Account Rating and Scoring in Salesforce

HIGHLIGHTS

- Consistent and actionable ratings for all your accounts in Salesforce
- Real-time visibility on account status, including related opportunities, contacts, and activities
- Simple UI to update rating rules as business needs change
- Fast and easy deployment into Salesforce

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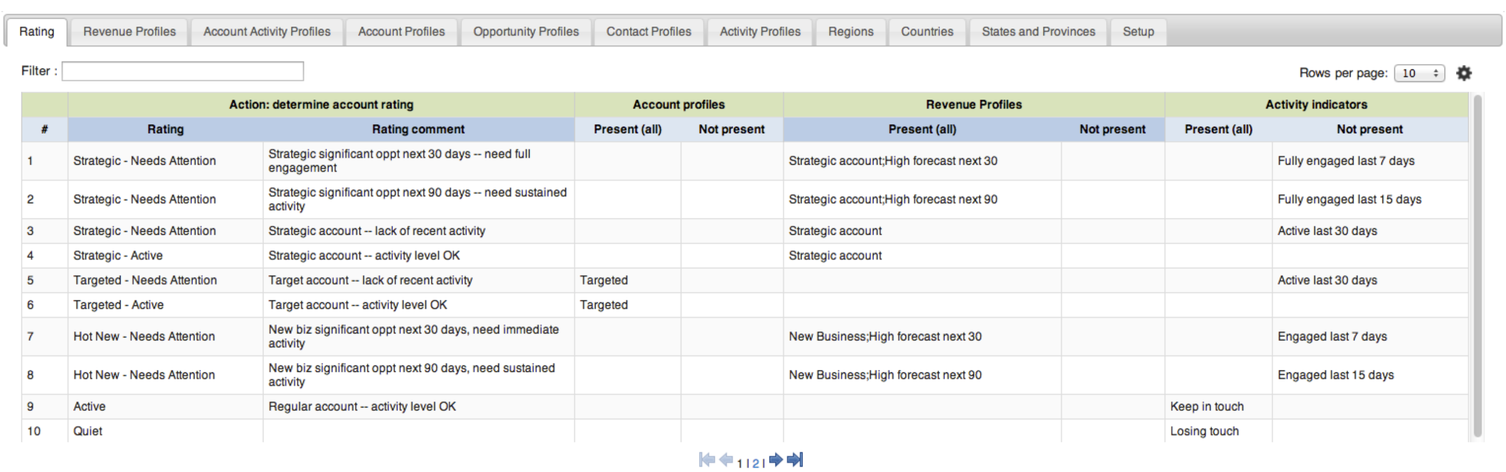
Effective sales management requires real-time visibility into account status and health. You need to focus your team, to make sure that the most strategic accounts are fully supported, and hot new opportunities actively pursued. But you do not have time to sift through hundreds of Salesforce records or spend hours generating reports in Excel.

How do you take all of the attributes of an account – contacts, activities, opportunities – and create a comprehensible account rating system in Salesforce? By taking advantage of the Decisions on Demand business rule management system (BRMS).

Consistent and actionable account ratings

Each account is unique. But as your team grows, you need a consistent way to evaluate the status of an account, and all the opportunities, contacts and activities related to it. That is the basis for effective prioritization and fact-based discussions with your reps -- making it clear what activities are expected, and what data should be entered into Salesforce.

Using the account, contact, and opportunity objects, you can create business rules matching against both standard and custom fields. Once you determine what account factors are most important to your organization – number of contacts, activity history, opportunity size, win/loss information – you can incorporate some or all of those into the ultimate rating for your accounts.



	Action: determine account rating		Account profiles		Revenue Profiles		Activity indicators	
#	Rating	Rating comment	Present (all)	Not present	Present (all)	Not present	Present (all)	Not present
1	Strategic - Needs Attention	Strategic significant oppt next 30 days -- need full engagement			Strategic account;High forecast next 30			Fully engaged last 7 days
2	Strategic - Needs Attention	Strategic significant oppt next 90 days -- need sustained activity			Strategic account;High forecast next 90			Fully engaged last 15 days
3	Strategic - Needs Attention	Strategic account -- lack of recent activity			Strategic account			Active last 30 days
4	Strategic - Active	Strategic account -- activity level OK			Strategic account			
5	Targeted - Needs Attention	Target account -- lack of recent activity	Targeted					Active last 30 days
6	Targeted - Active	Target account -- activity level OK	Targeted					
7	Hot New - Needs Attention	New biz significant oppt next 30 days, need immediate activity			New Business;High forecast next 30			Engaged last 7 days
8	Hot New - Needs Attention	New biz significant oppt next 90 days, need sustained activity			New Business;High forecast next 90			Engaged last 15 days
9	Active	Regular account -- activity level OK					Keep in touch	
10	Quiet						Losing touch	

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DECISIONS ON DEMAND

Real-time visibility on account status

After you have created your rating criteria, the status of your accounts is automatically updated with each interaction (contact activities, tasks, opportunity updates, etc.). The ratings can then drive processes and behavior within your sales teams. You can also generate tasks and alerts to focus your staff on working the accounts that are most strategic to the business and concentrate on moving opportunities with a higher success probability for closing. You can also build executive dashboards to graphically show your targeted accounts and see how they are being handled.

Simple UI to update rating rules as business needs change

Using the table-based editor, you can easily add, change, and delete business rules from inside the Salesforce UI. You can also export the business rules to Excel, make changes, and import the sheet back into Salesforce. Once changes are complete, the test console allows you to check your work before it is deployed. Versioning and audit trails keeps track of previous rule iterations and changes, plus let users revert back to previous iterations if necessary. The platform will also determine when the rules are “broken” due to changes in Salesforce fields or data.

Rating | Revenue Profiles | Account Activity Profiles | Account Profiles | Opportunity Profiles | Contact Profiles | Activity Profiles | Regions | Countries | States and Provinces | Setup

Filter :

Rows per page: 10

	Account Profile		Contact count – 1			Activity count -- 1		
				Num contacts			Num activities	
#	Name	Description	Profile	Lower	Upper	Profile	Lower	Upper
1	Fully engaged last 7 days		Active	2		Last 7 days	2	
2	Fully engaged last 15 days		Active	2		Last 15 days	2	
3	Engaged last 7 days		Active	1		Last 7 days	1	
4	Engaged last 15 days		Active	1		Last 15 days	1	
5	Active last 7 days		Active	1		Last 7 days	1	
6	Active last 15 days		Active	1		Last 15 days	1	
7	Active last 30 days		Active	1		Last 30 days	1	
8	Keep in touch		Active	1				
9	Losing touch		Active		0			

Fast and easy deployment into Salesforce

The Decisions on Demand platform is available via the Salesforce AppExchange. You can invoke rules from custom buttons, triggers, Visual Workflow or Batch APEX. Access to the platform is based on standard user profiles and permission sets.

Decisions on Demand helps companies automate the decisions driving advanced business processes – so they can operate more efficiently, adapt more quickly to changing business conditions, and save on IT costs. To discuss your account rating or other decision-automation needs, visit www.decisionsondemand.com or call +1 866-656-8527.