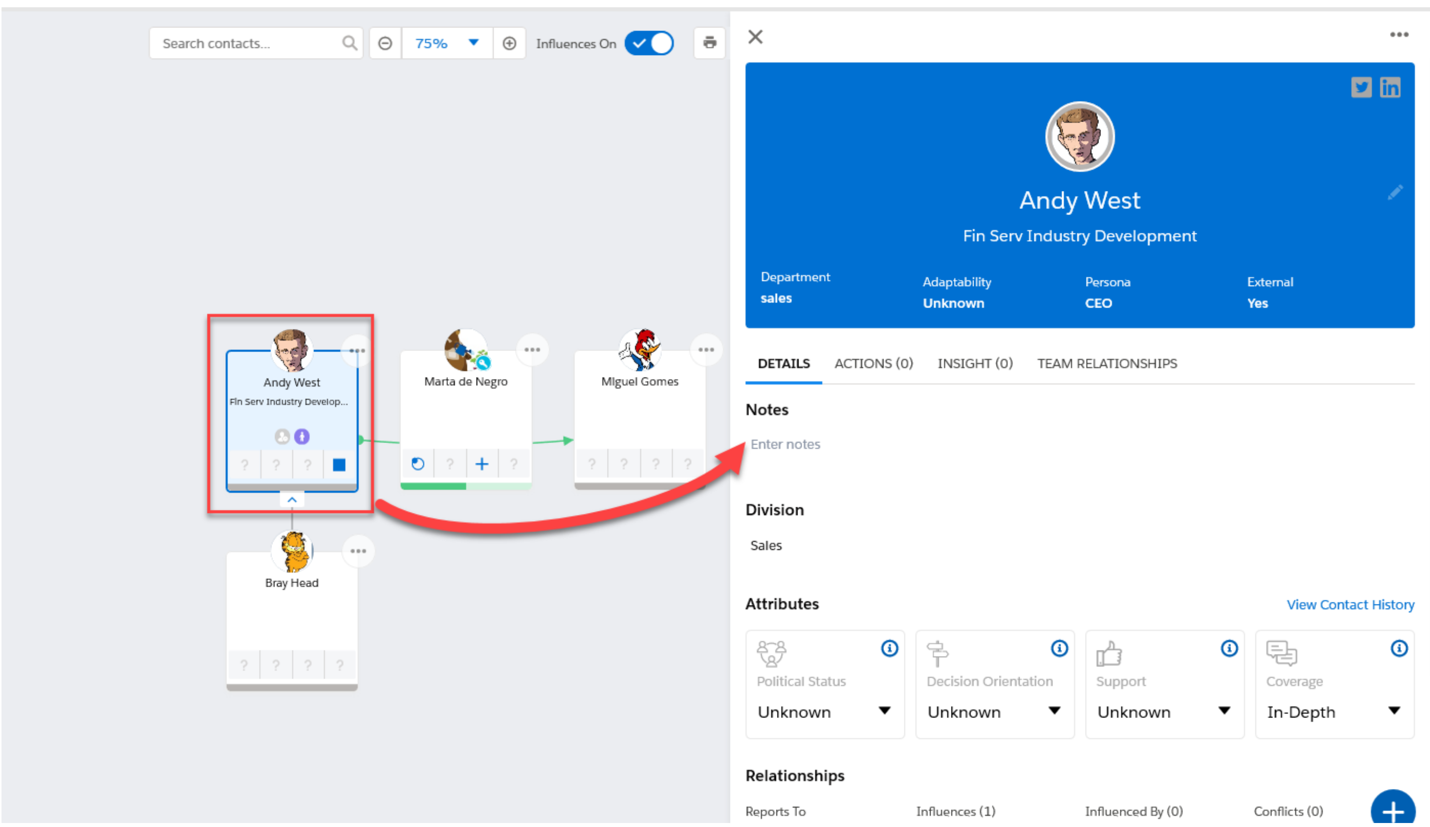


Removing a reporting relationship clears the *Reports To* field on the relevant Salesforce Contact record.

12.5 Understanding the Contact Details Panel

When you click a contact on a relationship map, the contact details panel opens on the right.

This gives you the contact's full relationship details, and provides a link to their contact record in Salesforce.



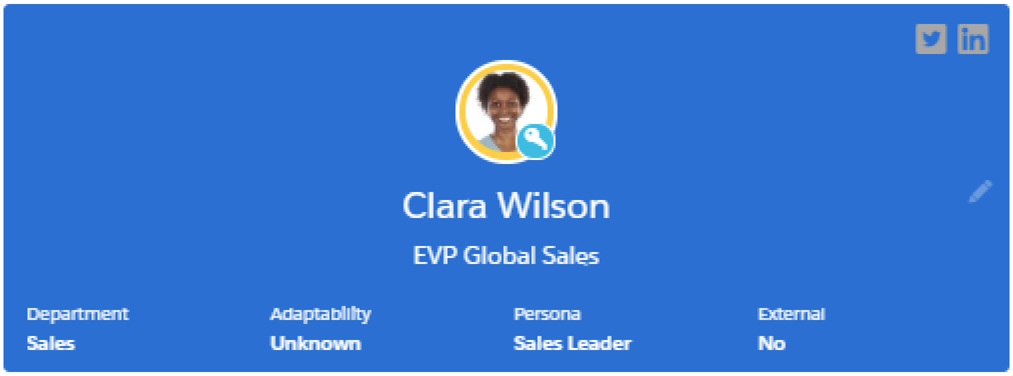
An additional tab, Decision Criteria, is not shown in the above image and is only displayed in Opportunity Manager.

The **Division**[1] area is only displayed in Altify Account Manager.

Basic contact details

[1]A division is typically a smaller service unit or business unit within an account. By providing the same features as an account (row on the opportunity map, relationship map, insight map, etc.), divisions allow you to accurately map your customers' buying structures, without restriction to Salesforce Account records.

The blue section at the top of the panel shows the most basic details about the contact.



The details in this area – Image, Name, Title, Department, **Adaptability**[1] (to change), Persona, and External – can all be updated in the panel.

The details are common to all relationship maps, so if you update them on your current map, the changes will be reflected on all maps that include the contact.

(The one exception is the External attribute. If you update External on a particular relationship map, the change is reflected on every relationship map that includes the contact and is associated with the same account. This can include the account relationship map and all related opportunity relationship maps. However, the value can be different on maps related to other accounts.)

If your administrator has integrated relationship maps with LinkedIn or Twitter, you see icons in the top right that give you access to these services.

Adaptability

The following Adaptability options are available.

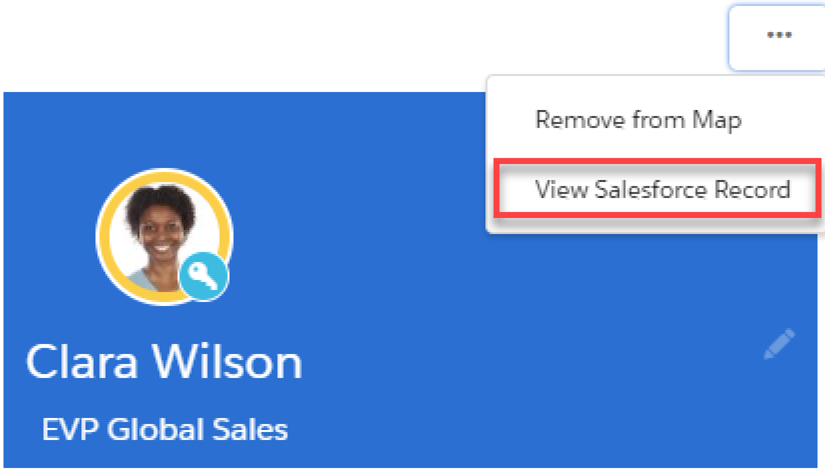
Laggard	A person who will only buy when there are no other alternatives. They are risk-averse. They prefer to invest in a product only when it is ubiquitous in the market.
Conservative	A person who wants ‘plug and play’ solutions; does not like lengthy implementations in either cost or time.
Pragmatist	A person who tends to be in-charge of mission-critical-systems; generally relies on incumbent for upgrades and fix the broken system.
Visionary	A person who is looking for a competitive advantage; will ask supplier to make changes to standard offering to give customer a competitive advantage.
Innovator	A person that loves to be the first to try new ideas and solutions. They are not afraid to be disruptive or make changes in something established. They may be willing to sign up for beta programs.

Opening the contact's Salesforce record

[1] Adaptability is a relationship attribute that can be assigned to a contact on a relationship map. It indicates the person's general attitude to concerns such as acquiring your solution. The available values are 'Laggard', 'Conservative', 'Pragmatist', 'Visionary', and 'Innovator'.

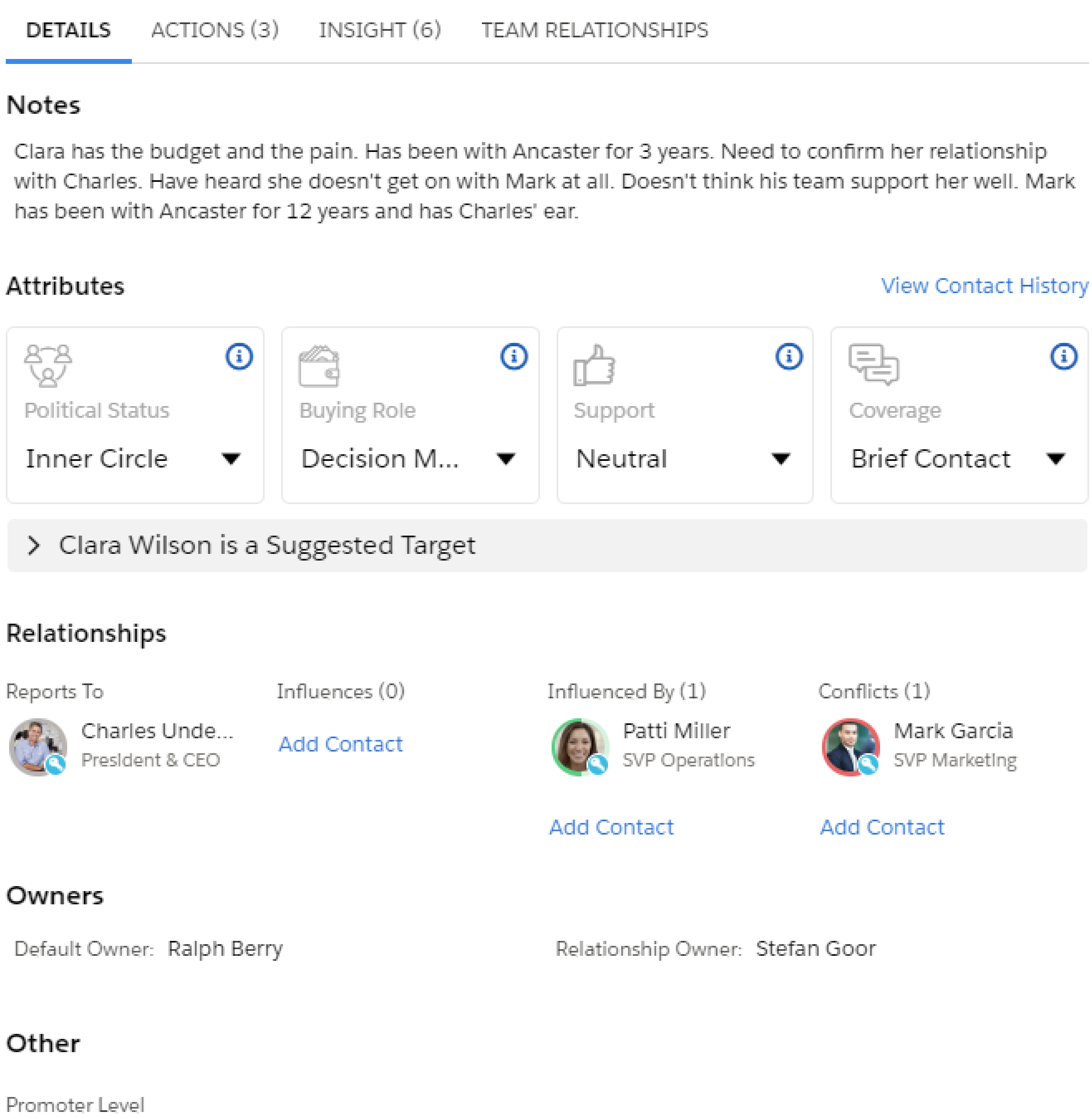
If you need to view or edit contact details that aren't shown on the relationship map, you can open the contact's Salesforce record by selecting the **View Salesforce Record** option in the top right of the details panel.

Don't worry about losing your working context – the contact record opens in a new browser tab.



Details tab

The **Details** tab shows the contact's key relationship details. These are specific to this map – any of the details may be different on other relationship maps that include the contact.



- Notes area

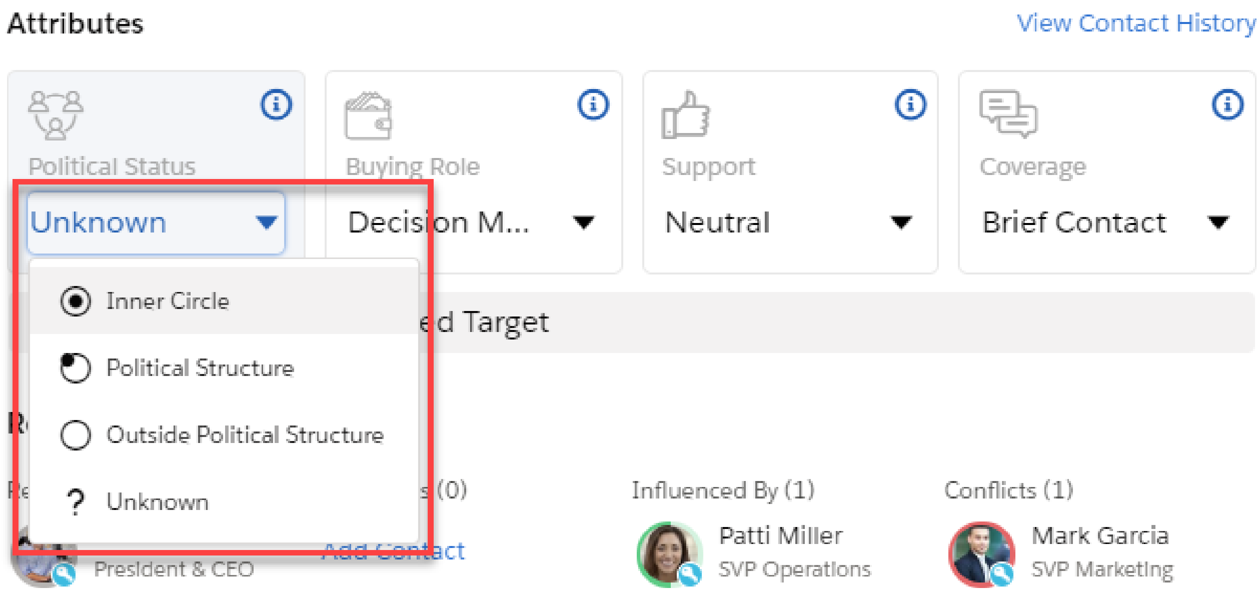
  Here you can add research notes about the contact. You can include links to other information.

- Attributes

  The Attributes area gives you two ways to set the contact's relationship attributes for this map.

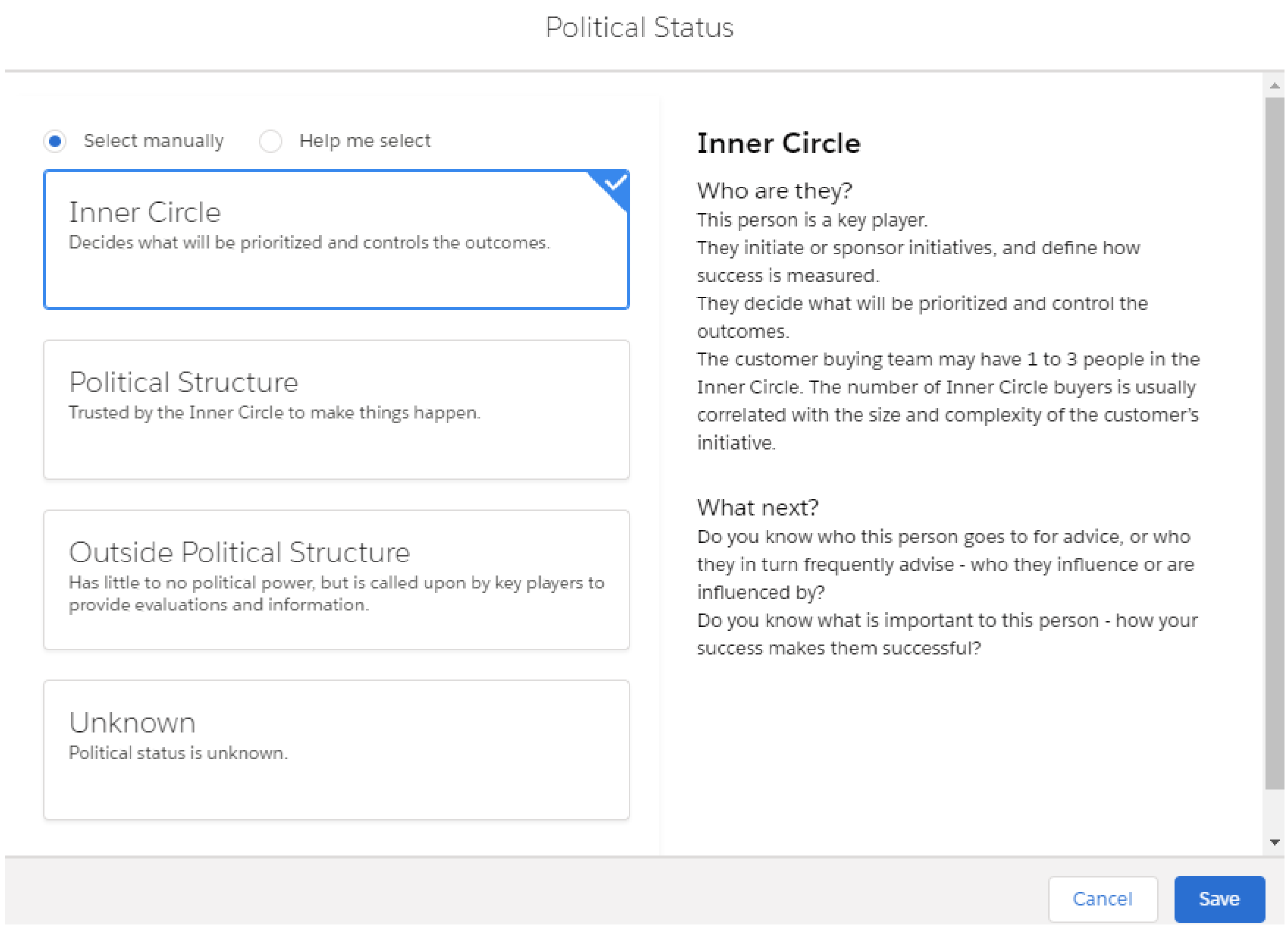
  If you're new to relationship maps, you may prefer this to setting relationship attributes directly on contact cards.

- Use the drop-down menu to select an option.



- Click the tile to get guidance from the software on what option to choose.

  You can review full definitions of each available option. Or, if you want even more guidance, use the **Help me select** radio button. You're then guided through a series of questions about that contact that will give you the software's assessment of the most appropriate option.

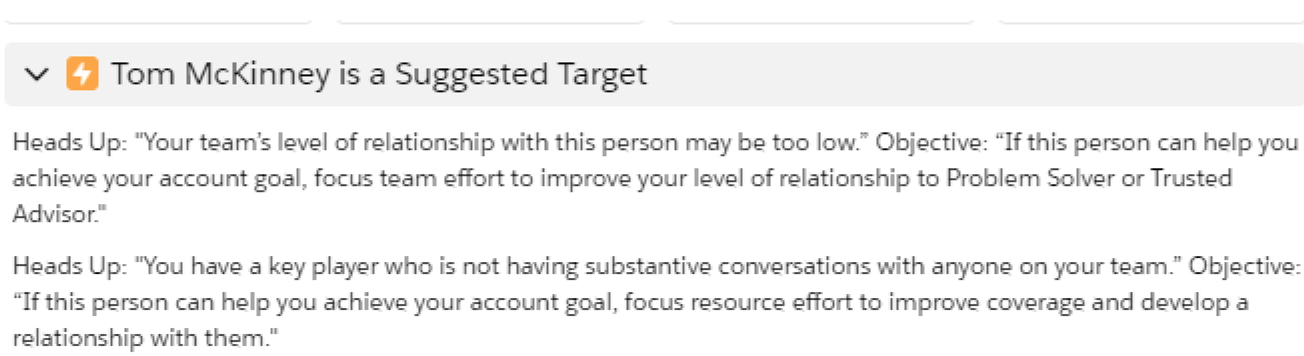


- View Contact History

  The **View Contact History** link gives you relationship details about the contact from other relationship maps related to the same account (this can include the account relationship map itself and opportunity relationship maps related to that account).

- Suggested Target

  The software automatically identifies contacts that the sellers need to move the needle with. If the contact currently selected on the map is one of those, they're flagged as a suggested target, and you get coaching in the Details panel on how to elevate your relationship with them.

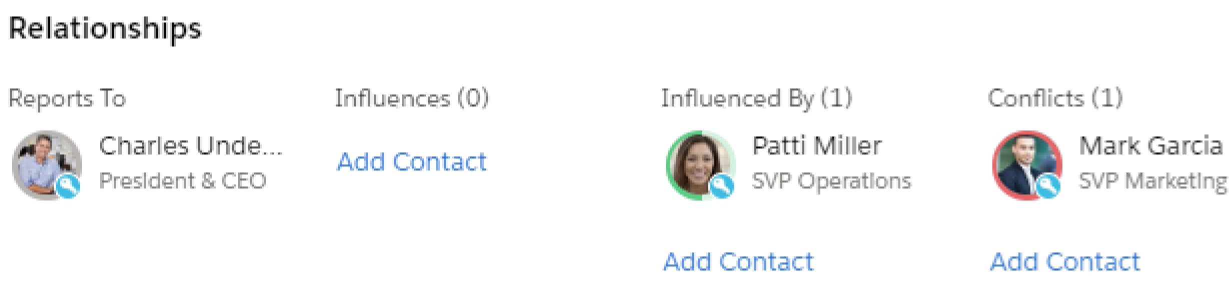


If a contact is a suggested target, an orange icon is shown on their contact card in the map.

- Relationships section

  The Relationships section summarizes the reports-to, influence, and conflict relationships the contact has on the map.

  - Click **Add Contact** to add a relationship of the relevant type.
  - Hover over a relationship and click the trashcan icon that is displayed to remove a relationship.



- Owners

  This section shows you the owner specified in the Salesforce contact record – the "default owner".

  You can also click **Relationship Owner** to specify the user who owns the relationship with this contact (in the context of this particular account or opportunity).

- Other

  Your administrator can configure relationship maps so that additional fields are shown in the Other section.

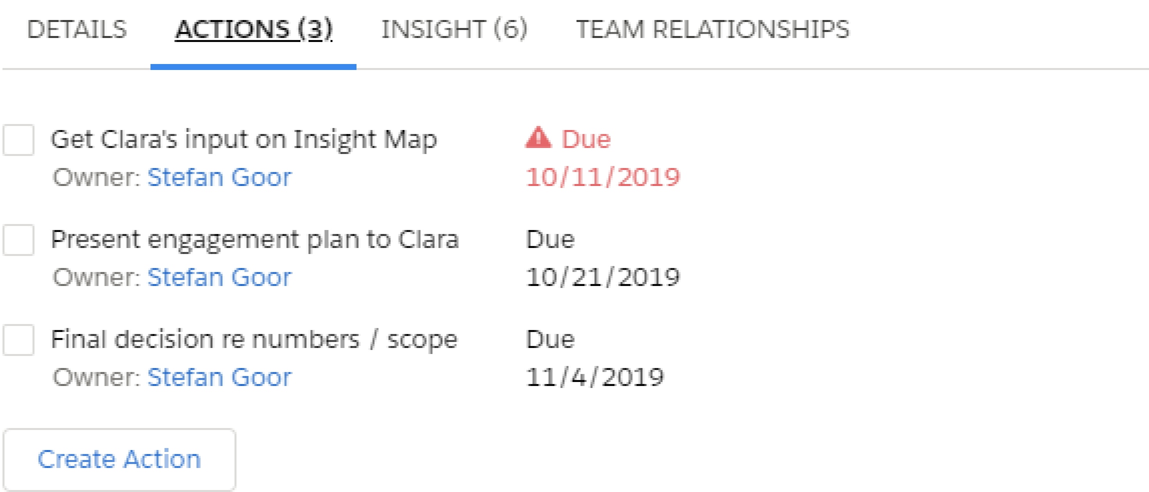
  So if there are contact details that are particularly important to your company's relationship map users, the administrator can add them to this section.

Actions tab

The **Actions** tab shows the actions assigned to you that are associated with this contact, if any.

Overdue actions are shown at the top of the list.

It also has a **Create Action** button, which gives you quick way of creating a new action associated with the contact.

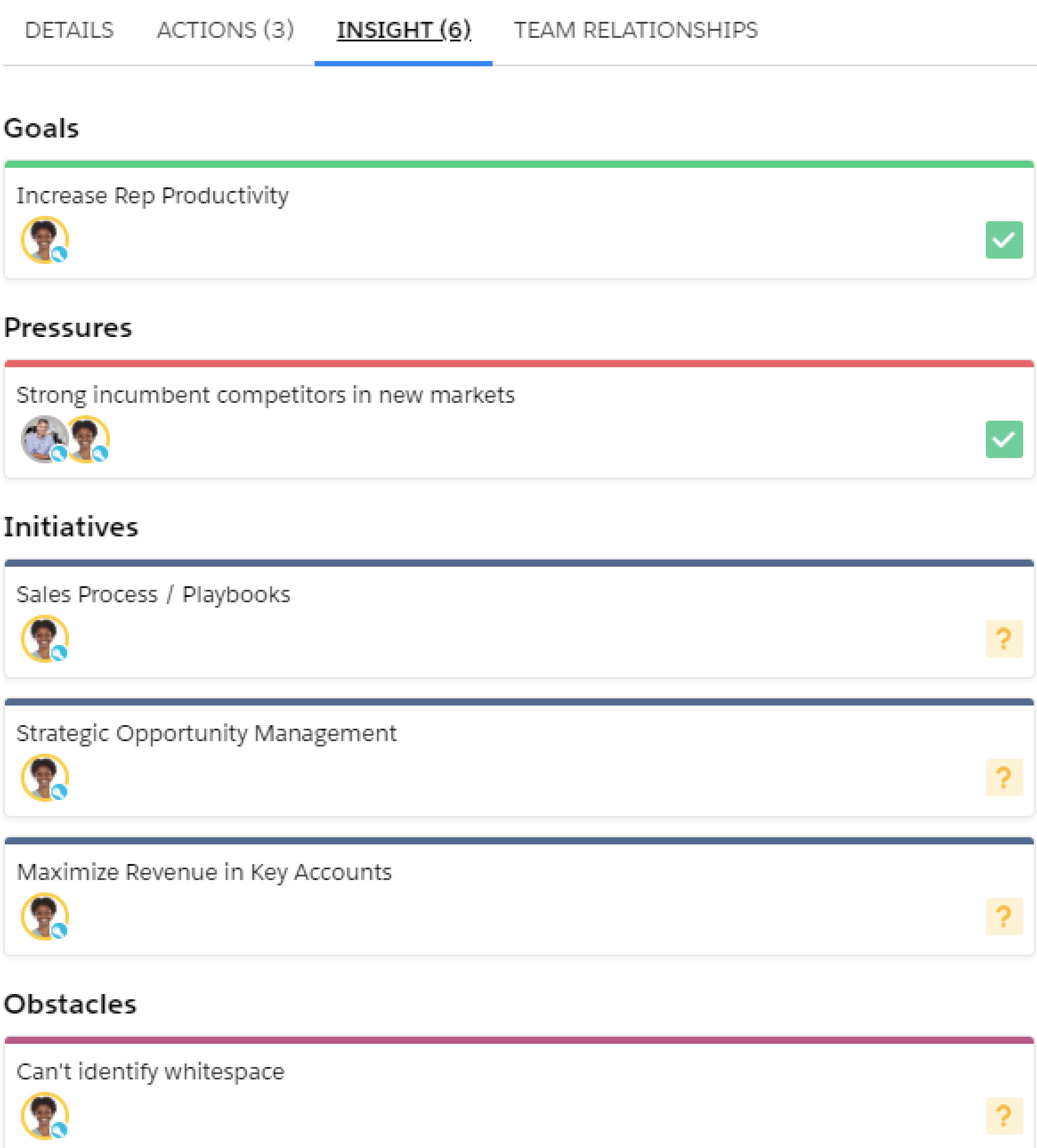


Tip: Actions should be created for all key players on your map (including enemies) in order to develop and maintain relationships and minimize the impact of non-supporters.

Insight tab

The **Insight** tab shows the insights on this account or opportunity's insight map that are associated with the contact.

Click an insight to see its details in a pop-up window.



Team Relationships tab

Each contact on the relationship map is important to the work you're doing to build, expand, and elevate relationships at the customer business.

You want to elevate your relationship with each contact to the right level. Altify defines four levels.

- **Vendor**[1]
- **Credible Source**[2]
- **Problem Solver**[3]
- **Trusted Advisor**[4]

Vendor is the lowest level, and indicates that the contact recognizes that you're a supplier of solutions that may be relevant to their business.

Trusted Advisor is the highest level, and indicates that you have a close working relationship with the contact where they trust you to give them expert and honest advice on the solutions that would be best for them.

You and members of your revenue team won't necessarily want to attain the highest level with every contact. What you need is a way to visually represent your current level of relationship with each contact on the map, and the level you want to attain with them.

The **Team Relationships** tab gives you a way to do this.

In the example below, Lynn Benfield and Jane Anderson – two members of the revenue team – have current and desired levels of relationship with Pete Morant.

The blue circle represents the current level of relationship.

And the highest red circle represents the desired level of relationship.

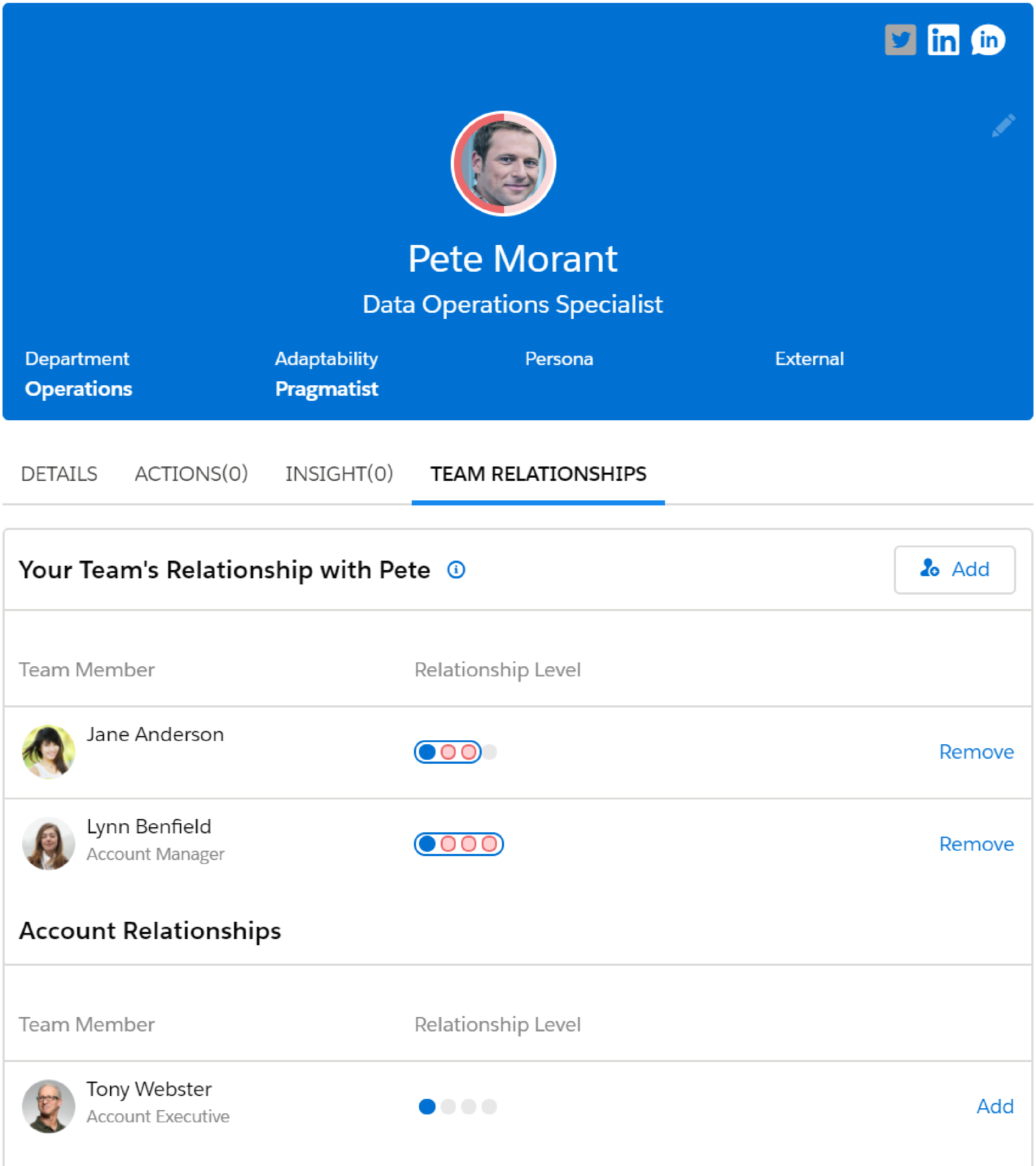
So in the example below, Jane Anderson is considered a Vendor by Pete, and she needs to elevate that relationship to Problem Solver.

[1] Your relationship is based solely on your product and your company's ability to deliver. Generally, you become aware that your customer has a specific need when the customer is ready to evaluate products. So, you are reactive in responding to the customer's needs. You generally leave the relationship just before the product or solution is implemented.

[2] You consistently meet or exceed the customer's expectations. Your contact or coverage in the account is with lower level managers across multiple functions. You typically enter the buying process just before the customer is ready to evaluate products or solutions to address their needs. You leave the relationship just after the product or solution has been implemented.

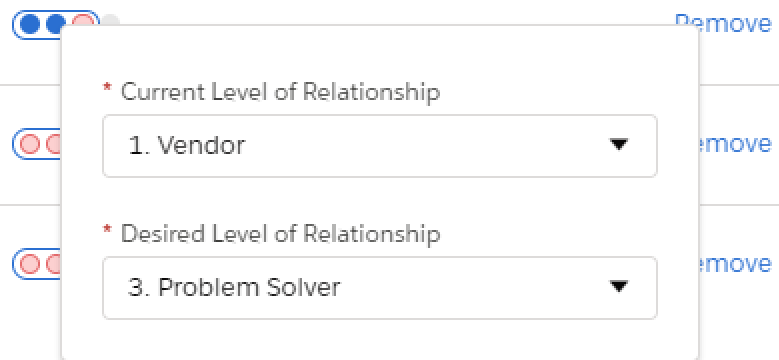
[3] Your relationship with the customer is more proactive. You are aware of existing problems and develop solutions for them. You also have contact with the customer at higher management levels within multiple functions and across multiple units. You get involved in the buying process just before the customer has initiated a project and you remain involved with the customer in the measurement of results.

[4] You and the customer explore emerging needs and new directions on a confidential basis. Therefore, your role in the customer's organization is like that of a consultant. Your contacts within the company are at the executive level throughout the enterprise. You really don't enter or exit the buying process. Your involvement with the customer is more cyclical.


Pete Morant
Data Operations Specialist
Department
Operations
Adaptability
Pragmatist
Persona
External
DETAILS
ACTIONS(0)
INSIGHT(0)
TEAM RELATIONSHIPS
Your Team's Relationship with Pete
Add
Team Member
Relationship Level
Jane Anderson
Remove
Lynn Benfield
Account Manager
Remove
Account Relationships
Team Member
Relationship Level
Tony Webster
Account Executive
Add

To update the current and desired level of relationship of any team member with Pete. click the indicator beside their name.

This opens the dialog where these levels can be set.



To add another team member to the Team Relationships list, click **Add User** and select them.

> **Note:** Changes you make on the Team Relationships tab apply to all other relationship maps where the contact appears.

In the Account Relationships section, the software also helps you to track people who might need to elevate their level of relationship with Pete, or who might be a source of useful information about the contact. In this example, the software has a record that Tony Webster already had a relationship with Pete Morant which you may wish to leverage. You can add him to the Team Relationships list by clicking **Add** or setting a Desired Level of Relationship for him.

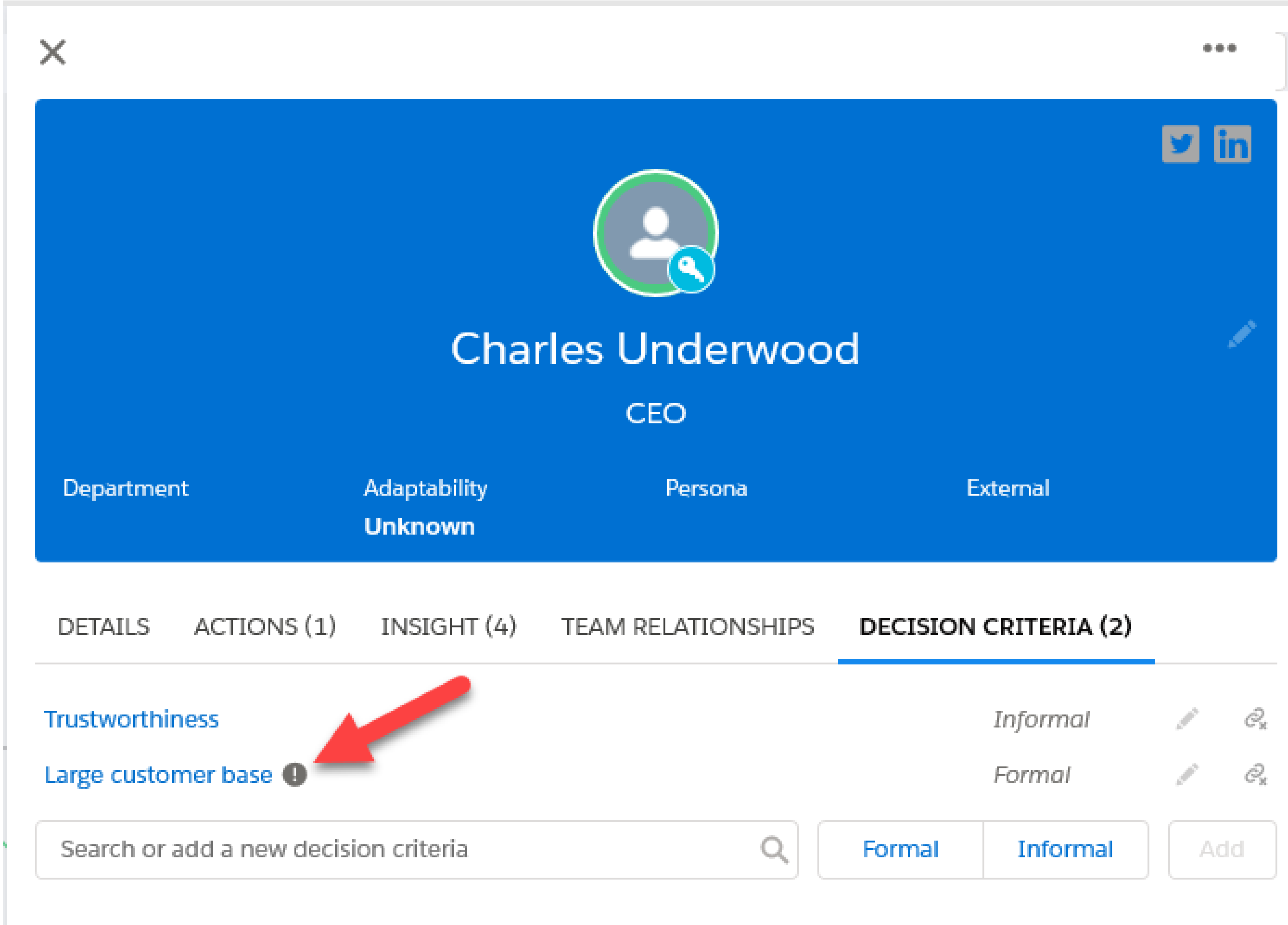
> **Note:** The Account Relationships section lists all users who are removed from the Team Relationships section. The Desired Level of Relationship is automatically set to None when you remove a user from the Team Relationships list.

Decision Criteria tab

The **Decision Criteria** tab shows the criteria that are important to the contact when they are making their buying decision.

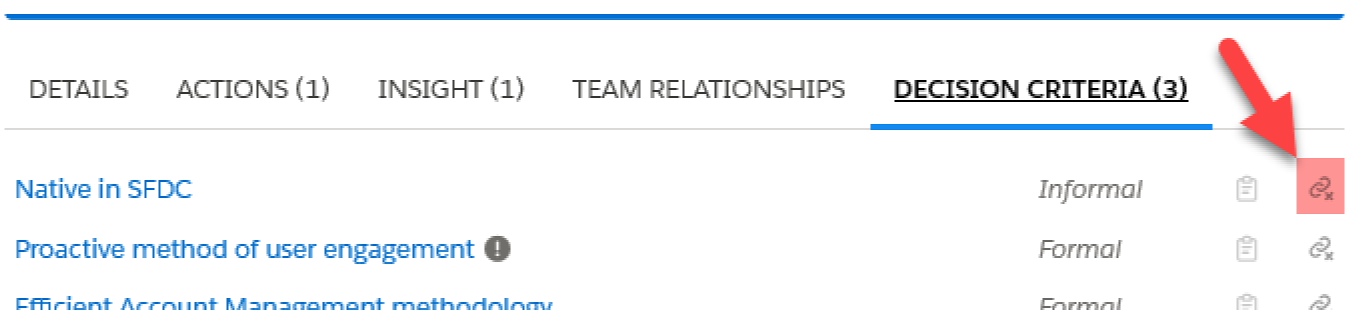
> **Note:** This tab is only displayed in Opportunity Manager. Decision criteria functionality can be disabled by an administrator.

The icon indicated below means that the criterion is mandatory, i.e. the deal cannot progress if the criterion is not met by your organization’s solution.



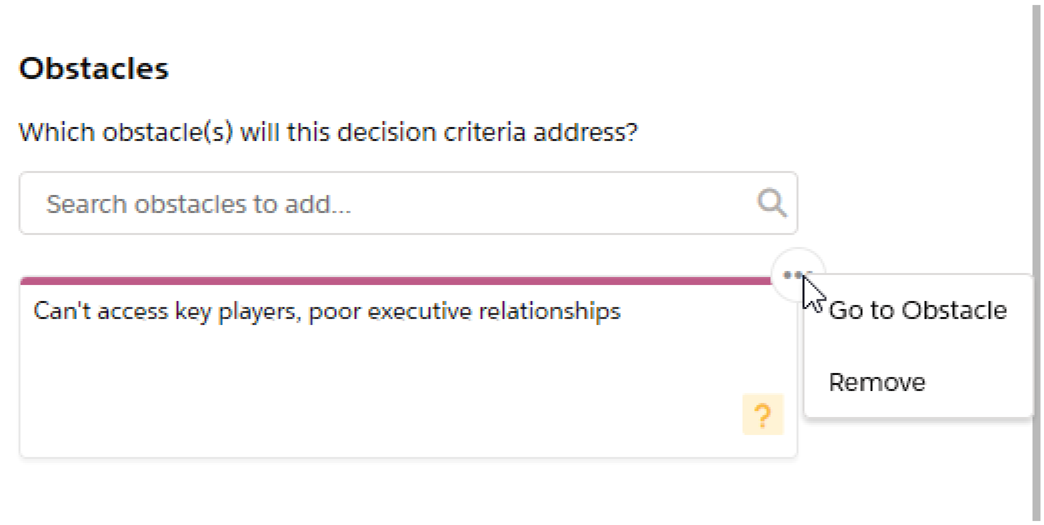
Add a decision criterion for the contact by entering a new criterion or selecting a criterion that is already created for the opportunity. If you create a new criterion, you must set it to **Formal** or **Informal**. Formal decision criteria are tangible, objective and measurable, e.g. 24/7 support. Informal decision criteria are intangible and subjective, e.g. user-friendly.

To remove a decision criterion from a contact, simply click the relevant unlink icon , as highlighted in the example below.



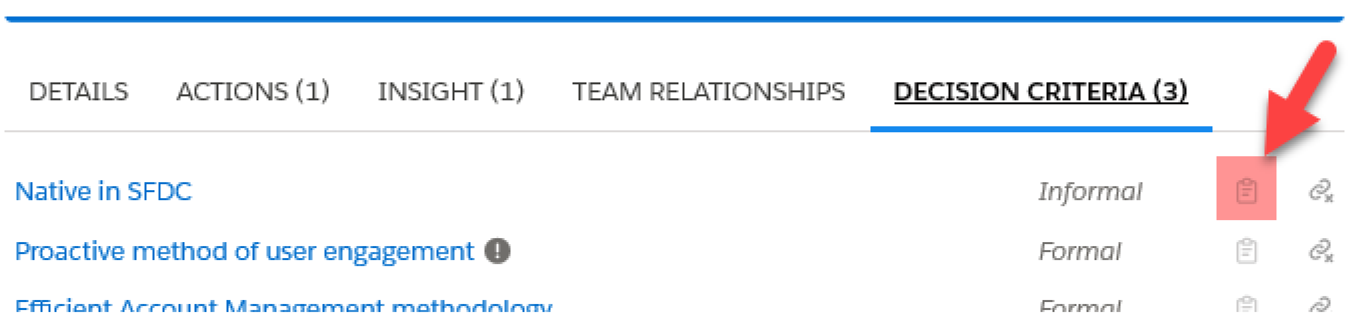
To edit a decision criterion and, for example, link it to more contacts or mark it as mandatory, click the name of the criterion. The Edit Decision Criteria dialog is displayed, where you can edit the criterion as follows:

- Rename the criterion or set it to **Mandatory**.
- Enter a **Milestone** for the criterion, or associate it with a Milestone that has already been created on the opportunity. Milestones are stages in the customer's buying process for the current opportunity. By doing this, you are indicating that the criterion needs to be met at a particular stage, such as an initial RFI.
- Under **Competitors**, record how well your organization's solution, and your competitors' solutions, fit the decision criterion.
- Under **Contacts**, add or remove contacts for whom the criterion is of importance. When you are adding a contact, the system automatically suggests contacts who are on the relationship map for the associated account.
- The **Obstacles** section allows you to link a decision criterion with an obstacle from the opportunity's insight map. In this way you can map how challenges faced by the customer directly impact upon their buying decision. Click the ellipsis icon in the upper right-hand corner of an obstacle card, as shown below, to remove it from the decision criterion or go the insight map.



Click the **Save** button to close the dialog and return to the Decision Criteria tab.

To view and edit the criterion on the Assessment tab, click the **Navigate to Assessment** icon - as shown below.



The Assessment tab allows you to view the criterion in the context of a ranked list of all formal/informal decision criteria that are created on the opportunity.

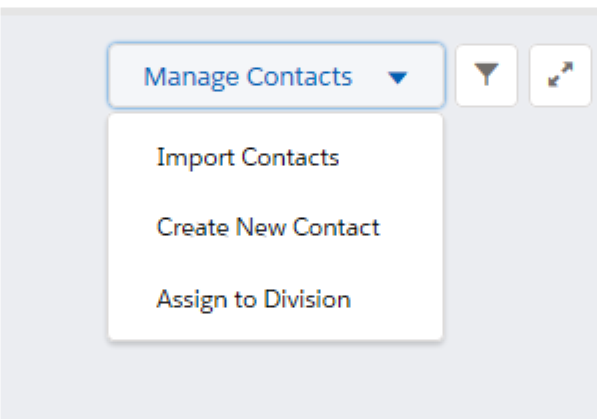
Note: Editing a decision criterion on the Assessment tab includes the additional abilities to delete the criterion or change it to formal/informal.

For more information on viewing, creating and editing decision criteria on the Assessment tab, see Assessing Decision Criteria.

12.6 Adding Contacts to the Relationship Map

The **Manage Contacts** menu in the top right of your relationship map enables you to:

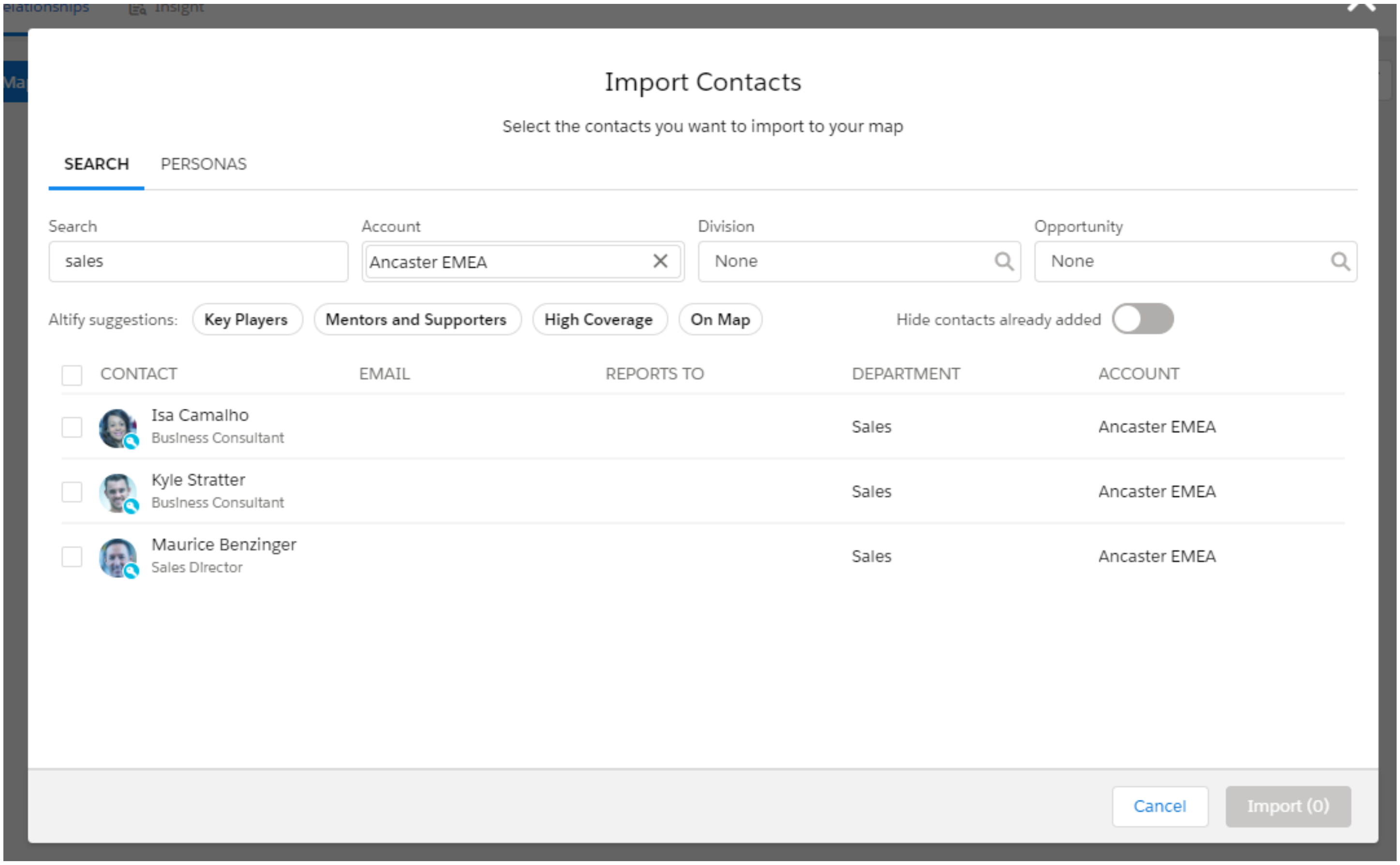
- **Import Contacts**: add existing Salesforce contacts to the map.
- **Create New Contact**: Add someone to the map who doesn't already have a Salesforce contact record, creating that record at the same time.
- **Assign to Division**[1]: assign multiple contacts to a **division**[2] of the relevant account. This option is only available in Altify Account Manager and when you are viewing the account view of the relationship map (see Viewing Division Contacts), and divisions are created for the relevant account.



Adding Existing Contacts

When you select **Manage Contacts > Import Contacts**, the Import Contacts window opens. On the **Search** tab, you can search for and select the contacts you want to add to the map.

[1] A division is typically a smaller service unit or business unit within an account. By providing the same features as an account (row on the opportunity map, relationship map, insight map, etc.), divisions allow you to accurately map your customers' buying structures, without restriction to Salesforce Account records.
[2] A division is typically a smaller service unit or business unit within an account. By providing the same features as an account (row on the opportunity map, relationship map, insight map, etc.), divisions allow you to accurately map your customers' buying structures, without restriction to Salesforce Account records.



The toggle **Hide contacts already added** allows you to tidy up your search results by hiding contacts who already appear on your map.

The search options can be used individually or in combination:

- **Search** - name, title, or email

  The contacts matching the characters you type in the field are listed.

- **Account**

  If you're working on an account relationship map, the account the map belongs to is specified automatically.

  If you're working on an opportunity relationship map, the account the opportunity belongs to is specified automatically.

  You can change the account selection if necessary. When no account is specified, the search is conducted across all accounts.

  > **Tip:** Key players are not necessarily associated with the customer account so make sure to import any external customer consultants and partners who have influence.

- **Opportunity**

When you specify an opportunity, the contacts on its relationship map are listed.

- **Division**

  When an account is selected, you can view the contacts in a specific division belonging to the account.

- **Altify Suggestions**

  You can use the filter 'pills' to refine your search of contacts:

  - *Key Players* on the map of the selected account or opportunity.
  - *Mentors and Supporters* on the map of the selected account or opportunity.
  - Contacts with *High* ***Coverage***[1] (high level of contact with your company) on the map of the selected account or opportunity.
  - All contacts on the map of the selected account (*On Map*). If an account is selected, this pill narrows your search to contacts who have been added to the account map and excludes all other contacts who are associated with the account.

A maximum of 50 matching contacts are listed. If your search returns more than 50 contacts, you may need to refine your search further.

Searching by Persona

A contact can be assigned a **persona**. Common personas include CEO and COO.

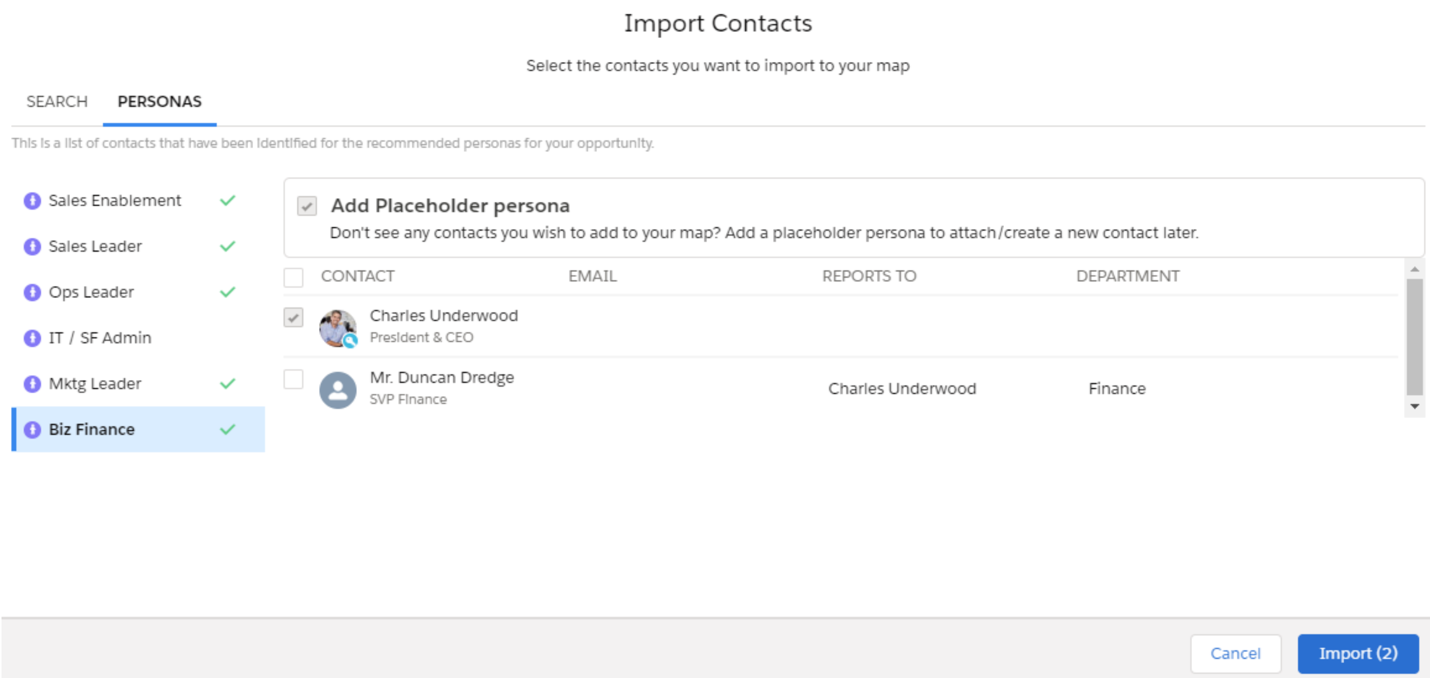
This gives you a way of quickly finding contacts with the types of roles that are important to include on your relationship map.

When you select **Manage Contacts > Import Contacts**, the Import Contacts dialog's **Personas** tab enables you to search for contacts by persona.

Select the persona you're interested in to get a list of contacts who have that persona. In this example, the **Biz Finance** persona is selected, and you can see that two contacts have that persona.

You can select one or more of these matching contacts to select them for inclusion on your map.

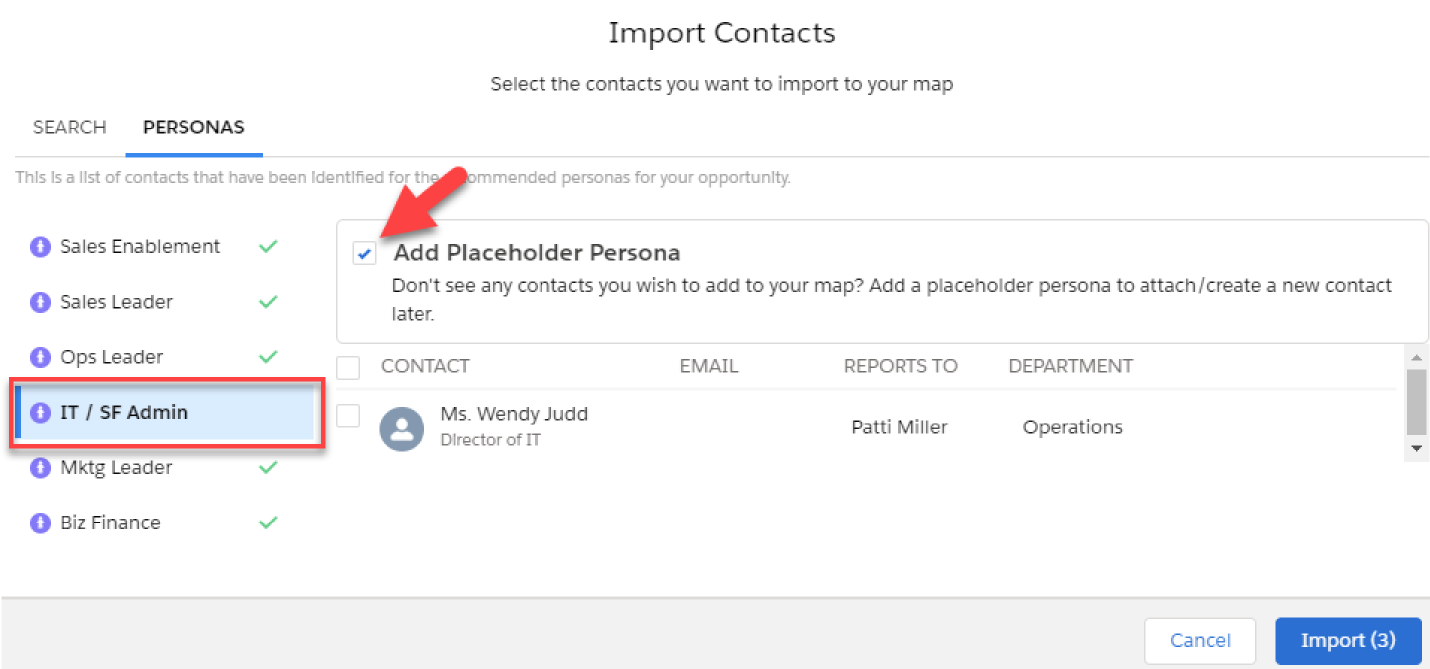
[1] Coverage is a relationship map attribute that indicates how much you've been in touch with a contact. There are several possible Coverage values: Unknown, No Contact, Brief Contact, Multiple Contacts, and In Depth.



Note: Altify comes with several personas already set up, but your company can have its own specific set of personas, as is the case in the example shown here.

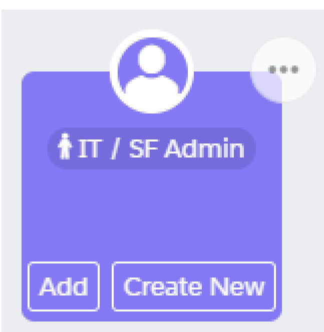
If you can't find the right contact for a persona that you know is important to include on your map, you can add a **placeholder persona** card to the map. You can easily replace this later when you know who the right contact is.

With the persona selected on the left, select the **Add Placeholder Persona** checkbox.



The placeholder persona card is purple to distinguish it from the contacts on the map. It has two buttons: **Add** and **Create New**.

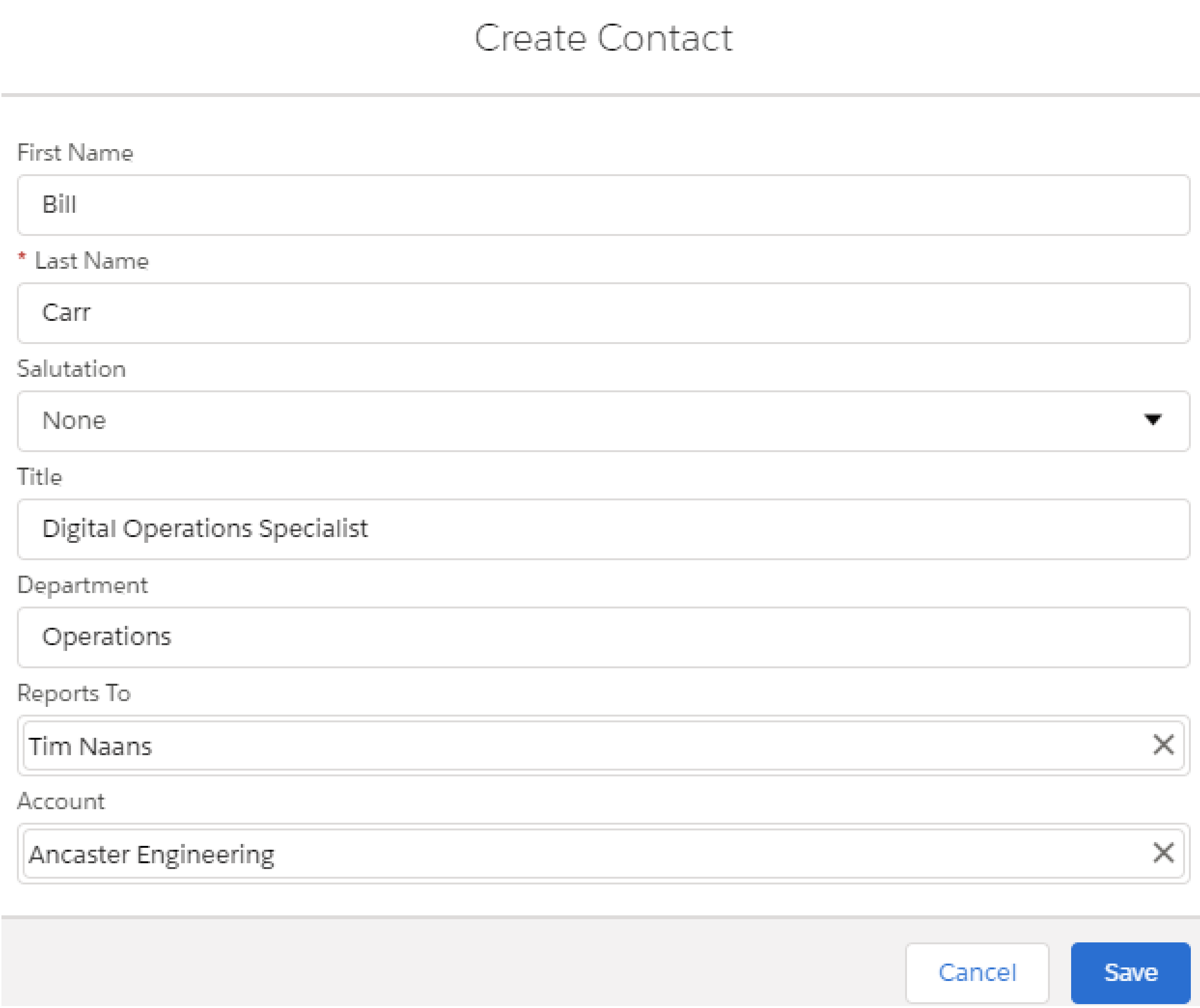
- **Add** is a quick way to replace the card with an existing contact.
- **Create New** is a quick way to replace the card with a contact who doesn't already exist in Salesforce, creating their Salesforce record at the same time.



Adding a New Contact

When you select **Manage Contacts > Create New Contact**, a dialog opens where you specify the basic details of the new contact.

When you click **Save**, their Salesforce contact record is created, and a card is added to the map for them.

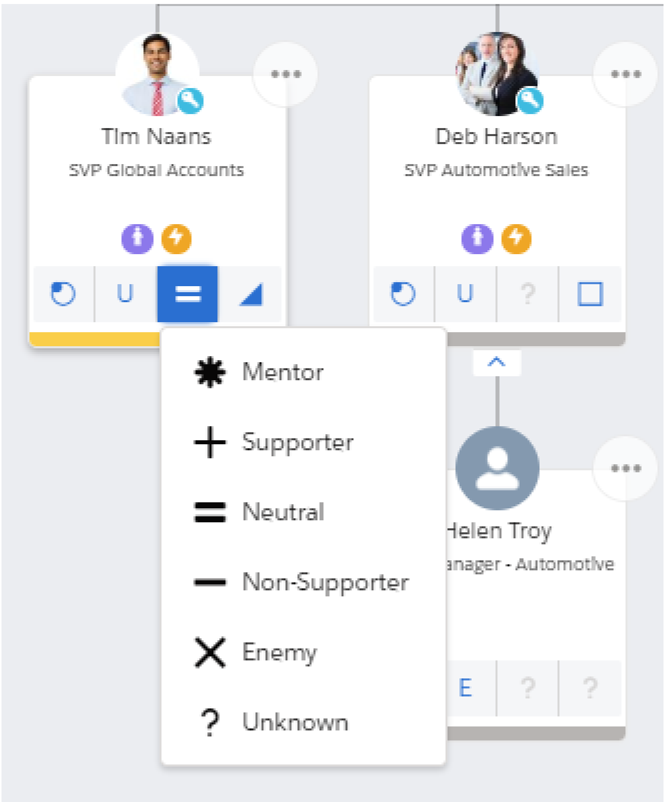


12.7 Relationship Attributes for a Contact

On a contact's card on a relationship map, four attributes are available to be set:

- Political Status
- **Buying Role**[1] (opportunity relationship maps only)
- **Decision Orientation**[2] (account relationship maps only)
- Support
- **Coverage**[3]

[1] Buying Role is a relationship attribute for contacts on an opportunity relationship map. The default options shipped with Opportunity Manager are: 'User', 'Evaluator', 'Decision Maker', and 'Approver'. Additional roles can be created, if necessary, but the software only uses the default values for scoring calculations.
[2] Decision Orientation is a relationship attribute for contacts on an account relationship map. It indicates what will influence the contact's decision-making process. The default values aailable for this attribute are: 'Financial', 'Technical', 'Relationship', and 'Business'.
[3] Coverage is a relationship map attribute that indicates how much you've been in touch with a contact. There are several possible Coverage values: Unknown, No Contact, Brief Contact, Multiple Contacts, and In Depth.



12.7.1 Political Status

Outside Political Structure	A typical outside-political-structure contact: • doesn't own initiatives • can't answer strategic questions • may have a relatively junior job title • is delegated tasks on a project A person outside the political structure "watches and wonders what happened".
Political Structure	This indicates a person with influence who is trusted by the inner circle to "makes things happen". A typical contact inside the political structure: • owns initiatives • has a job title that reflects that they are an insider • has a path to influence The number of buyers with this political status is usually correlated with the complexity and the size of the opportunity. You typically have two to five political-structure contacts per opportunity. Political-structure contacts are key players.

Inner Circle	This indicates a person who "controls outcomes". You may see them mentioned in the company's annual report or in the press. Inner-circle people have influence and decide what will happen in the organization. They typically own the company's 'macro' goals. On an opportunity relationship map, the deal's approver is often at the top of the inner circle. This is the person who approves and funds projects and initiatives. A second inner-circle contact has the approver's ear when they're deciding which projects to approve. Inner-circle contacts are key players. The number of inner-circle contacts is usually correlated with the complexity and size of the account or opportunity. You typically have two to three inner-circle contacts per opportunity.

12.7.2 Buying Role (opportunity relationship maps only)

The Buying Role attribute is specific to opportunity relationship maps.

In addition to the buying roles in the table below, your org can be configured to include additional buying roles.

Decision Maker and Approver	This attribute indicates someone who has the characteristics of both a decision-maker and an approver (see below).
Decision Maker	This attribute indicates someone who has the ability to commit the company to a vendor or to a certain strategic direction. They have accountability for selecting the solution. They typically write the necessary requirements. A decision maker is always in the political structure or inner circle. They can't be outside the political structure.
Approver	This attribute indicates someone at senior level who has the ultimate accountability for success of the project. They review the decision, give it their blessing, and typically release the funds. In large organizations, there may be multiple levels of approvers with dollar thresholds that delineate their approval responsibility – these individuals are not the ultimate approver. You need to have the ultimate approver on your map. (If a buyer can say "no" and over turn a decision-maker's decision, they are an approver.) The approver is at the top of the map, and is in the inner circle.

Evaluator	This attribute indicates someone who has the ability to say "No" to the buying decision, but can't say "Yes". The best an evaluator can do for you is to recommend your solution. Evaluators can block the competition or block you. Evaluators are formally assigned to the customer's evaluation project for your opportunity. They evaluate and accept based on defined standards, such as: • Do you meet the RFP requirements? • Have you met the defined criteria? • Do you operate within our standards (such as Six Sigma)/company policy/business practices?
User	This attribute indicates someone who will directly use your product or service or solution.

12.7.3 Decision Orientation (account relationship maps only)

The Decision Orientation attribute is specific to account relationship maps. It indicates what will influence the contact's decision-making process.

Technical	This person's primary focus is product functionality and technical capability. They are often analytical and detail-oriented. Product demonstrations, benchmarks, and careful deliberation will be key.
Financial	This person's primary focus is price, cost, and economics. While your product must be viable, numbers and negotiations will be key.
Relationship	This person believes they are forming a business partnership, and their focus is on the people and company that will be serving their organization. While your product must be viable, support, trust, effort, and responsiveness will be key.
Business	This person sees the big picture and overall impacts your product or solution will have on their company's present and future. This person can properly balance the technical, financial, and relationship issues. Their vision often extends beyond their company to include their clients, their competition, and their community. Industry knowledge and articulating business versus product value will be key.

12.7.4 Support

This indicates the level of support you currently get from the contact.

<table>
<tr><td>Mentor</td><td> A mentor is someone who prefers your solution and advocates for it in your absence. They believe that your success is critical to their success. A typical mentor may: share information with you
give positive feedback about your offering
give you access to other contacts
tell you how you can win Compared to a supporter, there is a personal dimension to your relationship with them. </td></tr>
<tr><td>Supporter</td><td> A supporter openly prefers your solution. They support you verbally with others. Compared to a mentor, they don't advocate for your offering in your absence, and there isn't the same personal dimension to the relationship. A typical supporter may: share information with you
give positive feedback about your offering
give you access to other contacts</td></tr>
<tr><td>Neutral</td><td> A neutral contact typically doesn't provide any feedback about your offering when asked. They may seem disengaged or indifferent to it, or say that they "don't know". </td></tr>
<tr><td>Non-Supporter</td><td> A nonsupporter typically has a historical preference for: a competitor's offering
business as usual
another project
meeting the goal through an internal initiative</td></tr>
<tr><td>Enemy</td><td> An Enemy may: openly state that they oppose your winning the deal
withhold information, or even provide misinformation
fail to attend meetings with you, or leave them early Compared to a nonsupporter, there is an added personal element to your relationship with an enemy. Typically, an enemy is a competitor’s mentor. </td></tr>
</table>

12.7.5 Coverage

This is a measure of the time or number of contacts you've had with the contact, relative to the total time and degree of contact you've had with everyone on the relationship map.

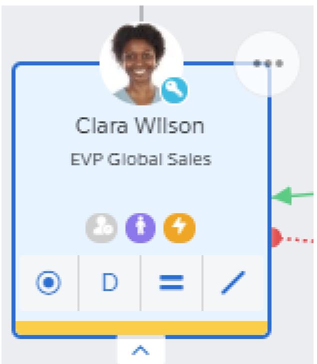
In Depth	In-depth coverage of the person relative to your total coverage of the opportunity.

Multiple Contacts	Multiple points of contact have been made with the person.
Brief Contact	Brief contact of the person relative to your total level of contact for the opportunity or account.
No Contact	No contact with this person yet.

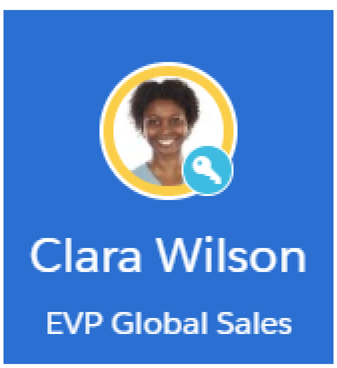
12.8 Contact Color Coding

Each contact on a relationship map is color coded to help you distinguish your supporters from your non supporters at a glance.

You see a color-coded bar or half-bar at the bottom of the contact card.



And when the contact is selected on the map, their image in the details panel on the right is bordered by a color-coded circle or semicircle.



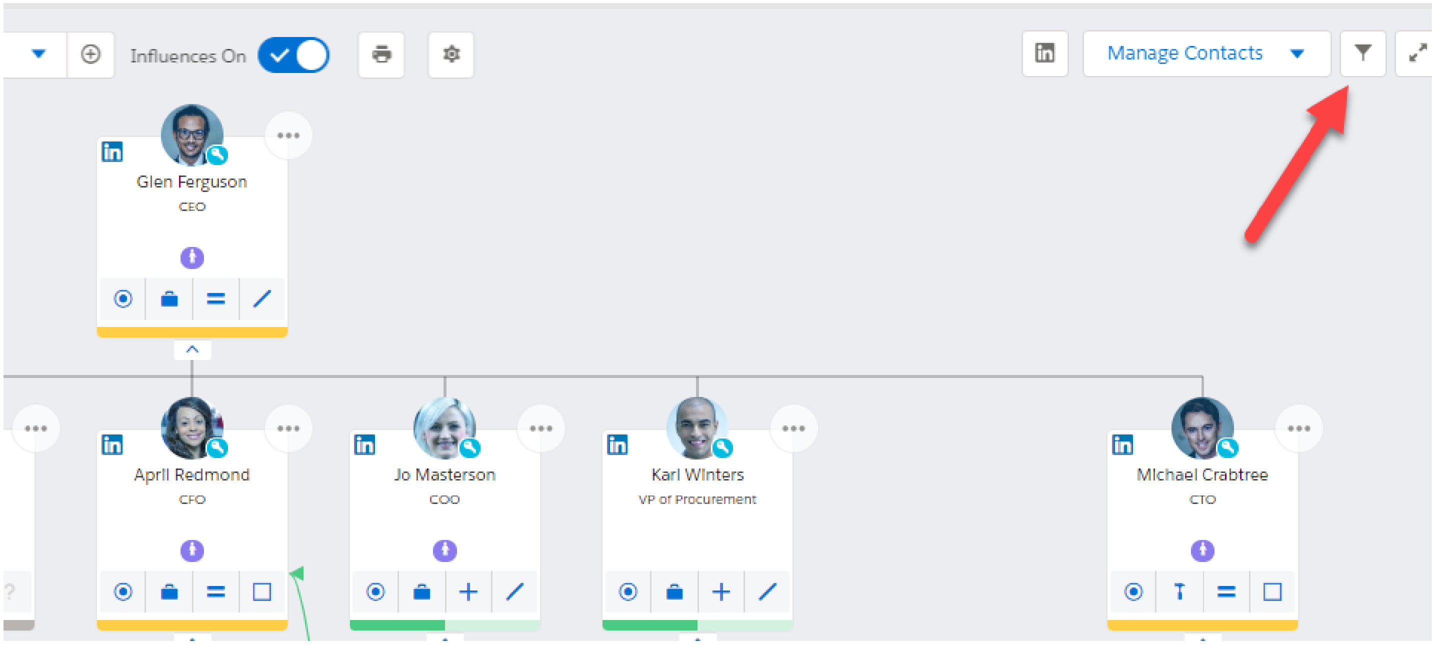
Altify's default color coding indicates the nature of your relationship with the contact in the context of this account or opportunity.

- **Green**: Mentor (bar and circle) or Supporter (half bar and semicircle).
- **Red**: Enemy (bar and circle) or Non-Supporter (half bar and semicircle).
- **Orange**: Neutral. (Bar and circle.)
- **Gray**: The attribute hasn't yet been set. (Bar and circle.)

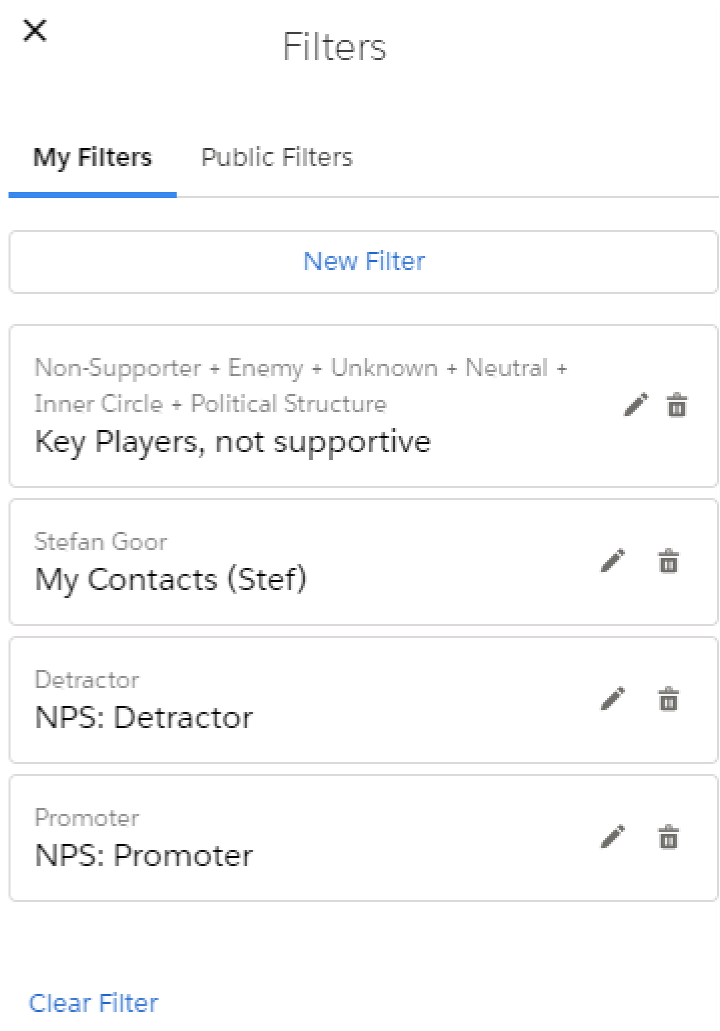
12.9 Relationship Map Filters

You can filter a relationship map to see only the contacts that match specific criteria.

Click the **Filter** icon in the top right.

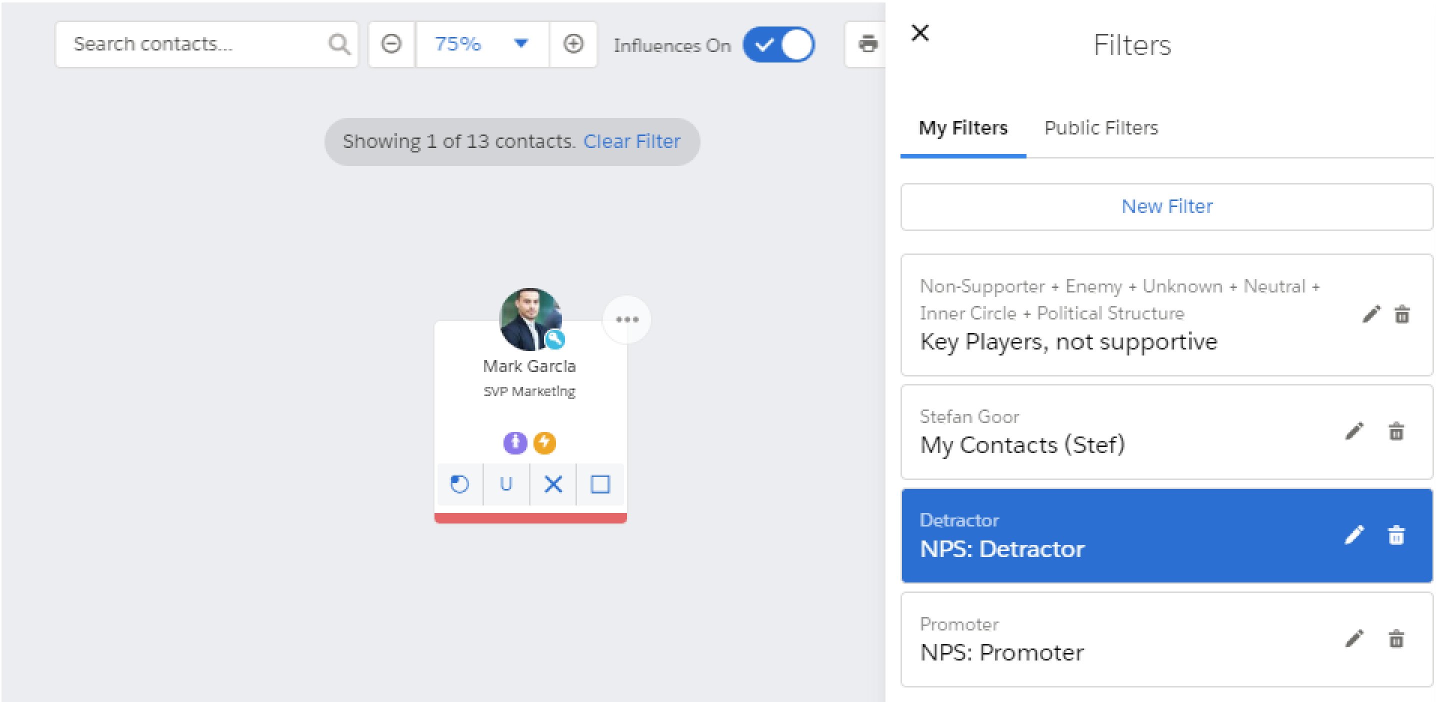


In the Filters panel, you can create filters and select saved filters.



12.9.1 Applying a Filter

To apply an existing filter to the map, simply click it.

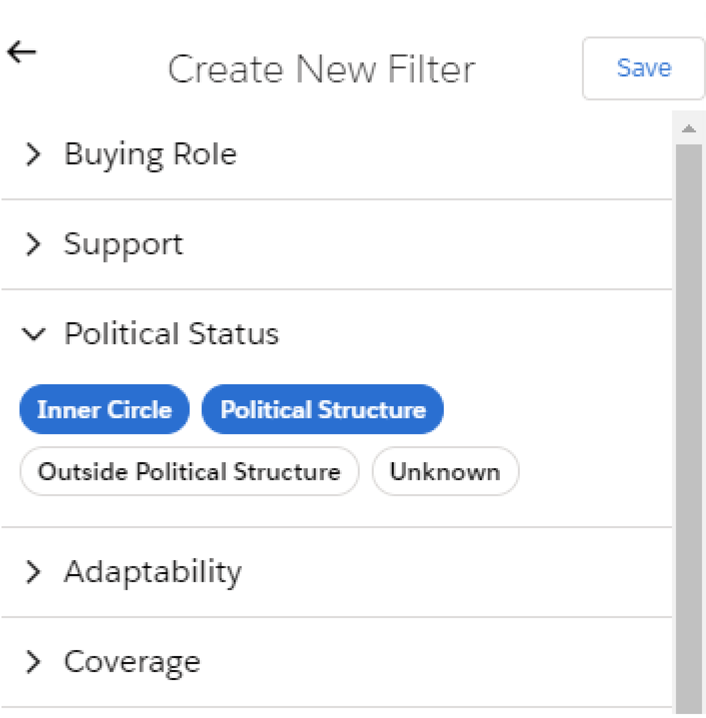


The software remembers your filter settings so that they're still applied the next time you open the map.

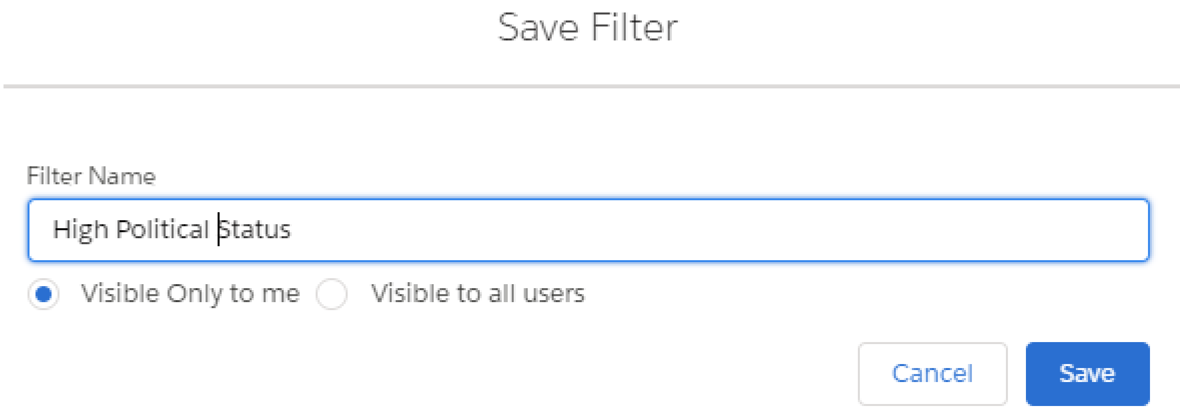
12.9.2 Creating a Filter

1. Click **New Filter**.
2. Specify the filter criteria. Your administrator can customize the set of available criteria.

> **Note:** Date fields are not supported by filters.



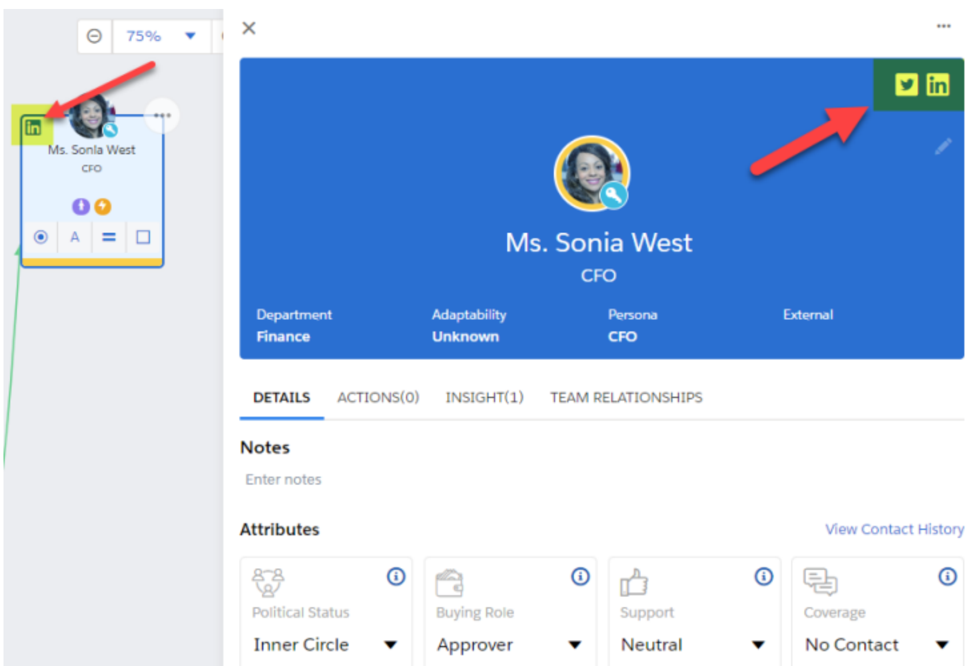
3. Click the **Save** button. The Save Filter dialog is displayed.
4. Specify a filter name, and whether it will be available just to you or to all users. If the latter is the case, the filter will be available in the **Public Filters** tab.



5. Click **Save**.

12.10 Integration with Social Media

Your administrator can configure relationship maps so that each contact on the map has a Twitter icon (on their contact card) and a LinkedIn icon (on their contact details panel and contact card) - as highlighted in the example below.



Clicking an icon opens the contact's social media account in a new browser window (IF the contact's Twitter or LinkedIn handle is specified on their Salesforce Contact record). If the handles are not specified, the icons are gray and inactive.

By keeping an eye on a contact's social media profiles, you can learn more about them. This can give you a better understanding of the issues that may affect their thinking about the kinds of solutions you can offer.

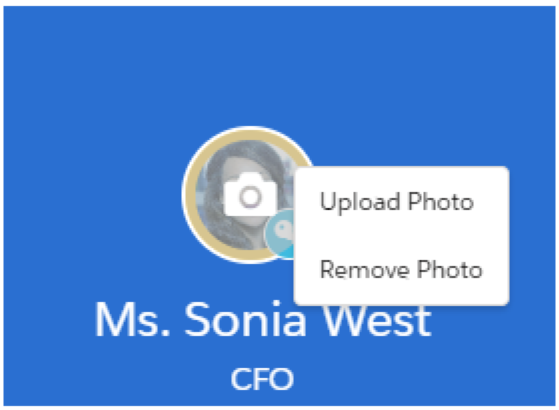
12.11 Contact Images on Relationship Maps

By default, relationship maps use a contact’s Twitter profile image, if the contact's Twitter profile has been specified in their Salesforce social profile.

Alternatively, your administrator can configure relationship maps so that you can upload a profile picture for each contact.

To upload a profile photo for a contact:

1. Select the contact on the relationship map.
2. In the details panel, click the profile image.
3. Select **Upload Photo**.



4. Upload the image file.
5. Click **Save**.

The image is set for the contact. It's used on all relationship maps that include the contact.

13 Relationship Maps in Quip

With Quip, your team can collaborate in real time on shared online documents.

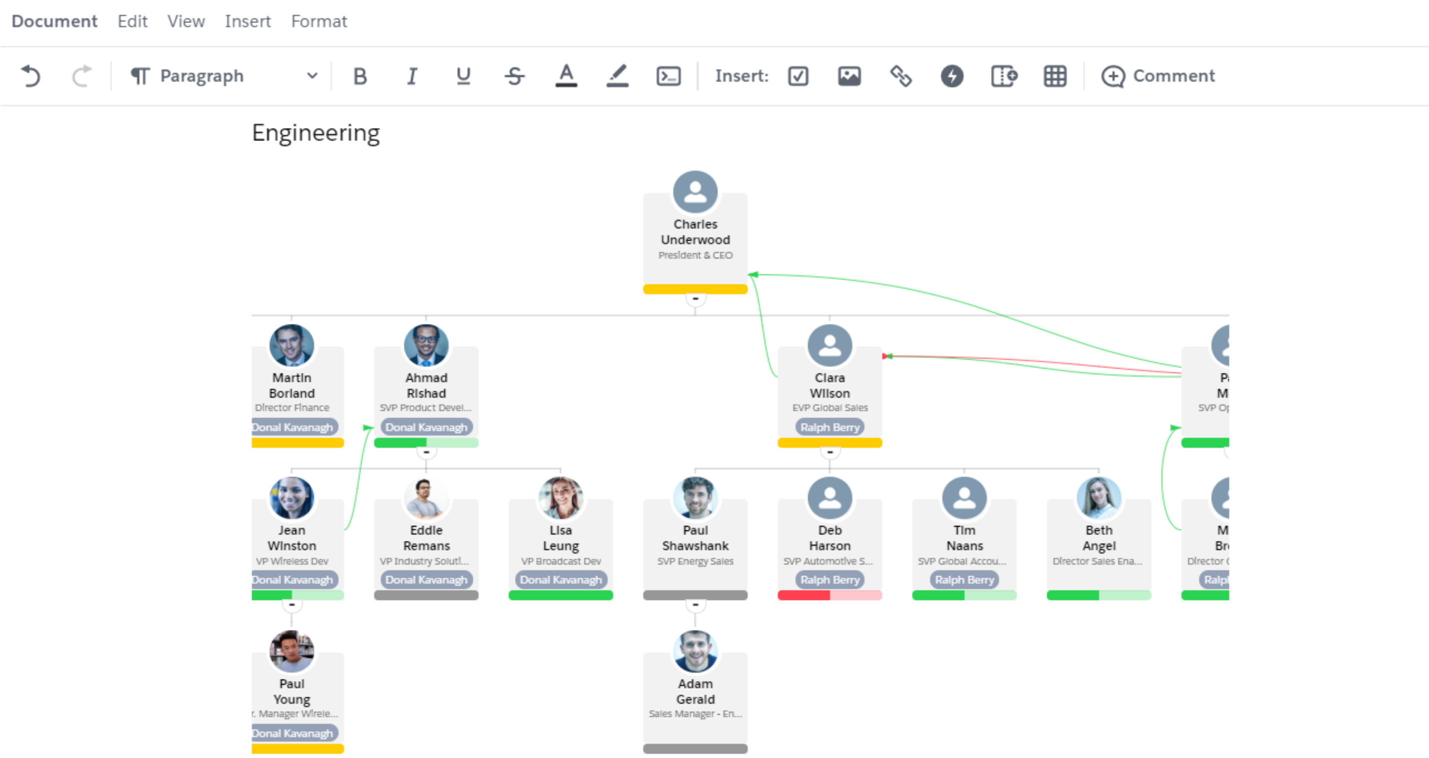
You can embed 'live apps' in a Quip document. These make custom functionality available in the document.

Altify Relationship Map for Quip is a Quip live app.

Use it to embed one of your relationship maps into the Quip document.

You can then view and work on the map in the document.

The app maintains a live connection to your Salesforce org, which ensures that your map stays in sync with Salesforce.



13.1 Relationship Map Features Available in Quip

In Quip, you get the most essential relationship map features:

- **Relationship Lines**

  You can see reports-to lines, influence lines, and conflict lines, just as in Salesforce.

  However, you can't show/hide or change these lines.

- **Color-Coding and Relationship Strength**

  The contact nodes show the same color-coding and strength indicator that you're familiar with from Altify.

- **Relationship Attributes and Contact Notes**

  To update a contact's relationship attributes or notes, click the contact and make the necessary changes.

- **Contact 'Relationship Owner'**

  If the contact has a relationship owner on the map in Salesforce, the owner's name is shown on the contact node.

  Otherwise, no owner name is shown.

- **Contact Visibility**

  You can control which contacts are visible:

  - Filtering out selected contacts
  - Expanding and collapsing branches of the map

- **Quip Comments**

  You can also add contact comments to a contact on the map in Quip. However, this is available only in Quip - you won't see these comments in Salesforce.

> **Note:** The following relationship map features are not displayed in Quip: indicators that a contact is a key player or external, and Persona cards. If you need the full range of features, you can quickly access the map in Salesforce.

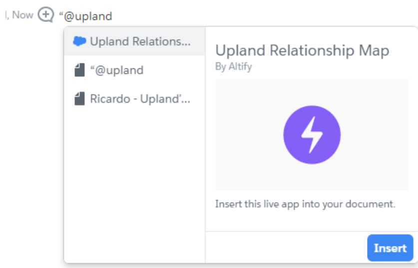
> **Note:** The Altify relationship map app works only if your org has been configured for Quip compatibility. This is an administrator task.

13.2 Adding a relationship map to Quip

> **Note:** You can't add a relationship map to your Quip document on a phone.

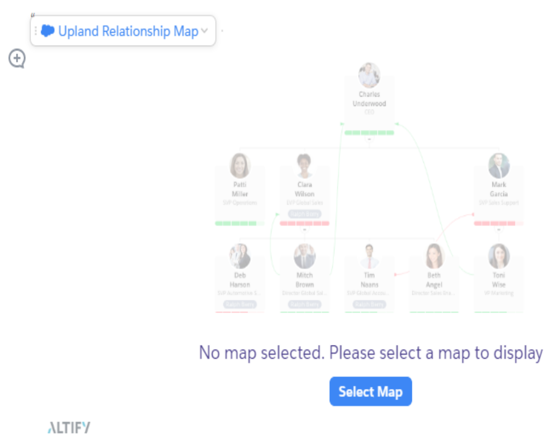
To add a relationship map to your Quip document:

1. Place the cursor at a suitable location in the document.
2. Begin typing @*Upland Relationship Map*.
3. As you type, the live app becomes available as an option you can select.

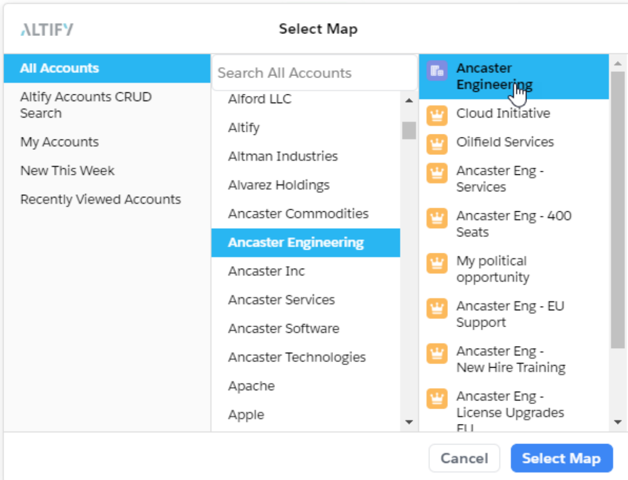


4. Select **Upland Relationship Map**, and click **Insert**.
5. If you haven't already logged into your org in an instance of the app:
    i. Click **Connect**.
    ii. Select either **Production** or **Sandbox**.
    iii. Log into your org.
    iv. Click **Allow** to give the live app access to the required Salesforce data.

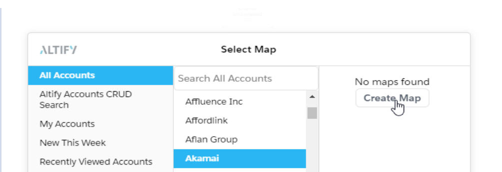
    If you have already logged into your org, you don't get these options.
6. Click **Select Map**.



7. Select a map belonging to an account or one of its opportunities, and then click **Select Map**.

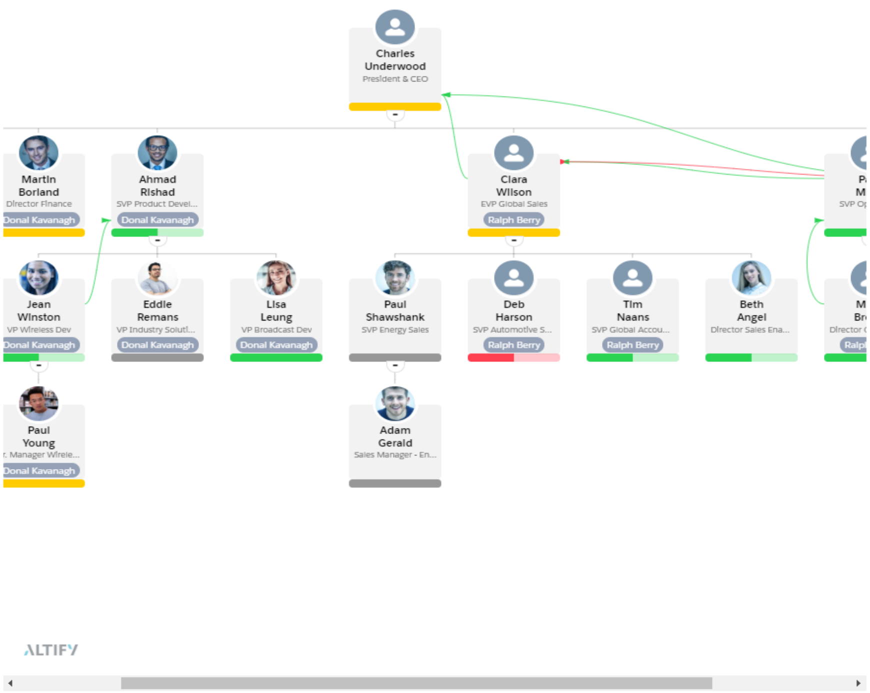


Note: If the selected account doesn't have any relationship maps, you can click **Create Map** to open the map creation page in Salesforce, and create the map you need.



(Once the map is created, repeat the map selection process.)

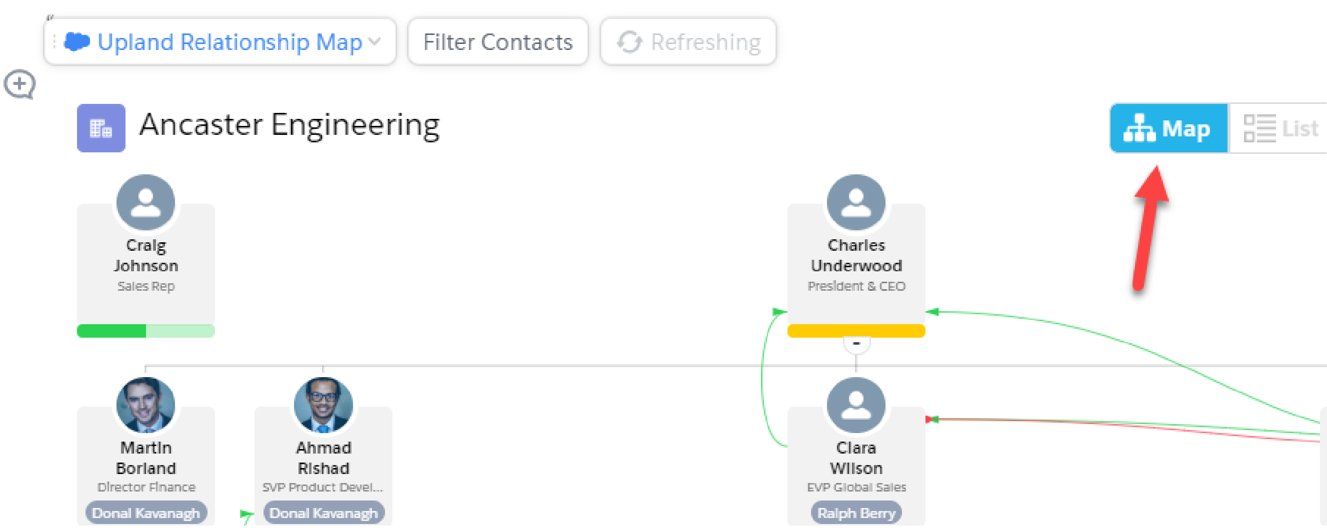
Once you've selected the map, it is shown in your Quip document.



13.3 Map View and List View

Quip offers two ways of viewing the contacts associated with the relationship map: 'Map View' or 'List View'.

You can toggle between these using the Map and List buttons.

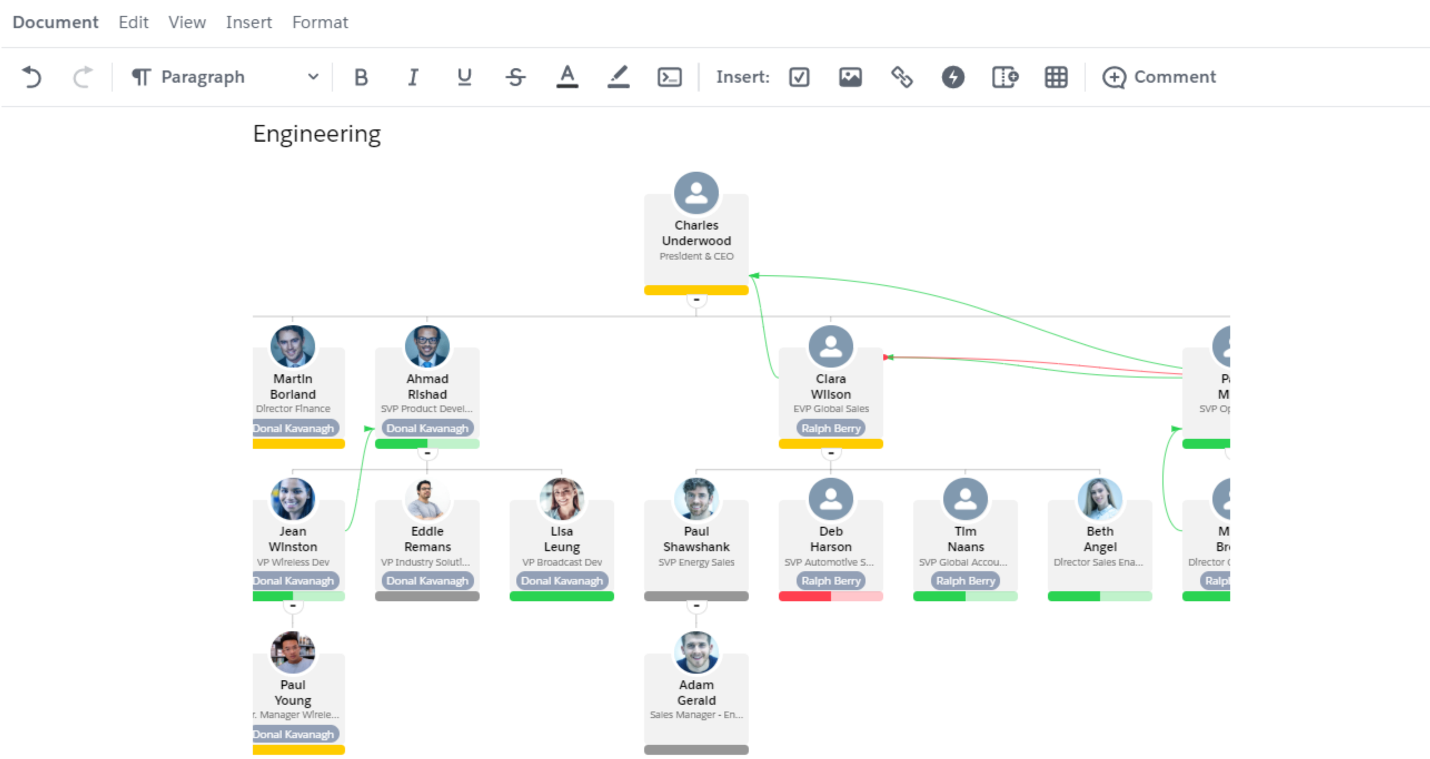


Map View

Normally, a relationship map is shown in 'Map View' format. This matches the map layout of the map in Salesforce:

- The contacts are shown in their reports-to hierarchy.
- Influence and conflict lines are shown.
- Each contact node includes relationship attribute symbols and the strength indicator.
- If a contact has a 'relationship owner', the owner's name is shown.

To update information about the contact, you click the node, and a dialog opens, where you can add notes and change attributes.



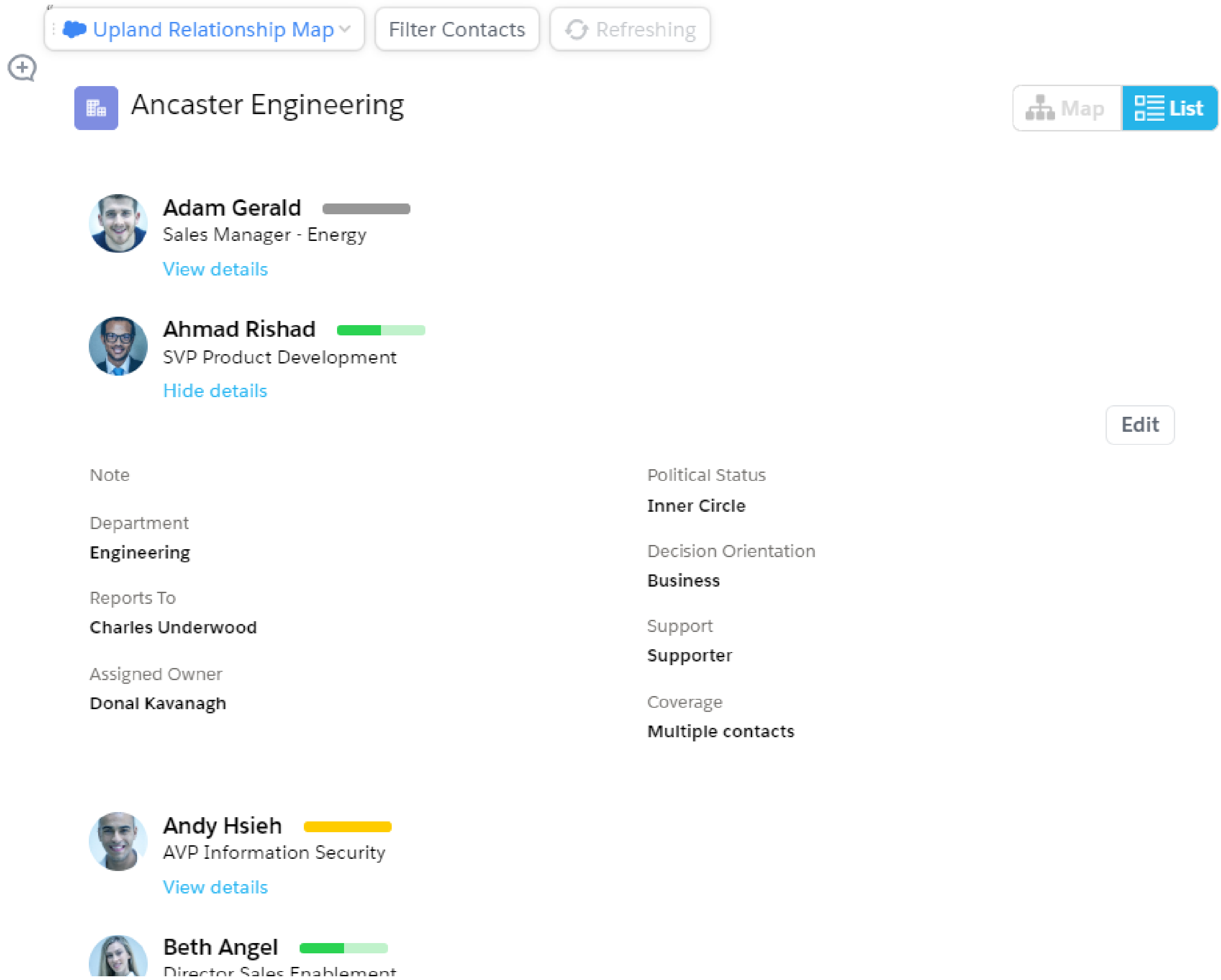
List View

In Quip, the map can also be shown in 'List View'.

This lists the map's contacts in order of their significance on the map. (Their significance is calculated by the software based on the relationship attributes assigned to the contact.)

Each contact has a **View details** link, which expands the contact's details.

You can then click **Edit** to update contact information.



13.4 Updating Contact Attributes and Notes

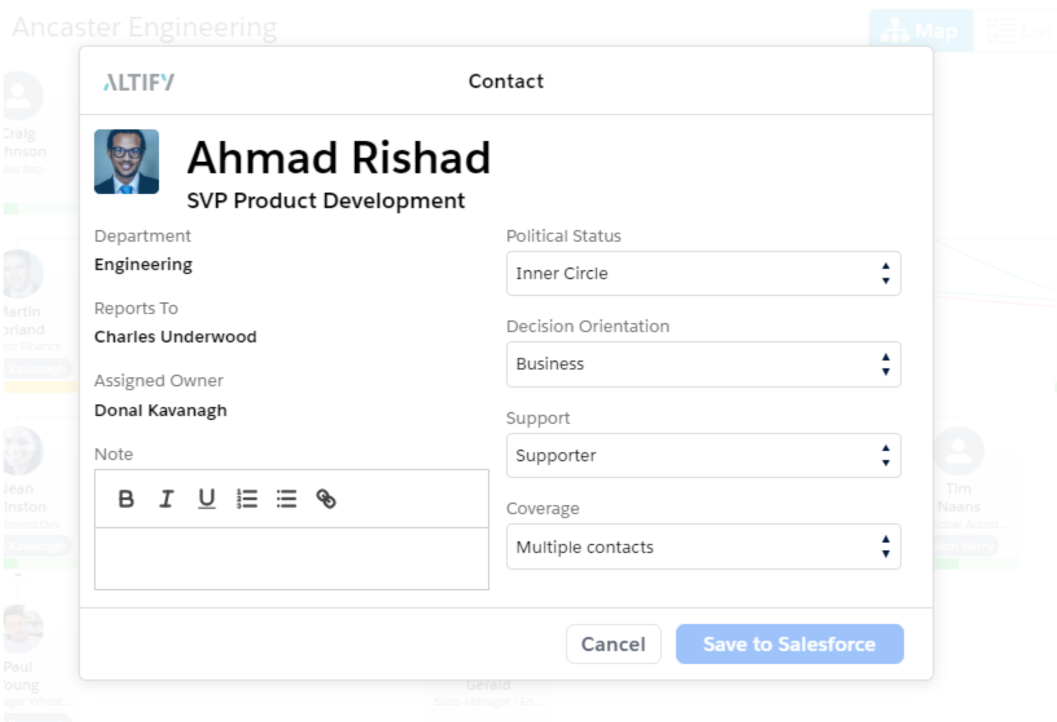
For a contact on a relationship map in Quip, you can:

- Set relationship attributes
- Add contact notes

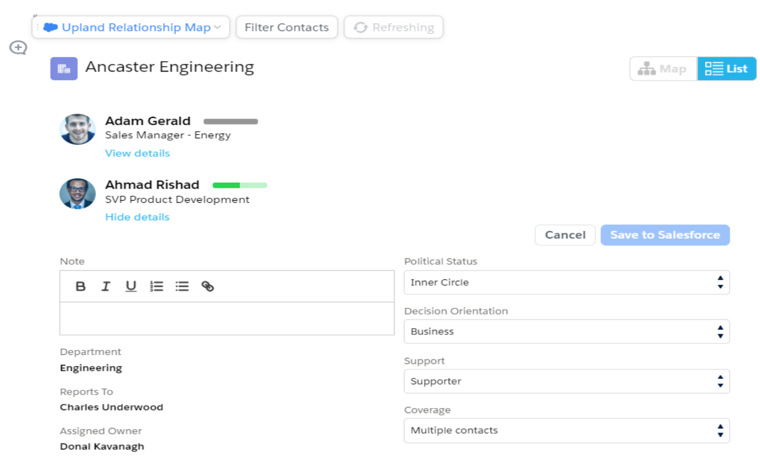
1. If you're in Map View, click the contact on the map.

   Or if you're in List View, click the contact's **View details** link, and then click **Edit**.

2. Add notes and make attribute selections as necessary.



Contact details in Map View



Contact details in List View

3. When you've made your changes, click **Save to Salesforce**.

Your changes are sent to Salesforce, and are reflected on the map in Salesforce the next time it is opened or refreshed.

13.5 Seeing the Latest Changes

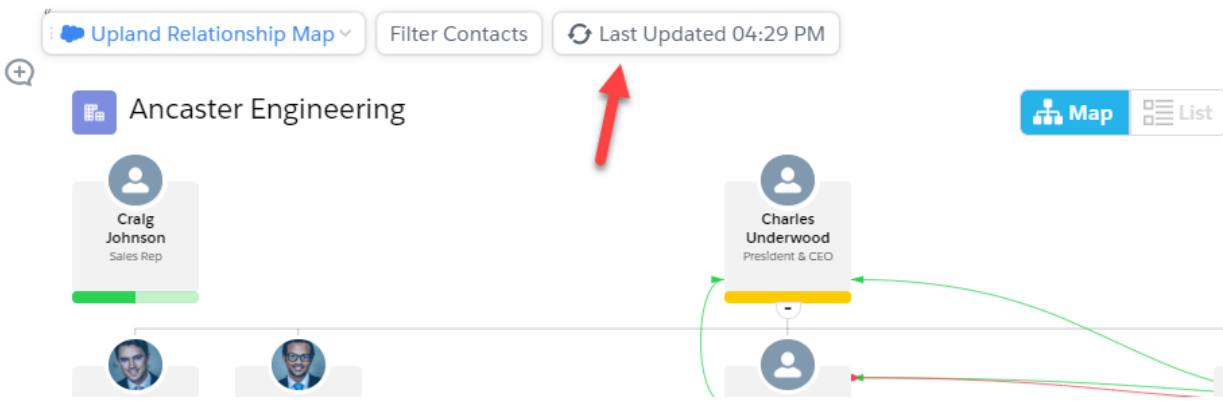
The relationship map in your Quip document has an active connection to Salesforce.

This means that:

- The changes you make in Quip are synced with Salesforce.
- Any changes made to the map in Salesforce are synced with Quip.

To see the latest changes, you need to manually refresh the map.

To do this, click the **Last Updated** button.

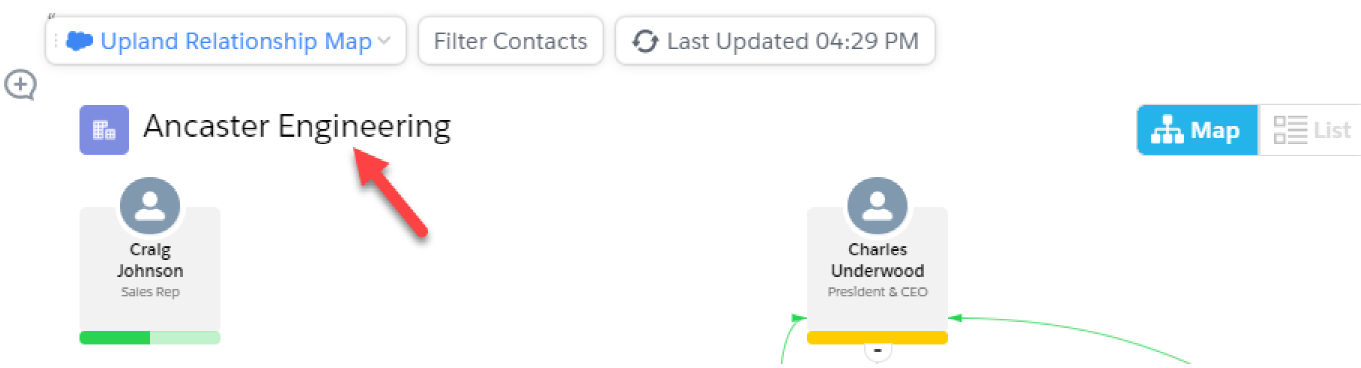


Note: Similarly, in Salesforce, to see the latest changes made in Quip, you need to refresh the page or reopen the map.

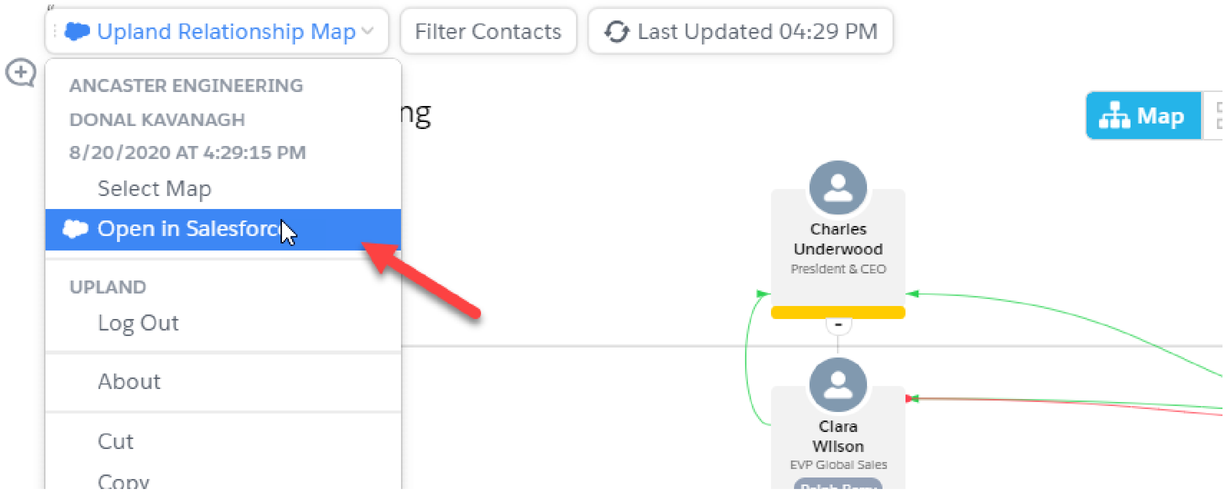
13.6 Launching the Map in Salesforce from Quip

To open another browser tab showing the relationship map in Salesforce:

Click the map's title.



Or select the **Open in Salesforce** drop-down option.



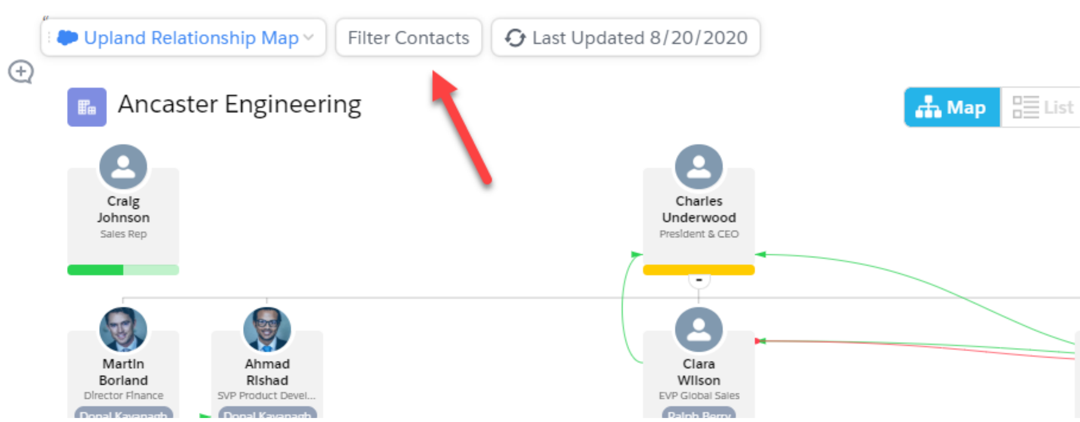
13.7 Showing and Hiding Contacts

To focus on particular contacts or areas of the relationship map, you can:

Filter Contacts

If you need to focus on particular contacts on the map, you can simplify your view by filtering out the others:

1. Click the **Filter Contacts** button.



2. Deselect the contacts you don't want to see.
3. Click **OK**.

The map adjusts accordingly.

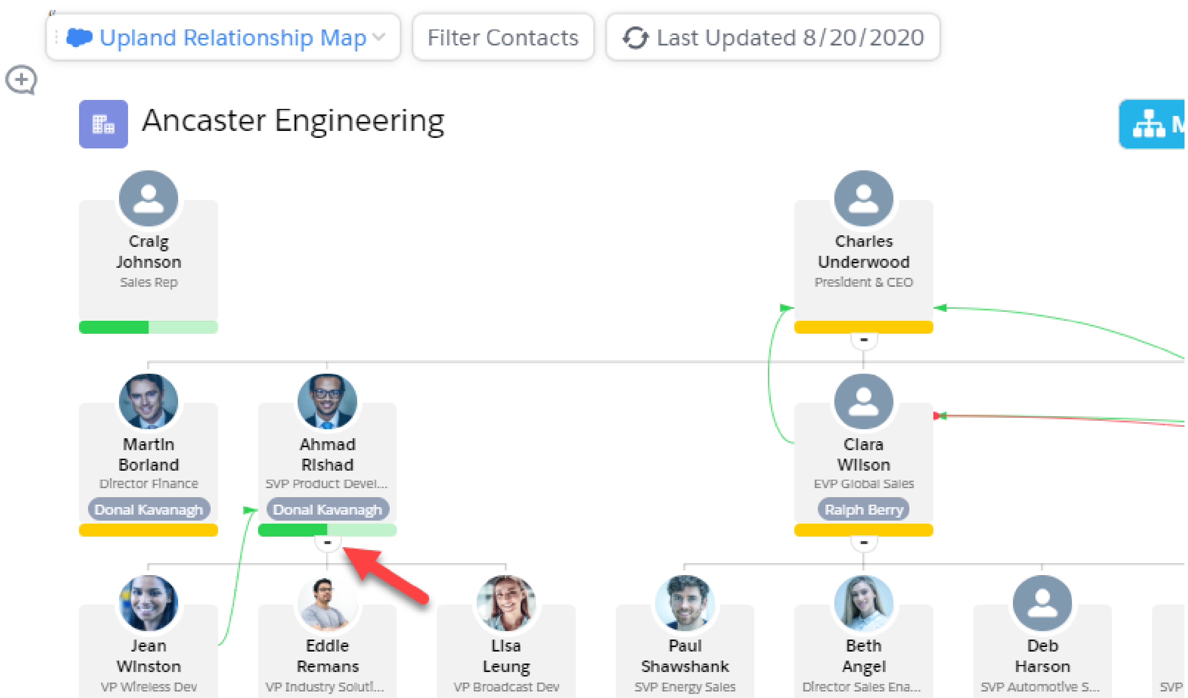
Collapse a Contacts Tree

If certain branches of the relationship map are not relevant to your work, you can simplify your view by collapsing them.

You can expand them again later.

To hide the tree of contacts below a particular contact, you can either:

- Double-click the contact.
- Click the **-** icon below the contact.



To expand a collapsed branch, either:

- Double-click the contact.
- Click the **+** icon below the contact.

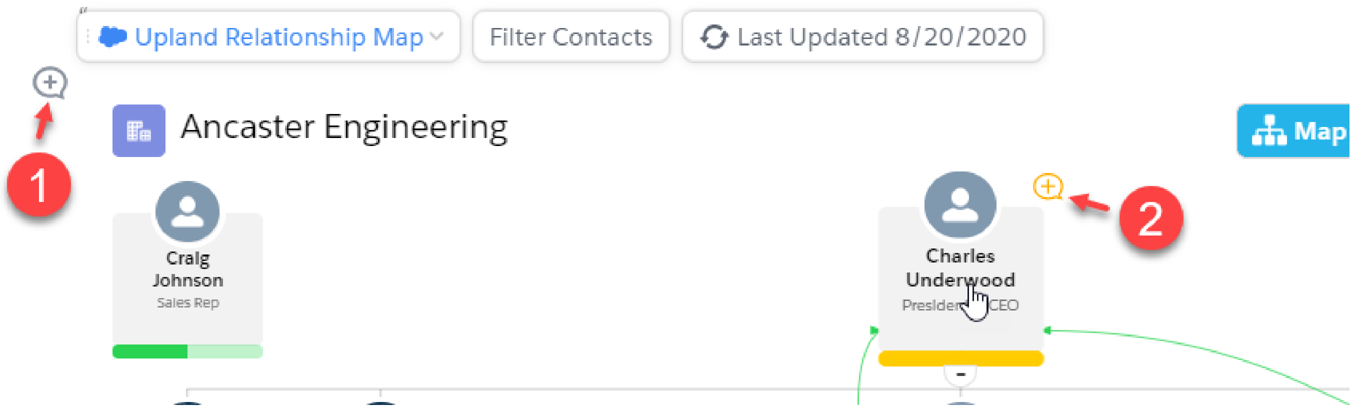
13.8 Adding Quip Comments

Part of Quip's standard functionality is to add comments to items embedded in the document.

This includes embedded relationship maps, and contacts within the map.

To add Quip comments to the map or a contact within the map:

1. Click the **Add a Comment** icon for the map (1) or the contact (2). The contact comment icon is displayed when you hover over the contact.



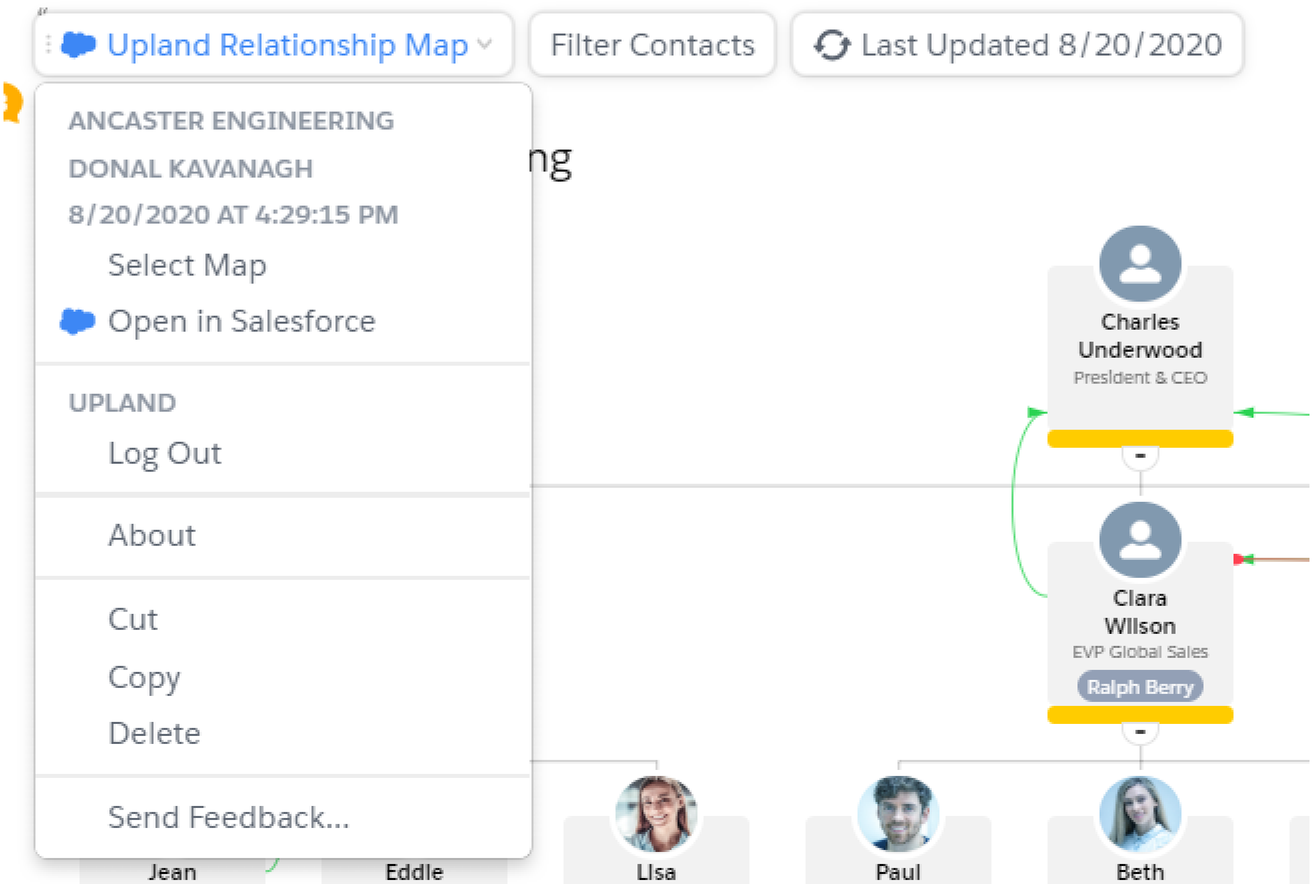
1. Type your comments in the Comments window that is displaed. You can also include file attachments if required.
2. Click **Send**.

The comments appear in the Quip document's chat thread. They are not sent to Salesforce.

When one or more comments have been added to a contact, the icon specifies how many comments there are.

13.9 App Menu

The app's system menu shows information you may find useful, and provides a number of options.



The following information is provided:

- The name of the map.
- The name of the user who last refreshed the map (to sync it with Salesforce).
- The date and time it was refreshed.
- The name of the org (shown above the Log Out option).

The following options are provided:

- **Select Map**: enables you to select another relationship map that you want the app to display in the Quip document.
- **Open in Salesforce**: opens a new browser tab showing the relationship map in Salesforce.
- **Log Out**: closes the app's connection to the Salesforce org.
- **About**: opens a dialog showing some basic information about the app.
- **Cut/Copy/Delete:** enable you to cut, copy, or delete this instance of the app in the Quip document.

14 Support

Need Assistance?

Upland Altify is here to help! We have a variety of online resources to help you find the information you need and a dedicated Technical Support team to help you resolve any issues or questions that are impeding your use of .

14.1 Upland Altify Community

The Upland Altify Community offers multiple resources to help you find the information you need, including:

- **Product Info, News, & Events**: View product data sheets, white papers, customer success stories, and general product information.
- **Notifications**: Sign up to receive proactive alerts regarding issues impacting the Altify cloud environment.
- **Forums**: Post and reply to discussions on topics with and other customers.
- **Knowledge Base**: Articles on how to solve common problems, from configuration to troubleshooting issues
- **Known Issues**: View current known issues.
- **Release Information**: Get product release notes and release timelines.
- **Training**: Information on our instructor-led training courses and free Open Q&A sessions. Q&A sessions are a great opportunity to ask questions and discuss with an experienced trainer and other users.

Visit the Upland Altify Community.

14.2 Technical support

The Technical Support team is dedicated to helping our customers succeed with their use of our products by providing timely resolutions to customer issues and questions that are impeding their use of products.

14.2.1 Contact Technical Support

When contacting Technical Support, you will need to provide your name, contact information, company account name, and as much technical detail that you can provide to clearly describe your question or issue. Attachments can be included when using the Community or email to request assistance.

- **Web**: Manage cases and open new cases by clicking the **Contact Support** button in the Community.
- **Email**: Send any support requests to altify-support@uplandsoftware.com.

14.2.2 Support hours

Standard support hours are 4:00 AM to 7:00 PM (U.S. Eastern Time), Monday-Friday. Support issues submitted after these hours will be addressed on the next business day.

14.2.3 After contacting Technical Support, what should I expect?

You will receive an email confirming your case has been created, along with the case number. Please use that case number when corresponding with Technical Support on any follow-up communications.

Response times

The following are our response times for each level of issue:

Priority Level	Definitions	Response Time	Commitments
Urgent (Outage)	Upland cloud service is unavailable.	1 hour (24 hours a day, 365 days a year)	• Immediate and continuous. • Hourly status updates.
Urgent (Business Critical)	• Production system defect that prevents business critical work from being done and no workaround exists. • Defect causes a material loss of data in the production system. • Security-related defect.	1 business hour	• Immediate and continuous effort to resolve the defect or provide a workaround. • Daily status updates until the defect is resolved or a workaround is provided.
High	• Production system defect that prevents business critical work from being done and a workaround does exist. • Defect violates the material specifications in the documentation and impacts your organization's production system.	4 business hours	Upland will use reasonable efforts to resolve the defect as rapidly as practical, but no later than the next update after reproduction of the defect.
Normal	All other defects	1 business day	Defects will be addressed in Upland's normal update.

15 Glossary

A

Adaptability

Adaptability is a relationship attribute that can be assigned to a contact on a relationship map. It indicates the person's general attitude to concerns such as acquiring your solution. The available values are 'Laggard', 'Conservative', 'Pragmatist', 'Visionary', and 'Innovator'.

Adaptability: Conservative

'Conservative' is an Adaptability value that can be assigned to a contact on a relationship map. It indicates a person who prefers ‘plug and play’ solutions, and does not like implementations that are high in either cost or time.

Adaptability: Innovator

'Innovator' is an Adaptability value that can be assigned to a contact on a relationship map. It indicates a person that loves to be the first to try new ideas and solutions. They are not afraid to be disruptive, or to make changes to something that is well-established.

Adaptability: Laggard

Laggard' is an Adaptability value that can be assigned to a contact on a relationship map value. It indicates a person who will only buy your solution when there are no other alternatives.

Adaptability: Pragmatist

'Pragmatist' is an Adaptability value that can be assigned to a contact on a relationship map. It indicates a person who tends to be in charge of mission-critical systems. They generally rely on the incumbent supplierfor upgrades, and to fix the system when it is broken.

Adaptability: Visionary

'Visionary' is an Adaptability value that can be assigned to a contact on a relationship map. It indicates a person who is looking for a competitive advantage, who will ask the supplier to make changes to the standard offering to give them a competitive advantage.

B

Buying Role

Buying Role is a relationship attribute for contacts on an opportunity relationship map. The default options shipped with Opportunity Manager are: 'User', 'Evaluator', 'Decision Maker', and 'Approver'. Additional roles can be created, if necessary, but the software only uses the default values for scoring calculations.

Buying Role: Approver

A Buying Role is a relationship value for a senior-level contact with ultimate accountability for success of the project. They review the buying decision, give it their blessing, and typically release the funds. An 'Approver' is a buyer who can say ‘no’ and overturn a Decision Maker's decision. In large organizations, there may be multiple Approver levels, with dollar thresholds delineating their level of approval responsibility. For your map, you need to have the ultimate Approver. The Approver is positioned at the top of the map, is in the Inner Circle, and is a Key Player.

Buying Role: Decision Maker

'Decision Maker' is a Buying Role value that can be assigned to a contact on an opportunity relationship map. A Decision Maker is a person who can commit the company to a particular vendor, or to a certain strategic direction. They have accountability for selecting the solution. A Decision Maker's Political Status on the map is always 'Political Structure' or 'Inner Circle' (never 'Outside Political Structure'). A Decision Maker is a Key Player.

Buying Role: Evaluator

'Evaluator' is a Buying Role value that can be assigned to a contact on an opportunity relationship map. It indicated that the person can say 'No' to the solution, but they can’t say 'Yes'. The best an Evaluator can do for you is to recommend your solution. Evaluators can block your competitors, or they can block you. They are formally assigned to the evaluation project (for an opportunity). They evaluate and accept based on defined standards, such as, “Do you meet the RFP requirements?', 'Have you met the defined criteria?', 'Do you operate within our standards/ company policy/business practices?'. (An example of standards might be that the customer is a Six Sigma organization, and you need to meet that requirement.)

Buying Role: User

'User' is a Buying Role value that can be assigned to a contact on an opportunity relationship map. It indicates that the person will directly use your solution.

C

Coverage

Coverage is a relationship map attribute that indicates how much you've been in touch with a contact. There are several possible Coverage values: Unknown, No Contact, Brief Contact, Multiple Contacts, and In Depth.

D

Decision Orientation

Decision Orientation is a relationship attribute for contacts on an account relationship map. It indicates what will influence the contact's decision-making process. The default values aailable for this attribute are: 'Financial', 'Technical', 'Relationship', and 'Business'.

Decision Orientation: Business

'Business' is a Decision Orientation value that can be assigned to a contact on an account relationship map. It indicates that the person sees the big picture and overall impact of your product or solution. They can properly balance the technical, financial, and relationship issues. Their vision often extends beyond their company to include clients, competitors, and community.

Decision Orientation: Financial

'Financial' is a Decision Orientation value that can be assigned to a contact on an account relationship map. It indicates that this person’s primary focus is price, cost, and economics. As well as the viablity of your solution, with this person you must also consider numbers and negotiations.

Decision Orientation: Relationship

'Relationship' is a Decision Orientation value that can be assigned to a contact on an account relationship map. It indicates that this person believes they are forming a business partnership. Their focus is on the people and company that will be serving their business. As well as the viablity of your solution, with this person you must also consider support, trust, effort, and responsiveness.

Decision Orientation: Technical

'Technical' is a Decision Orientation value that can be assigned to a contact on an account relationship map. It indicates that this person’s primary focus is on product functionality and technical capability. They are often analytical and details-oriented. Product demonstrations, benchmarks, and careful deliberation are key to your success with this person.

Division

A division is typically a smaller service unit or business unit within an account. By providing the same features as an account (row on the opportunity map, relationship map, insight map, etc.), divisions allow you to accurately map your customers' buying structures, without restriction to Salesforce Account records.

L

Level of Relationship: Credible Source

You consistently meet or exceed the customer's expectations. Your contact or coverage in the account is with lower level managers across multiple functions. You typically enter the buying process just before the customer is ready to evaluate products or solutions to address their needs. You leave the relationship just after the product or solution has been implemented.

Level of Relationship: Problem Solver

Your relationship with the customer is more proactive. You are aware of existing problems and develop solutions for them. You also have contact with the customer at higher management levels within multiple functions and across multiple units. You get involved in the buying process just before the customer has initiated a project and you remain involved with the customer in the measurement of results.

Level of Relationship: Trusted Advisor

You and the customer explore emerging needs and new directions on a confidential basis. Therefore, your role in the customer's organization is like that of a consultant. Your contacts within the company are at the executive level throughout the enterprise. You really don't enter or exit the buying process. Your involvement with the customer is more cyclical.

Level of Relationship: Vendor

Your relationship is based solely on your product and your company's ability to deliver. Generally, you become aware that your customer has a specific need when the customer is ready to evaluate products. So, you are reactive in responding to the customer's needs. You generally leave the relationship just before the product or solution is implemented.

O

Opportunity Health

For an opportunity whose last activity is occurred 30 days ago or less, the value in the Health field is 'Active'. If the last activity occurred longer than 30 days ago, but less than 60 days ago, the value in the Health field is 'Stalled'. If the last activity occurred longer than 60 days ago, the value in the Health field is 'Inactive'. (These are the default thresholds, and may be different in your org.)

Opportunity Status

An opportunity has the Status value'Won' if it has been closed won. It has the Status value 'Projected' when its closure probability is above a configurable threshold value. (The default is 70%.) Below this threshold, its status is 'Possible'.

P

Political Status: Inner Circle

'Inner Circle' is a Political Status value that can be assigned to a contact on a relationship map. It indicates that the contact 'controls outcomes'. They have Influence and decide what will happen in the organization. They are Key Players. The number of Inner Circle contacts usually correlates with the complexity and size of the account or opportunity. Typically, you have 2 to 3 Inner Circle contacts for an opportunity. The ultimate Approver is often at the top of the Inner Circle. This is the person who approves and funds projects and initiatives. Other Inner Circle contacts have the Approver’s ear when deciding which projects to approve.

Political Status: Outside Political Structure

'Outside Political Structure' is a Political Status value that can be assigned to a contact on a relationship map. It indicates a person who is outside the customer's decision-making political structure - a person who 'watches and wonders what happened'.

Political Status: Political Structure

'Political Structure' is a Political Status value that can be assigned to a contact on a relationship map. It indicates a person who is trusted by the Inner Circle and “makes things happen” for them. They have Influence and are Key Players. The number of Political Structure buyers usually correlates with the complexity and the size of the opportunity. Typically, you have 2 to 5 Political Structure contacts for an opportunity.

Y

Your Status

Your Status is a relationship attribute that can be assigned to a contact on a relationship map. The default options are 'Mentor', 'Supporter', 'Neutral', 'Non-Supporter', and 'Enemy'.

Your Status: Enemy

'Enemy' is a Your Status value that can be assigned to a contact on a relationship map. It indicates that the person is a Mentor for one of your competitors.

Your Status: Mentor

'Mentor' is a Your Status value that can be assigned to a contact on a relationship map. It indicates a person who prefers your solution, and sells your solution to colleagues in your absence. They believe that your success is critical to their success.

Your Status: Neutral

'Neutral' is a Your Status value that can be assigned to a contact on a relationship map. It indicates a person who is undecided or indifferent with regard to your product.

Your Status: Non-Supporter

'Non-Supporter' is a Your Status value that can be assigned to a contact on a relationship map. It indicates a person who prefers a competitor over you, or prefers business-as-usual or a do-it-yourself approach to your solution, or favours another project.

Your Status: Supporter

'Supporter' is a Your Status value that can be assigned to a contact on a relationship map. It indicates a person who prefers your solution, and who supports you visibly and verbally with others, but who doesn’t sell in your solution to colleagues in your absence.

16 Index

Q

R