INSERT LOGO

Reorganize Support Team

National Account Coordinator

<presenter name>

<Email>

<Date>

Executive Overview

- Sales Operations was designed for a different, older Sales Organization. Now Sales has bigger goals, bigger customers and bigger needs.
- It was imperative that Sales Operations change.
- An advisory council was convened in November with field team members to define business needs for the new Sales Organization
- The advisory council identified five areas requiring focus: proposals, contracting, account support, reporting, and CRM/SFA
- We heard the message. Resources have been re-aligned and re-trained to meet these needs and we’re ready to launch

Refreshed and updated Sales Operations approach that is clearly aligned to the strategy, our customers and affords greater selling time

Every advisory council member made significant contributions and their time is much appreciated

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The advisory council process confirmed many directional changes

“I’ve got a $750K non-strategic account and I can’t get help to roll out the agreement.”

“You are all great, but you just don’t seem to have enough time…”

“Can you offer help with business presentations and how about editing a proposal I wrote?”

“It would be great if we had a standard set of reports for me to show a new customer.”

“Every account team manages an account differently… we need some standardization.”

“Can we be notified before contracts lapse?”

“the Contracting and Proposal process is complicated and lengthy.”

“CRM/SFA support is great but not everyone knows how to access this team.”

Sales Operations got the message: “Focus on fewer things and do them well.”

We now do five critical things…

Proposals
Contracts
Account Support
Reporting
CRM/SFA

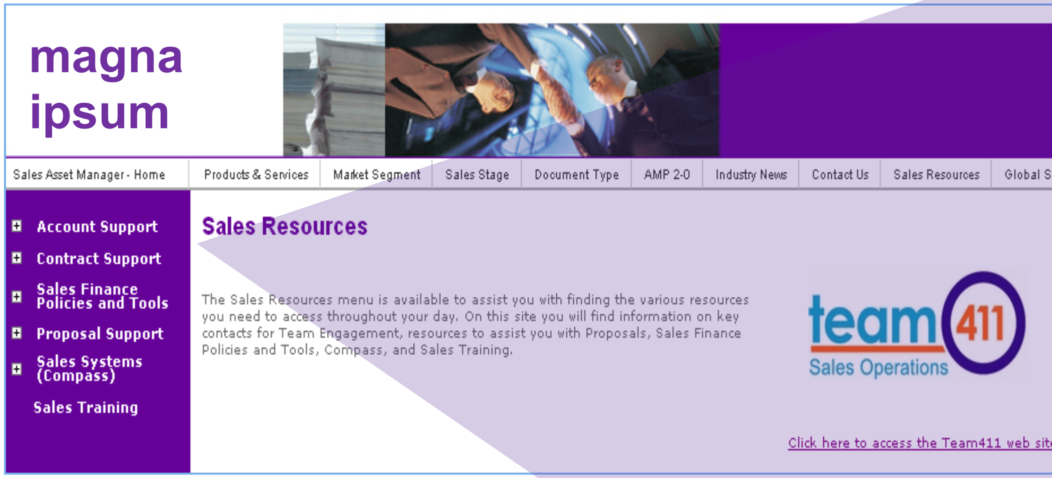
Sales Operations deliverables are now simply organized and easy to access through the Sales Knowledge Community

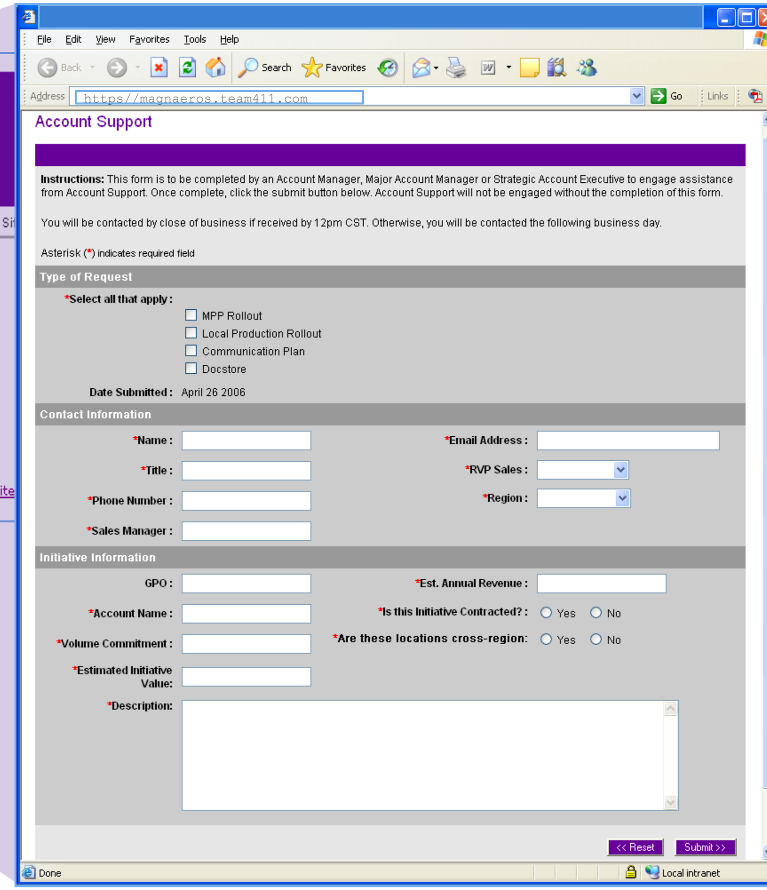
Proposals	• Full service proposal management • Consultative Services • Editorial Services
Contracts	• Contract Coordinators • Contract Notification • Contract Review
Account Support	• Program rollout • Account Coordination • Project Plan • Sales Tools
Reporting	• Customer reporting Suite • Ad Hoc Reporting • More to Come…
CRM/SFA	• Training • Support and Development

team 411
Sales Operations

Look for this icon on the Sales Knowledge Community to find engagement forms for all of these services

Click on Sales Resources in the Sales Knowledge Community to access engagement forms





We suggest adding to your favorites toolbar to find quickly in the future. The address will appear as https://magnaeros.team411.com . You will have to enter your Intranet user id and password to re-enter.

The organization has been aligned to support our new vision

Sales Operations
First, Last Name

- Proposals
  First, Last Name
  - First, Last Name
  - First, Last Name
  - First, Last Name
  - First, Last Name
  - First, Last Name
- Contracts
  First, Last Name
  - First, Last Name
    Specialty
  - First, Last Name
    Midwest
  - First, Last Name
    California
  - First, Last Name
    S. Central
  - First, Last Name
    Northeast
  - First, Last Name
    Mountain
- Account Support
  First, Last Name
  - First, Last Name
    Dedicated
  - First, Last Name
    S. Central
  - First, Last Name
    California
  - First, Last Name
    Northeast
  - First, Last Name
    Midwest
  - First, Last Name
    Mountain
- Reporting & CFM/SFA
  First, Last Name
  - First, Last Name
    CRM/SFA
  - First, Last Name
    CRM/SFA
  - First, Last Name
    Reporting
  - First, Last Name
    Reporting
  - First, Last Name
    Reporting

Proposal Services is your partner in preparing formal written business proposals and presentations

WHEN would I need Proposals?

Your client has requested a formal response for a solution that we can fulfill or you have the opportunity to present an solicited or unsolicited proposal that meets the customers' key business issues.

Customer solicited responses are most commonly known as RFP's, RFQ's, RFI's, or Vendor Forms and the earlier we are contacted, the more thorough we can be in writing a response.

WHAT does this mean to my customer and to me?

- **Full Service Proposal Management**
  - Minimum value of $250K and minimum turnaround of 10 days
  - The process will start with the coordination of a kick-off meeting to plan the action steps by everyone involved in the proposal.
  - You will have a dedicated proposal writer to prepare professional responses to RFPs, RFIs, and RFQs (that include extensive questionnaires).
  - We will coordinate the deadlines, business review, legal review, draft and final edits.
- **Consultative Services (NEW for this year)**
  - Minimum value of $100K and minimum turnaround of 10 days
  - We will provide council on content and format for proposal presentations and proposals written by you.
- **Editorial Services (NEW for this year)**
  - Minimum value of $25K and minimum turnaround of 5 days
  - Provide editorial services on templates, sales written proposals and proposal presentations, graphics and content.

Contract Support is dedicated to efficiently guiding you through the contracting procedures

WHEN would I need Contract Support?

You are working with a client who is ready to contract with us.

The Contract Support Team works with the Sales team to support the execution, maintenance and renewal of customer agreements.

This is often seen as a complex process and it is our goal to simplify contracting and present a professional and efficient procedure to the customer.

WHAT does this mean to my customer and to me?

- **Contract Coordinators (Expanded in this year)**
  - You have a single point of contact in the Contracting process that will assist you in navigating the complexities of contracting.
  - Offering recommendations on the Approval of Business Terms based on historical information and previous contract negotiations.
  - Identifying what approvals will be necessary to close the deal and helping to attain those approvals.
  - Notifying other functional areas that will need to be brought in to meet customer requirements
- **Contract Notification (Automated in this year)**
  - You will receive notification of contract renewal and/or contract suspension activities.
- **Contract Review (New in this year)**
  - Each contract will be reviewed on a semi-annual or annual basis to ensure both FedEx Kinko's and the customer are on course to meet the contractual objectives.

Account Support is focused on the post sale activity of rolling out contracted services to customers

WHEN would I need Account Support?

As you begin to approach contract execution and you wonder how you will implement the program, consider the Account Support Team.

Is your account maturing and taking a turn?

If you could use a refresher campaign within the account, consider the Account Support Team.

WHAT does this mean to my customer and to me?

- **Program Rollout**
  - You will be able to engage support for the rollout of all contracted initiatives with contract value of $250K or greater. This service will also be available for specialty products with contracts with contract value of $100K or greater.
- **Account Coordination**
  - Account Support resource is assigned to your project
  - Project management assistance thru project end date
  - Implementation compliance and requirements tracking
- **Project Plan**
  - A communication plan is created including: Customer training events, Calendar of activities, Collateral and Quarterly Business Review samples
- **Sales Tools**
  - Customer-facing presentations for your account
  - Customer toolkits including checklists and workflows
  - Internal toolkits including checklist and workflows

Sales Reporting provides a standardized reporting process for our customers and sales professionals

WHEN would I need Reporting?

You desire greater detail on your customers past and current activity than you can get from CRM/SFA.

Your customer has requested detailed reports on prior spend from Accounts Receivable.

You may be pitching a new deal and want to show the enhanced reporting that would be available if they were under contract.

Or you are new to the reporting tools and require training and support.

WHAT does this mean to my customer and to me?

- **Customer Reporting Suite**
  - A Standardized suite of Customer reports has been developed to aid our sales professionals in presenting customer value
  - Everyone will be trained on how to access this tool through the a web interface and when to use these reports.
- **Ad Hoc Reporting**
  - Larger customers often require customized reporting and therefore this service will be available for customers with greater than $100K annual spend.
- **More to Come…**
  - This year is the inaugural year for this reporting group and many projects are planned for future:
  - Automation of the QBR report that will self populate the graphs
  - Predictive reporting that suggests the customers needs earlier
  - Automating re-occurring reports sent directly to your e-mail
  - Scorecards & Management Metrics

Systems Help supports CRM/SFA and other sales related systems

WHEN would I need Systems Help?

New team members work with Business Systems Help to receive CRM/SFA training.

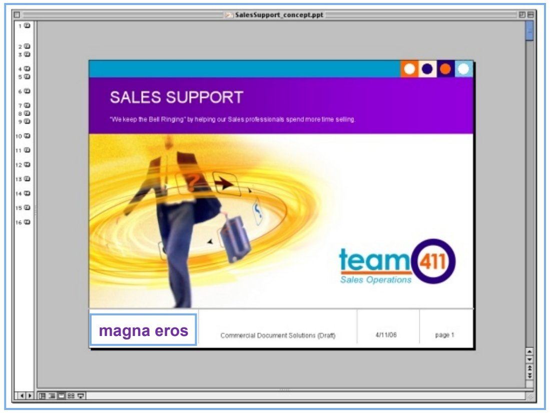
Sales Managers should also engage Systems Help when a refresher course is needed on any aspect CRM/SFA System wide issues are resolved through this team.

WHAT does this mean to my customer and to me?

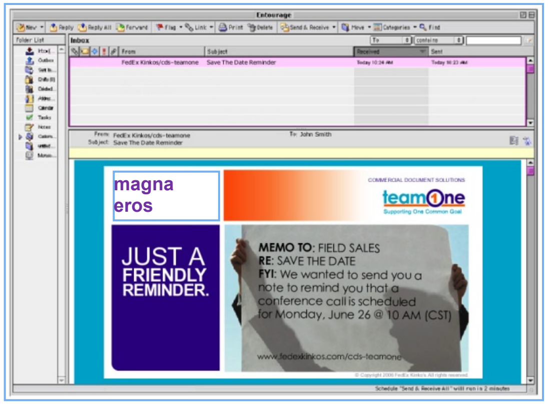
- **CRM/SFA Training**
  - Dedicated CRM/SFA training allows new team members to quickly access customer information in the system.
  - Provides all team members the tips and tricks to most effectively use CRM/SFA.
- **CRM/SFA Support and Development**
  - Searching for issues and working to solve inefficiencies before they cause you to loose selling time or miss a deadline.
  - Research and resolve the field sales questions that are escalated Tech Support.
  - Communicate all system changes so you can best use an evolving technology.

Rich multi-media tools will be used to launch the services of Team 411 in a phased approach

E-mail invites by region to participate on the conference call launch meetings



This presentation will be modified and used for the launch conference calls



Everyone will get a reminder of the services after the launch

Reference guides will be sent to all sales professionals for a quick reference to new services

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Pellentesque habitant morbi tristique senectus et

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Sales Operations

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FIELD GUIDE
TO THE SUMMIT

New Sales Operations services will be launched regionally starting mid May

Legend

	Regional leadership update
	Exciting e-mail sent to reps
	Guide arrives to rep homes
	Presentation for call is sent
	Conference call rollout

Post Launch Week

Web Access Report Training for Region
Reminder communications on new services
Measure usage of team 411 on SAM

MAY	Mon	Tues	Wed	Thurs	Fri
Midwest	1 May 9 Memphis	2	3	4	5

JUNE	Mon	Tues	Wed	Thurs	Fri
S. Central	5 April 12 New Orleans	6	7	8	9
California	19 June 12 Conf Call	20	21	22	23

JULY	Mon	Tues	Wed	Thurs	Fri
Northeast	17 May 23 Baltimore	18	19	20	21
Mountain	24 July 12 Las Vegas	25	26	27	28