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PeopleSoft Strategic Account Planning 9.1 PeopleBook

May 2012

PeopleSoft Strategic Account Planning 9.1 PeopleBook
SKU crm91csap-b0512

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Oracle's PeopleSoft CRM Strategic Account Planning Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleSoft automation and configuration tools.
- PeopleTools PeopleBooks.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation

  This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

- Workforce Management

  This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft CRM. It includes information on competency management and assigning workers to tasks.

- Interactions and 360-Degree Views

  This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers

  This part discusses how to set up, administer, and use self-service applications for customers and workers.

- Relationship Management

  This part discusses how system users manage their contacts and tasks.

- Entitlement Management

  This part discusses setting up agreements and warranties.

- SmartViews

  This part discusses how to set up and use SmartViews to manage key customer segments and accounts in a central environment.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Oracle's PeopleSoft CRM Application Fundamentals Preface"

PeopleSoft Automation and Configuration Tools

The *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*discusses automation and configuration tools that are common to multiple PeopleSoft CRM applications. This is an essential companion to the *PeopleSoft CRM Application Fundamentals PeopleBook.*

The *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook* contains these parts:

- Correspondence Management

  This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation Tools

  This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), and scripts.

- Configuration Tools

  This part discusses configurable search pages, configurable toolbars, attributes, display templates and industry-specific field labels and field values.

- Knowledge Management

  This part discusses the setup of Verity search.

- Business Process Management

  This part provides information on the two different approaches to manage business processes in PeopleSoft CRM and discusses:

  - The setup of the Business Process Execution Language (BPEL) infrastructure to initiate and manage BPEL process instances.
  - The setup of Business Process Monitor to view the status information of initiated BPEL process instances.
  - The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.
  - The setup and execution of business projects.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Oracle's PeopleSoft CRM Automation and Configuration Tools Preface"

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.52 PeopleBooks.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with PeopleSoft Strategic Account Planning

This chapter provides an overview of PeopleSoft Strategic Account Planning and discusses:

- PeopleSoft Strategic Account Planning business processes.
- PeopleSoft Strategic Account Planning integrations.
- PeopleSoft Strategic Account Planning implementation.

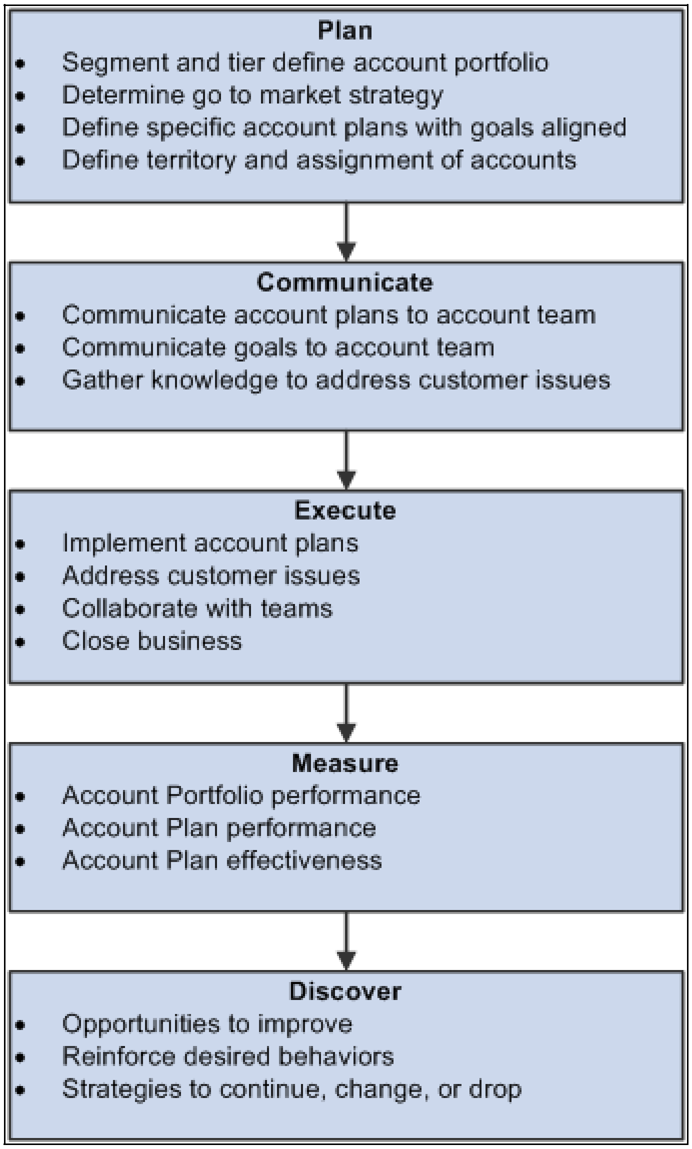
PeopleSoft Strategic Account Planning Overview

PeopleSoft Strategic Account Planning provides tools that enable you to leverage customer value data to drive strategic planning and budgeting for the entire customer life cycle—marketing, sales, and service. With this application you can:

- Evaluate customer value and needs.
- Develop sales and support strategies to maximize customer value.
- Allocate resources based on customer value.
- Identify new opportunities to increase customer value.
- Collaborate with account team members and partners.
- Measure and improve account performance.

PeopleSoft Strategic Account Planning Business Processes

The following process flow illustrates the PeopleSoft Strategic Account Planning business processes, describing details in the Plan, Communicate, Execute, Measure, and Discover phases). We discuss these business processes in the business process chapters in this PeopleBook:



PeopleSoft Strategic Account Planning business processes categorized in five areas: Plan, Communicate, Execute, Measure, and Discover

Using PeopleSoft Strategic Account Planning, you can:

- Organize account portfolio by segment or tier.
- Plan market strategy.
- Define specific account plans with goals aligned with market strategy.
- Define territory and assignment of accounts.
- Communicate account plans, goals, and their target values to account team members.
- Identify and address customer issues.
- Measure account portfolio performance, account plan performance, and the effectiveness of the account plan.

PeopleSoft Strategic Account Planning Integrations

By leveraging the Active Analytics framework, you can integrate PeopleSoft Strategic Account Planning with any of the other products in the PeopleSoft Customer Relationship Management (PeopleSoft CRM) product line to obtain goal and metric data for account plans. For example, integration with PeopleSoft Sales enables you to set goals and track goal attainment using the information captured in PeopleSoft Sales (for example, leads and opportunities). Integration with PeopleSoft Client Manager enables you to set and track account plan goals based on a client's personal goals, such as target retirement age.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Understanding AAF.

In addition to supplying additional goal and metric data, integration with the following products expands the features of your strategic account planning solution:

PeopleSoft Marketing

Integrate with PeopleSoft Marketing to enable account plans at the segment level. Segmenting the customer base enables you to group like customers and enables uniform planning across them. Account managers who are responsible for a large set of accounts or consumers can segment them into smaller groups based on revenue, profitability, and common characteristics, such as industry, geography, or buying requirements.

See and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Using Audiences," Understanding Audiences.

SmartViews

Integrate with the SmartViews feature to make it easy to identify specific issues to address in the account. You can track performance in individual accounts or roll up key metrics to see aggregate performance in a single view. For each metric, account managers can compare actual versus target goal attainment.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up SmartViews."

PeopleSoft Partner Planning

Integrate with PeopleSoft Partner Relationship Management to improve collaboration by clearly identifying key tasks, due dates, and owners to meet the plan objectives. Managers control who can access and edit the account plan.

See and *PeopleSoft Partner Relationship Management 9.1 PeopleBook*, "Oracle's PeopleSoft CRM Partner Relationship Management Preface."

PeopleSoft Strategic Account Planning Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for your organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, as well as links to the corresponding PeopleBook documentation.

Other Sources of Information

In the implementation planning phase, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources is in the preface in the *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, PeopleSoft CRM 9.1 Business Object Management PeopleBook,* and *PeopleSoft CRM 9.1 Product and Item Management PeopleBook,* with information on where to find the most up-to-date version of each.

See Also

PeopleTools 8.52: PeopleSoft Setup Manager PeopleBook

Chapter 2

Understanding PeopleSoft Strategic Account Planning

This chapter discusses:

- Strategic account planning.
- Strategic account planning business processes.
- Account assignment.
- Account planning.
- Audience segmentation.
- Reporting and metrics.

Strategic Account Planning

PeopleSoft Strategic Account Planning enables your organization to capture maximum value throughout the customer's life cycle. It helps you align your strategy with customer needs and corporate objectives, and measure progress against metrics-driven goals. You can segment your customers and consumers and work with partners to identify opportunities in high-potential or underperforming accounts. You can customize performance metrics for your business, leveraging both internal and external data sources. You can also improve your execution of the account strategy by triggering recommended actions based on actual versus target goal attainment. With PeopleSoft Strategic Account Planning, you can manage your resources proactively to extract more value from every customer relationship.

At the simplest level, strategic account planning is the process of managing accounts at a company or client level rather than at the opportunity level. An account can be a company, consumer, site, or partner. Account planning is the process of setting the goals for the accounts and measuring those goals. Account management represents a fundamental shift—regardless of business model—away from a transaction-oriented approach to an account-based model.

Strategic Account Planning Business Processes

PeopleSoft Strategic Account Planning enables you to plan for and manage the customer relationship through the following stages:

- Evaluate customer value and needs.

  PeopleSoft Strategic Account Planning helps your organization identify the customers who will bring you the most value and greatest profit. It helps your account team evaluate each customer's current and long-term revenue potential, as well as strategic importance, so that you can invest an appropriate level of resources to serve them profitably.

  You can manage your customers at both the company and account manager level. Accounts are typically grouped into customer portfolios at the company level. Your account managers can further segment their territories based on criteria that they define.

  Global account managers who cover a few major customers can segment these customers into smaller divisions to identify cross-sell and up-sell opportunities. Account managers who are responsible for a large set of accounts or consumers can segment them into smaller groups based on revenue, profitability, and common characteristics such as industry, geography, or buying requirements.

- Develop a measurable strategy.

  The account strategy drives your plan for managing the customer life cycle. It determines how you can capture more value from both high-potential and underperforming accounts. Different customers require different strategies. Each strategy must be based on measurable goals and objectives to help you track the progress that your team and partners are making in the account.

  Account managers can use PeopleSoft Strategic Account Planning to:

  - Define metrics-driven goals and qualitative objectives for each account.
  - Align account goals and compensation with corporate objectives.
  - Identify critical success factors for reaching plan targets.
  - Outline the value proposition required to meet the customer's specific needs.

- Allocate resources based on customer value.

  The next step is to determine how you will allocate limited resources to execute your account strategy. To drive profitable revenue growth, you must choose the most cost-effective channels while ensuring a seamless experience that optimally meets your customers' needs.

  PeopleSoft Strategic Account Planning enables you to match your resources to marketing, selling to, and servicing your customers. Team members are automatically or manually assigned to accounts based on criteria that you define. Territory changes are automatically updated so that your accounts are always assigned to the most appropriate account managers. You can also create account plans to leverage partners in capturing more value from key customers. Finally, you can quickly adjust your resource allocation by measuring and monitoring performance against account goals and objectives.

- Identify new opportunities to increase customer value.

  PeopleSoft Strategic Account Planning provides a centralized repository of all account information, delivering a complete, 360-degree view across the enterprise of all the sales, marketing, and service interactions with the customer. PeopleSoft Strategic Account Planning also has prebuilt integration to third-party data sources so that account managers can leverage real-time information to uncover new opportunities to increase customer value.

- Collaborate with account team and partners.

  PeopleSoft Strategic Account Planning improves collaboration by clearly identifying key tasks, due dates, and owners to meet the plan objectives. Managers control who can access and edit the account plan. You can also use PeopleSoft online analytics to drive plan execution. Based on progress against account goals, the application triggers alerts and recommended actions.

  The account plan helps the team identify which relationships that they can leverage to influence key decision makers. The account team can view all the contacts associated with the account and track metrics, such as the number of meetings with key contacts, to evaluate how well they are executing against the relationship strategy.

Account Assignment

This section discusses:

- Global account programs.
- National and regional account programs.
- Organizational structure.

Global Account Programs

A global account program is an integrated, multinational framework for implementing a strategic, global account management process. A closer look at global account programs in practice reveals the difficulty in both defining and understanding what exactly constitutes a global program versus a national, regional, international, or multinational program, and what is a global account. Companies use varying criteria of geography and customer characteristics in classifying their accounts and programs. Yet, in-depth research with individual companies suggests that factors such as a high level of process and systems integration, geographical spread, and worldwide coordination of resources and operations distinguish the global account programs.

National and Regional Account Programs

A national or regional account program uses a number of key processes to successfully implement corporate strategy for strategic accounts. These processes include securing senior management support; creating the appropriate internal systems to coordinate activity nationally or regionally; building the appropriate product or service delivery model, maintaining account planning, program, and account metrics; training and educating personnel; using compensation to drive behavior that will achieve account objectives; and optimizing technology and IT systems for national and regional account communications and knowledge management.

National account programs establish centralized decision making and operate within a uniform culture. Regional account programs may cross national boundaries, but they tend to develop semi-autonomous operations defined around geographical locations, such as Europe, North America, or the Pacific Rim. Within these programs, decision making is more decentralized, organizational processes are more complex, and the culture is more diverse.

By contrast, global account programs coordinate worldwide process and operations, using both centralized and decentralized decision making to implement a corporate global strategy at regional and local levels worldwide. Organizational complexity is high, and cultural sensibilities are a critical success factor for global account relationships.

Organizational Structure

Organizational structure for a strategic accounts program refers to the company reporting structure and design of infrastructure for the delivery of products, services, and solutions to key customers.

In some corporations, organizational structure for strategic accounts is integrated into an existing centralized structure. Where existing corporate structure is decentralized, however, a strategic accounts organization can be created as an *umbrella,* while the underlying structure is left in place. Functionally effective strategic account programs have been implemented using each of these approaches.

Internal alignment coupled with internal selling by the strategic accounts group makes the business case for strategic account management among all the stakeholders in the corporation. The sales force architecture that has territory and division salespeople staking claim to accounts and geographical areas is deeply rooted in many corporate cultures.

Organizational structure for a global accounts program versus a national or regional program typically involves a higher degree of structural complexity, flexibility, and a combination of both centralized and decentralized authority.

Account Planning

Account planning is a process of planning for a strategic account that provides an understanding of the customer or client's position, compiles and analyzes data, sets goals, establishes responsibilities, allocates resources, and sets measurable objectives. Unlike most traditional account planning, strategic account planning is meant to be a flexible, collaborative, and ongoing activity that is both comprehensive and linked to the day-to-day management of a strategic account.

Account planning usually involves the strategic account manager, the strategic account manager's manager, the account team, and possibly the customer. The focus of an account plan differs according to the go-to-market strategy developed for that account. Components of a plan frequently include a mission statement, industry/market/customer overview, business objectives alignment, position/performance in the account, resource allocation, strategic opportunities, and value-based account plan objectives.

Audience Segmentation

Audience segmentation tools enable organizations to finely target customers and prospects based on customer or profile attributes. These tools are invaluable for organizations that must prioritize customer investments and strategies based on tangible criteria, such as customer value, customer profitability, and other custom metrics.

Audience segmentation tools provide an interactive graphical segmentation tree display and show hierarchical segment relationships and real-time counts. The visual and detailed nature of these new capabilities enables marketers to support the natural, iterative segmentation process while quickly gaining insight into customer segments.

Audience segmentation includes:

- A visual segment builder.

  You can define segments (groups of customers defined by selection criteria). Hierarchical relationships between segments are included, and you can clearly and easily view them in a visual and interactive tree structure. Using the visual segment builder, you can see the hierarchies created by parent-child relationships of segments. Further, segments can be contained in segment groups, which enable you to group segments and segment hierarchies logically.

- Segment definitions.

  Segments can be published to be actionable. When a segment is published, it is available for use by various components, including the Active Analytic Framework (AAF), Strategic Account Planning, and SmartViews. In the AAF, these terms can be used to build any conditions in an AAF policy. For PeopleSoft Strategic Account Planning and SmartViews, users can select published segments to create a segment plan. They can set objectives and goals, and they can view the overall performance of the segments through PeopleSoft Strategic Account Planning and SmartViews.

- Integration with a virtual data library.

  New types of selection criteria are supported, enabling you to select from the AAF data library terms, audience and segment membership, campaign execution data (for example, marketing contacts this month via email), and campaign response data (for example, individuals who placed an order and referenced a campaign's promotion code).

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework," Understanding AAF

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up SmartViews," Understanding SmartViews

Reporting and Metrics

This section discusses:

- Metrics of a strategic account program or strategic account.
- Account selection and segmentation.

Metrics of a Strategic Account Program or Strategic Account

The metrics of a strategic account program or strategic account are the measurements by which the objectives of an individual account plan, relationship, or portfolio of account relationships are evaluated. The criteria for these assessments cover a range of expectations established individually and jointly by the supplier and the customer who anticipate mutually beneficial results from the relationship.

Metrics define the value or set of values that the supplier brings to the customer, the value the customer provides to the supplier, and the shared value. Value is represented in both financial and relationship-based terms and, ideally, is incorporated into the account plan at the beginning of the partnership.

Examples of value and measurements include segment loyalty and growth achievement, expanse of executive relationships (breadth and depth), mutual gain in productivity and efficiency, increased share of client's total spend, acknowledgement of client and of the value of partnership, and improvement in client's business results.

Account Selection and Segmentation

The process of account selection and segmentation is a systematic method for optimum customer portfolio management. Account selection is part of determining the go-to-market strategy for each customer. Using a set of tools and criteria, accounts are selected as well as cleared, and they can be segmented or tiered according to varying levels of resource allocation, funding, and service. The process of account selection requires the supplier to first define a strategic account. For example, one company may define strategic accounts as *those accounts that are managed separately from the organization's traditional sales channels, by account managers who have total responsibility for the sales, business processes, value proposition, and customer satisfaction.*

The account team's perspective and input contribute to objective evaluations of accounts, helping to match the supplier's comparative capability to customer opportunities. The process can determine in which accounts a supplier is overinvested or underinvested, a critical determinant of business success. Appropriate account selection is considered a critical step in the design of a strategic account program.

Chapter 3

Setting Up PeopleSoft Strategic Account Planning

This chapter provides an overview of setup for PeopleSoft Strategic Account Planning and discusses how to:

- Set up objectives.
- Set up supported roles for planning.
- Define plan types.
- Define assessments.
- Define goals.
- Create a territory tree for accounts.
- Set up merge options for account teams.

Understanding Setup for PeopleSoft Strategic Account Planning

This section provides overviews of:

- Objectives.
- Supported roles for planning.
- Plan types.
- Assessments.
- Goals.

Objectives

Strategic objectives relate to outcomes that strengthen an organization's overall business position and competitive vitality. Objectives are defined at a higher level than goals. For example, an objective might be to increase revenue from additional sales. At the goal level, this objective would be defined in measurable terms, such as increasing revenue by 25 percent.

Objectives are provided by default from the plan type to the template, but you can select additional objectives by either selecting from predefined objectives or by creating custom objectives.

Supported Roles for Planning

PeopleSoft Strategic Account Planning delivers four supported roles for planning: company, consumer, partner, and site. You use supported roles when you define accounts. Role types are associated with plan types to identify the plan types applicable to specific roles.

Plan Types

You use plan types to create the account template. The definition of a plan type controls the free-form text fields that are available in the Details section of the Account Planning component.

Assessments

Assessments are the quantifiable definition of plan goals. The assessments are associated with plan goals in the template and in the account plan itself.

Assessment name specifies the visual status breaks that appear (green, red, yellow, and so on) and the variance indicator associated with the associated assessment.

The assessments show visual icons to depict the plan goal's status break. For example, if the plan meets 100 percent of the target, the system shows a green icon. It shows a red icon when the actual is less than 60 percent of the target. The purpose of the variance indicator is to indicate whether the high attainment is good or bad for a goal. For example, achieving a high revenue number is good and is shown in green, but having a high number of reported bugs is not good and is shown in red.

Goals

Goals are the quantifiable measurements of objectives. A goal has a target and an attainment. You can measure the attainment using the data library or you can enter it manually.

In a template or in a plan, you can add a new goal either by selecting a shared goal, which is already set up, or by manually entering all the details. You can also add a minimum or maximum limit on the goal target.

Setting Up Objectives

To set up objectives, use the Objectives (RSP_OBJECTIVE) component.

This section discusses how to set up objectives for account or segment planning.

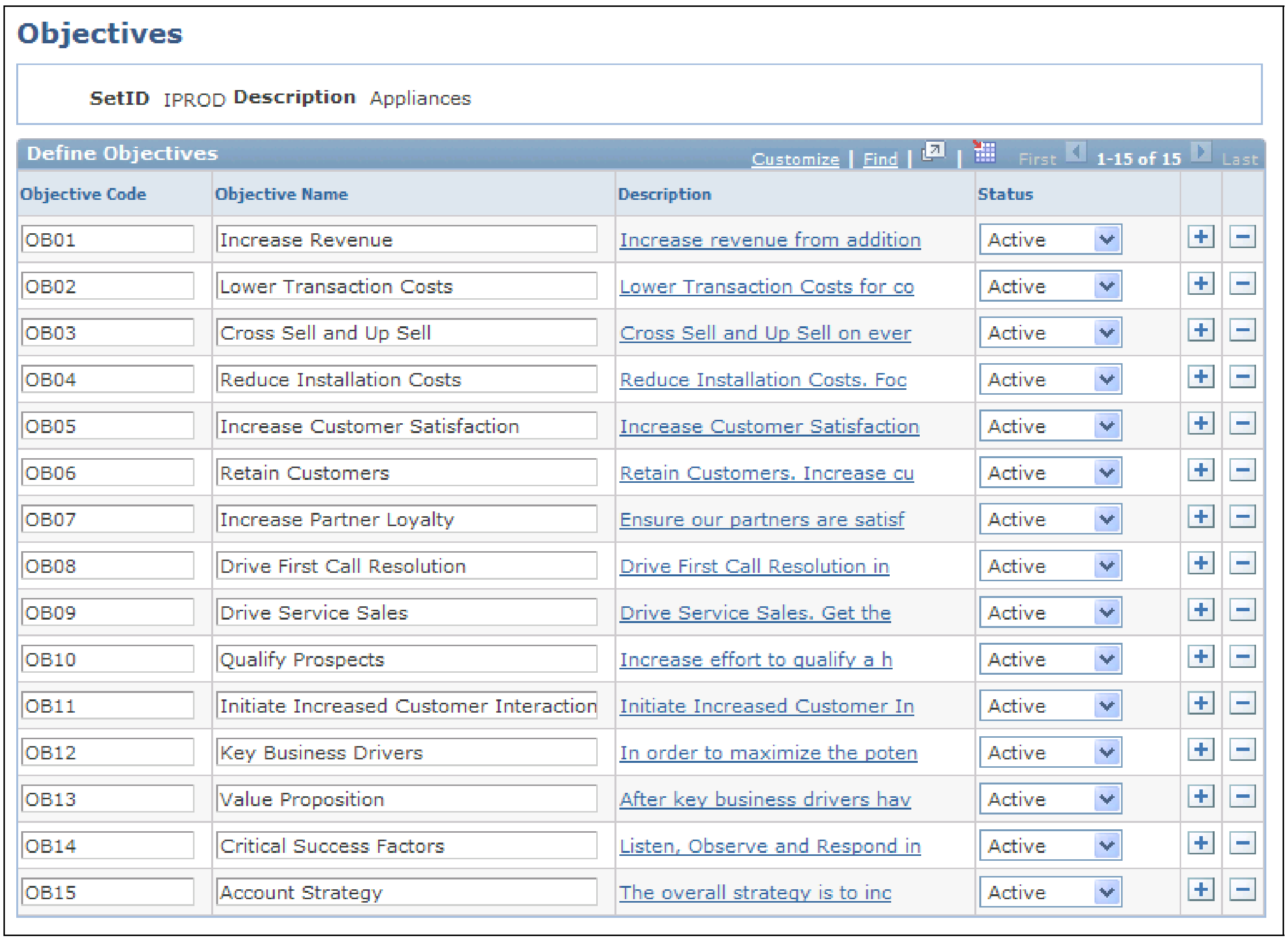
Pages Used to Set Up Objectives

Page Name	*Definition Name*	*Navigation*	*Usage*
Objectives	RSP_OBJECTIVE	Set Up CRM, Product Related, Strategic Account Planning, Objectives, Objectives	Create objectives for account or segment planning.

Page Name	Definition Name	Navigation	Usage
Strategic Plan Objectives - Objective Details	RSP_OBJECTIVE_SEC	• Click the link in the Description column for an existing objective. • Click the Enter Objective Description link for a new objective.	Create descriptions of your objectives.

Setting Up Objectives for Account or Segment Planning

Access the Objectives page (Set Up CRM, Product Related, Strategic Account Planning, Objectives, Objectives).



Objectives page

Objective Code Enter a four-character code for the objective.

Objective Name Enter a name for the objective.

Description Click the text in the Description column to access the Objective Details page, where you can enter or modify a description of the objective.

Setting Up Supported Roles for Planning

To set up supported roles for planning, use the Supported Roles for Planning (RSP_ROLES) component.

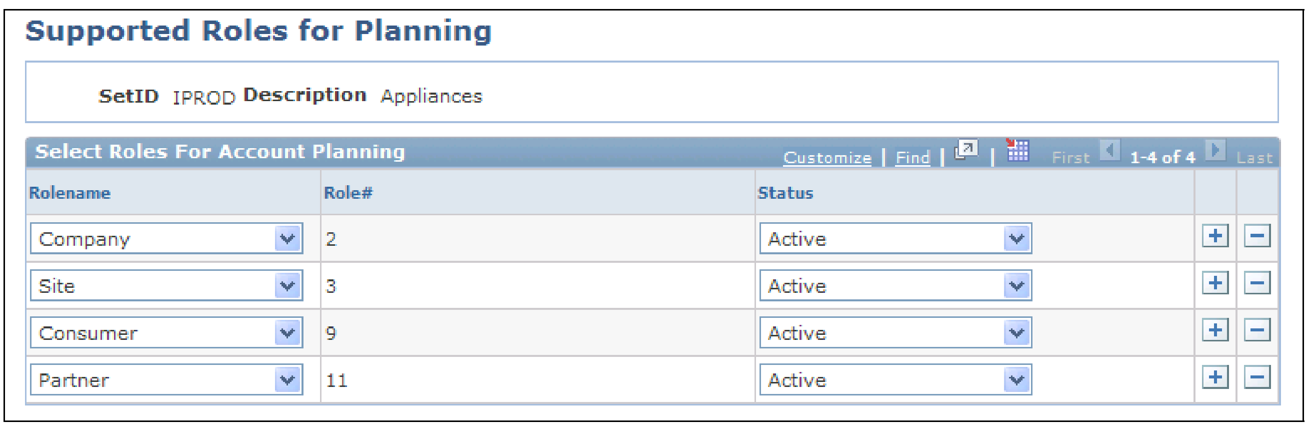
This section discusses how to set up supported roles for account planning.

Page Used to Set Up Supported Roles for Planning

Page Name	*Definition Name*	*Navigation*	*Usage*
Supported Roles for Planning	RSP_ROLES	Set Up CRM, Product Related, Strategic Account Planning, Supported Roles for Planning, Supported Roles for Planning	Define supported roles for account planning.

Setting Up Supported Roles for Account Planning

Access the Supported Roles for Planning page (Set Up CRM, Product Related, Strategic Account Planning, Supported Roles for Planning, Supported Roles for Planning).



Supported Roles for Planning page

Rolename Select a role for account planning. Possible values are *Company*, *Consumer*, *Partner*, and *Site.*

Role # (role number) Displays the role number for the Rolename that you entered.

Status Select a status for the role. Possible values are *Active* and *Inactive.*

Defining Plan Types

To define plan types, use the Plan Type (RSP_PLAN_TYPE) component.

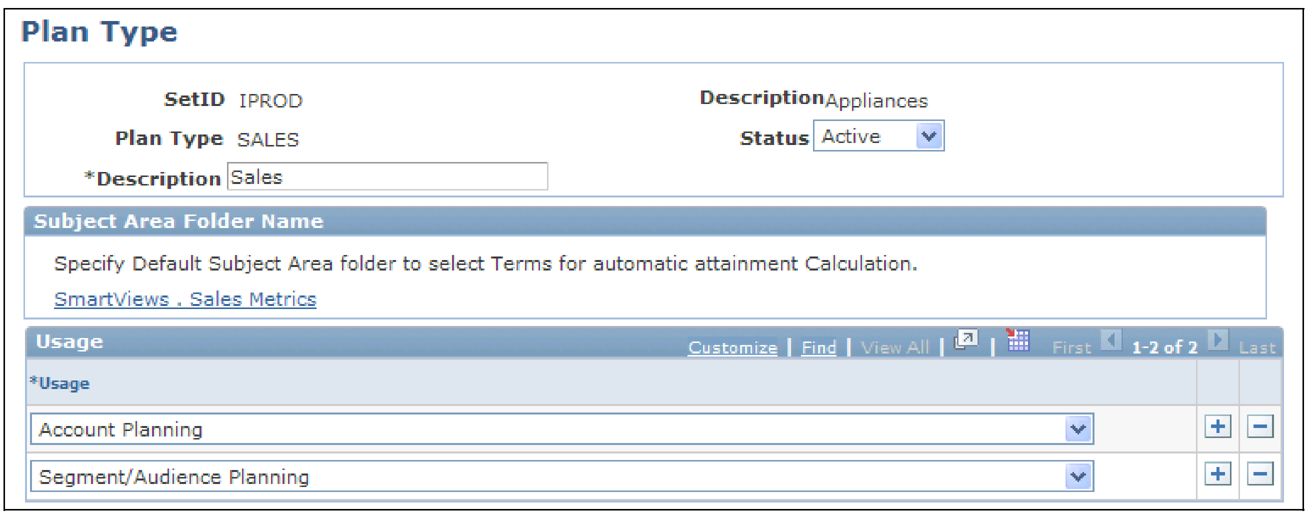
This section discusses how to define plan types for account or segment planning.

Page Used to Define Plan Types

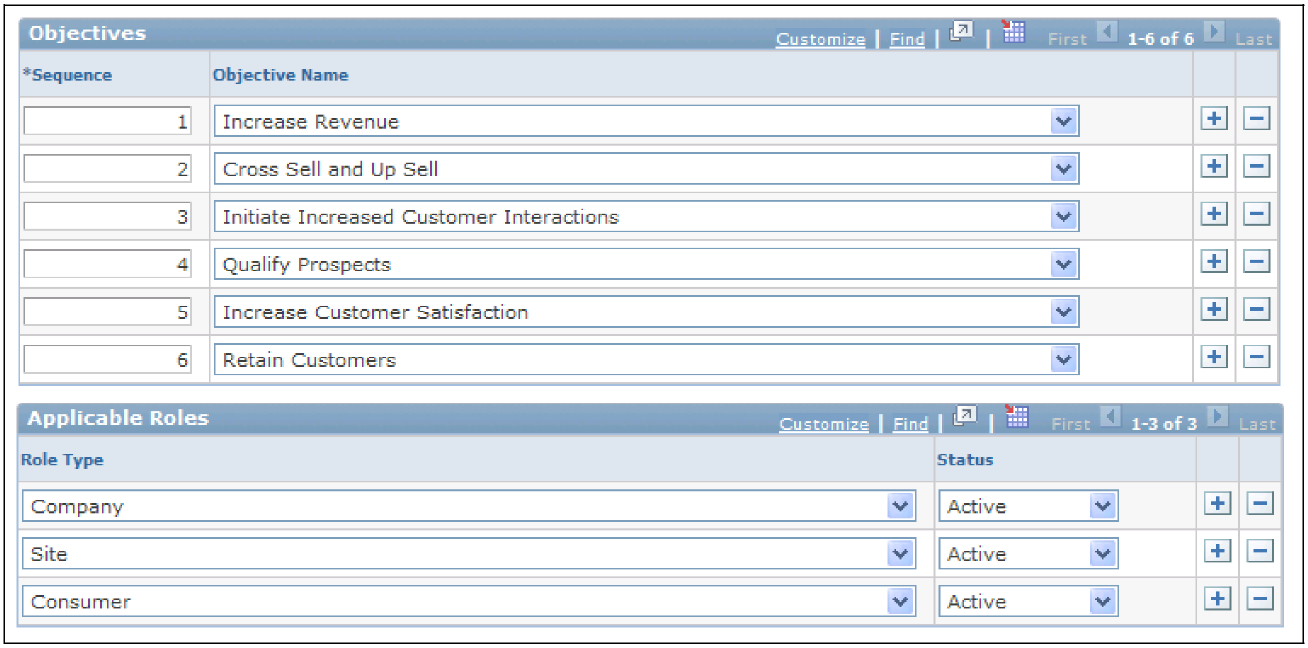
Page Name	*Definition Name*	*Navigation*	*Usage*
Plan Type	RSP_PLAN_TYPE	Set Up CRM, Product Related, Strategic Account Planning, Plan Types, Plan Types	Define plan types for account planning.

Defining Plan Types

Access the Plan Type page (Set Up CRM, Product Related, Strategic Account Planning, Plan Types, Plan Types).



Plan Type page (1 of 2)



Plan Type page (2 of 2)

You use plan types to define goals and create account templates.

Description Enter a description for the plan type. This is a required field.

Status Select a status for the plan type. Possible values are *Active* and *Inactive.*

Subject Area Folder Name

Select a default subject area to specify terms for the automatic attainment calculation.

Usage

Usage Select the usage for the plan type. Possible values are *Account Planning* and *Segment/Audience Planning.* This is a required field. If you want the plan type to be used for both account planning and segment/audience planning, add a row and select both values.

Objectives

Sequence Enter a number that orders the objectives.

Objective Name Select an objective that you defined on the Objectives page. Add lines as necessary to define additional objectives for the plan type.

Applicable Roles

Role Type

Select a role type that you defined on the Supported Roles For Planning page. Add lines as necessary to define additional role types for the plan type.

Status

Select a status for the role type. Possible values are *Active* and *Inactive.*

Defining Assessments

To define assessments, use the Assessments (RSP_ASSESSMENT) component.

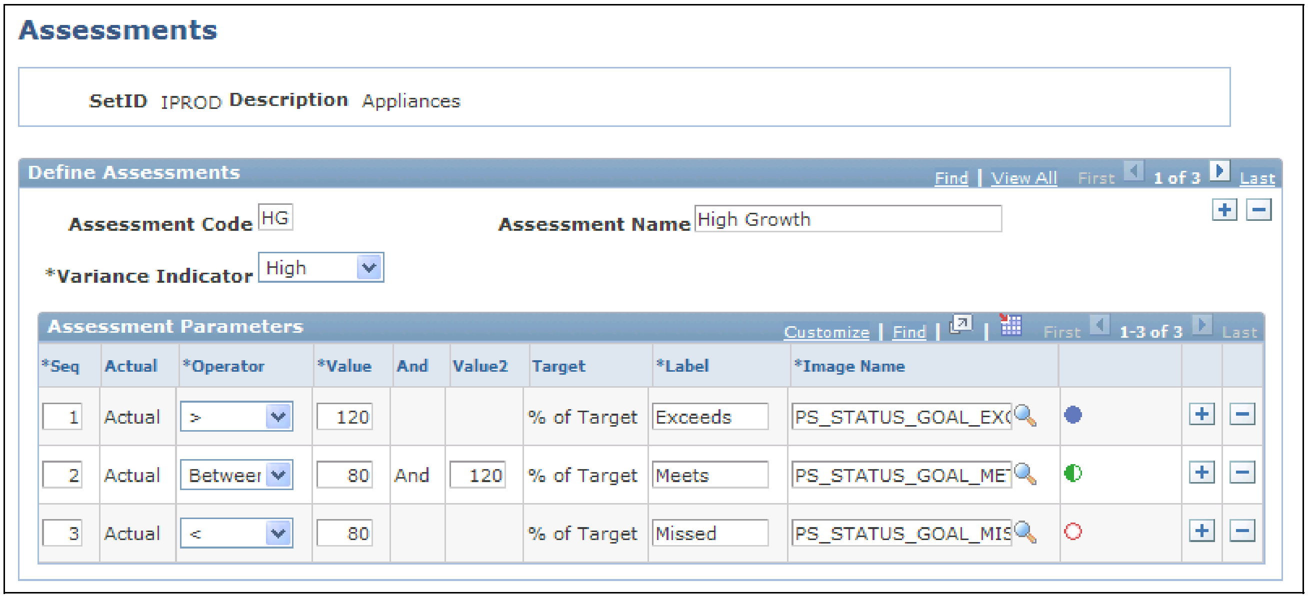
This section discusses how to define assessments for evaluating plan goals.

Page Used to Define Assessments

Page Name	***Definition Name***	***Navigation***	***Usage***
Assessments	RSP_ASSESSMENT	Set Up CRM, Product Related, Strategic Account Planning, Define Assessments, Assessments	Define assessments for evaluating plan goals.

Defining Assessments for Evaluating Plan Goals

Access the Assessments page (Set Up CRM, Product Related, Strategic Account Planning, Define Assessments, Assessments).



Assessments page

Assessment Code Enter a two-character code for the assessment.

Assessment Name Enter a name for the assessment.

Variance Indicator Select either *High* or *Low* to denote whether a high value or a low value is a positive for a goal. For example, if the goal is revenue generation, then select *High.* If the goal is product failures, then select *Low.*

Assessment Parameters

Seq (sequence) Enter a sequence number for the assessment line.

Operator Enter an operator for the assessment line. Possible values are <, <=, =, >= >, and *Between.*

Value Enter a numeric value to compare against the actual value. If you enter *Between* in the Operator field, enter a numeric value that is at the low end of the range.

Value2 If you enter *Between* in the Operator field, enter a numeric value that is at the high end of the range.

Label Enter a label that describes the outcome specified on the assessment line. For example, if the actual is greater than 125 percent of the target, you can enter a label of *Very Good.*

Image Name	Select an image file that the system displays on plan results pages when the actual results match the criteria specified on the assessment line. After you select the image file, the system displays the actual image to the right of this field.

Defining Goals

To define goals, use the Goal (RSP_GOAL_TBL) component.

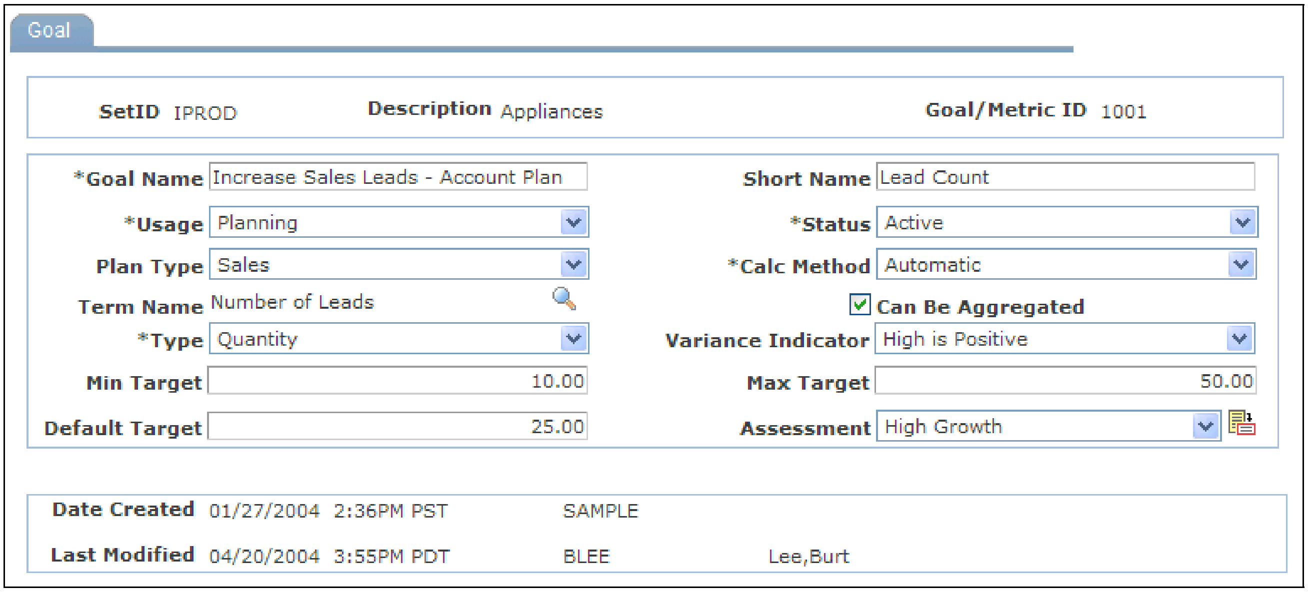
This section discusses how to define goals. Each account or segment plan that you create contains goals. You can manually enter goals on each account or segment plan. Also, if you have goals that are used on multiple account and segment plans, you can define shared goals on the Goal page and then associate these shared goals with the appropriate account and segment plans.

Pages Used to Define Goals

Page Name	***Definition Name***	***Navigation***	***Usage***
Goal	RSP_GOAL_TBL	Set Up CRM, Product Related, Strategic Account Planning, Define Goal, Goal	Define goals for account planning.
Term Selection	RSP_GOAL_EOCF_SEC	Click the Select Term button next to the Term Name field on the Goal page.	Select a term for the goal.

Defining Goals

Access the Goal page (Set Up CRM, Product Related, Strategic Account Planning, Define Goal).



Goal page

Goal Name	Enter a name for the goal.
Short Name	Enter a short name for the goal.
Usage	Select the usage for the goal. Possible values are: *Planning:* This goal is used only for planning. *SmartViews:* This goal (metric) is used within SmartViews for reporting purpose only. *Both Planning and SmartViews:* This goal can be used for planning, as well as for reporting purposes within SmartViews.
Status	Select a status for the goal. Possible values are *Active* and *Inactive.*
Plan Type	Select a plan type for the goal.
Calc Method (calculation method)	Specify whether the attainment for the goal will be calculated automatically from the system or manually entered by the user.
Term Name	Click the Select Term link to access the Term Selection page. PeopleSoft Strategic Planning integrates Terms setup under Active Analytics Framework (AAF) to calculate the attainment of a goal.
Can Be Aggregated	Select this check box to indicate that this value can be used in an aggregate calculation.
Type	Select a value based on the type of goal. Possible values are *Amount,Other, Percent,* and *Quantity*. For example, if the goal is revenue generation, select *Amount.* If the goal is number of new accounts, select *Quantity*.

Variance Indicator	Select where a high or low value is positive for the goal. Possible values are *High is Positive* and *Low is Positive.*
Min Target (minimum target)	Enter the minimum target value for the goal.
Max Target (maximum target)	Enter the maximum target value for the goal.
Default Target	Enter the default target value for the goal.
Assessment	Select an assessment name that you defined on the Define Assessments page.

Creating a Territory Tree for Accounts

To set up a management structure for account planning and to set up automatic assignment of sales representatives to accounts, you must create a territory tree for accounts.

See and *PeopleSoft Sales 9.1 PeopleBook*, "Creating Territory Trees."

Setting Up Merge Options for Account Teams

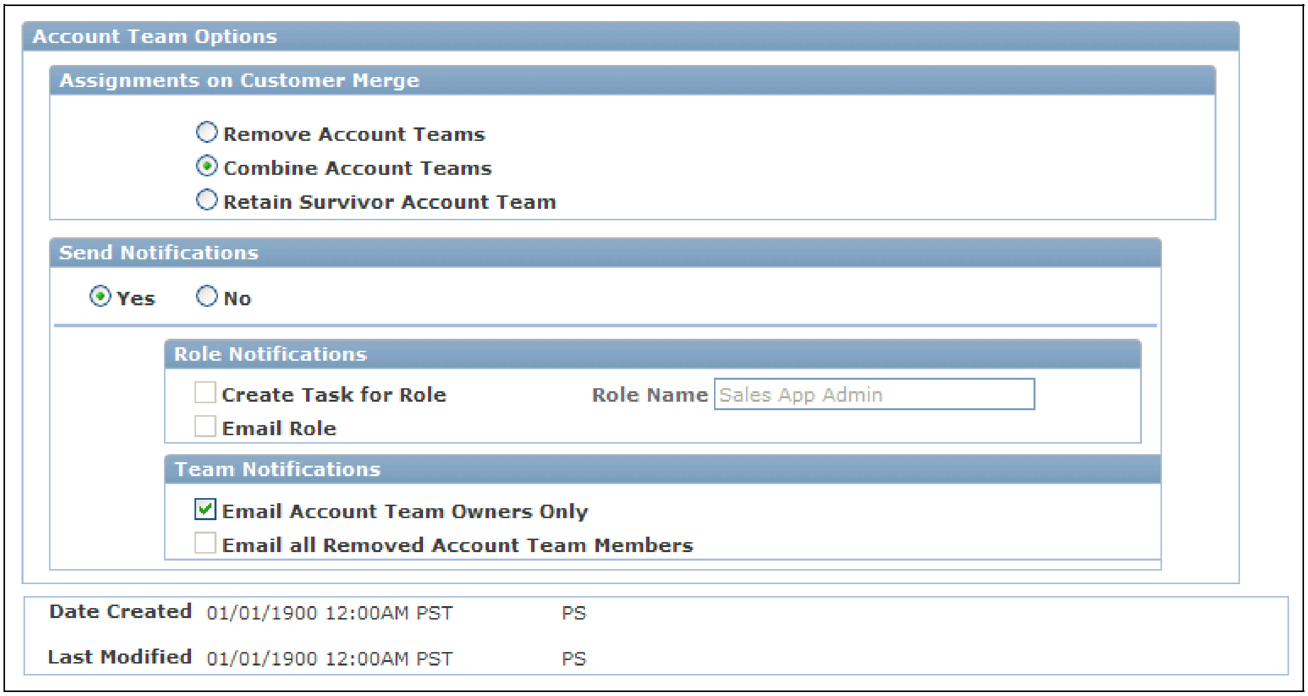
This section discusses how to set up merge options for account teams.

Page Used to Set Up Merge Options for Account Teams

Page Name	***Definition Name***	***Navigation***	***Usage***
Account Team Merge Options	RSP_ACCTM_MERGE	Set Up CRM, Product Related, Strategic Account Planning, Account Team Merge Options	Set up assignment and notification options for account teams when customers to which they're assigned are merged by Customer Data Hub (CDH).

Setting Up Merge Options for Account Teams

Access the Account Team Options page (Set Up CRM, Product Related, Strategic Account Planning, Account Team Merge Options).



Account Team Options page

When two customers are merged by Customer Data Hub (CDH) as a result of duplicate prevention, it is possible that the account teams that are assigned to the customers will differ. Use this page to determine the assignment and notification options for account teams that are impacted as a result of customer merge.

Assignments on Customer Merge

Remove Account Team	Select to have no account team assigned to the surviving customer. In this case, manual intervention is needed to assign a new account team to the survivor.
Combine Account Team	Select to add all account team members of the non-survivors to the existing account team of the survivor, after removing any duplicates.
Retain Survivor Account Team	Select to only keep the account team of the surviving customer and remove the teams of the non-survivors.

Role Notifications

Notifications can be sent to the appropriate people or roles whenever account team assignments are made on a customer merge. Two role notification options have been provided.

Create Task for Role and **Role Name**	Select to have the system create a task is for the role that is specified in the Role Name field. For example, the *Sales AppAdmin* role can be notified about the need to assign a new account team to a survivor.
Email Role	Select to have the system send an email to the specified role.

Team Notifications

Two team notification options have been provided to notify members of the account team of changes that have happened because of a merge.

Email Account Team Owners Only	Select to have the system send email only to the account team owners of the Survivor and each Non-Survivor, describing the assignments made and any actions that need to be taken.
Email all Removed Account Team Members	Select to have the system send email to all the original members of the survivor or non-survivor that are no longer on the new account team of the survivor.

See and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Understanding Customer Data Hub Integration," Understanding Customer Data Management and the Customer Data Hub.

Chapter 4

Setting Up Planning Templates

This chapter provides an overview of planning templates and discusses how to:

- Set up planning templates.
- Clone planning templates.

Understanding Planning Templates

A planning template specifies a set of data that is used to create a plan. Planning templates enable you to define a template that contains a default set of objectives and goals, and create multiple plans from the template. Templates are keyed by setID. They are used by PeopleSoft Strategic Account Management to define goals that are measured against set targets and by Smart Views to report metrics.

You can create a template that is similar to an existing template by cloning the existing template and modifying the new template.

Planning templates are composed of these main sections:

- Template Details
- Objectives
- Identify Goals
- Template Editors

You can also attach tasks or notes to an account plan. The tasks added to the account plan for a company appear when you view the tasks for the associated company. You can also define tasks for planning templates.

Template Details

The Template Details section captures high level information, such as the template name, the plan type to which a template belongs, the planning period, template status, currency, and the purpose for which the template is used. The template usage differentiates whether a template is applicable to the account plan or to the segment plan (both for Strategic Account Management). Only active templates can be associated with plans or with segment groups.

The plan type controls which free-form text fields appear in the Details section. For example *Value Statement* and *Critical Success Factors* appear for Sales plans, because they are set up for the sales plan type. The template has a currency code associated with it; all the goal targets that have a type of amount are entered in this currency.

Objectives

Objectives are the purposes for the plan, and are either selected from a list of predefined objectives or entered free-form.

Identify Goals

To identify goals, the user enters the details of each goal, such as the name of the goal, the target score expected, and how this is to be calculated (automatic or. manual). Target type specifies whether the target score being specified is an amount value, quantity, percentage, or some other type. The assessment name specifies which visual status breaks are to appear (green, red, yellow, and so on), as well as which variance indicator is associated with the associated assessment.

Template Editors

Template editors are the people are allowed to view or modify the template. When there is at least one Editor marked as Owner then only an Owner can change the template from Active to Draft.

Setting Up Planning Templates

To set up planning templates, use the Planning Template (RSP_PLANNING) component.

This section discusses how to:

- Define planning templates.
- Add tasks to a planning template.
- Add notes and attachments to a planning template.

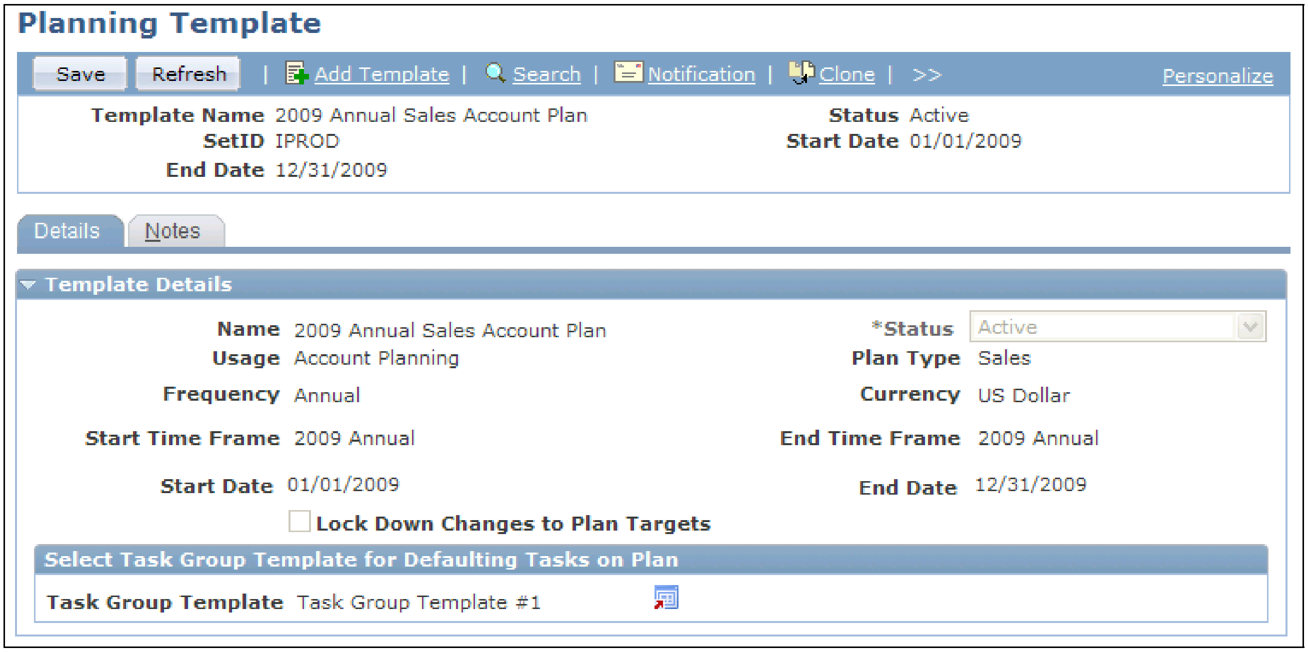
Pages Used to Set Up Planning Templates

Page Name	*Definition Name*	*Navigation*	*Usage*
Planning Template - Details	RSP_PLANNING	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Planning Template - Details	Define planning templates. Header details that you enter include: template parameters, objectives, goals, and template editors.
Planning Template - Tasks	RB_TSK_EDIT_GRID	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Planning Template - Tasks	Add tasks to planning templates.

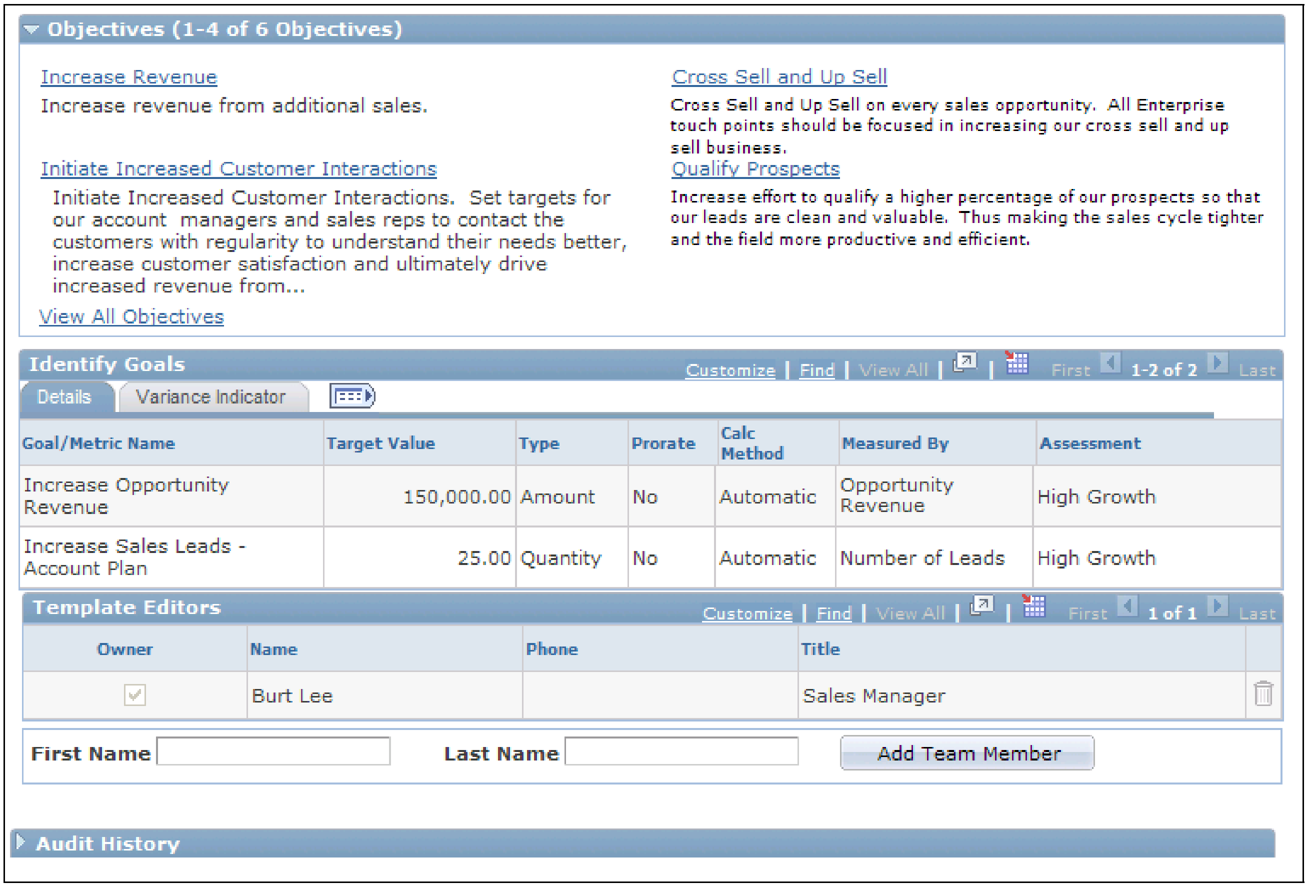
Page Name	***Definition Name***	***Navigation***	***Usage***
Planning Template - Notes	RSP_PLANNING_NOTE	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Planning Template - Notes	Add notes and attachments to planning templates.

Defining Template Details

Access the Planning Template - Details page (Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Planning Template - Details).



Planning Template - Details page (1 of 2)



Planning Template - Details page (2 of 2)

Template Details

This section is editable when the current status is set to *Draft.*

Name Enter a name for the planning template.

Status Select a status for the planning template. Values are:

Draft: The default value when you create a planning template. You can edit the template when it has this status. You must change the status to *Active* before you can use the template.

Active: The template can be used to create a new plan . When a plan has this status, the system does not allow you to edit the objectives or goals. Only template owners who have *write with override access* can change the status back to *Draft.*

Inactive: The planning template can no longer be used when it is inactive.

Canceled: The planning template is canceled and cannot be used.

Completed: The validity of the template has expired, so it is not available for use.

Description Enter a description for the planning template.

Usage	Select the whether the template is being created for segment planning or for account planning. Values are *Account Planning* and *Segment/Audience Planning.*
Plan Type	Select a plan type for the planning template. The list of available plan types differs depending on the usage that you select.
Frequency	Select a frequency for the planning template. Values are *Annual, Bi-Weekly, Daily, Monthly, Quarterly, SemiAnnual,* and *Weekly.*
Currency	Select a currency for the planning template.
Start Time Frame	Select the starting time period for which this planning template is valid. The Start Time Frame and End Time Frame fields prevent a user from using this template for a timeframe which falls out of this range.
End Time Frame	Select the ending time period for which this planning template is valid.
Start Date	Displays the date for the start time frame selected.
End Date	Displays the date for the end time frame selected.
Lock Down Changes to Plan Targets	Select to prevent the user from modifying target values in plans that are created from this template.
Task Group Template	Select a task group template from which to populate tasks on plans that are created from this template.

Objectives

Add Objective	Click this button to access the Select Objectives page. You can choose a predefined objective or create a new objective for the planning template. This button appears only when the template is in *Draft* status.
View All Objectives	Click this link to access the Objectives page and view all the objectives for the planning template. You can delete an objective on this page.

Note. When you select a plan type for the template, the system adds the plan type's objectives to the template.

Identify Goals

Add New Goal	Click this button to add a new goal. This button only appears when the template is in *Draft* status.
Goal Name	Select a predefined goal or enter a goal name to add a custom goal.

Target Value	Enter the target value for the goal.
Type	Displays the type of value for the goal. Values are *Amount, Percent Quantity* and *Other*.
Prorate	When the value for the Prorate field is set to *Yes,* the attainment is compared with a prorated value of the target. The prorating is done based on number of days in the plan period.
Calc Method (calculation method)	Displays how the attainment for the goal is calculated. Possible values are *Automatic* or *Manual.*
Measured By	Displays the term name used to measure the goal.
Assessment	Select an assessment name for the goal. The assessment name determines the images that the system displays and the variance indicator.
Variance Indicator	Click this tab to display the variance indicator that is associated with the assessment.

Template Editors

Add New Editor	Click this button to add a new template editor.
Owner	Specifies that one of the editors owns the template. You do not have to specify a template owner. If you do not specify an owner, then anyone can change the status of the template, otherwise only the owner or the owner's manager can change the status.

See Also

Chapter 3, "Setting Up PeopleSoft Strategic Account Planning," Setting Up Objectives, page 12

Chapter 3, "Setting Up PeopleSoft Strategic Account Planning," Pages Used to Define Goals, page 19

Defining Tasks

Access the Planning Template - Tasks page (Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Planning Template - Tasks).

Note. The View filter is not applicable in planning templates.

See and *PeopleSoft Sales 9.1 PeopleBook,* "Creating Sales Tasks and Adding Notes for a Lead or Opportunity."

Defining Notes and Attachments

Access the Planning Template - Notes page (Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Planning Template - Notes).

See and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Company Business Objects," Defining Company Information.

Cloning Planning Templates

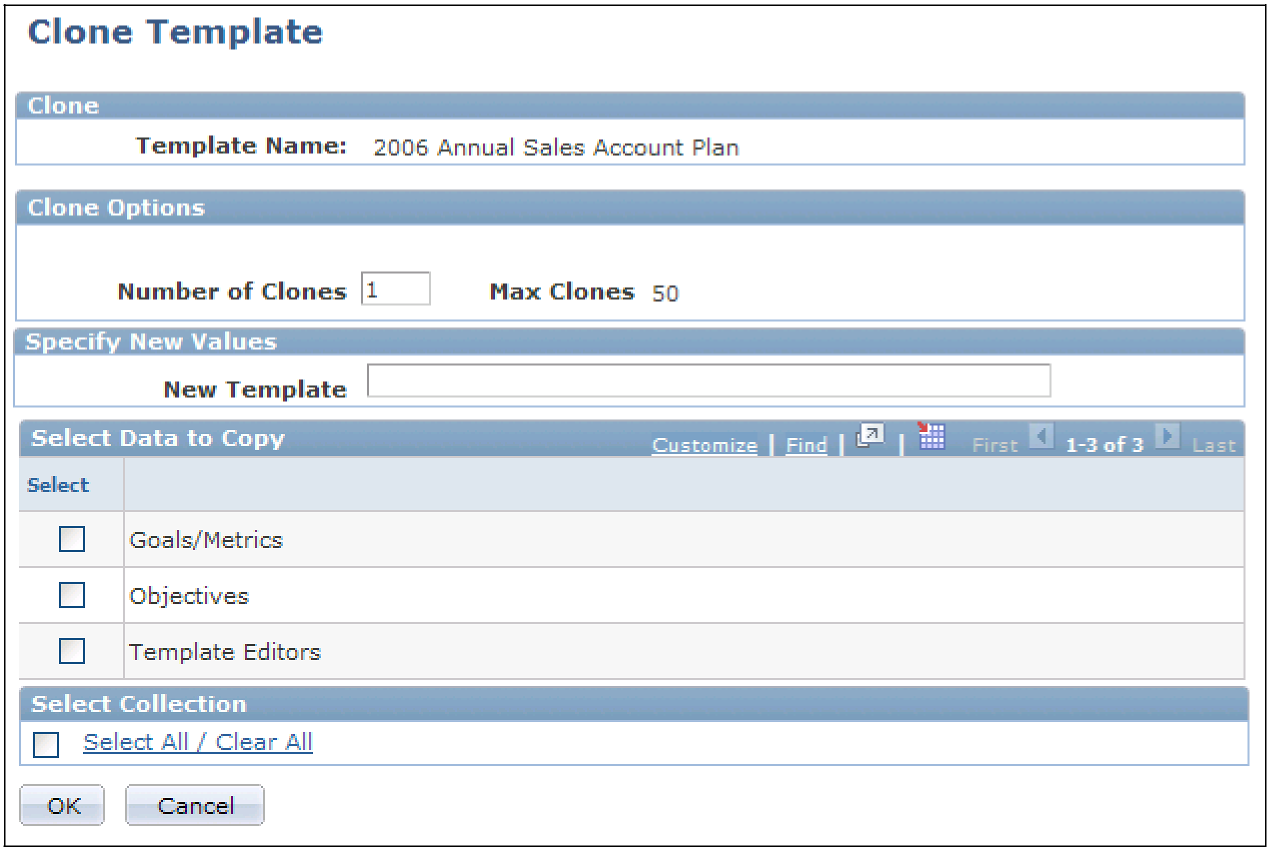
This section discusses how to clone a planning template.

Page Used to Clone Planning Templates

Page Name	***Definition Name***	***Navigation***	***Usage***
Clone Template	RB_CLONE_TXN_SEC	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates Select a template and click the Clone button on the toolbar.	Define parameters for cloning planning templates.

Cloning Planning Templates

Access the Clone Template page (click the Clone button on the Planning Template page toolbar).



Clone Template page

Number of Clones Enter the number of templates that you want to create.

New Template Enter a name for the cloned template.

Select Select to copy Goals,Objectives,Tasks, or Template Editors to the new template.

Chapter 5

Managing Accounts

This chapter discusses how to:

- Access accounts.
- Assign a team to an account.
- Reorganize and reassign accounts.

Accessing Accounts

This section provides an overview of accounts and discusses how to:

- Use the Strategic Account Planning toolbar.
- Access accounts.

Understanding Accounts

An account is represented in the customer data model as a business object keyed by BO_ID (business object identifier) + Role Type ID, where the role type is either Company, Consumer, Partner, or Site.

Page Used to Access Accounts

Page Name	***Definition Name***	***Navigation***	***Usage***
My Accounts	RD_ACCOUNTS	My Accounts, My Accounts	View accounts and add plans.

Using the Strategic Account Planning Toolbar

Toolbars are configurable and customizable. In addition, you can give end-users the ability to personalize their toolbar.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Toolbars," Understanding the Configurable Toolbar.

PeopleSoft CRM delivers these toolbar buttons for Strategic Account Planning:

My Tasks	Click to access a list of the tasks that are associated with the account.
Add Call Report	Click to add a call report for the selected account.
Add Task	Click to add a task for the selected account.
My Calendar	Click to access the My Calendar page, where you can see daily, weekly, and monthly views of your calendar.

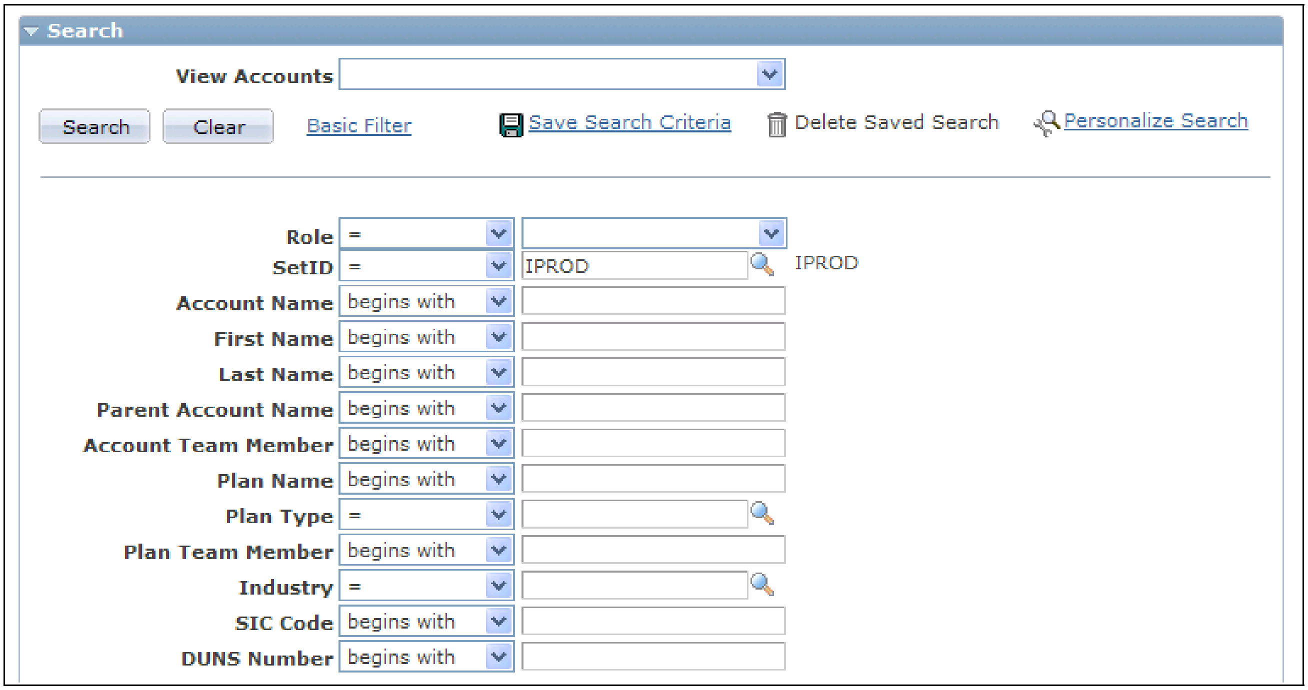
Refer to the see reference for descriptions of buttons that do not appear in the preceding table.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook,* "Configuring Toolbars," Delivered Common Toolbar Buttons.

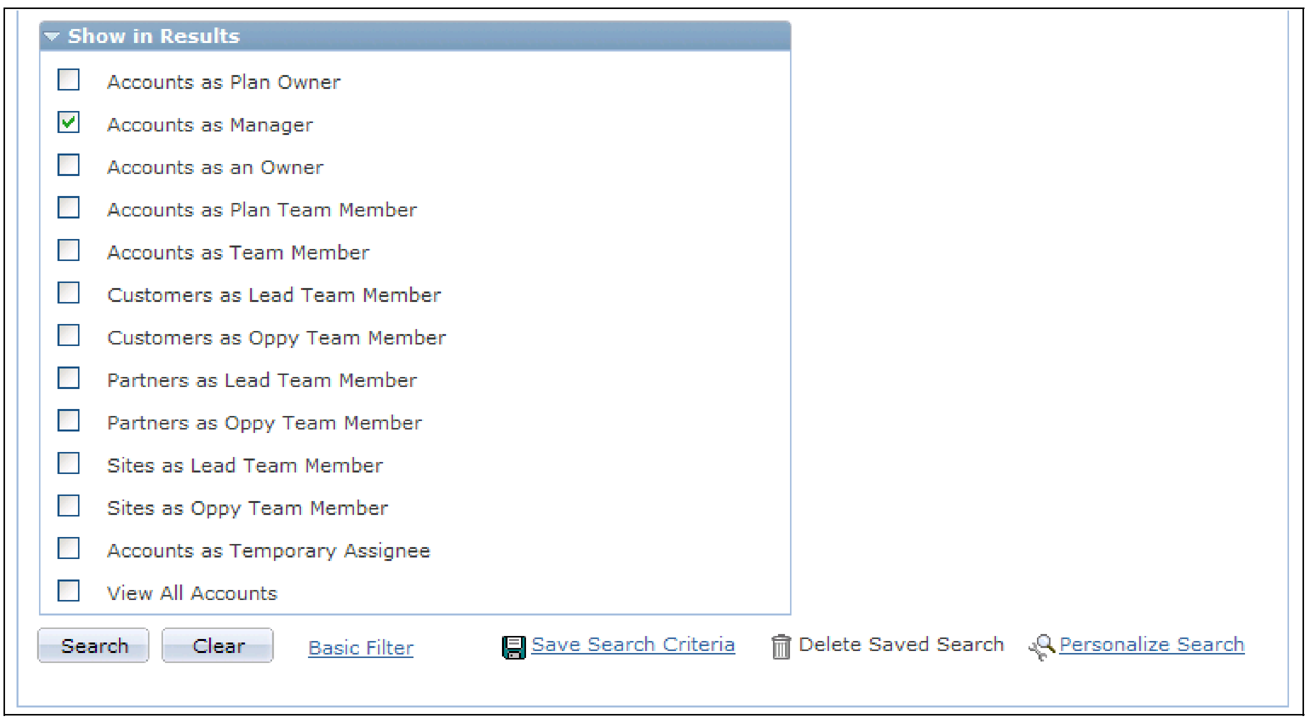
Accessing Accounts

Access the My Accounts page (My Accounts, My Accounts).

My Accounts page (1 of 3)



My Accounts page (2 of 3)



My Accounts page (3 of 3)

View Accounts	Select to filter the list of accounts using a new search that you create or a saved search that you previously created.

Create Plans for Selected Accounts	Click to create account plans for one or more accounts that you select.

Account List

	Click to access the 360-Degree View of the account.
Create Plan	Click this link to create a new plan.
View Account Plans	Click this link to view existing plans.

Show in Results

Select the following check boxes to select which accounts appear when you perform a search.

Note. The check boxes available in this section depend on how you set the configurable search options.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages," Configuring Searches.

Accounts as Plan Owner	Select to have the system display accounts for which you are the plan owner.
Accounts as Manager	Select to have the system display accounts for which you are the manager or a representative on the account team.
Accounts as an Owner	Select to have the system display accounts for which you are the owner.
Accounts as Plan Team Member	Select to have the system display accounts for which you are a member of the plan team.
Accounts as Team Member	Select to have the system display accounts for which you are a team member.
Customers as Lead Team Member	Select to have the system display customer accounts that are associated with a lead on which you are a team member.
Customers as Oppy Team Member (customers as opportunity team member)	Select to have the system display customer accounts that are associated with an opportunity on which you are a team member.
Partners as Lead Team Member	Select to have the system display partner accounts that are associated with a lead on which you are a team member.
Partners as Oppy Team Member (partners as opportunity team member)	Select to have the system display partner accounts that are associated with an opportunity on which you are a team member.

Sites as Lead Team Member	Select to have the system display site accounts that are associated with a lead on which you are a team member.
Sites as Oppy Team Member (sites as opportunity team member)	Select to have the system display site accounts that are associated with an opportunity on which you are a team member.
Accounts as Temporary Assignee	Select to have the system display accounts on which you are a temporary assignee.
View All Accounts	Select to have the system display all accounts.

Assigning a Team to an Account

This section provides an overview of account team assignment and discusses how to:

- Assign a team to an account.
- Add members to the account team.

Understanding Account Team Assignment

You can assign teams automatically to accounts if you establish team structures and the assignment criteria for selecting one team from within the structure of teams. Assigning account teams is similar to assigning sales reps and sales teams to leads or opportunities and is based on comparable structures of trees and territories. Once you set up the criteria to enable automated selection, the system scans the available account teams and identifies the best-qualified choice. Assignment normally occurs when the account object (company, site, partner, or consumer) is created. You can explicitly invoke assignment and review the account team or assign a default team using a background event during the save. The component or application class that creates an object can initiate team assignment whenever there is no existing account team if you set a user preference for automated assignment.

The team to assign is found on a territory tree as a specific territory. Both the tree that is searched and the assignment group are supplied by user preference. The assignment group's criteria with weights, plus the territory's specific values for each assignment criterion, produce a score—a degree of match to the new account—for each territory. Values for fields, such as region, size, or zip code, are captured from the component buffer or from parameters passed from the application class. The field values that correspond to assignment criteria are compared with the territory values, and results are weighted and summed per territory. The best score among the territories is used for selecting the optimal team. That team is then attached to the object account's page for account team.

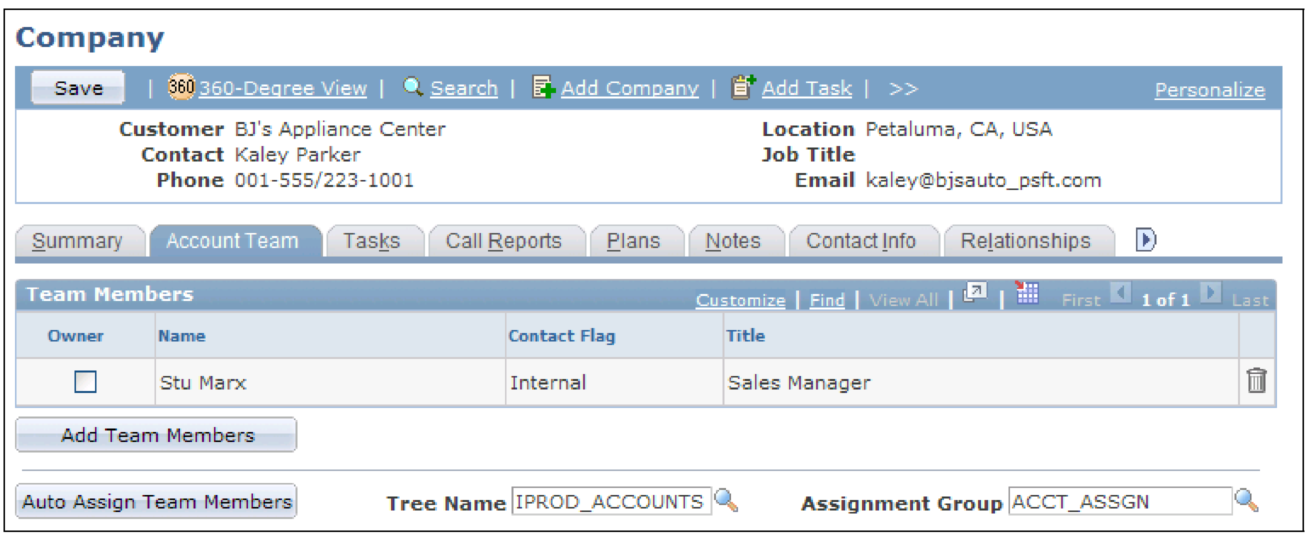
Pages Used to Assign a Team to an Account

Page Name	*Definition Name*	*Navigation*	*Usage*
Account Team Company - Account Team Site - Account Team Person (Consumer) - Account Team Partner Company - Account Team	RD_ACCOUNT_TEAM	• Select the Account Team tab from any page in the Company, Site, Person (Consumer), or Partner Company components. • My Accounts Click a listed Account Name or Owner.	Assign the account team for a company, site, consumer, or partner company account.
Add Team Member	RD_PERS_SRCH_SEC	Click the Add New Team Member button on the Account Team page.	Add members to the account team.

Assigning a Team to an Account

Access the Company - Account Team page (select the Account Team tab from any page in the Company component).

Note. The page that is shown here is from the Company component. Pages from other account components are similar in appearance and usage.



Company - Account Team page

Add Team Members Click to access the Add Team Member page and add company representatives manually to the account team.

Tree Name, Assignment Group and **Auto Assign Team Members**

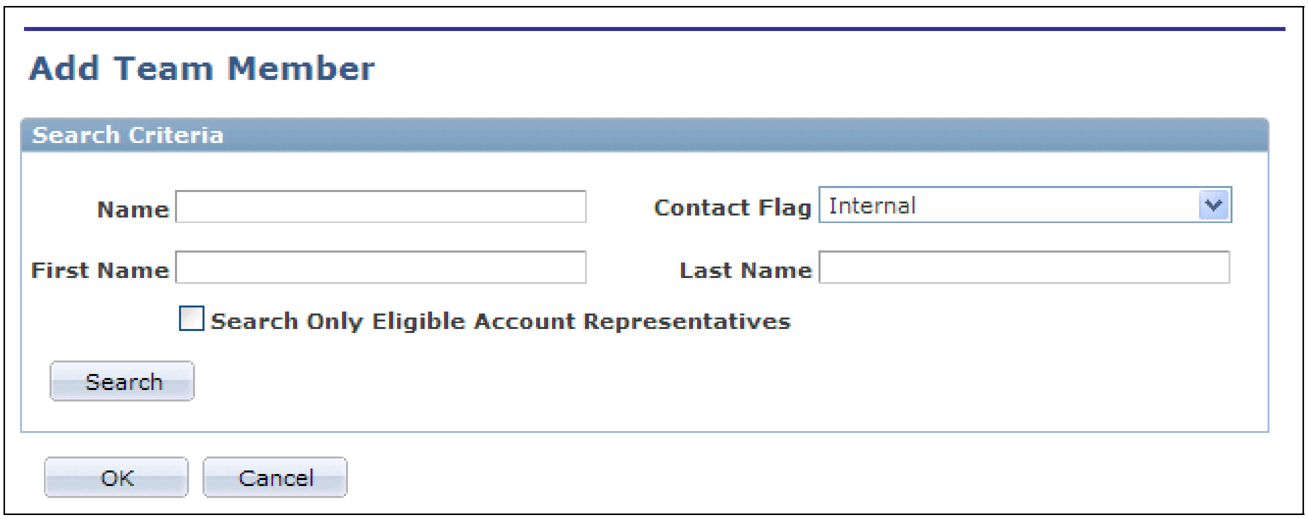
Enter the territory tree and assignment group that the system uses for performing the automatic assignment process when you click the Auto Assign Team Members button. The process selects sales users of the selected territory tree to become members of the account team based on the assignment criteria that are set up in the selected assignment group.

Note. In addition to assigning sales representatives to leads and opportunities, assignment group setup can be used to assign team members to accounts as well.

See and *PeopleSoft Sales 9.1 PeopleBook*, "Configuring Assignment Criteria," Creating Assignment Groups.

Adding Members to the Account Team

Access the Add Team Member page (click the Add New Team Member button on the Account Team page).



Add Team Member page

Contact Flag

Select *Internal* to limit the search to internal people and *External* to limit the search to external people.

Search Only Eligible Account Representatives

Select to limit the search for new team members to persons who are already assigned the role of account representative in the system.

Reorganizing and Reassigning Accounts

This section provides an overview of account team reorganization and reassignment and lists the pages used to reorganize and reassign accounts.

Understanding Account Team Reorganization and Reassignment

An organization needs the ability to reorganize or reassign accounts. Generally, an account administrator is responsible for reassigning accounts. This activity could occur when one or more account managers leave the company or their positions. The account administrator has the ability to reassign a set of accounts. Each reassigned activity automatically inherits the predefined tasks of the new owner.

If you make changes to the account territory tree, you can use the Reorganize Territories component in PeopleSoft Sales to reorganize the account team. If you want to reassign accounts to different account representatives, you can use the Reassign Sales Activities component in PeopleSoft Sales.

See and *PeopleSoft Sales 9.1 PeopleBook,* "Oracle's PeopleSoft CRM Sales Preface."

Pages Used to Reorganize and Reassign Accounts

Page Name	***Definition Name***	***Navigation***	***Usage***
Tree Reorganization	RSF_TR_REORG	Sales, Reorganize Territories	Reorganize the territories on a tree.
Territory Reassignment	RSF_TR_REASSIGN	Sales, Reassign Sales Activities	Reassign a sales user's leads, opportunities, and accounts to another sales representative.

Chapter 6

Creating Account Plans

This chapter provides an overview of account plans and discusses how to:

- Create account plans.
- Create plans for multiple accounts.

Understanding Account Plans

Account plans contain the specific goals and objectives that have been established to manage a company, partner, site, or consumer. You can associate a template with an account plan, or manually enter the information for a plan. An account plan has three main sections:

- Plan details

  Contains detailed information about the plan, including the plan type, objectives, and status.

- Goals

  Specifies the quantifiable results that are expected for the account.

- Plan team

  Lists the people who can view or modify the plan.

You can create a plan for an account by either accessing a company, partner, site, or consumer in the Customers CRM or Partner Profile component or by using the My Accounts page.

Understanding Account Access

A plan has two types of application security, in addition to PeopleTools security, that use the permission list. The row-level application security is implemented by using dataset rules. Plan edit control security ensures that the user has been granted appropriate access before any status changes can be made to the plan.

Plan access follows these guidelines:

- When an account and a plan on that account are unassigned, everyone with visibility to the plan can edit and change status.
- When a plan has team members, but no one is identified as an owner, everyone with visibility to the plan can edit and change status.

- When a plan has team members, and one or more is identified as the owner, everyone with visibility can edit in *Draft* status, but only the owners or owners' managers can change status from *Draft* to *Active* and back.
- When a plan has no team members, but an account team exists with no owners, everyone with visibility to the plan can edit and change status.
- When a plan has no team members, but an account team exists with one or more owners, everyone with visibility can edit in *Draft* status, but only the account owners or owners' managers can change status from *Draft* to *Active* and back.

Creating Account Plans

This section discusses how to:

- Create account plans.
- Identify goals and their targets.
- Define the plan team.

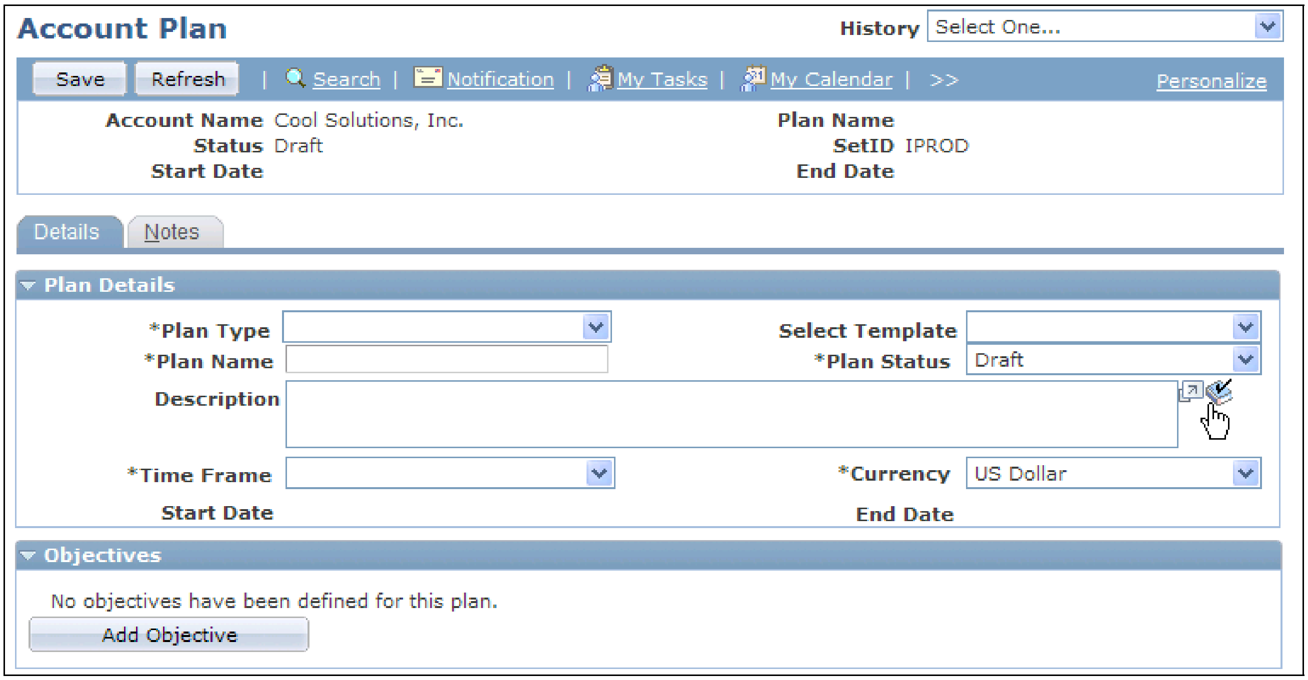
Pages Used to Create Account Plans

Page Name	***Definition Name***	***Navigation***	***Usage***
Account Plan - Header Details	RSP_PLANNING	• My Accounts Select an account and click the Create Plan link on the account line. • My Accounts Click the View Account Plans link for any account in the Account List. The account plan page from the component definition for the account appears. Select an existing plan or click the Create Plan button. • You can also create or modify account plans from the component where the account is defined.	Create or modify an account plan, including objectives, goals, and team members.

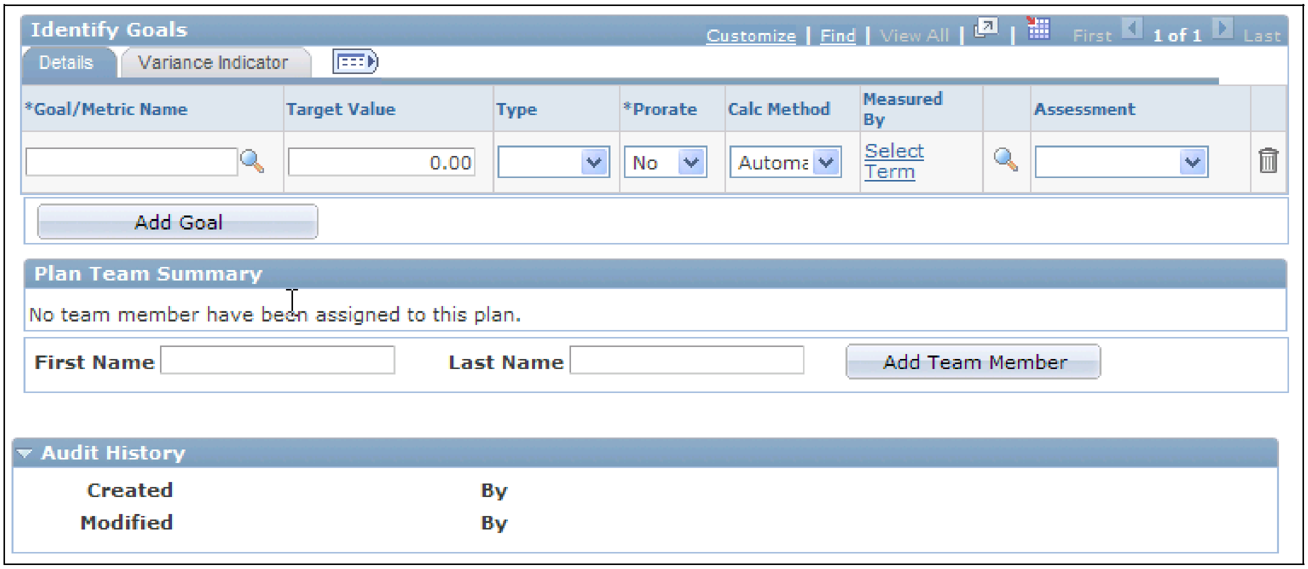
Page Name	*Definition Name*	*Navigation*	*Usage*
Account Plan - Tasks	RB_TSK_EDIT_GRID	Select the Tasks tab on the Account Plan - Header Details page.	Manage tasks for an account.
Account Plan - Notes	RSP_PLANNING_NOTE	Select the Notes tab on the Account Plan - Header Details page.	Add notes for an account.

Creating Account Plans

Access the Account Plan page (select an account on the My Accounts page and click the Create Plan link).



Account Plan page (1 of 2)



Account Plan page (2 of 2)

If you create an account plan from a template, the system automatically populates the plan with the information from the template, including objectives, goals, tasks, and so on. You can then modify or add information for the specific account plan.

Plan Details

Plan Type

Select a plan type for the plan. Possible values include *MARKETING*, *PARTNER*,*SALES*,*SERVICE* and *SUPPORT*.

Select Template

Select a template to populate the data for the plan.

Plan Name

Enter a name for the plan.

Plan Status

Select a status for the plan. Values are:

Draft: The default value when you create a plan. You can edit the plan when it has this status.

Active: The plan is in use. When a plan has this status, you cannot edit the goals. Only users who act as plan owners can change the status back to *Draft.*

Inactive: The plan is no longer in use and attainment does not need to be calculated.

Canceled: The plan is canceled and attainment does not need to be calculated.

Completed: The plan attainment has been calculated and there are no more transactions expected that would change the goal attainment.

Description

Enter a description for the plan.

Time Frame

Select the time frame for the plan.

Currency

Select a default currency for the plan that is used to show all attainment and goals that have to do with a monetary value.

Start Date

Displays the start date for the plan time frame selected.

End Date

Displays the end date for the plan time frame selected.

Objectives

Add New Objective

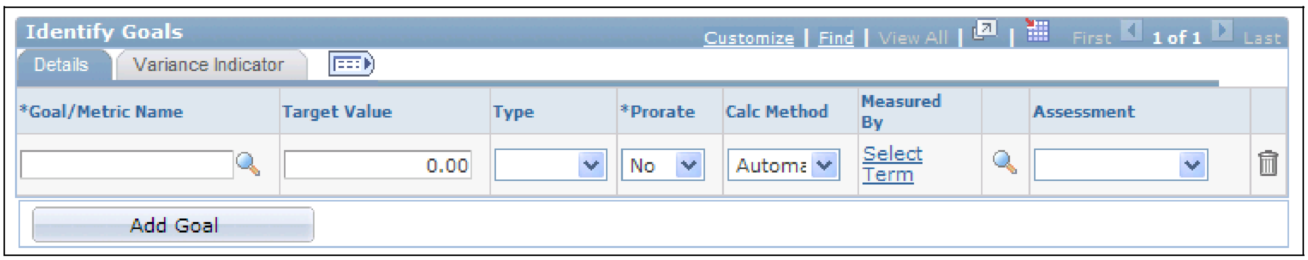
Click this button to access the Select Objectives page, where you can choose a predefined objective or create a new objective for the plan.

View All Objectives

Click this link to access the Objectives page, where you can view all the objectives for the plan. You can also delete objectives on this page.

Identify Goals

The fields that are available in the Identify Goals page region depend on whether you are adding goals or viewing the progress against existing goals. You can only add goals to an account plan that is in *Draft* status.



Example of Identify Goals for Adding a Goal

Add Goal

Click this button to add a new goal.

Goal/Metric Name

Select a goal name for the plan.

Target Value

Enter the expected value for the goal.

Type

Select the type of value for the goal. Values are *Amount*, *Percent*,*Quantity*, and *Other*.

Prorate

This should be set to *Yes* when the attainment needs to be compared with a prorated value of the target. The prorating is done based on the number of days in the plan period. For example, if the target is to increase revenue by $3 million in 90 days, and the attainment is being measured on the 30th day of the plan, the prorated target appears as $1 million and the assessment appears based on this value.

Calc Method (calculation method)

Displays how the attainment for the goal is to be calculated. Values are *Manual* or *Automatic.* If you specify *Automatic,* select a term to use for the calculation.

See and Chapter 8, "Measuring the Attainment of Plan Goals," Understanding the Measurement of Plan Goals, page 59.

Measured By

Click this link to select the term name used to measure the goal.

Assessment

Select an assessment name for the goal. The assessment name determines the image that the system displays and the variance indicator.

Attainment

Enter a measure of the goal attainment. This field is enterable for goals with a calculation of *Manual.*

If the calculation method is *Automatic,* the calculated attainment appears.

Calculate Attainment

Click to calculate the goal attainment according to the term that you specified.

Variance %

Displays the variance percent associated with the assessment. The unlabeled column to the right of this column displays an indicator of whether this is a positive or negative variance.

Copied From Template

Displays whether the system copied the goal from a template.

See and Chapter 4, "Setting Up Planning Templates," Understanding Planning Templates, page 25.

Plan Team Members

Add Team Member

Click this button to add a team member to the plan. A new page opens where you can search for persons to add to the team if the values you entered in the First Name and Last Name fields do not uniquely identify a person.

Owner

Specifies that one of the team members is the owner of the plan. You do not have to specify anyone as the owner of the plan. If you do not specify an owner, then anyone who can access the plan (according to dataset security) can change the status of the plan. If you specify one or more owners, then only the owners or the owners' managers can change the status.

Managing Tasks for an Account

Access the Account Plan - Tasks page (select the Tasks tab on the Account Plan - Header Details page).

See and *PeopleSoft Sales 9.1 PeopleBook,* "Creating Sales Tasks and Adding Notes for a Lead or Opportunity."

Note. If you create task from a planning template, task dates are derived from the template. The task start date is the plan start date plus the offset days from the task group template. The task end date is the task start date plus the duration days from the template.

Adding Notes for an Account

Access the Account Plan - Notes page (select the Notes tab on the Account Plan - Header Details page).

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,* "Working with Notes and Attachments," Viewing Lists of Notes.

Creating Plans for Multiple Accounts

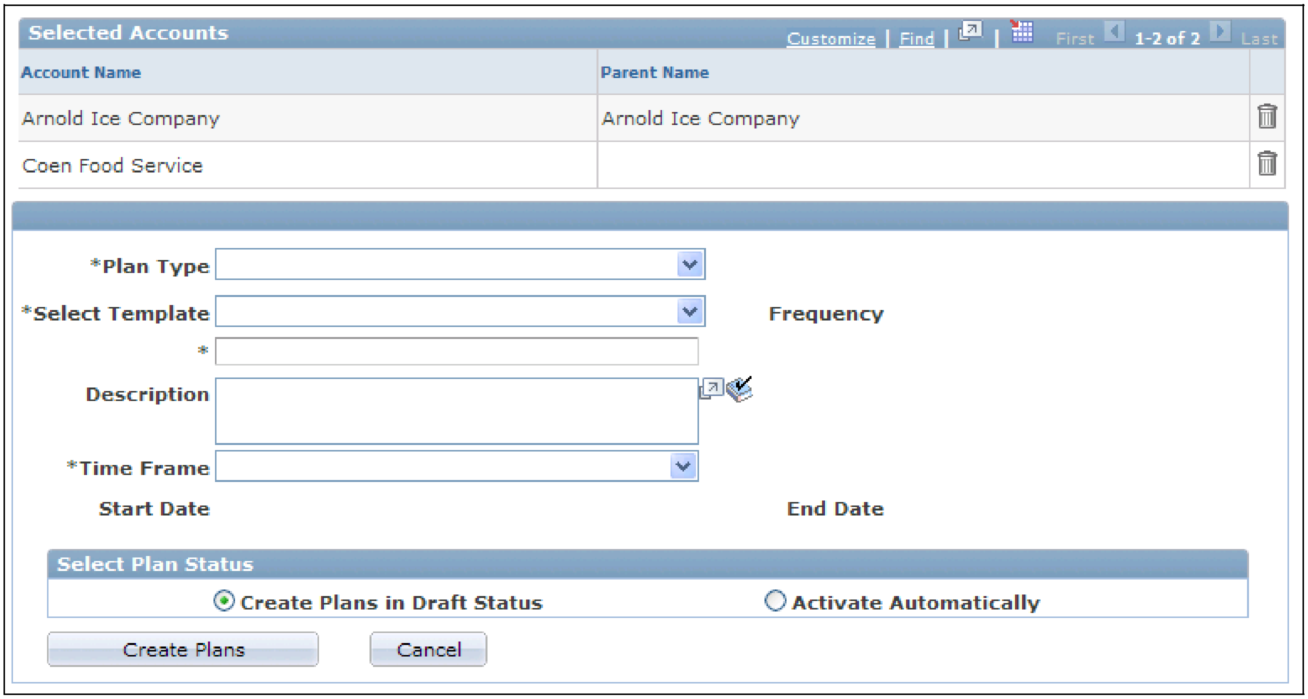
This section discusses how to create plans for multiple accounts.

Page Used to Create Plans for Multiple Accounts

Page Name	***Definition Name***	***Navigation***	***Usage***
Selected Accounts	RD_SEL_ACCOUNT	My Accounts Select one or more accounts from the results list. Click Create Plans for Selected Accounts.	Enter parameters to create plans for one or more accounts. **Note.** All selected accounts must have the same role.

Creating Plans for Multiple Accounts

Access the Selected Accounts page (select one or more accounts on the My Accounts page, then click Create Plans for Selected Accounts).



Selected Accounts page

Note. You must select accounts with the same role and setID to create plans for multiple accounts.

Plan Type Select a plan type for the plan.

Select Template Select a template to populate the data for the plan.

Frequency This field appears only if a template is selected. The frequency displayed is the same as specified in the selected template.

Plan Name Enter a name for the plan.

Description Enter a description for the plan.

Time Frame Select the time frame for the plan.

Start Date Displays the start date for the plan time frame selected.

End Date Displays the end date for the plan time frame selected.

Select Plan Status Select Create in Draft Status to create the plan with a status of *Draft*or select Activate Automatically to create the plan with a status of *Active.*

Chapter 7

Creating Segment and Audience Plans

This chapter provides an overview of segment and audience plans and discusses how to:

- Create segment plans.
- Roll over segment plans.
- Create audience plans.
- Roll over audience plans.

Understanding Segment and Audience Plans

You can create plans for a group of accounts by creating a plan for an audience. You can roll over that plan and allocate the target values to individual accounts. For example, if an audience contains 10 contacts who work for five distinct companies (two people for each company), it creates five account plans for those five companies. It does not create 10 plans, one for each person. Similarly, you can create plans for a segment. Segment plans contain the specific goals for a segment of customers, consumers, sites, or partners. You can use PeopleSoft Marketing to create segments. A segment plan can be created only for published segments.

The difference between a segment and an audience is that segments can contain a hierarchy of segments that at the bottom level finally contains accounts. When a segment plan is rolled over from the segment to the child segment group, segment plans are created for those subsegments.

You can roll over plans multiple times; but when you do, any plan that was created in the previous rollover is set to *Cancelled.*

A segment plan has three main sections:

- Plan details

  Contains detailed information about the plan, including the plan type, plan start, plan end date, high-level plan objectives, and status.

- Goals

  Specifies the quantifiable results that are expected for the account.

- Plan team

  Lists the people who can view or modify the plan.

You can create a plan for a segment by accessing a segment in the Manage Audiences component (RA_CAMPAIGN_MANAGEMENT).

See Also

PeopleSoft CRM 9.1 Marketing Applications PeopleBook, "Using Audiences," Creating and Managing Audiences

Creating Segment Plans

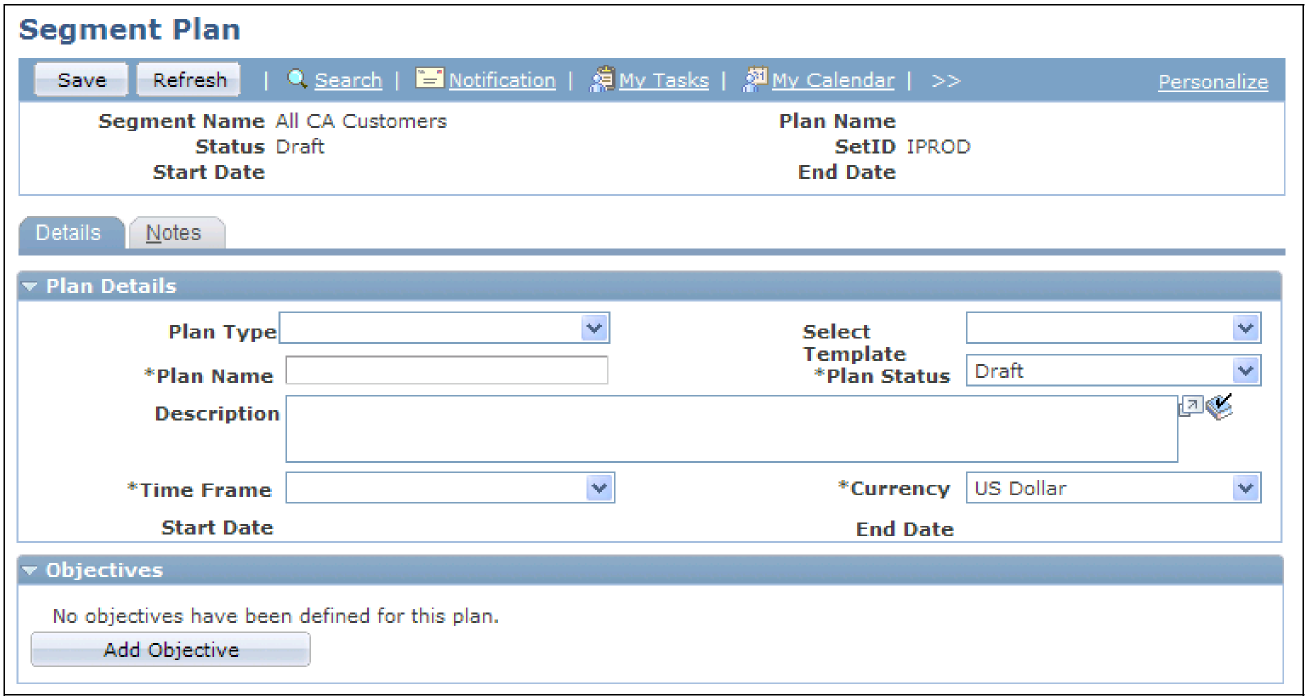
This section discusses how to create segment plans.

Pages Used to Create Segment Plans

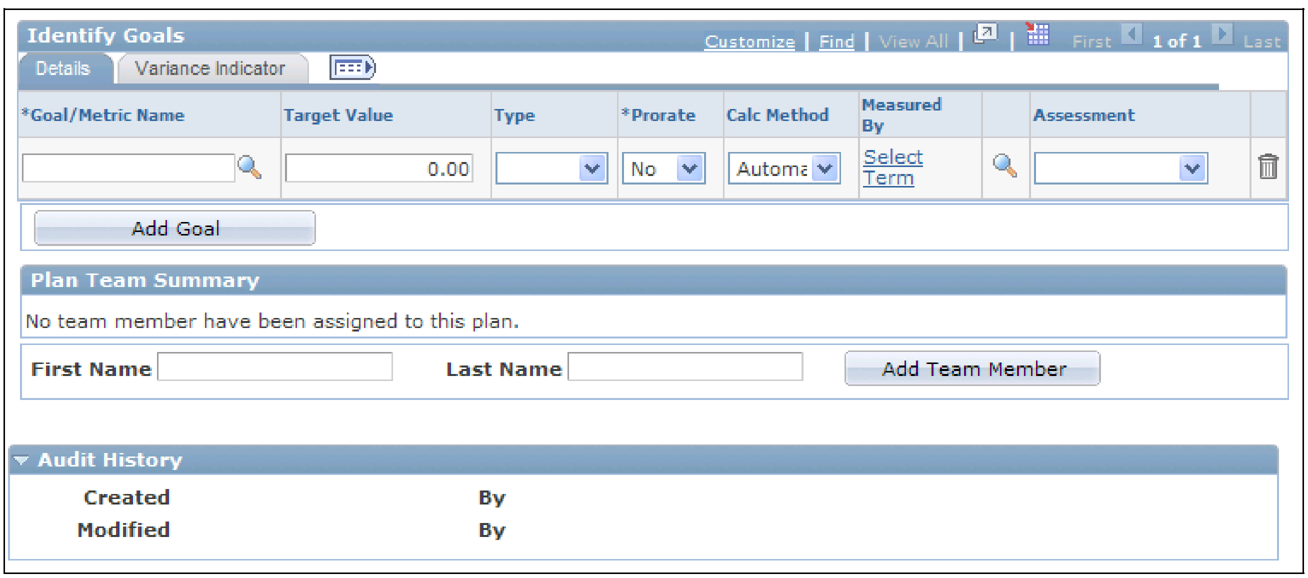
Page Name	*Definition Name*	*Navigation*	*Usage*
Segment - Plans	RA_LIST_PLANS	Marketing, Manage Audiences Select a segment from the Audience Summary list. Select the Plans tab.	View plans for a segment.
Segment Plan	RSP_PLANNING	Click the Create Plan button on the Segment - Plans page.	Create a segment plan.

Creating Segment Plans

Access the Segment Plan page (Marketing, Manage Audiences. Click the Create Plan button on the Segment - Plans page).



Segment Plan page (1 of 2)



Segment Plan page (2 of 2)

The Segment Plan page is identical to the Account Plan page, except that it has the Rollover Plan button. The system displays this button when you change the status of the plan to *Active*. Click this button to roll over the segment plan to child segments. The Rollover Plan button appears when the current segment contains any child segments.

See and Chapter 6, "Creating Account Plans," Creating Account Plans, page 42.

Rolling Over Segment Plans

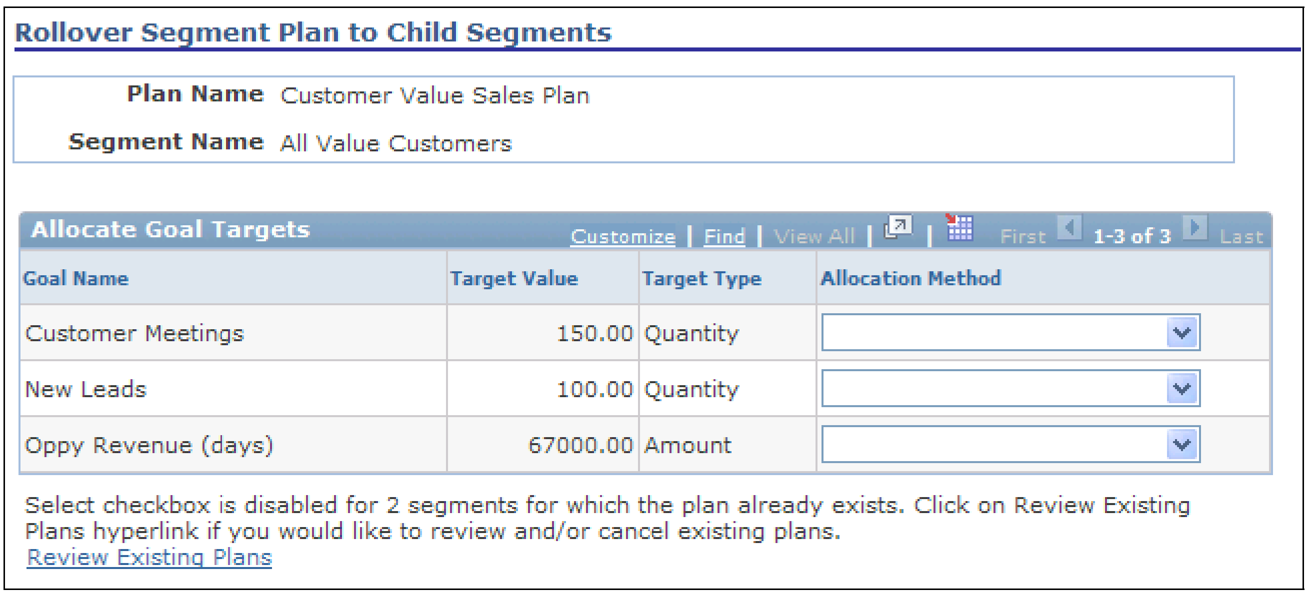
This section discusses how to roll over a segment plan to child segments.

Page Used to Roll Over Segment Plans

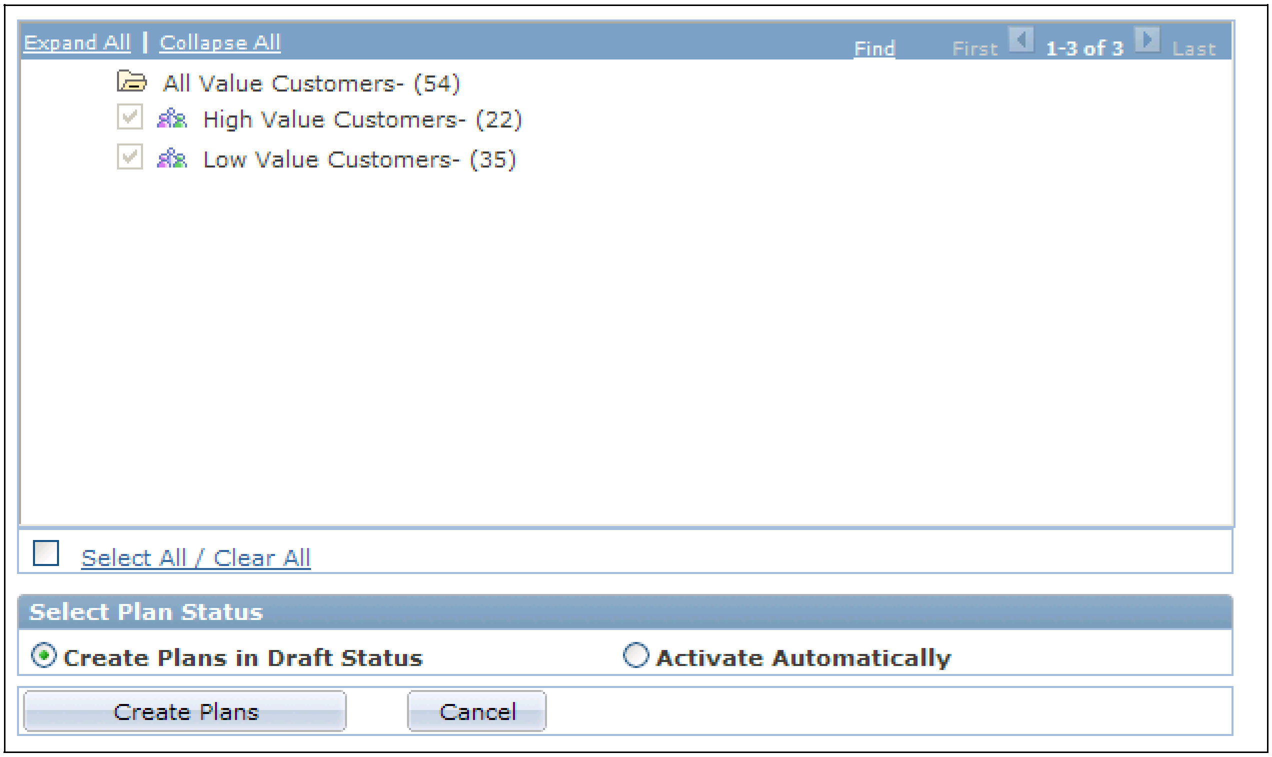
Page Name	*Definition Name*	*Navigation*	*Usage*
Rollover Segment Plan to Child Segments	RSP_TP_ROLLOVR_SEC	Click the Rollover Plan button on the Segment Plan page.	Roll over a segment plan.

Rolling Over Segment Plans

Access the Rollover Segment Plan to Child Segments page (click the Rollover Plan button on the Segment Plan page).



Rollover Segment Plan to Child Segments page (1 of 2)



Rollover Segment Plan to Child Segments page (2 of 2)

Allocation Method

Specify how to allocate the target value among the child segments. Values are:

# of Accounts in Segments (number of accounts in segments): The target value is assigned to a segment based on number of accounts it contains. For example, we need to distribute a 3 million USD target between two segments. The first segment has 100 accounts, and second segment has 200 accounts. In this scenario, the target value for the first segment is allocated as 1 million USD and for the second segment as 2 million USD.

# of Selected Segments: The target value is distributed by number of selected segments. This distribution depends on the tree level on which the segment resides. To distribute targets from the root node of the tree, only the first level of selected segments is considered. For example, if the current (root) segment has three child segments and only two are selected, each of the selected segments is allocated a target value of 50 percent. Similar target distribution logic is implemented when you are allocating targets from first level to second level and so on.

Copy as is: This method copies the target value (as it appears on the current plan) to the new plan.

Set Target to 0: This method sets the target value to zero on the new plan. A user can select this value if the purpose is to create the new plan so as to enable the user to view that plan and set the target values manually.

Select Plan Status

Select *Create Plans in Draft Status* to create the plans with a status of *Draft,* or select *Activate Automatically* to create the plans with a status of *Active.*

Create Plans Click this button to create plans for the child segments.

Creating Audience Plans

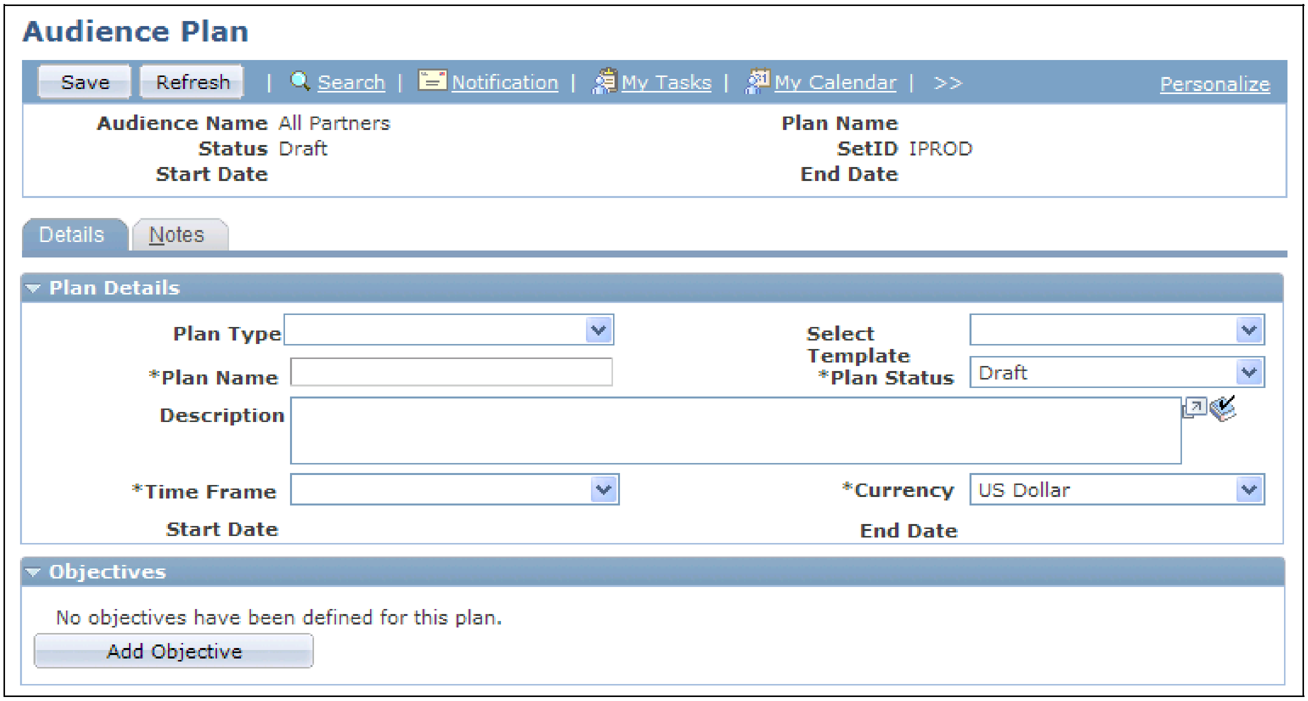
This section discusses how to create audience plans.

Pages Used to Create Audience Plans

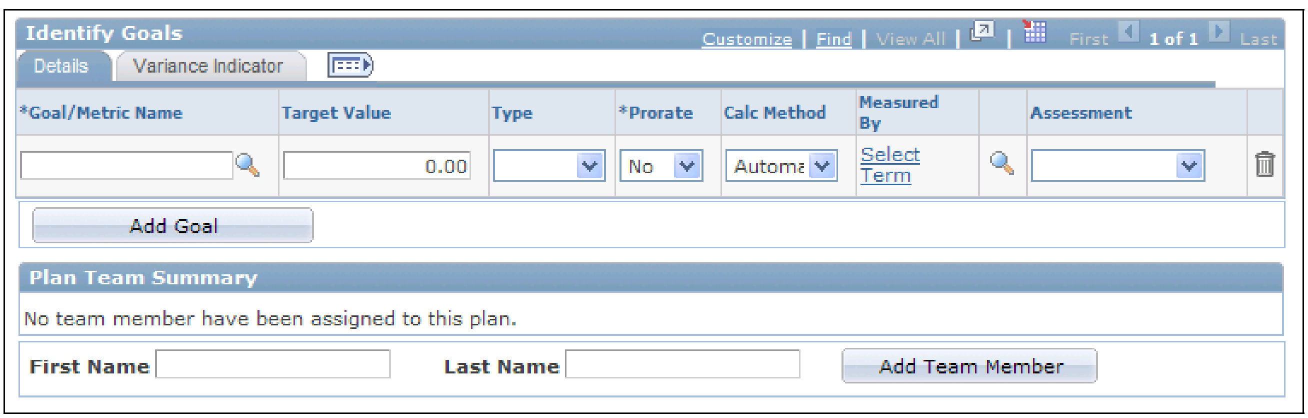
Page Name	*Definition Name*	*Navigation*	*Usage*
Audience - Plans	RA_LIST_PLANS	Marketing, Manage Audiences Select an audience from the Audience Summary list. Select the Plans tab.	View plans for an audience.
Audience Plan	RSP_PLANNING	Click Create Plan on the Audience - Plans page.	Create an audience plan.

Creating Audience Plans

Access the Audience Plan page (Marketing, Manage Audiences, click the Create Plan button on the Audience - Plans page).



Audience Plan page (1 of 2)



Audience Plan page (2 of 2)

The Audience Plan page is identical to the Account Plan page, except that it has the Rollover Plan button. The system displays this button when you change the status of the plan to *Active.* An audience plan that is in the active stage can be rolled over to the member accounts. The Rollover Plan button appears only when the current audience contains any member accounts. The system captures the rollover date and the user who rolled over the plan on the current audience plan.

You can roll the plan over only to member accounts that are in the appropriate setID and have a role that is valid for the plan type. You can roll over an audience plan multiple times as long as member accounts exist that don't already have the plan. Users also have the option of canceling the existing plan, as long as they have appropriate access to the plan according to the dataset and edit control security.

See and Chapter 6, "Creating Account Plans," Creating Account Plans, page 42.

Rolling Over Audience Plans

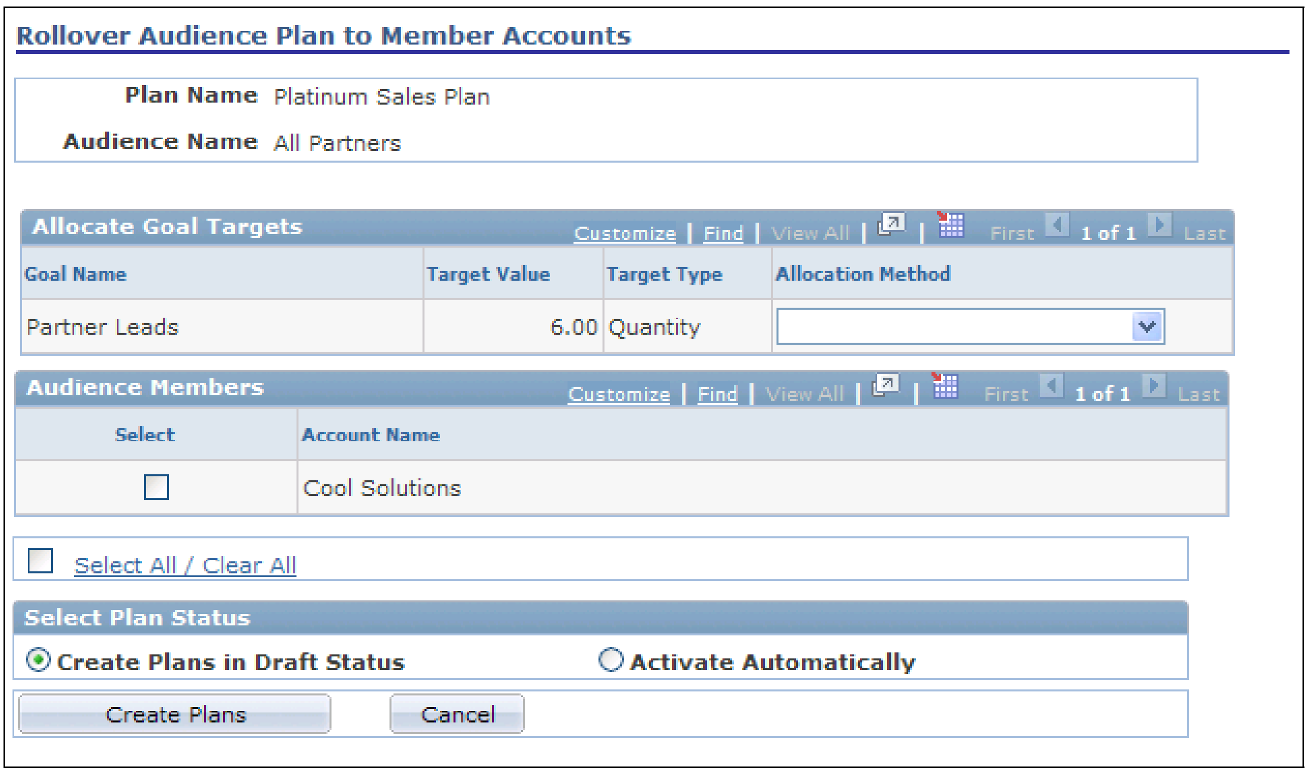
This section discusses how to roll over an audience plan to member accounts.

Page Used to Roll Over Audience Plans

Page Name	*Definition Name*	*Navigation*	*Usage*
Rollover Audience Plan to Member Accounts	RSP_TP_ROLLOVR_SEC	Click the Rollover Plan button from the Audience Plan page.	Roll over an audience plan.

Rolling Over Audience Plans to Member Accounts

Access the Rollover Audience Plan to Member Accounts page (click the Rollover Plan button from the Audience Plan page).



Rollover Audience Plan to Member Accounts page

Allocation Method	Specify how to allocate the target value among the member accounts. Values are: *# of Accounts in Audience* (number of accounts in audience): The goal target is evenly distributed and then applied to the selected members when creating a new plan. For example, the audience has 10 member accounts and the manager selects only two of them to create the plan; eight other accounts are not selected. The goal target is to increase revenue by 10 million USD. Therefore, you need to earn 1 million USD in revenue from each account. To do this, you must allocate a target value of 1 million USD for each of the two plans created. *# of Selected Accounts* (number of selected accounts): The goal target is distributed based on newly selected accounts and members who already have the plan. This allocation method should be used when the manager wants to target a few specific accounts in the audience. For example, the audience has 10 member accounts and the manager selects only two of them to create the plan; three members already have the plan. The goal target is to increase revenue by 10 million USD. Therefore, you need to earn 2 million USD in revenue from each account. To do this, you must allocate a target value of 2 million USD for each of the two plans created. *Copy as is:*This method is used primarily for allocating targets that are of *Percent* type. For example, the purpose of a goal is to increase customer satisfaction to 80 percent. This target should be met by all members, not just one member. *Set Target to 0:*This allocation method is used when the user wants to create the plan but wants to drill into the newly created plan and set the target manually.
Select Plan Status	Select the Create Plans in Draft Status option to create the plans with a status of *Draft* or select the Activate Automatically option to create the plans with a status of *Active*.
Create Plans	Click this button to create plans for the member accounts.

Chapter 8

Measuring the Attainment of Plan Goals

This chapter provides an overview of the measurement of plan goals and discusses how to:

- Establish plan goal metrics.
- Calculate goal attainment.

Understanding the Measurement of Plan Goals

To measure the success of a strategic plan, base each strategy on measurable goals and objectives that help you track the progress that your team and partners are making in the account.

PeopleSoft Strategic Account Planning delivers configurable templates for setting up the account strategy. Sales, marketing, and service managers can tailor these plan templates to track performance objectives for each plan. Each plan template contains suggested goals, or you can create new performance indicators that are specific to your business needs.

You define a metric once and deploy it across all account plans. Both internal and third-party data sources can be leveraged for metric calculations. For example, you can use market share data to track your competitive position or you can import survey results to measure customer satisfaction.

Establishing Plan Goal Metrics

This section discusses how to:

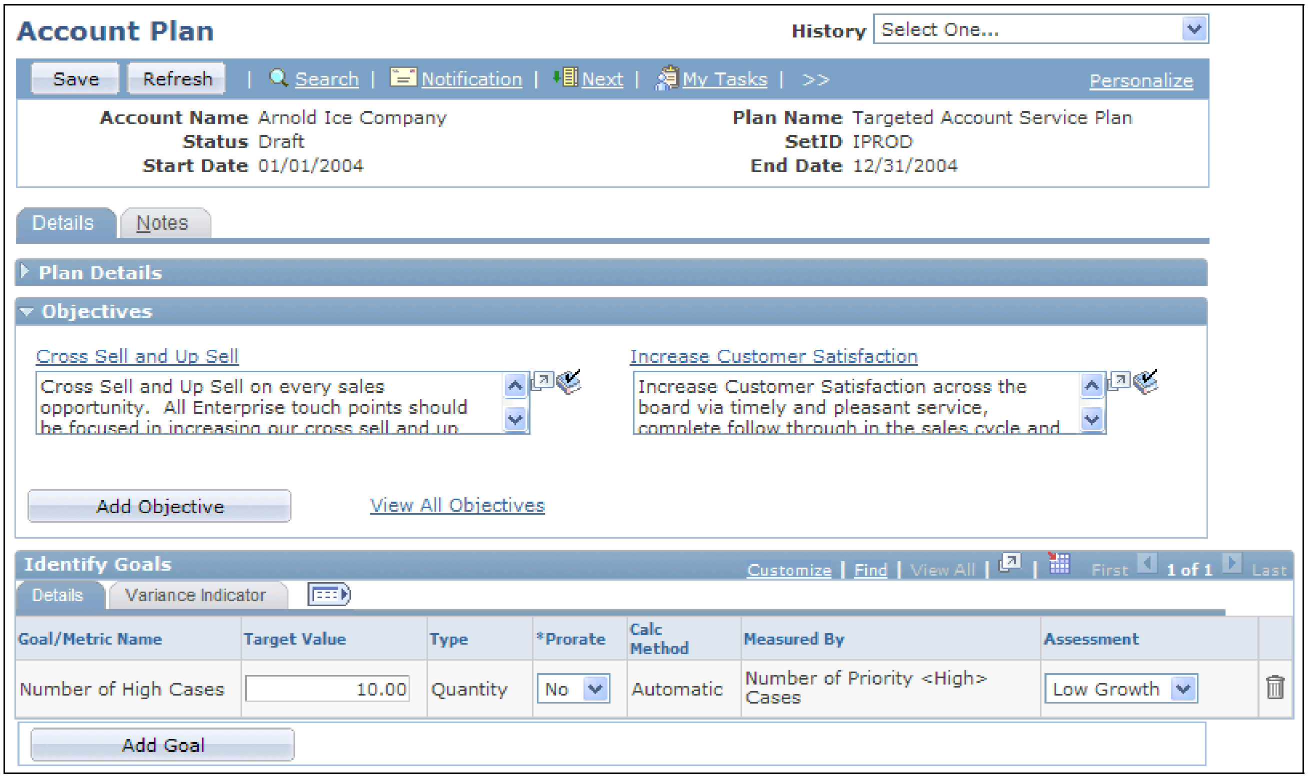
- Enter goal metrics.
- Select the attainment measurement.

Pages Used to Establish Plan Goal Metrics

Page Name	***Definition Name***	***Navigation***	***Usage***
Account Plan	RSP_PLANNING	Click the View Account Plans link of an account in the Account List section of the My Accounts page. Click a plan name link on the Plans page that appears.	Enter goal metrics to measure goal attainment.
Strategic Plan Term Selection	RSP_TP_EOCF_SEC	Click the Select Term link on the Account Plan page.	Select a term to measure the calculation of attainment. **Note.** This link is available only when you are adding a new goal.

Entering Goal Metrics

Access the Account Plan page (click the View Account Plans link of an account in the Account List section of the My Accounts page. Click a plan name link on the Plans page that appears).



Identify Goals section of the Account Plan page

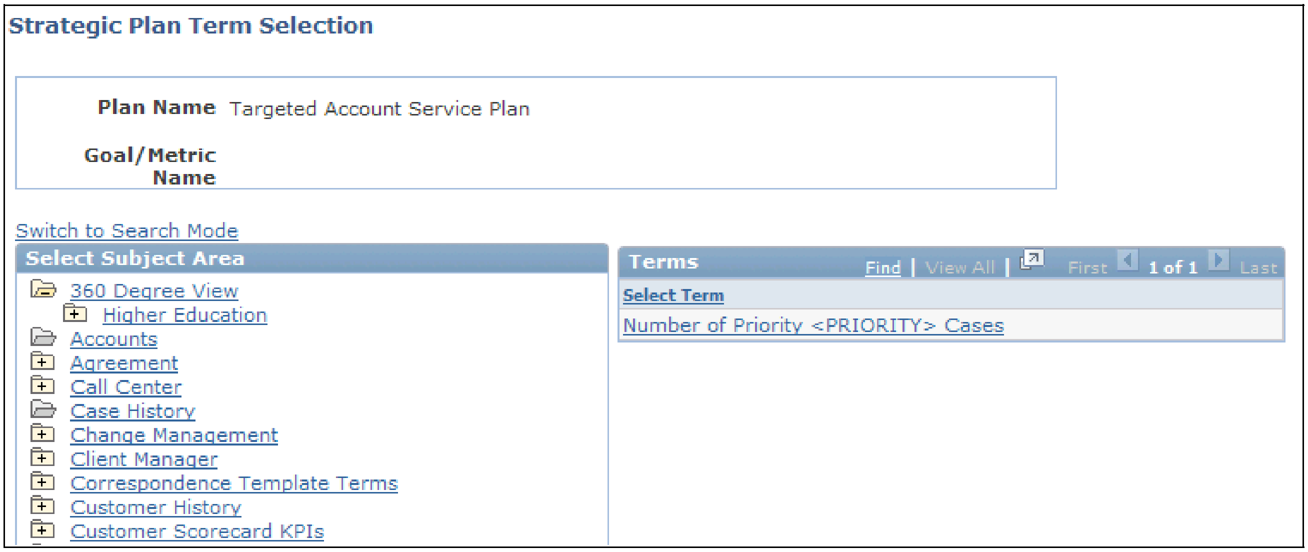
Calc Method (calculation method)

Select *Manual* to enter the goal values. Select *Automatic* to select the strategic plan term.

See and Chapter 6, "Creating Account Plans," Creating Account Plans, page 42.

Selecting the Attainment Measurement

Access the Strategic Plan Term Selection page (click the Select Term link on the Account Plan page).



Strategic Plan Term Selection page

Select a term to measure the calculation of attainment.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Understanding AAF.

Calculating Goal Attainment

This section discusses how to:

- Calculate attainment for one plan.
- Calculate attainment for multiple plans.

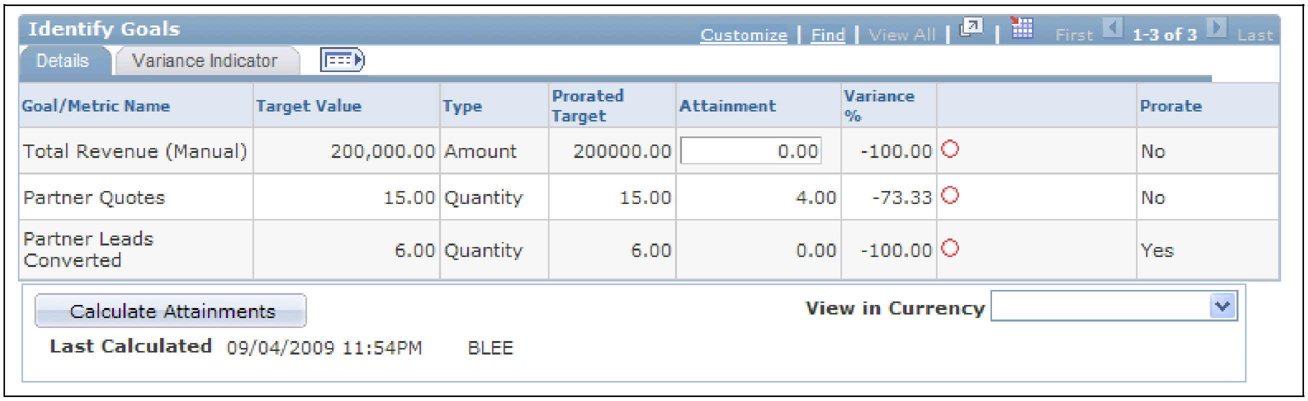
Pages Used to Calculate Goal Attainment

Page Name	*Definition Name*	*Navigation*	*Usage*
Account Plan	RSP_PLANNING	• My Account Select an account on the My Accounts page. • Customers CRM, Add Company or Search Company, Plans Select an account. • Customers CRM, Add Site or Search Site, Plans Select an account. • Partner CRM, Add Person (Consumer) or Search Person, Plans Select an account. • Partner CRM, Add Partner Company or Search Partner Company, Business Plans Select an account.	Calculate the attainment of goals for one plan.
Auto Calculate Plan Goals Attainment	RSP_PLANNING	Set Up CRM, Product Related, Strategic Account Planning, Auto Calc Plan Attainments	Calculate the attainment of goals for multiple plans.

Calculating Attainment for One Plan

Access the Account Plan page (select an account on the My Accounts page).

Note. You can calculate attainment for plans in *Active* status only.



Calculating attainment on the Account Plan page

Target Value Displays the target value assigned to the goal.

Type Displays the type of value defined by the Target Value. Options are *Amount*, *Percent*, *Quantity*, and *Other*.

Prorated Target Displays the target value with proration applied, if applicable.

Attainment Displays the actual attainment for the goals.

Note. If the goal is a manual goal, enter a number for the goal in the Attainment field.

Variance % (variance percentage) Displays the percentage difference between the target and the attainment.

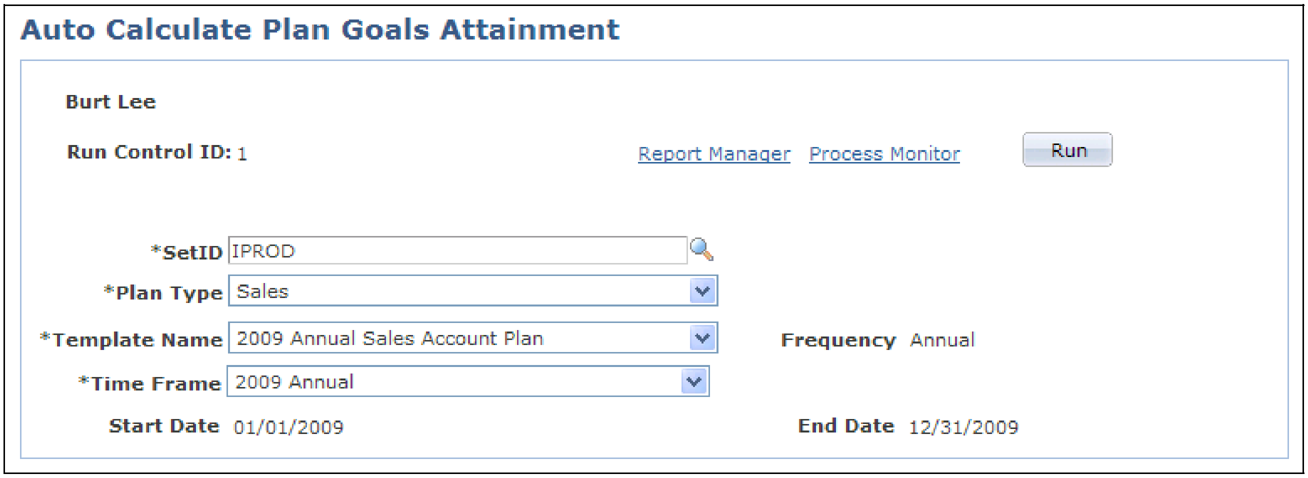
Prorate Displays whether proration is applied to the target value.

Calculate Attainments Click this button to calculate attainments.

View in Currency Select a currency to use for all monetary amounts that appear on the page.

Calculating Attainment for Multiple Plans

Access the Auto Calculate Plan Goals Attainment page (Set Up CRM, Product Related, Strategic Account Planning, Auto Calc Plan Attainments, Auto Calculate Plan Goals Attainment).



Auto Calculate Plan Goals Attainment page

Based on specified parameters, a batch Application Engine program runs to select matching plans to which the current user has access and to calculate attainment for each of the matching plans. The last calculated date for each of these plans is updated. An administrator running this program can view batch program status by clicking the Process Monitor link.

Plan Type	Select a plan type. The system calculates goal attainment for plans of this type.
Template Name	Select a template name. The system calculates goal attainment for plans that use this template.
Time Frame	Select a time frame for calculating attainments.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Understanding AAF.

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