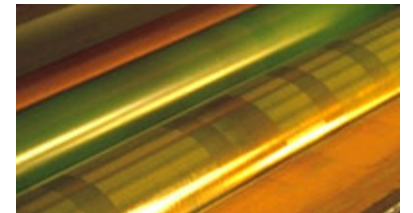


JOBZ!

Sales Management Through Self Management

Part 1; Manage to the Pipeline



Sales & Management

- Self Management is the origin and philosophy of JOBZ!
 - The Sales Rep is accountable and responsible for information and communication.
 - “Everything in Writing, Without the Paperwork”
- Sales Management applies the same tools & skills to a larger data set.
 - By the extension of access privileges across a sales region.

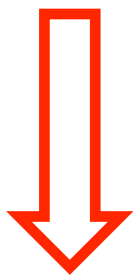
Seize the Data

- Sales reps create data in JOBZ!
 - Job Specs, Pricing, Schedules, Orders etc.
- Data is re-purposed to enable efficient workflow.
 - RFE > Proposal > SOP > Invoice
- JOBZ! also organizes the data into Sorts and Reports.
- Sales reps use these Sorts and Reports to manage themselves.
- Management uses the same Sorts and Reports to manage sales.

JOBZ!

The Data Set

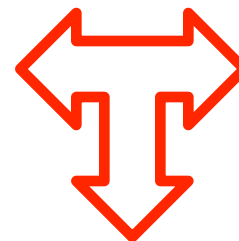
Sales Rep



Rep Data

Manager

Rep Data



Rep Data

Rep Data

Pipeline

The screenshot shows the JOBZ! software interface. At the top, there is a navigation bar with buttons: '>', '>>', 'Organize', 'New', and a blue button. A red arrow points down to the 'Organize' button. Below the navigation bar, a dropdown menu is open, showing various options. A red arrow points to the 'Pipeline' option under the 'Reports:' section. The background shows a table with columns for 'In', 'Due', 'Press', 'Invoice', 'Partial', and 'Due'.

In	Due
17/11	10/18/11
21/11	10/22/11
21/11	10/22/11

Press	Invoice
7/11	October
1/11	November
1/11	November
4/11	November

Partial	Due
	10/21
	10/26
	10/26
160%	10/24



Sales Rep View



Pipeline

October 25, 2011

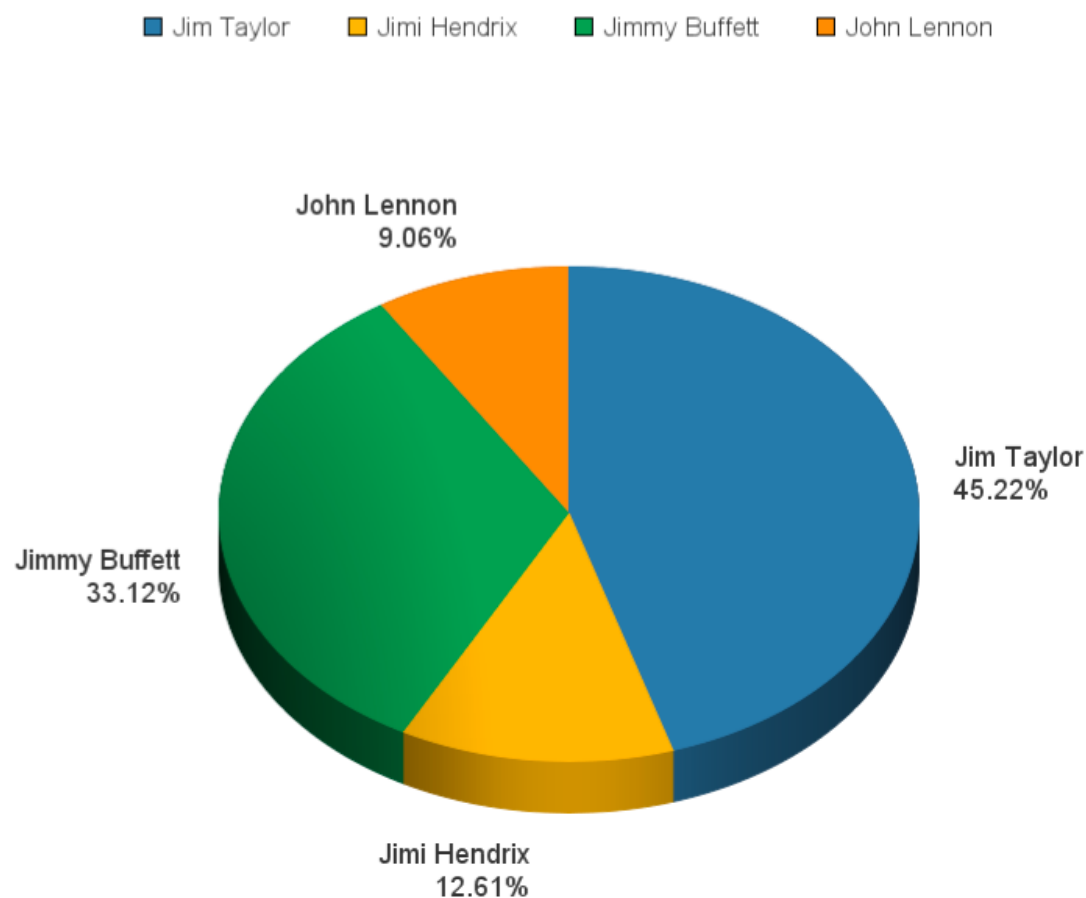
Invoice Month, Year	Plant, Job #, Status, Likelihood %, Invoice Date	Sale
October 2011		
11 by Seventeen - Margaritaville Brochure	<i>SF 10027-11-JB Working</i> 10/27/11	\$157,702
Abort Retry Ignore - Cheeseburger in Paradise	<i>LA 10023-11-JB Working</i> 10/27/11	\$19,852
Client, Inc - Havana Daydreamin	<i>SF 10028-11-JB Working</i> 10/27/11	\$19,752
	October Jimmy Buffett Working	\$197,306
	October Jimmy Buffett Total	\$197,306
	October 2011 Total	\$197,306
November 2011		
A4 Graphics - Come Monday Mailer	<i>Pending 100%</i> 11/4/11	\$33,275
11 by Seventeen - Coconut Telegraph	<i>Pending 75%</i> 11/8/11	\$42,824
	November Jimmy Buffett Pending	\$76,099
	November Jimmy Buffett Total	\$76,099
	November 2011 Total	\$76,099
	Grand Total	\$273,405



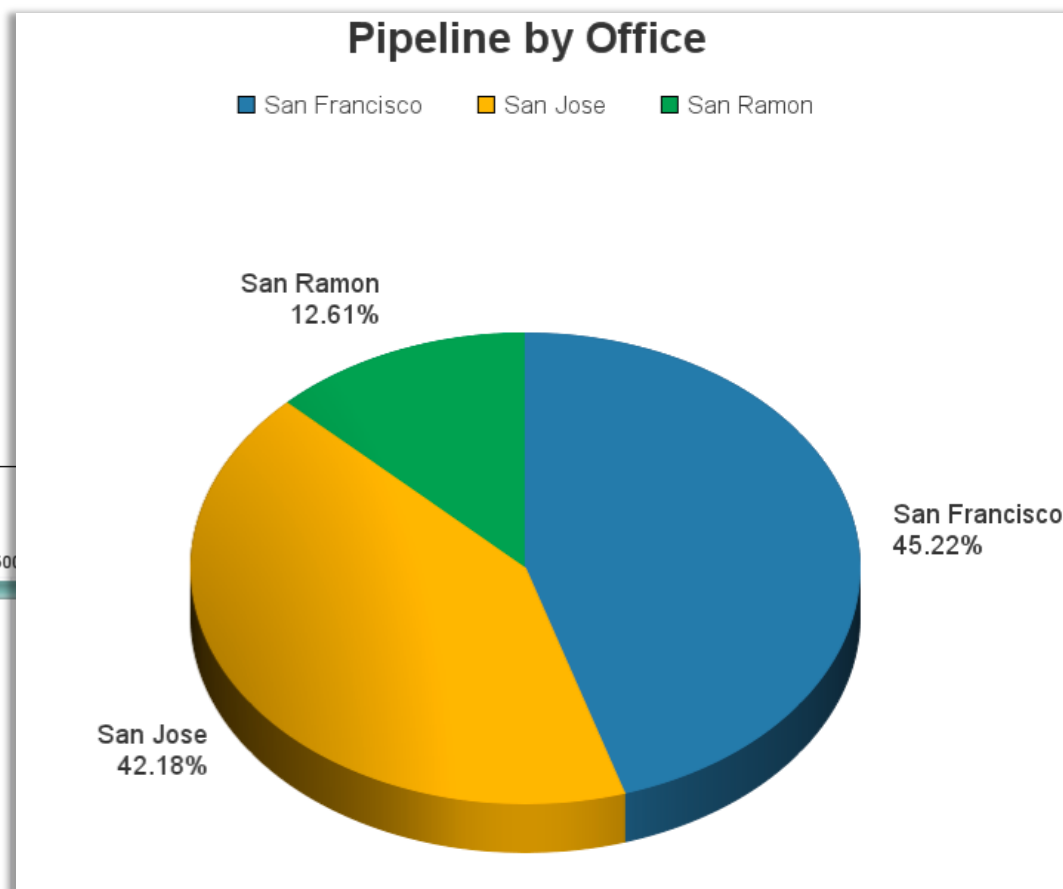
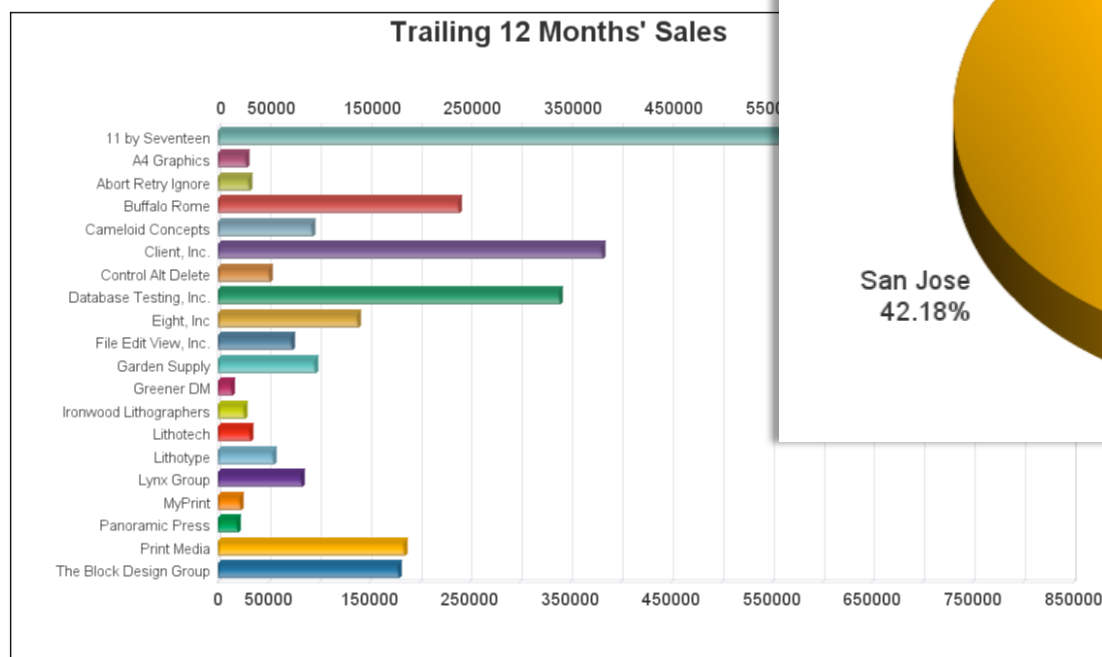
Manager Views

<i>SF 10212 Billed</i>	10/4/11	\$82,813
<i>PDX 10007-11-01 Billed</i>	10/5/11	\$297,956
<i>SF Billed</i>	10/25/11	\$1,250
<i>LA 10015-11-01 Billed</i>	10/25/11	\$39,340
October Jim Taylor Billed		\$421,359
<i>LA Pending 90%</i>	10/28/11	\$41,110
October Jim Taylor Pending		\$41,110
<i>LA 10018-11-01 Working</i>	10/31/11	\$42,000
October Jim Taylor Working		\$42,000
October Jim Taylor Total		\$504,469
<i>PDX 10219 Billed</i>	10/19/11	\$28,903
October Jimi Hendrix Billed		\$28,903
<i>LA 10010-11-01 Shipped</i>	10/31/11	\$125,000
October Jimi Hendrix Shipped		\$125,000
October Jimi Hendrix Total		\$153,903
<i>SF 10027-11-JB Working</i>	10/27/11	\$157,702
<i>LA 10023-11-JB Working</i>	10/27/11	\$19,852
<i>SF 10028-11-JB Working</i>	10/27/11	\$19,752
October Jimmy Buffett Working		\$197,306
October Jimmy Buffett Total		\$197,306
October 2011 Total		\$855,678

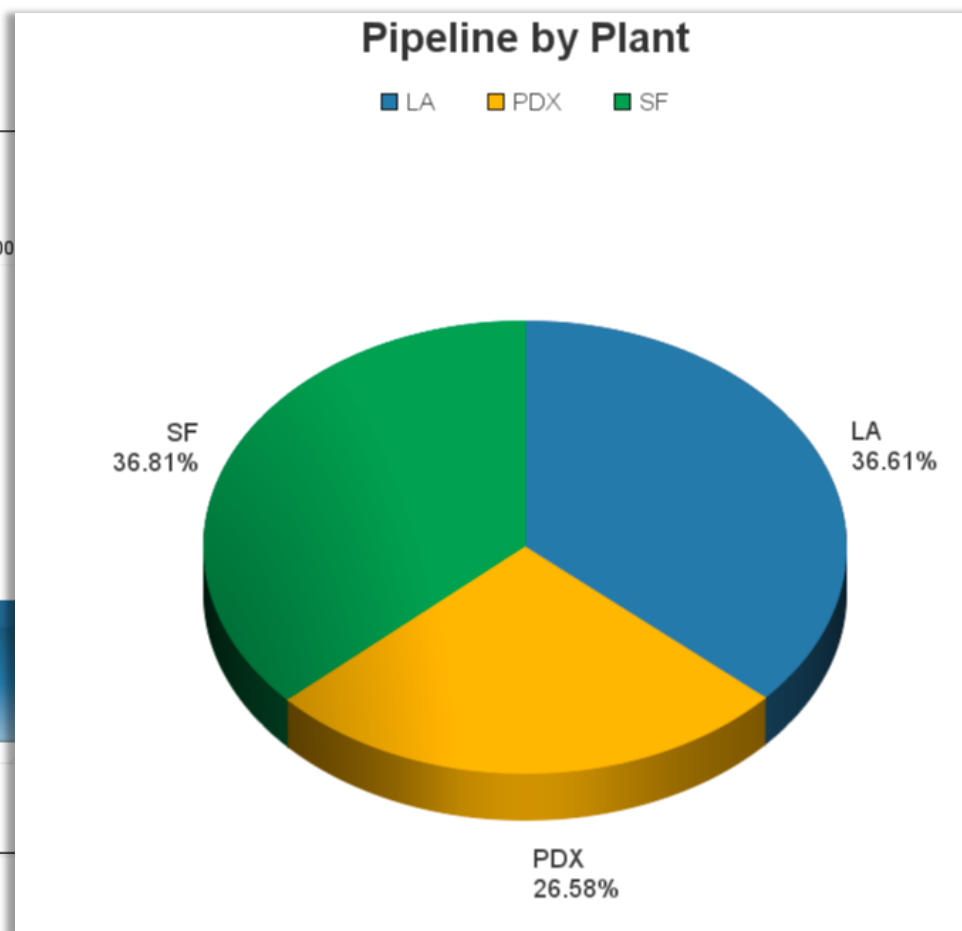
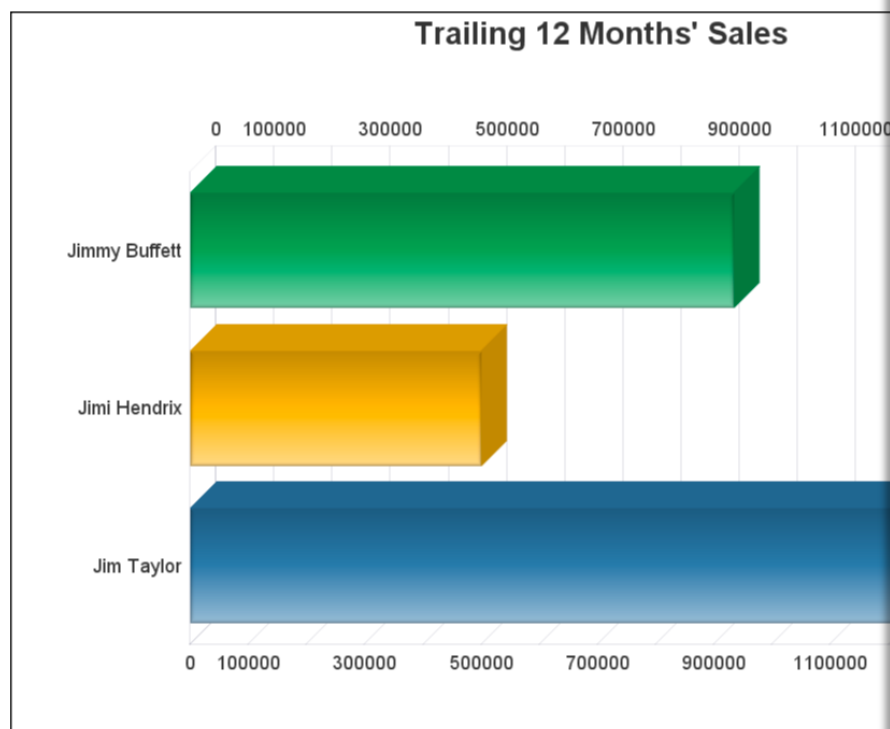
Pipeline by Rep



Manager Views



Manager Views



Manage to the Pipeline

- Sales Reps maintain their own sales **Pipeline**:
 - Job status and invoice date for **sold** jobs.
 - Status = *Working, Shipped or Billed*.
 - Invoice date = Anticipated or Actual (approximate.)
 - Likelihood of sale and anticipated (approximate) invoice date for **quoted** (*Pending* status) jobs.
 - Likelihood = No, or Yes, with a percentage of likelihood.

After Quoting a Job

JOBZ!

110.0%	110.0%	110.0%	110.0%			13232	1st Deliv
13,580.00	26,887.00	39,928.00	52,704.00			<u>Job #</u>	1st Delv Qty
							Deliv
							Invoice

Pipeline This Job?

Would you like to put this job into your pipeline?

1) Click OK

Not Now OK

13,580.00	26,887.00	39,928.00	52,704.00				
\$123.00	\$234.00	\$345.00	\$456.00				
						+ Ms % Sell	
						Cost/M x MU	P

1 / 1

Record Number / Found Records

Abort Retry Ignore - Tombstone Blues, 4p

Invoice Date 11/4/2011

Follow Up By Date Wed 11/2

Status Pending

Likely Sale? Yes

Likelihood

Done

2) Click Yes

3) Then a likelihood %

1 / 1

Abort Retry Ignore - Tombstone Blues, 4p

Invoice Date 11/4/2011

Follow Up By Date Wed 11/2

Status Pending

Likely Sale

Likelihood

Pipeline \$16,638



Easy to keep “Pending” jobs current, and in the PIPELINE

Pull-Down “Pending”

Pending Pipeline

- Global Flexpac - Example Proposal with New Identity
- Database Testing, Inc - Heidelberg Presentation Folder 2011
- Database Testing, Inc - Heidelberg Sheetfed Brochure 2011
- Database Testing, Inc - Heidelberg Service Brochure 2011

Working YTD

<< < > >> **Organize** New

Or Pull-Down “Organize”

Then Select “Pending Jobs”

Pending Jobs

- Pending Likely Projects Follow Up
- Reports: Forecast Pipeline Recent Pending

Keep them up to date, status and likelihood.

Go To 1 / 35 << < > >> **Organize** Print This List Follow Up Likely Find... Clear X Find X

Pending October 24, 2011 Pending jobs will be marked Dead if the Invoice Date passes 60 days ago.

Customer	Job Title	Rep	On Press / Invoice	Quoted / FU	Pipeline \$	Project
Database Testing, Inc - Heidelberg Presentation Folder 2011	4 page presentation folder with 2 capacity pockets.	Jim Taylor	11/1/2011 < Press 11/9/2011 < Invoice (FollowUp)	10/11/2011	\$79,475	[] heidelberg
			November			
			Keep notes to yourself about a job. These notes appear on the Pending list			
Database Testing, Inc - Heidelberg Service Brochure 2011	12 pages + cover	Jim Taylor	11/4/2011 < Press 11/8/2011 < Invoice (FollowUp)	10/10/2011	\$26,127	[] heidelberg
			November			
			Keep notes to yourself about a job. These notes appear on the Pending list			
One.com - Oxford Town	24 pages + cover	Jimi Hendrix	11/4/2011 < Press 11/8/2011 < Invoice (FollowUp)	10/10/2011	\$25,399	[]
			November			
			Keep notes to yourself about a job. These notes appear on the Pending list			

Tracking Pending Jobs List

Follow Up Wed, Oct 26, 2011

Likely Sale? Yes 100%

Pipeline \$79,475

P

This is the Tracking box, on the QUOTE screen. Use it to Pipeline a job and set a Follow Up reminder.

Let JOBZ! do the Work

JOBZ! will find jobs with date / status problems and help you make adjustments.

Customer	Job Title	Rep	On Press / Invoice	Quoted / FU +	Pipeline \$	Project
Control Alt Delete - Forever Young 24 pages + cover Jim Taylor			8/10/2009 < Press	8/9/2009	\$25,399	☐ Q
			8/17/2009 < Invoice	8/24/09		Del.
	August					
☐ Pending ☐ Yes ☐ 100%			<< PIPELINE a job with "Yes," and a % of likelihood, and invoice date in the future.			
11 by Seventeen - Mailing To From Ramona 24 pages + cover			8/17/2009 < Press	8/28/2009		☐ Q
			8/20/2009 < Invoice	8/28/09		Del.
☐ Pending						

Pending Status / Invoice Date Problem!

These jobs are in Pending status, yet have Invoice Dates in the past. You should change either the Invoice Date or the Status of these jobs, then click Pending again. Click "Push" to add a week to all of them at once.

The Rest of the Pipeline

- So, for Pending (Quoted) jobs to appear in the sales pipeline:
 - Need Invoice Date, Status, and Likelihood %.
- What about jobs that have already been sold?
- Only 2 fields really matter for sold jobs:
 - Status
 - Invoice Date
 - These are set and checked at Order Entry.
- Later, Status can be changed to Shipped or Billed.
 - Producing an Invoice Draft will automatically change Status to Billed.
- That's it!

Keeping an Eye on Sold Jobs

Click "Working"



Working

YTD \$4,402,296

11 by Seventeen - JOBZ! Shipping

11 by Seventeen - JOBZ! Delivery

Abort Retry Ignore - JOBZ! from Mobile

Print Media - Behind the 8 Ball- a

JOBZ! will find jobs with date / status problems and help adjust them.

Status	Company	Contact	Job Title	Sales Rep	Press Date / Invoice	...Month	Job#	Part#	Plant	Press	Project
Database Testing, Inc - I Dreamed I Saw St											
					8/19/2009 < Press	LA SF-1	826-3953123				
					8/24/2009 < Invoice	August		2009351			[] Working
Jim Taylor					These schedule notes appear in many places- schedule requests, schedules sent to customers, internal daily schedules an so on.						
Working											
11 by Seventeen - Just Like A Woman											
					8/18/2009 < Press	NY W-2	8264096				
					8/21/2009 < Invoice	August					[] Working
Jim Taylor											
Working											

Message

Using the buttons below, you can either Push their Invoice Dates to next week or change them all to Shipped status. Click Cancel to edit them individually.

Until you fix this problem, you will not be able to use the Working jobs sort.

Shipped

Push

Cancel

Working Jobs List

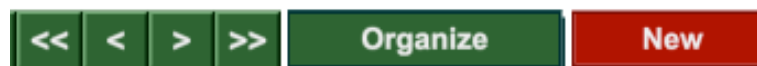
Click on the truck to
"Ship" a job

Go To	1 / 8	<<	<	>	>>	Organize	Print This List	Jobs Report	Files Due	Due to Ship	Find...		
Working October 24, 2011													
Customer	Job Title	Ship Qty	Rep	Files	Press	Ship	Part	Due	Plant	Job#	Sale \$	Select X	Project
Database Testing, Inc	Outlaw Blues Redux			10/27	10/31	11/1		11/2	WL	10020-11-01		☐	Q
	12 pages plus cover				☐				S		\$0		
	Jim Taylor								(Schedule Notes)				
		Go To											
11 by Seventeen	JOBZ! Delivery			10/20	10/24	10/25		10/26	SF			☐	Q
	24 pages + cover				☐			10:00 AM	WF		\$19,752		
	Jimmy Buffett								(Schedule Notes)				
	45,000												
		Go To											
11 by Seventeen	JOBZ! Shipping			10/20	10/24	10/25		10/26	SF			☐	Q
	24 pages + cover				☐			9:00 AM	WF		\$19,752		
	Jimmy Buffett								(Schedule Notes)				
	45,000												
		Go To											
Abort Retry Ignore	JOBZ! from Mobile			10/20	10/24	10/25		10/26	LA	10221		☒	Q [] ADMIN
	24 pages + cover				☐			11:00 AM	S		\$19,852		
	Jimmy Buffett								Important schedule notes here.				
	45,000												
		Go To											

Pipeline Includes

- Working, Shipped and Billed status jobs.
 - With invoice dates in the current month or future months.
- Pending status jobs marked as Likely Sales, with % of likelihood, and invoice dates in the future.
 - Pipeline amount for a pending job is an average of the prices for the quantities quoted, times the % of likelihood.
- Results displayed depend on your access level.
 - Sales reps see only their own.
 - Managers see their region rolled up.
 - Executives see all regions.

Where is this Business Intelligence?



Explore the many types of reports that make use of sales-entered data.

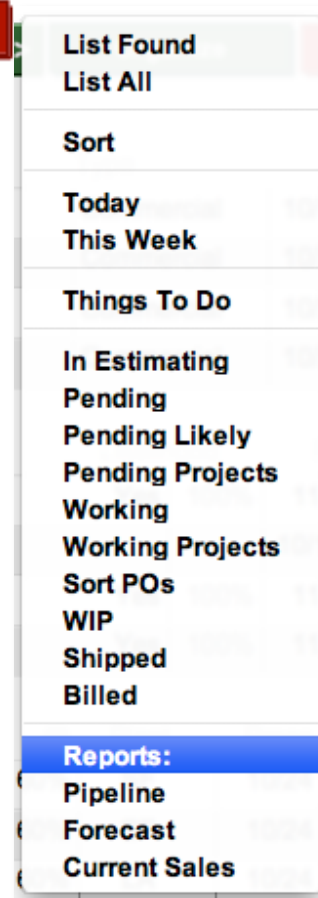
Pull-Down

The Business Menu

Looking Forward...					Looking Back...					
Pipeline	... Summary		... by Office		... Plant		YTD	12 Mo.	Paper	Lost Jobs
Current Month's Sales			...one Rep			Billed Sales	Cust.	Analysis	Commish	
Pending Sales Forecast		... by Likelihood		... VA		Summary by Rep & Customer			Export Jobs .xls	
Booked Sales (Working)			Sales by OE Date			Sales / Company		.../ Contact		.../ Product
Current Month's Sales by Ship Month						Budget Analysis		Account Analysis		VA
Annual Sales Budget						Billed Sales by Quarter (Specify Invoice Year)				
In Production		Found Set Report		Quote Activity		Recent Activity		JOBZ! Activity		Customer Activity
Management Only										
Booked Sales Summary by Region						Results w VA		Results by Rep/Job		Reps Standings
Rep	Rep	Office	Press	Plant		Region / Rep / Plant			Regional Summary	
Housekeeping / Working		... Pending		... Estimating		Production Mgr. Load			Lost Jobs	
Sales Activity by Query						Statement of Account			Accounts Receivable	
Manager Pipeline by Query						Sales Tax Report			Billed: Paid & Due	
Pipeline- Excel				PO List		Accounting Summary			Accounting Summary .xls	
Manager's Job Status		On Press SF								
		Shipping SF								

Top section visible to Sales Reps & Management

Bottom section visible only to Management



You can also navigate to the Business Menu by means of the Go To pull-down.

Another Report Example- Recently Quoted Jobs, Not Yet Sold

JOBZ!

(Likelihood of Sale) is derived from the Pipeline.

Recent JOBZ! Activity; Pending Status

Sorted by Sales Rep & Quote
Quote is Qty. 1

Oct 24, 2011
Quoted in the last 30 days

Job, Quoted Date (Likelihood)	# Jobs	Quote
Jimmy Buffett	1	\$13,580
Abort Retry Ignore - Tombstone Blues, 4p 10/24/2011	100% Yes	\$13,580
Jimi Hendrix	2	\$181,046
The Block Design Group - Father of Night 10/9/2011	25% Yes	\$160,650
One.com - Oxford Town 10/10/2011	100% Yes	\$20,396
John Lennon	2	\$153,456
Lenticular Graphics - Maggie's Farm 10/10/2011	75% Yes	\$123,456
Apple Music - Lonesome Death of Hattie Carroll 10/10/2011	Report Lost	\$30,000
Jim Taylor	6	\$357,292
Global Flexpac - Example Proposal with New Identity 10/18/2011		\$200,000
Database Testing, Inc - Heidelberg Presentation Folder 2011 10/11/2011	100% Yes	\$59,401
Printing Today - Test Box 9/29/2011	90% Yes	\$45,678
Database Testing, Inc - Heidelberg Sheetfed Brochure 2011 10/11/2011	100% Yes	\$19,800
Database Testing, Inc - Spirit on the Water 10/10/2011	100% Yes	\$17,575
Database Testing, Inc - Heidelberg Service Brochure 2011 10/10/2011	100% Yes	\$14,838
Total		\$705,374

Pull-Down "Pending"

The screenshot shows the JOBZ! software interface. At the top, there are two buttons: 'Pending' and 'Pipeline'. Below them, a list of jobs is displayed, including 'Global Flexpac - Example Proposal with New Identity', 'Database Testing, Inc - Heidelberg', and 'Database Testing, Inc - Heidelberg'. A pull-down menu is open, showing options: 'Pending Jobs', 'Pending Likely Projects Follow Up', 'Reports: Forecast Pipeline', and 'Recent Pending'. A red arrow points to the 'Pending' button, and another red arrow points to the 'Recent Pending' option in the pull-down menu.

Competitive Pricing Analysis

Lost Jobs Report on Business Menu

Lost Jobs Report

June 10, 2009
Invoice Dates: 11/7/08 to 6/12/09

Jobs Reported as Lost	Billing	Press	Our Quote	@	Lost To	Their Quote	@
Jim Taylor							
Federal Motors - Shelter From The Storm <i>These guys are killing me!</i>	January	2009	SF	\$21,066	100.0%	Nemesis Printing	\$16,500 82%
Arrowspace - Positively Fourth Street <i>Just missed it.</i>	February	2009	SF	\$17,457	90.0%	Loballer Printing	\$16,850 89%
Control Alt Delete - The Levee's Gonna Break <i>FSC paper- couldn't get any.</i>	February	2009	SF	\$16,736	90.0%	Nemesis Printing	\$14,500 78%
Cursory Software - Just Like A Woman <i>We discounted to 95%, but looks like we need to be below 80% with these guys.</i>	February	2009	SF	\$17,666	95.0%	Usual Suspects	\$14,000 75%
Five, Inc - Return to Me <i>Note about the quote</i>	February	2009	SF	\$18,034	86.7%	Nemesis Printing	\$15,000 72%
More than Enough - Thunder On the Mountain <i>UV Job</i>	February	2009	SF	\$20,456	110.0%	Nemesis Printing	\$16,500 89%
Claymore Information Systems - Don't Think Twice, It's All <i>Should have quoted web</i>	March	2009	SF	\$18,164	88.0%	Ink Scum Bags	\$12,580 68%
Claymore Information Systems - A Hard Rain's A-Gonna <i>Lost this one because of the schedule</i>	March	2009	SF	\$18,235	92.0%	Nemesis Printing	\$18,500 93%
Control Alt Delete - Time Passes Slowly <i>Went digital</i>	March	2009	W	\$18,536	90.0%	Whozits Printing	\$15,245 82%
Control Alt Delete - Knockin' On Heaven's Door <i>Need a half web!</i>	March	2009	SF	\$17,681	89.7%	Cheapo Printing	\$14,500 78%
Control Alt Delete - The Times They Are a <i>Mailing price under \$4,000</i>	March	2009	SF	\$18,536	90.0%	Ink Scum Bags	\$14,000 75%
Federal Motors - Gotta Serve Somebody <i>Quality not the issue</i>	March	2009	SF	\$15,342	82.5%	Nemesis Printing	\$13,500 73%
Federal Motors - Things Have Changed <i>These guys are killing me!</i>	March	2009	SF	\$17,142	82.5%	Whozits Printing	\$14,258 77%
File Edit View, Inc - Lay Down Your Weary Tune <i>I give up</i>	March	2009	SF	\$11,111	90.0%	Unknown	\$10,000 81%
Five, Inc - Visions Of Johanna	March	2009	SF	\$21,925	112.0%	RRD	\$18,750 96%
Bell Labs - Lay Lady Lay <i>Should get the next one.</i>	November	2008	SF	\$15,481	100.0%	Nemesis Printing	\$11,500 74%
Clan Tech, Inc - Stuck Inside Of Mobile With	November	2008	W	\$22,256	110.0%	Ink Scum Bags	\$17,852 96%
Federal Motors - You've Gotta Serve Somebody <i>Need to be more aggressive.</i>	November	2008	SF	\$19,500	100.0%	Nemesis Printing	\$15,000 77%

JOBZ!

Simple Method

QUOTE Screen:

Tracking Pending Jobs List

Follow Up

Likely Sale **Report Lost**

P Lost To Nemesis Printing

Their \$ Qty 1 \$16,500 = 82%

These guys are killing me!

The price the job went for, and the calculated % of our Estimate Total Cost that it represents.



It's a Win - Win

- Self Management is the origin and philosophy of JOBZ!
- Sales Management applies the same tools & skills to a larger data set.
- Communicate your expectations. Share this presentation with Sales.
- Thanks for using JOBZ!

What's good for the goose, is good for the gander.



A sure-fire way to spark a conversation:

Ask one of your sales reps to bring you their Pipeline.