

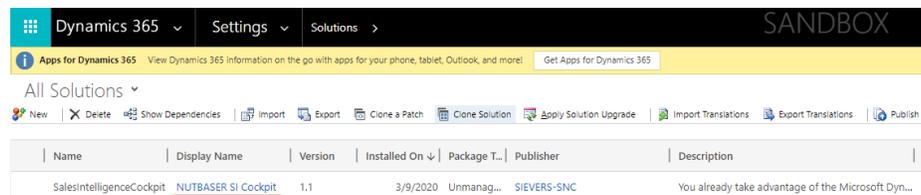
NUTBASER Sales Intelligence Cockpit

NUTBASER Sales Intelligence Cockpit is a tool to easily and intelligently qualify and manage sales opportunities. You are simply guided by 8 criteria to describe the current situation of the opportunity. By focusing on clear results and facts, this analysis is highly objective. The calculation of the probability is thus based on objective information instead of the typical, insignificant stage in which the opportunity has been classified. Intelligent evaluations provide you with a current and highly reliable forecast.

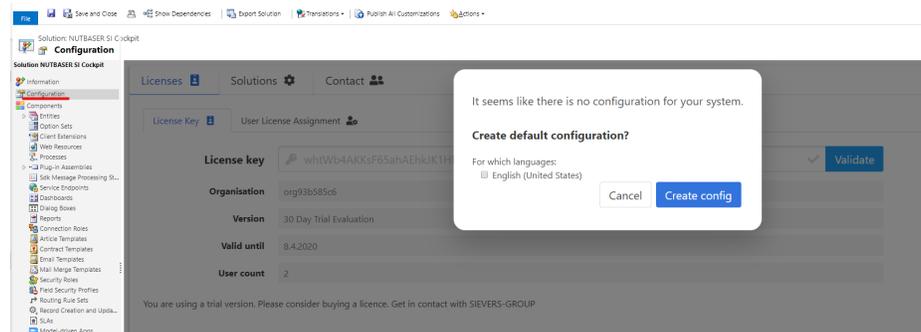
NUTBASER Sales Intelligence Cockpit provides you with . . .

- Overview in the cockpit
- Transparency: all decision-relevant information at a glance
- The essential “MORE” of information:
 - Opportunity health, how does it look like?
 - Where is your shortage?
 - What to do in order to win?
- real knowledge: What is the status of the opportunity?
- Insight: What is the quality of the opportunity?
- Overview Which factors are influencing the success/failure of an opportunity?

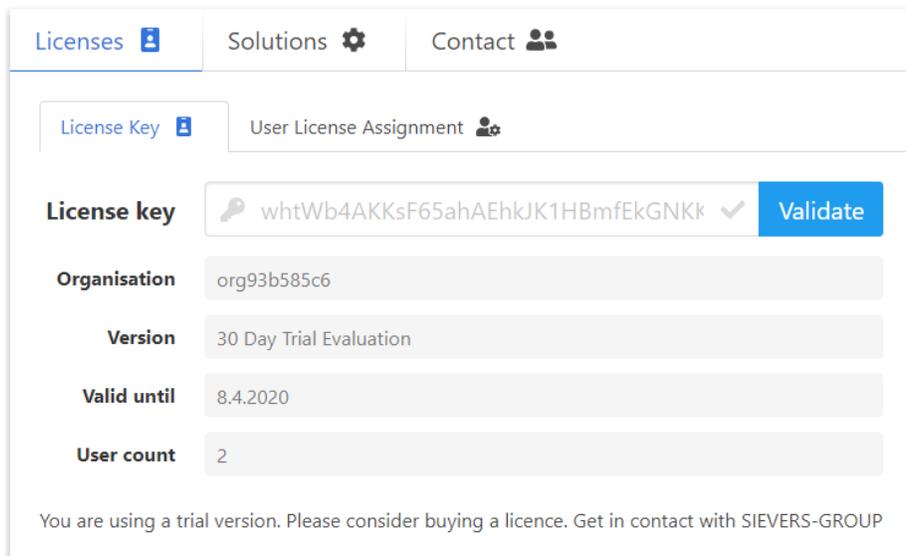
Configuration



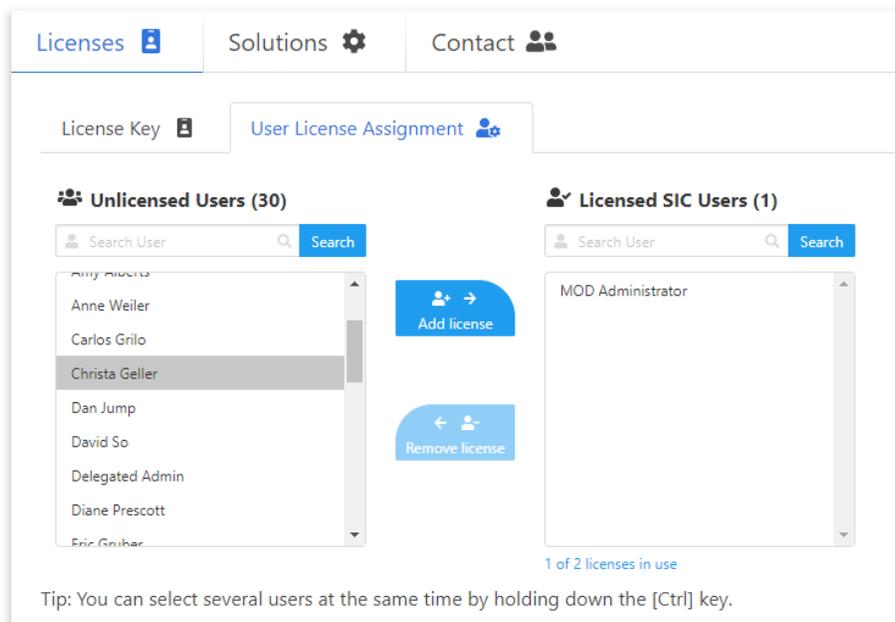
Select the **NUTBASER SI Cockpit** solution in the solution-menu.



Choose the **Configuration**-menu. After you accepted the terms of use, you will be asked to create a new configuration. Select your language and click on **Create config**.



At the **Licenses**-screen you have an overview of your current license. If you bought a license, you can enter the key here.



At the **User License Assignment**-tab, you can assign licenses to your users. Just select them and click on **Add license**.

Licenses **Solutions** Contact

Select a solution or create a new one

Select a solution [Add new +](#)

Solution name [Save](#)

Dynamics 365

Borders

Overwrite identification borders?

Identification Questions English (United States)

Position	Points	K. O. level	Fulfillment condition	
1	10	0	More than 50 employees	Delete
2	20	0	Customer in my region	Delete
3	30	0	Customer in preferred br	Delete
4	20	0	Already using ECM syste	Delete

[Add new row +](#)

At the **Solutions**-screen, you can create and edit solutions for your products. The **Identification Questions** describe your ideal customer profile.

Open Nutbaser SI Cockpit

Email-Templates
Opportunity · Opportunity ▾

Opportunity Sales Process < **Qualify (< 1 Min)**

Summary Product Line Items Quotes **Related**

Topic	* Email-Templates
Solution	---
Contact	---
Account	---
Purchase Timeframe	---
Currency	* USD
Budget Amount	---
Source Campaign	---
Purchase Process	---

- Related - Common
 - SI Cockpit**
 - Activities
 - Connections
 - Audit History
 - Playbooks

To open the *Nutbaser SI Cockpit*, open an opportunity, click on **Related** and select **SI Cockpit**.

Lookup Record
Enter your search criteria.

Look for: SIC solution
Look in: NUTBASER Solution search view
Search: Search for records

Show Only My Records

Name	Border 1	Border 2	Border 3	Created On	Modified On
<input checked="" type="checkbox"/> Dynamics 365				3/9/2020 2:32 PM	3/9/2020 2:32 PM

1 - 1 of 1 (1 selected) Page 1

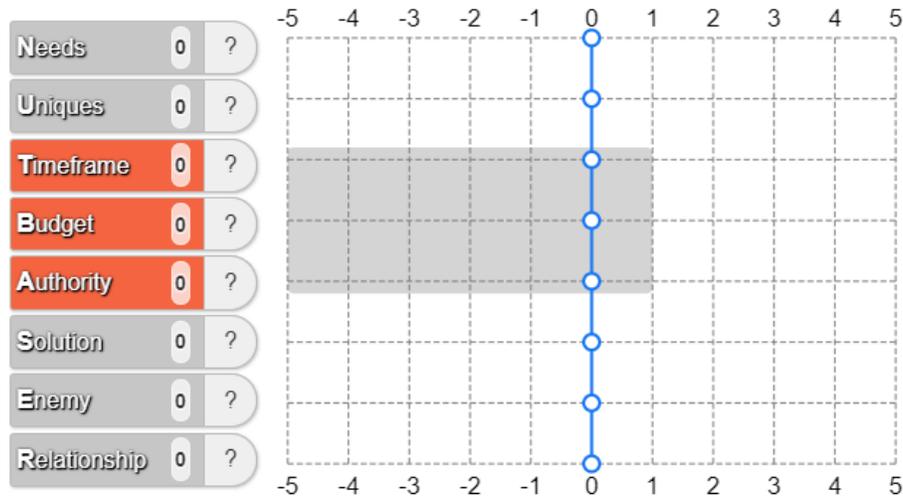
New Add Cancel Remove Value

If no solution has yet been assigned to the opportunity, a window will popup, where you can select a solution.

The screenshot displays a CRM interface for an opportunity. At the top, it shows the opportunity name 'Opportunity - Opportunity', the current stage 'Quality (18 Hrs)', and key metrics: '3/31/2020 Est. Close Date', '\$250,000 Est. Revenue', and 'In Progress Status'. The user is identified as 'MOD Administrator'. Below this, there are tabs for 'Summary', 'Product Line Items', 'Quotes', 'SI Cockpit', and 'Related'. The main area is divided into three sections: 'Graphical Overview' on the left, 'Sales processes' in the center, and 'Notes' on the right. The 'Graphical Overview' shows a grid with a blue line graph and a list of criteria: Needs (4), Uniques (2), Timeframe (0), Budget (1), Authority (2), Solution (4), Enemy (2), and Relationship (4). The 'Sales processes' section lists stages: IDENTIFICATION, QUALIFICATION, PRESENTATION, VERIFICATION, and DECISION. The 'Notes' section contains a list of notes with initials (N, U, T, B, A, S, E, R) and their corresponding text. Below these sections, there are 'General' and 'Results' tabs. The 'General' tab shows fields for 'Maker', 'Recommender', and 'Contact'. The 'Results' tab shows 'Date of purchase' (31 Mar 2020), 'Incoming order' (250000), 'Forecast' (152,500), and 'Purchase probability' (61%).

Now you can use the *SI Cockpit*.

NUTBASER Criterias

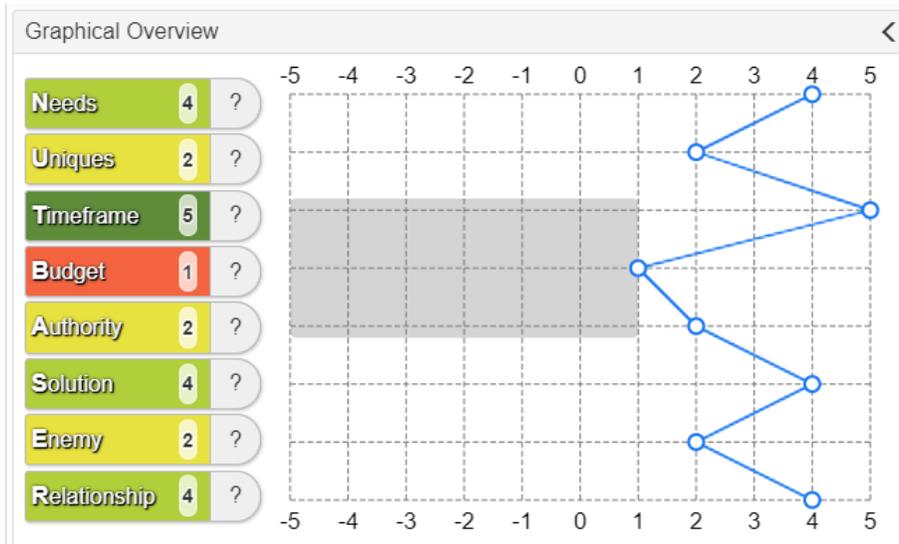


At the beginning all NUTBASER criteria and the graphic line are set to 0. The criteria are shown as buttons. These can be used to call up the selection of the criteria texts by clicking. Criteria are shown in color depending on the respective rating.

Cockpit areas

The cockpit is divided into following areas:

Graphical Overview



This area is the most important for the content and objective assessment of the opportunity. You can set the criteria according to the current situation.

Notes

Notes <

N: Check Business case (measuring)

U: clarify his uniques

T: Notes for Timeframe...

B: Notes for Budget...

A: do we know all criteria?

S: Notes for Solution...

E: check soon!

R: ok

The notes to the right of the graphic are best used for hints and important information about your project status. As the opportunity is processed multiple times over a longer period of time, the notes can change over and over again.

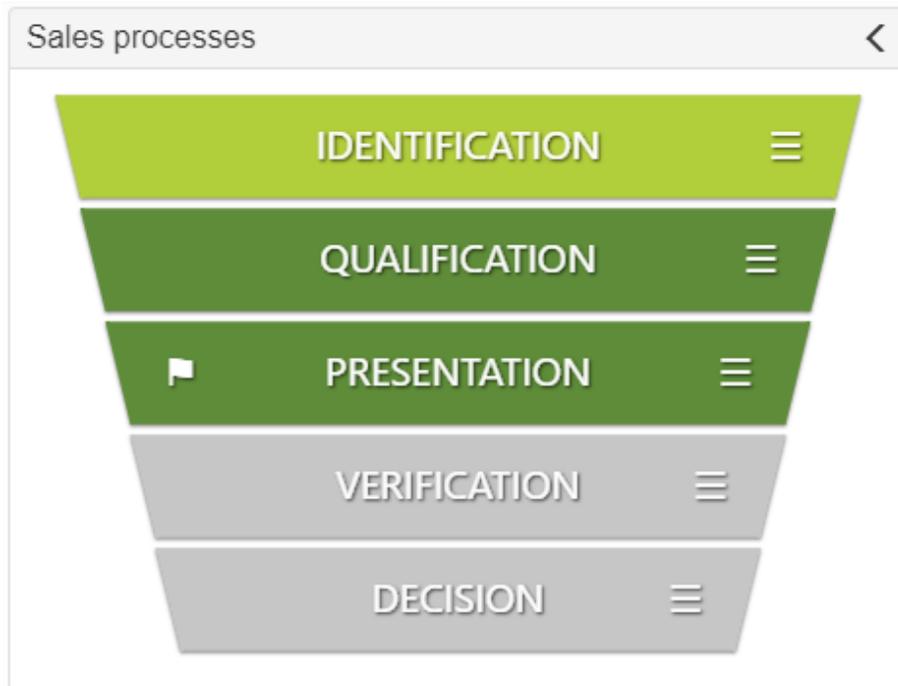
General

General <

Taker	<input type="text" value="..."/>	Q
Maker	<input type="text" value="Geralt Riva"/>	X Q
Recommender	<input type="text" value="Nancy Anderson"/>	X Q
Contact	<input type="text" value="John Doe"/>	X Q
Initial contact	<input type="text" value="05 Mar 2020"/>	📅

The project specific information about the customer and the opportunity is displayed here.

Sales process



The phases of an opportunity are displayed in the cockpit via the sales funnel. Depending on the purchase probability, the phases are typically activated automatically. The current project phase may also be specified by the user at any time with a double click.

IDENTIFICATION X				
✓	Number	Points	K. O.	Kondition
<input checked="" type="checkbox"/>	0	10	0	More than 50 employees
<input checked="" type="checkbox"/>	1	20	0	Customer in my region
<input checked="" type="checkbox"/>	2	30	0	Customer in preferred branch
<input type="checkbox"/>	3	20	0	Already using ECM system
		60		

The first phase *IDENTIFICATION* shows with the different colors the degree of correspondence with the ideal customer profile. You can make the classification by clicking on the menu icon of this phase.

Results

Results <

Date of purchase 31 Mar 2020 📅

Incoming order 250000 €

Forecast 152.500 €

Purchase probability

61%

The **Results**-area displays further project specific data for the opportunity. The forecast is only displayed, when the threshold value is exceeded. The default threshold value is 60%.

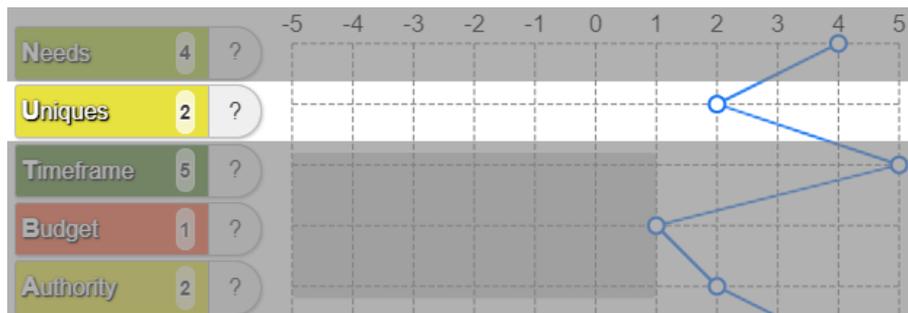
Example *UNIQUES*

Uniques

X

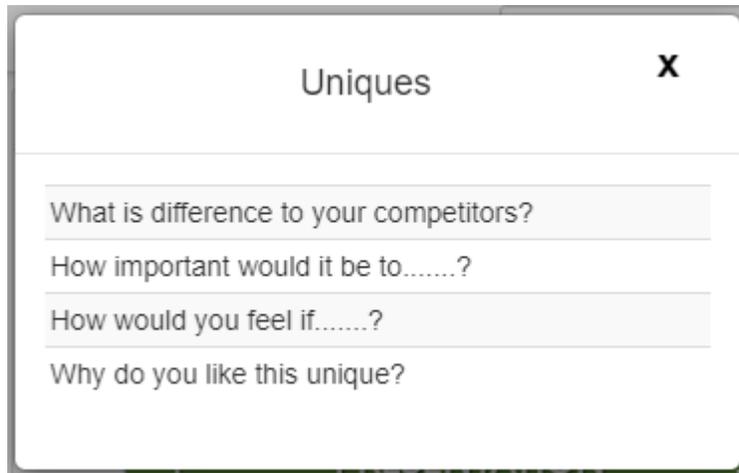
Position	Criteria
5	The customer accepts all our uniques as important to him.
4	The customer accepts some of our uniques as important to him.
3	The customer accepts that some of our uniques provide value to him.
2	The customer understands our uniques and told us that some of them are nice to have.
1	The customer understands our uniques.
0	The customer doesn't know our uniques.
-1	The customer doesn't care about our uniques.
-2	The customer believes that the competition offers more uniques.
-3	...
-4	...
-5	...

Select by clicking on the appropriate condition, which completely corresponds to the current situation of your opportunity. So the whole condition should be true. Otherwise choose the next lower one. In this example, the condition with the value 2 is selected. Now the background color of the criterion changes from gray to yellow.



The referenced point in the graphic is also changed accordingly.

By clicking on the ?-Symbol to the right of the appropriate criterion, the *Help*-window opens.



For each criterion you will receive a selection of typical questions for use in communication with the customer. You should receive further information from your contacts about one or another suitable question. The help questions are intended as a collection of ideas for you.

You can also move the reference point with drag an drop, if you already know the content of the respective rating level.