

## Best Practices and Suggested Guidelines

The following is a Best Practices Guide showing user expectations as well as Administrator responsibilities on a monthly, quarterly, and as needed basis. These are guidelines based on years of feedback from our most successful dealers.

For a copy in Word, please email [training@compasscontact.net](mailto:training@compasscontact.net).

## Best Practices & Suggested Guidelines

### Recommended Guidelines:

We recommend the following guidelines in order to most effectively integrate Compass into your Sales organization. This document is broken down by the 3 main areas of responsibility to ensure you're getting the most out of your Compass investment.

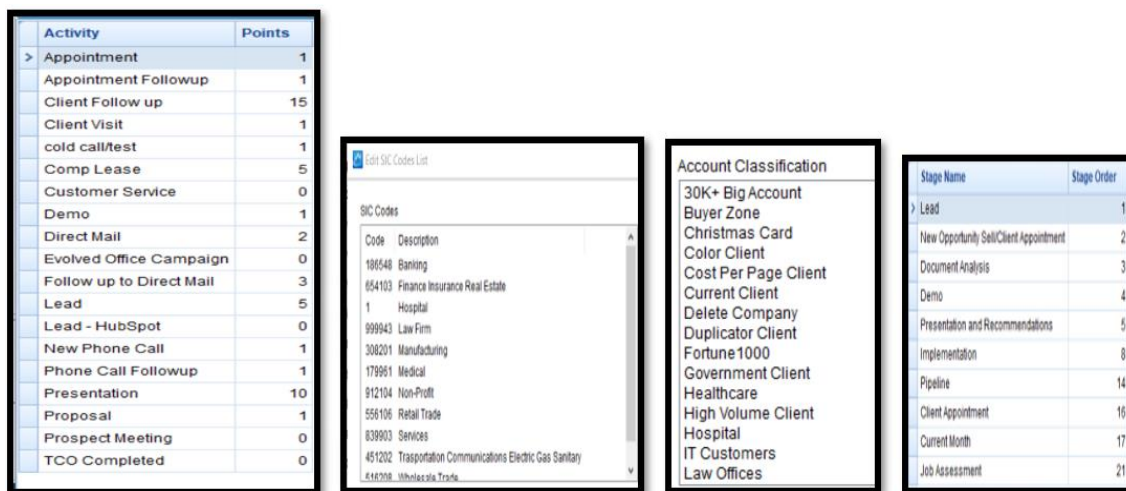
### Compass Overall Philosophy:

Compass recommends using the philosophy of "If it's not in Compass, it didn't happen". All orders must be processed through Compass, using the Company provided Sales Templates/proposals and Order Processing/closing sales paperwork to submit deals. Whether this is achieved by the Rep putting the information in themselves, or by an assistant, commissions will not be paid until information is entered and the order is processed through Compass.

### Set Up – How you structure your system:

In order to successfully use Compass, you need to make sure a few key areas are set up correctly.

1. Enter recommended Activity types with point values, SIC codes, Vertical Marketing Checkboxes and Sales Stages. This will provide your dealership with crucial reporting in these areas.



Activity	Points
> Appointment	1
Appointment Followup	1
Client Follow up	15
Client Visit	1
cold call/test	1
Comp Lease	5
Customer Service	0
Demo	1
Direct Mail	2
Evolved Office Campaign	0
Follow up to Direct Mail	3
Lead	5
Lead - HubSpot	0
New Phone Call	1
Phone Call Followup	1
Presentation	10
Proposal	1
Prospect Meeting	0
TCO Completed	0

Code	Description
186548	Banking
654103	Finance Insurance Real Estate
1	Hospital
999943	Law Firm
300201	Manufacturing
179991	Medical
812104	Non-Profit
556106	Retail Trade
839903	Services
451202	Transportation Communications Electric Gas Sanitary
814708	Wholesale Trade

Account Classification
30K+ Big Account
Buyer Zone
Christmas Card
Color Client
Cost Per Page Client
Current Client
Delete Company
Duplicator Client
Fortune1000
Government Client
Healthcare
High Volume Client
Hospital
IT Customers
Law Offices

Stage Name	Stage Order
> Lead	1
New Opportunity Sell/Client Appointment	2
Document Analysis	3
Demo	4
Presentation and Recommendations	5
Implementation	8
Pipeline	14
Client Appointment	16
Current Month	17
Job Assessment	21

2. Review all settings in the Control Panel including drop down lists and delete options. Recommended suggestions are below:



- Identify accounts that need to be merged and/or deleted to ensure data integrity. Always put a note in the Account Notes box detailing why the account needs to be merged or deleted.
- Always check in the Duplicate Account search to identify accounts that may already be within the database and outside of your assigned territory in order to avoid adding duplicate accounts.
- Responsible for maintaining all classifications (i.e. sic codes & vertical markets) for accuracy in reporting and filtering.
- All activity needs to be logged into Compass including all email communication
- Link all related documents to account.
- Enter all Forecasting into Opportunities Tab.
- Maintain Opportunities and progress them through the sales funnel.
  
- TCO
  - Enter in all clients' document output expenses including printers, MFP's and outsourcing.
  
- MPS
  - It is expected that a minimum of one MPS opportunity is uncovered per week.
  - All assessment information is entered in TCO.
  - Asset Strategy should be used to strategize solutions and identify what devices are going to be kept, replaced and if any volume is going to be migrated.
  - All MPS opportunities need to be forecasted through Printer Pricer and staged in "Document Analysis" in Sales Stages.
  - Use IDM (Intelligent Device Mapper) to scan in a customer's floor plan and show a visual current vs proposed solution.
  - View the MPS video found on [compasscontact.net](http://compasscontact.net)
  
- Proposal / Paperwork Generation
  - Utilize Printer Pricer to determine your MPS costs.
  - Utilize Solution Configurator to configure your recommended hardware.
  - Utilize Financials to determine costs and generate proposals.
  - All forecasts must be generated and maintained – including tagging as closed or lost as needed in the Opportunities tab.
  - All orders must be processed through Compass, using the Company provided Sales templates and Order Processing/sales closing paperwork to submit deals. This can be achieved either by the Rep themselves or an assistant. Also include Financial Detail Report.
  - All deals must be submitted through the Order Processing pipeline if your dealership has this add-on module.
  - Datamine for opportunities in Sherpa Navigator and filter off of ERP data.

## Sales Manager

Sales Manager will review the following reports Weekly, Monthly, Quarterly and as needed.

### **Basic Management Requirements:**

- Reports:
  - Weekly - Activity Reports, Sales Stages, Forecast & Closed, Current campaign, available and missed opportunities.
  - Monthly – Lost Sales, Lease Expirations, Points Report, Activities not completed and Zero activity.
  - Quarterly – Activity Ratio Report.
  - As Needed - Review and approve all Sales Orders including any “edits” on the Financial Detail Report.
  
- One to One Reviews:
  - The Sales Manager will perform a monthly one to one meeting with each Sales Rep who is not achieving quota. This meeting will be performed using the Sales Stage Report and drilling into activities to validate the staged opportunity.
  
- Training:
  - Send Quarterly Compass webinar Training schedule to all Compass users.
  - Require all Reps to attend a minimum of one Compass Training webinar per month.
  - Require new Compass users to attend full product webinar upon hire.
  - Attend Sales Management Training Webinar.
  - Enforce all Sales Rep Requirements.

## Senior Management / Owner

Senior Management will review the following reports on a Weekly and Monthly Basis.

### **Upper Management Requirements:**

- Reports:
  - Weekly - Forecast & Closed
  - Monthly – Forecast, Closed and Lost Sales, Lease Expirations, Points Report

## Administrator

### ***A good Administrator is crucial to your Compass Success!***

For the users to effectively and profitably utilize Compass, the accuracy of the back-end data is imperative. Your role as an Administrator is to ensure that Compass has up to date, accurate information that will allow the reps to utilize the CRM (Accounts) section, along with being able to prepare accurate and professional proposals.



Below is a list of Common duties that an Administrator would be responsible for doing on a monthly, quarterly and on an as needed basis, as well as an estimated time frame to do so.

\*Average time is based on the actual update time in the system for an account with 20 Users, 3 Manufactures, and not utilizing the Compass Professional Services Team

### **Basic Requirements:**

- CRM
  - Review accounts tagged for deletion and delete them, if necessary, on a monthly basis. – **20 Min.**
  - Merge all Duplicate accounts that were tagged as merged and utilize the Merge Tool in Administration, monthly. – **30 Min.**
  - Add new users as needed. – **5 Min.**
  - Unauthorize / Delete users and reassign territory & named accounts. – **10 Min.**
  - Force password changes as needed. – **1 Min.**
  - Add any new data imports such as D&B, Hoovers, InfoUSA, etc. – **30 Min.**
  - For all closed deals verify that the Current Client checkbox is checked, that the forecast was closed out and enter in the ERP customer number. Optional idea is to transfer in the machines from TCO. – **5 Min per Closed Deal.**
  
- Equipment
  - Add new products and accessories, as needed. – **1 Hr. depending on the Manufacturer**
  - Update pricing including dealer cost and promotions. – **1 Hr. depending on the Manufacturer**
  - Update Lease rates quarterly or as needed. – **30 Min.**
  - Revisit Service Rates annually with Service Manager or as needed. – **30 Min.**
  - Revisit Install and Connect fees with Service Manager. – **10 Min.**
  - Offer a few proposals options for the reps such as a 1 page, 4 page and Fleet Management proposal templates. – **1 Hr.**
  - Run the TCO Updater at lease quarterly (updates are being added consistently). – **5 Min.**
  
  - If using Lease Tracker Module, map updates from your Leasing providers, import in Lease Portfolio Reports & run reconciliation monthly. Assign leases to reps if more than one rep is assigned to the account. – **30 Min.**
  - If using the UCC import, update on a monthly basis, or as needed, anytime you receive an updated spreadsheet from EDA. – **30 Min.**
  
- MPS Price Book
  - Import new prices and printers from Suppliers using the import feature. – **10 Min.**
  - Run the Audit Report in the MPS Price Book Reports to ensure all consumables, costs and yields are properly entered. – **10 Min.**
  
- General Policies
  - Make sure all users are running any program updates.

- Be your Company's contact person for any Compass Support related items.
- Notify Reps of Compass training webinar schedule.
- Make sure you have signed up for our email blasts and newsletters through our website and are following us on our social media sites to keep up to date on enhancements, Tips and Tricks and Compass events.

### **Compass Website – Registering for Webinars**

Go to [www.compasscontact.net](http://www.compasscontact.net) and click on the Customer Login area. You will be asked for a password; enter the password: **compass2019** and you will be brought to a page with several tabs. The first two are for Web Training Registration (one for the US and one for Australia). You will see a variety of topics to choose from. Keep in mind that some are geared toward Administrators only, and others are for Sales Reps and Sales Managers.

To register for webinar, scroll to the topic and choose the date and time you would like to attend from the dropdown, and then click on the Register button. You will be brought to another web page where you will be asked to enter your first and last name, company name and email address. Click on Register again once you've entered that information. You are now registered and can add the event to your Outlook calendar. You will also be sent an email confirmation with a link to log in to the web training and a conference call dial-in number for the audio.

The Compass webinars are live events, not recordings, so please log in at your scheduled time to join. The times listed are also set to Pacific Time Zone, and while it will show on your Outlook calendar in your time zone, keep in mind the time change when choosing your registration time. There are also Tutorial videos available on the Videos tab that you can view anytime.