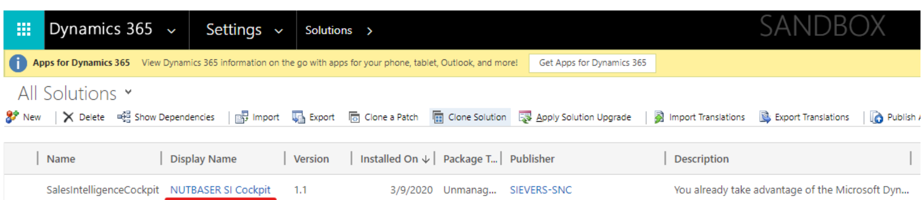
NUTBASER Sales Intelligence Cockpit

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.

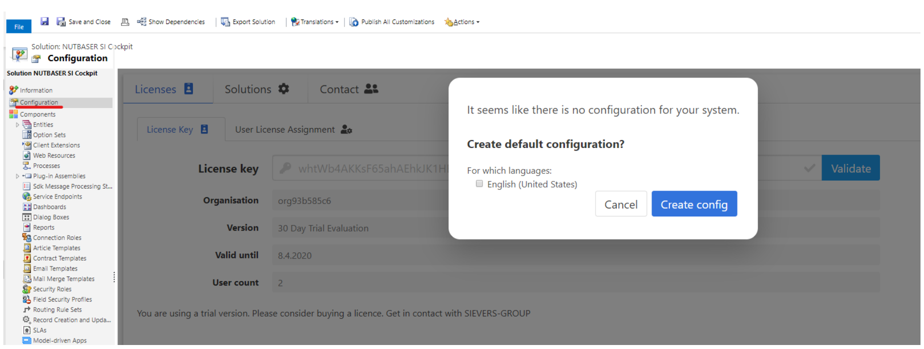
NUTBASER Sales Intelligence Cockpit provides you with ...

- 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?

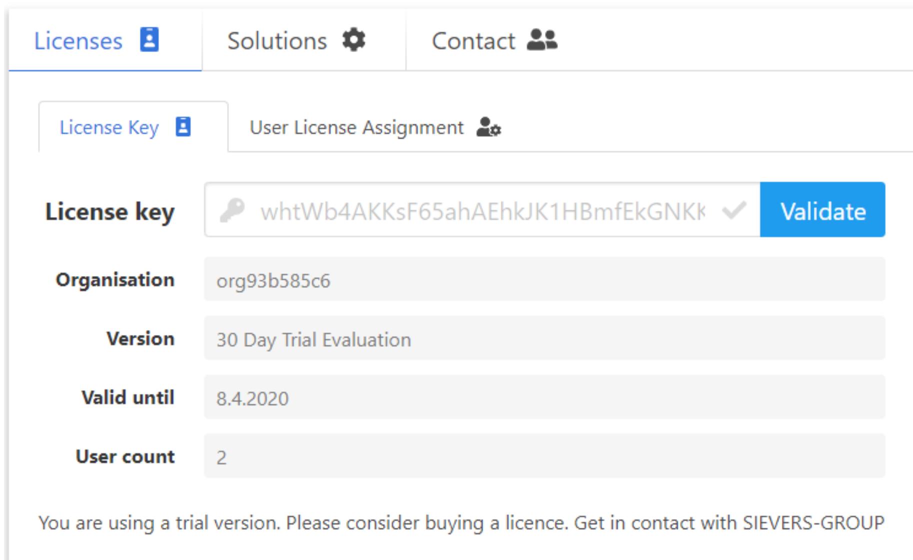
Configuration



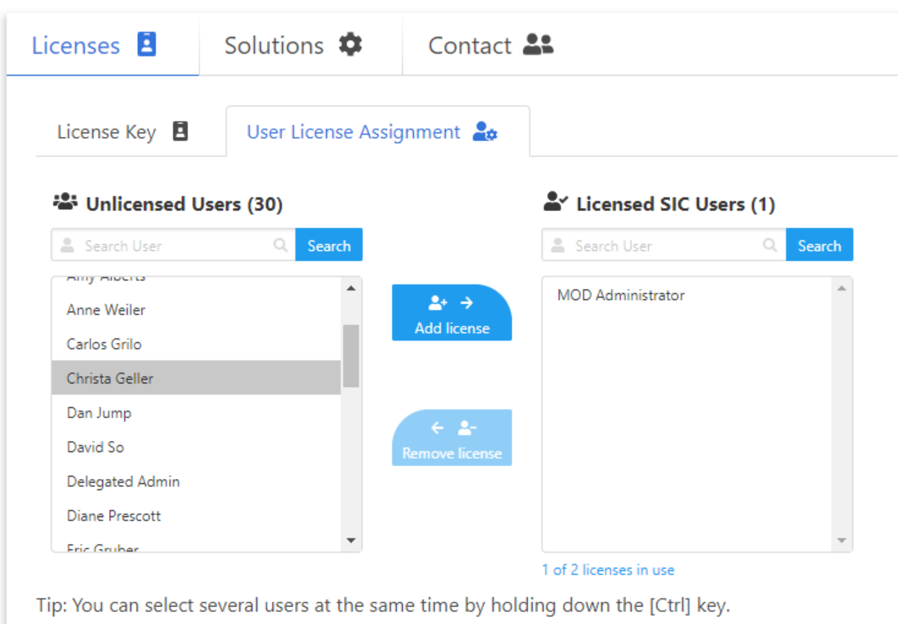
Select the `NUTBASER SI Cockpit` solution in the solution-menu.



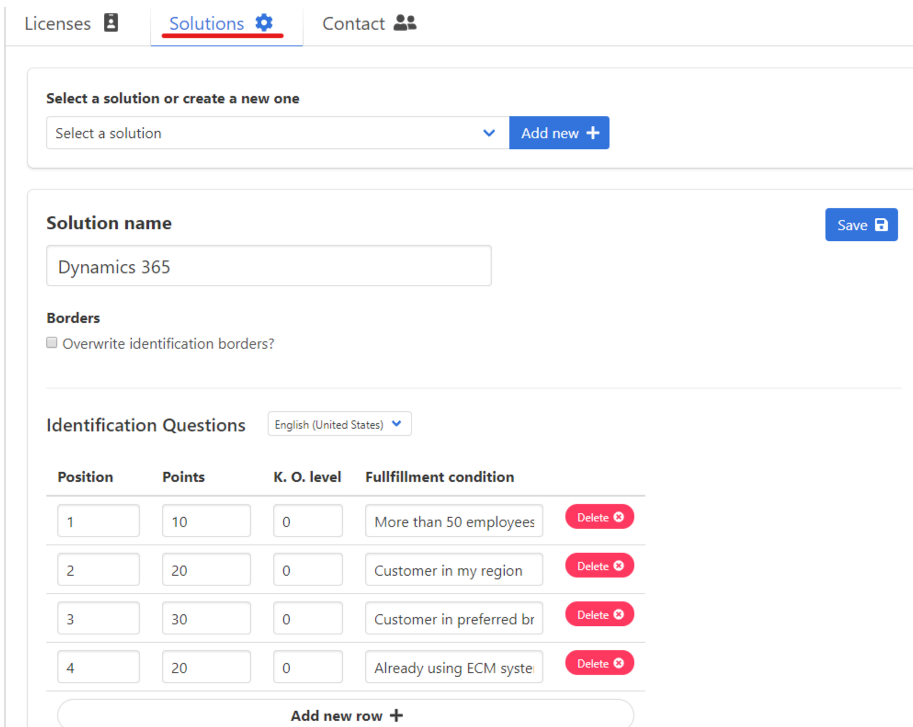
Choose the `Configuration`-menu. After you accepted the terms of use, you will be asked to create a new configuration. Select your language and click on `Create config`.



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

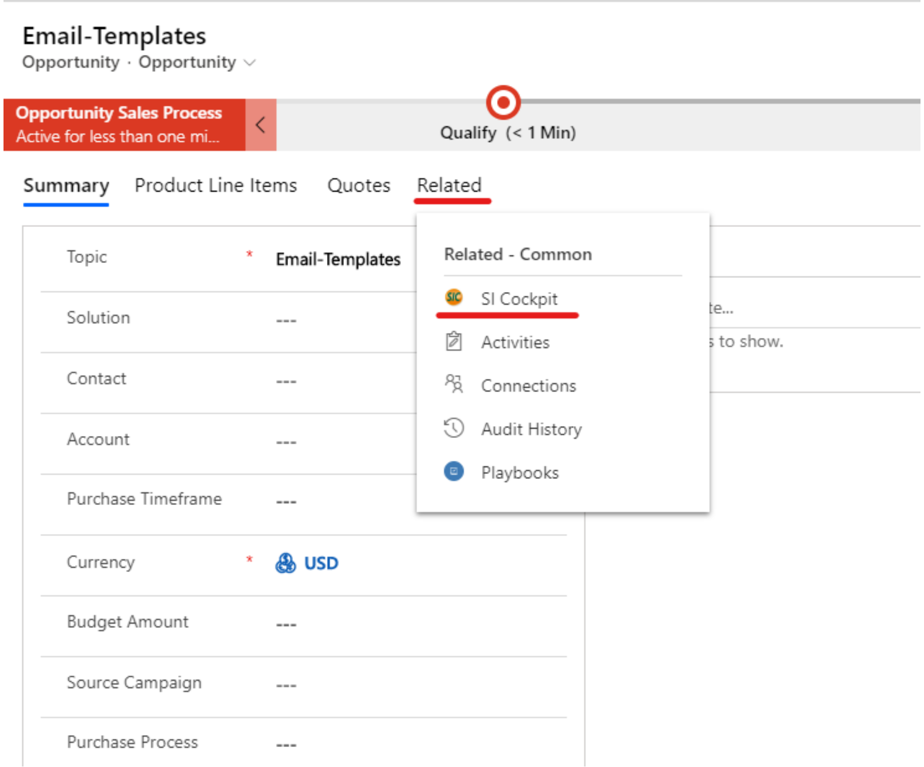


At the `User License Assignment`-tab, you can assign licenses to your users. Just select them and click on `Add license`.

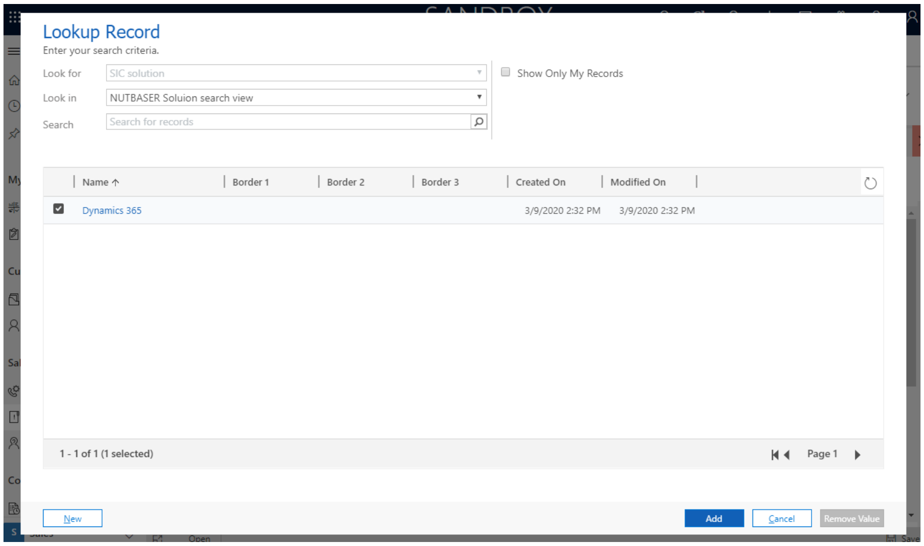


At the `Solutions`-screen, you can create and edit solutions for your products. The `Identification Questions` describe your ideal customer profile.

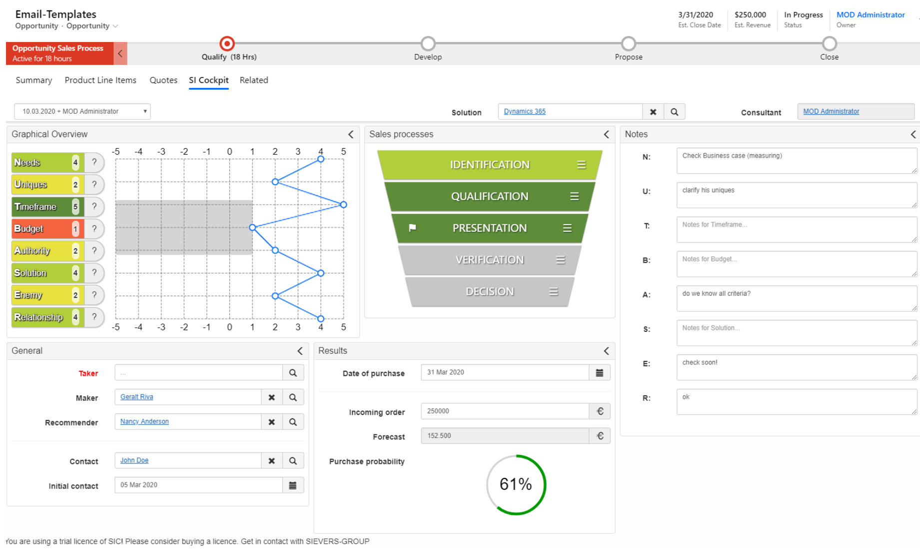
Open *Nutbaser SI Cockpit*



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

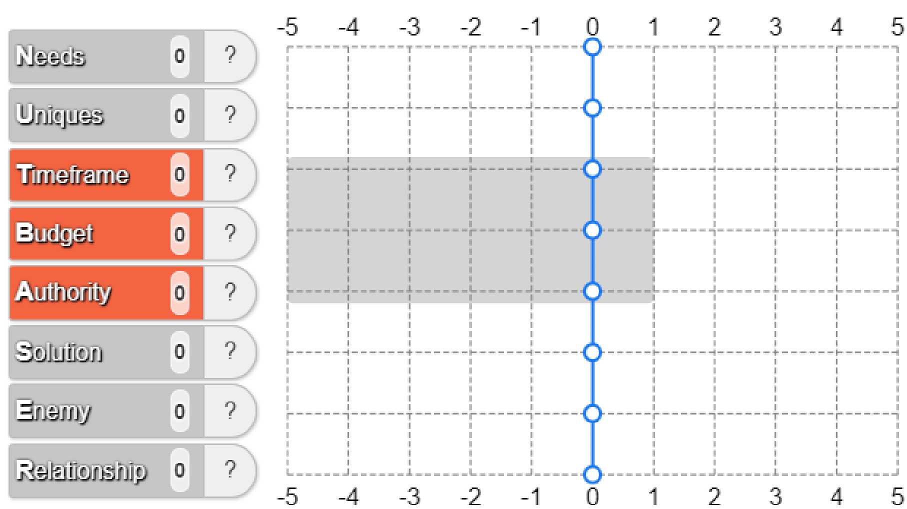


If no solution has yet been assigned to the opportunity, a window will popup, where you can select a solution.



Now you can use the *SI Cockpit*.

NUTBASER Criterias

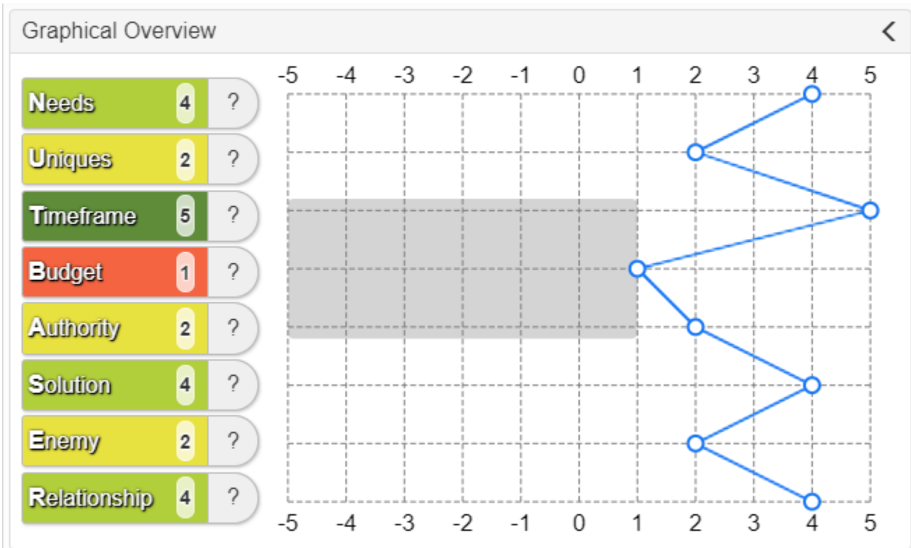


At the beginning all NUTBASER criteria and the grapic line are set to 0. The criteria are shown as buttons. These can be used to call up the selection of the criteria texts by clicking. Criteria are shown in color depending on the respective rating.

Cockpit areas

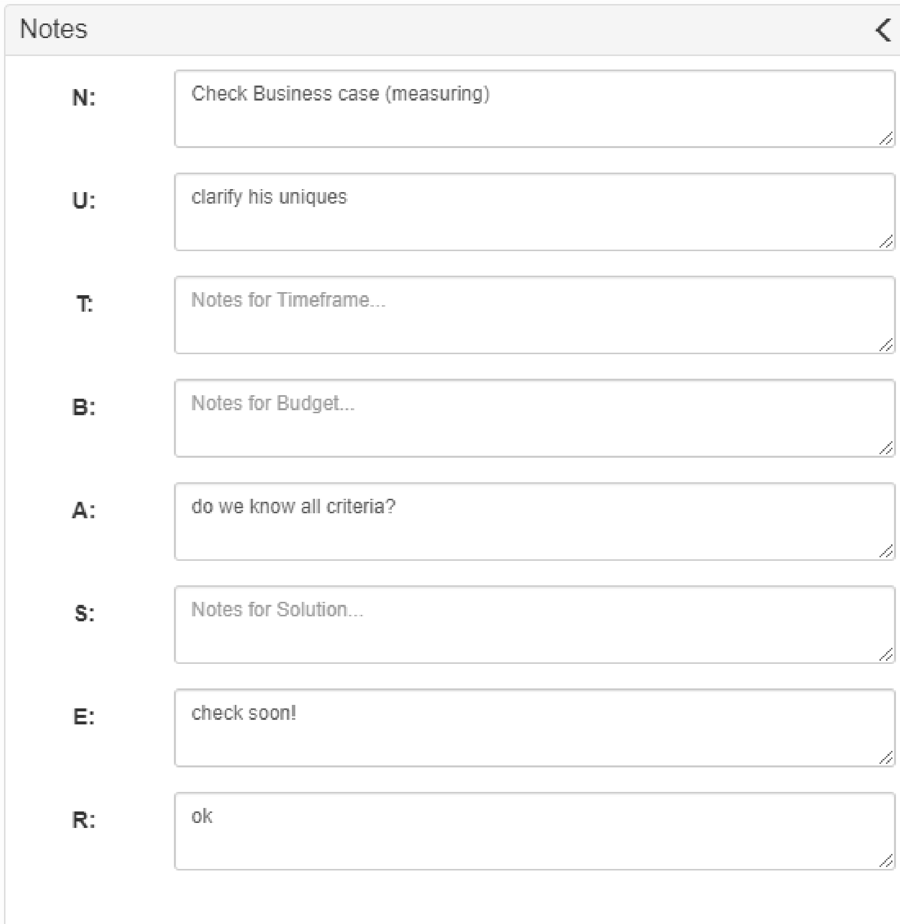
The cockpit is divided into following areas:

Graphical Overview



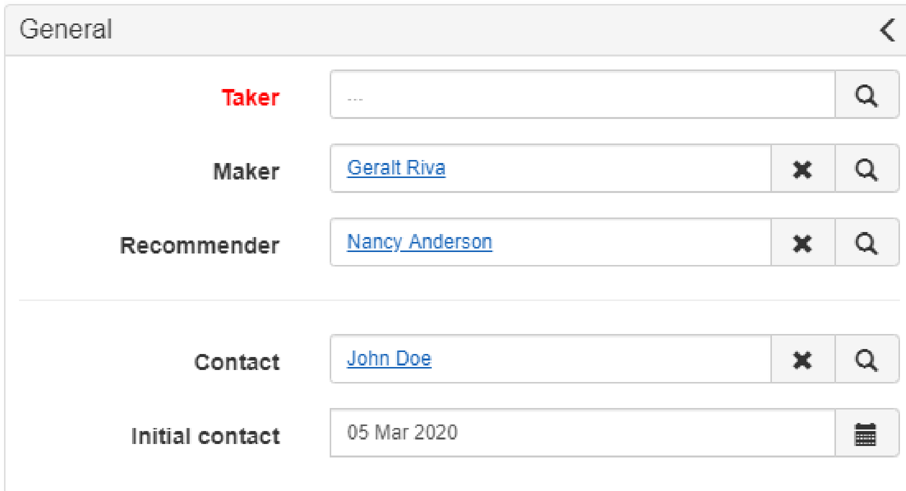
This area is the most important for the content and objective assessment of the opportunity. You can set the criteria according to the current situation.

Notes



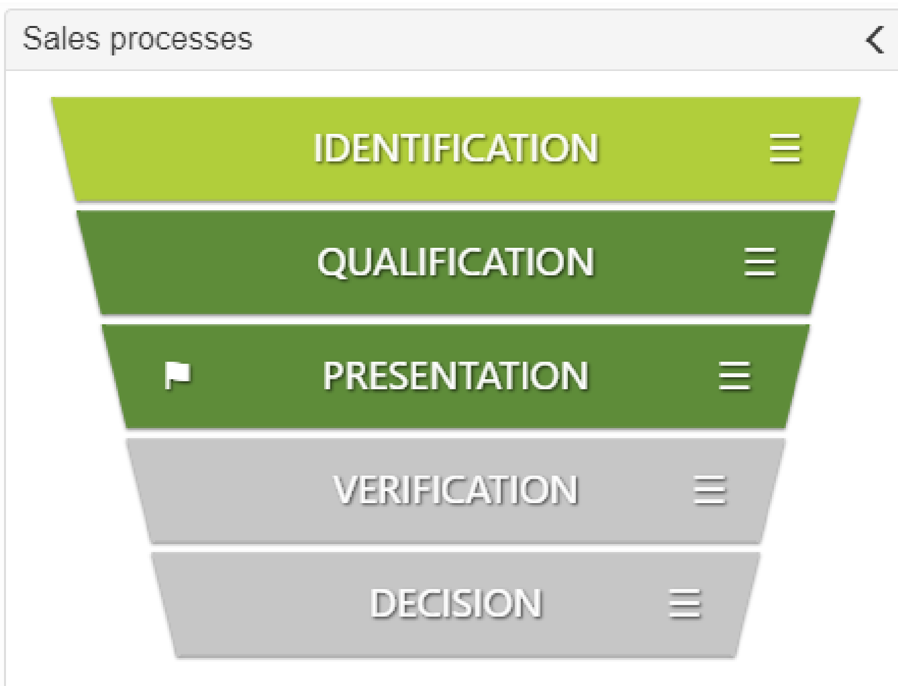
The notes to the right of the graphic are best used for hints and important information about your project status. As the opportunity is processed multiplie times over a longer period of time, the notes can change over and over again.

General

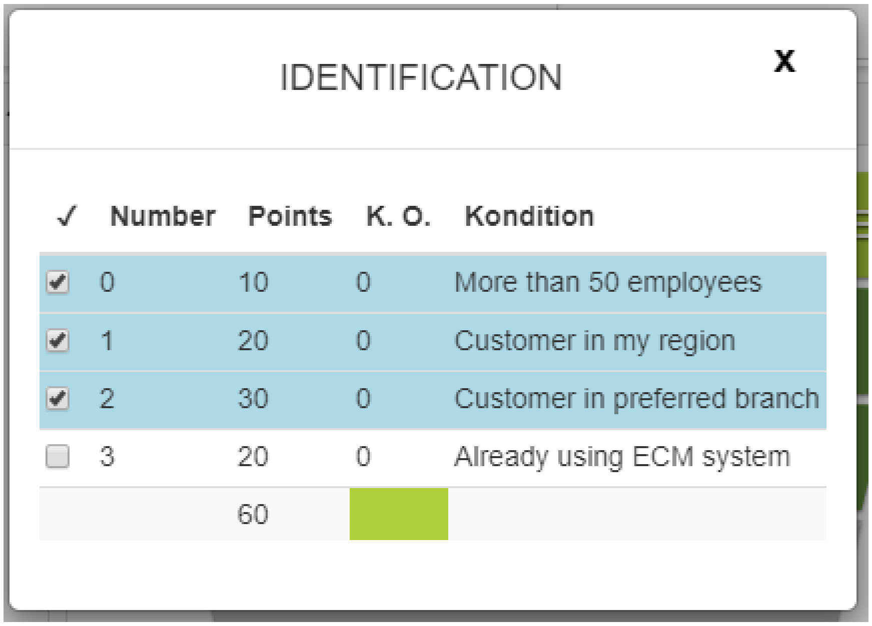


The project specific information about the customer and the opportunity is displayed here.

Sales process

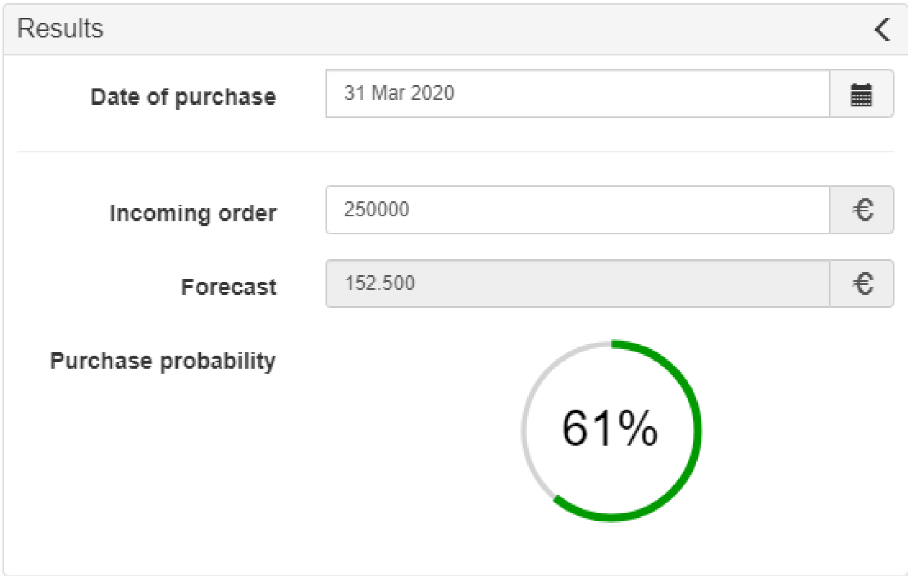


The phases of an opportunity are displayed in the cockpit via the sales funnel. Depending on the purchase probability, the phases are typically activated automatically. The current project phase may also be specified by the user at any time with a double click.



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



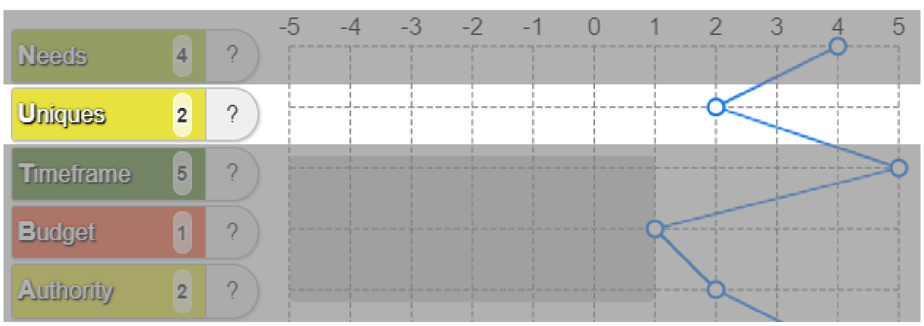
The `Results`-area displays further project specific data for the opportunity. The forecast is only displayed, when the threshold value is exceeded. The default threshold value is `60%`.

Example *UNIQUES*

Uniques x

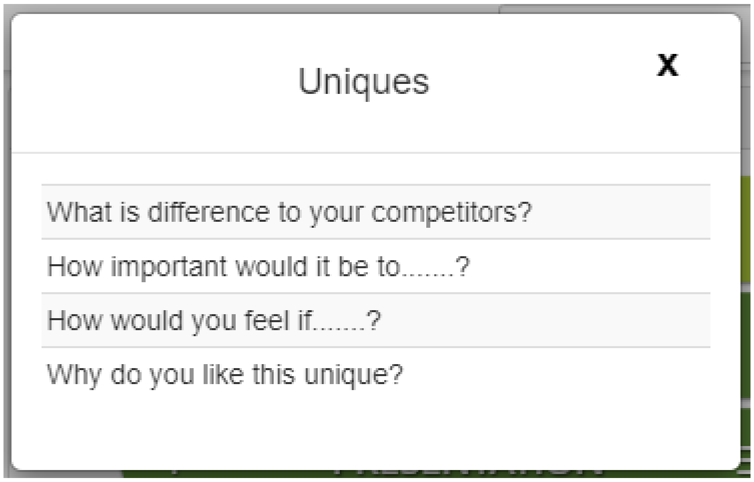
Position	Criteria
5	The customer accepts all our uniques as important to him.
4	The customer accepts some of our uniques as important to him.
3	The customer accepts that some of our uniques provide value to him.
2	The customer understands our uniques and told us that some of them are nice to have.
1	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.