



BASF SalesX

Pact Plan, SalesX for Managers & Future State

Presented October 2019, SalesX Release 3

 **BASF**
We create chemistry



Dashboard

4 Territories

Sales

No Data

2019 Calendar Years Sales from Accounts **\$10.3M**

2018 Calendar Years Sales from Accounts **\$8.4M***

2017 Calendar Years Sales from Accounts **\$5.1M***

Sales | Previous Sales * Based on 2019 pricing

PDF X Excal

Rank [Account Name]-(City)

1 2019 \$10.3M

Sales Goals

Set and track sales goals for products and crops.

2019 Seasonal Year

Sales Goals

Add a Sales Goal

2019 Planned Sales **\$5.2M**

2019 All Sales **\$8.4M**

Show sales table

[PY] Planned Sales	\$7.6M
[PY] All Sales	\$10.2M
Territory Budget	\$12.7M

Territory Budget Edit

Insights

2019 Calendar Years Sales from Accounts **\$10.3M**

2018 Calendar Years Sales from Accounts **\$8.4M***

2017 Calendar Years Sales from Accounts **\$5.1M***

Sales | Previous Sales * Based on 2019 pricing

PDF X Excal

Rank [Account Name]-(City)

Insights

2019 Calendar Year Sales from Accounts **\$10.3M**

Jan \$1.5M	Feb \$1.5M	Mar \$0.45M	Apr \$0.15M
Jun \$0.10M	Jul \$0.10M	Aug \$0.50M	Dec

Insights

Product at Risk

Volume at Risk

Reason for Risk

Proposed Solution

Rationale

Armezon® Herbicide

\$0.5M

High Inventory

Fendona CS Solo

Trelona for PC of

accounts; Top

in territory es

or more

1 Gain

Risks & Contingencies

All risks, contingencies and actions needed to happen for your sales to be successful this year.

2019 Seasonal Year

Risks & Contingencies

Kip's Pears-Durham

Organizational Units

3

Outlets 21

Show only my territory

Annie's Apples-Raleigh Organizational Unit

Kip's Pears-Durham Outlet

John's Farm-Charlotte Outlet

SWOT Analysis

Identify the Strengths, Weaknesses, Opportunities & Threats facing your business.

2019 Seasonal Year

SWOT Analysis

Contents

Presented October 2019,
SalesX Release 3

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Help & Feedback

Resources

Pact Plan

Creating Transparency

IS Pact Plan

Supported Users

US Crop	BR	IS	SA
P&SS	SR	SAM	
Canada	BR	IS	

The screenshot displays the SalesX Plan Management interface. At the top, there is a navigation bar with 'Profile Management' and 'Plan Management' (the active tab). To the right of the navigation bar are icons for 'IS', a search icon, and a globe icon. Further right is the BASF logo with the tagline 'We create chemistry'. Below the navigation bar, the breadcrumb 'SalesX > Plan Management' is visible. The main heading is 'Plan Management', followed by a dropdown menu for '[CY] Seasonal Year'. Below this, there are two tabs: 'Pact Plan' (active) and 'Account Plans'. A 'Download Report' link with a downward arrow icon is positioned above the main content. The main content is divided into two sections: 'Pact Plan' and 'Team Plans'. Under 'Pact Plan', there is a card for 'Sales Goals' with the description 'Set and track sales goals for products and crops.' and an 'In-Progress' status with a downward arrow icon. Under 'Team Plans', there are two cards: 'Business Rep Pact Plan' with the description 'Track the sales progress of your business representatives.' and a 'View' button with a downward arrow icon; and 'Seed Advisor Pact Plan' with the description 'Track the sales progress of your seed advisor.' and a 'View' button with a downward arrow icon. A 'Download PDF' tooltip is shown over the downward arrow icon of the 'Business Rep Pact Plan' card.

Creating Transparency

SA Pact Plan

Supported Users

US Crop	BR	IS	SA
P&SS	SR	SAM	
Canada	BR	IS	

The screenshot shows a web application interface for 'SA Pact Plan'. At the top, there is a navigation bar with 'Profile Management' and 'Plan Management' (the latter is underlined). To the right of the navigation bar are icons for 'SA', a search icon, and a globe icon. Further right is the BASF logo with the tagline 'We create chemistry'. Below the navigation bar, there is a breadcrumb trail: 'SalesX > Plan Management'. The main heading is 'Plan Management', followed by a dropdown menu for '[CY] Seasonal Year'. Below this, there is a section titled 'Pact Plan' with a sub-section 'Account Plans'. The main content area is divided into two columns: 'Pact Plan' and 'Team Plans'. Under 'Pact Plan', there is a card for 'Sales Goals' with the description 'Set and track sales goals for products and retailers.' and a green 'In-Progress' status with a download icon. Under 'Team Plans', there are two cards: 'Business Rep Pact Plan' with the description 'Track the sales progress of your business representatives.' and a green 'View' button with a download icon; and 'Innovation Specialist Pact Plan' with the description 'Track the sales progress of your innovation specialist.' and a green 'View' button with a download icon. A 'Download PDF' button is positioned below the 'Business Rep Pact Plan' card.

Creating Transparency

BR Pact Plan

Supported Users

US Crop	BR	IS	SA
P&SS	SR	SAM	
Canada	BR	IS	

The screenshot shows the 'Plan Management' section of the BR Pact Plan web application. The interface includes a navigation bar with 'Profile Management' and 'Plan Management' tabs, a search icon, and the BASF logo. A breadcrumb trail shows 'SalesX > Plan Management'. The main heading is 'Plan Management' with a dropdown menu for '[CY] Seasonal Year'. Below this, there are tabs for 'Pact Plans' and 'Account Plans'. The 'Pact Plan' section contains six cards: 'SWOT Analysis' (In-Progress), 'Market Trends' (In-Progress), 'Improvement Commitments' (Complete), 'Risks & Contingencies' (Get Started), 'Sales Goals' (Get Started), and 'Team Plans' (Innovation Specialist Pact Plan and Seed Advisor Pact Plan). A 'Download PDF' tooltip is visible over the 'Market Trends' card.

Profile Management Plan Management BR 🔍 🌐 **BASF**
We create chemistry

🏠 SalesX > Plan Management

Plan Management

 [CY] Seasonal Year ▾

Pact Plans Account Plans

Pact Plan

SWOT Analysis
Identify the Strengths, Weaknesses, Opportunities & Threats facing your business this year.
In-Progress ↓

Market Trends
Identify trends you are seeing in the market this year.
In-Progress ↓
Download PDF

Improvement Commitments
Set sales goals for specific products this year.
Complete ✓ ↓

Risks & Contingencies
Identify areas you're targeting for overall improvement and safety of your team this year.
Get Started

Sales Goals
Set and track sales goals for accounts and products.
Get Started

Team Plans

Innovation Specialist Pact Plan
Track the sales progress of your innovation specialist.
View ↓

Seed Advisor Pact Plan
Track the sales progress of your seed advisor.
View ↓

Creating Transparency

BR Viewing IS Pact Plan

Supported Users

US Crop	BR	IS	SA
P&SS	SR	SAM	
Canada	BR	IS	

Sales Goals

Supported Users

US Crop	BR	IS	SA
P&SS	SR	SAM	
Canada	BR	IS	

Profile Management **Plan Management**
IS 🔍 🌐
BASF
We create chemistry

🏠 SalesX > Plan Management > Pact Plan > Sales Goals

[CY] Seasonal Year ▾

Sales Goals

Set and track sales goals for growers and products.

Sales Goals
Business Rep Sales Plan
Seed Advisor Sales Plan

YTD Sales
Season Total Sales
➕ Add a Sales Goal

2019 Product Sales

\$XX.XK
Planned Sales

\$XX.XK
All Sales

[Show sales table](#)
| [PY] Planned Sales \$XX.XK
| [PY] All Sales \$XX.XK
| Territory Budget \$XX.XK
| Goal \$XX.XK
[Edit](#)

[Product] ⌵

[CY] Planned Sales vs. Goal

[CY] Planned Sales

\$XX.XK

Goal

\$XX.XK

Crops

[Crop] _____

[Crop] _____

[Crop] _____

[Crop] _____

[Crop] _____

Total Acres

Acres

XX ac

XX ac

XX ac

XX ac

XX ac

Retailers

[Retailer Name]-[City] _____

[Retailer Name]-[City] _____

Primary

✓

Actions Needed for Success

You should be able to find several indispensable facts about motivation in the following paragraphs.

[Edit](#) [Remove](#)

Probability of Success

High

[Product] \$XX.XK ⌵

Mark Section as Complete

Sales Goals

Supported Users

US Crop	BR	IS	SA
P&SS	SR	SAM	
Canada	BR	IS	

SA 🔍 🌐
BASF
We create chemistry

Profile Management | Plan Management

Home SalesX > Plan Management > Pact Plan > Sales Goals

Sales Goals

[CY] Seasonal Year ▾

Set and track sales goals for retailers and varieties.

Sales Goals | Business Rep Sales Plan | Innovation Specialist Sales Plan

YTD Sales | Season Total Sales | ➕ Add a Sales Goal

2019 Variety Sales

\$XX.XK

Planned Sales

\$XX.XK

All Sales

Show sales table | █ [PY] Planned Sales \$XX.XK | █ [PY] All Sales \$XX.XK | █ Territory Budget \$XX.XK █ Goal \$XX.XK █ Edit

Accounts | Variety

[Account Name]-[City] ⤴

[CY] Planned vs. All Sales	█ [CY] Goals	█ [CY] Planned	█ [CY] All Sales (Change)	[PY] All Sales
	\$900.0K	\$450.0K	\$750.0K (X.X%)	\$X.XK

Planned Variety	[CY] Goal	[CY] Sale (Change)	[PY] Sale
Product 1	\$100.0K	\$50.0K (X.X%)	\$X.XK
Product 2	\$100.0K	\$50.0K (X.X%)	\$X.XK
Product 3	\$100.0K	\$50.0K (X.X%)	\$X.XK
Product 4	\$100.0K	\$50.0K (X.X%)	\$X.XK
Product 5	\$100.0K	\$50.0K (X.X%)	\$X.XK
Product 6	\$100.0K	\$50.0K (X.X%)	\$X.XK
Product 7	\$100.0K	\$50.0K (X.X%)	\$X.XK
Product 8	\$100.0K	\$50.0K (X.X%)	\$X.XK
Product 9	\$100.0K	\$50.0K (X.X%)	\$X.XK

Actions Needed for Success	Prob of Success
1. Secure as Seed Retailer for 2019. 2. Increase fungicide acres by 30K.	High

Mark Section as Complete

SalesX for Managers

Manager

Dashboard

Supported Management

US Crop	VP	RD	DM	RSL	ISAM
P&SS	Dir	NSM	RM		
Canada	N/A				

Dashboard

Territory 42
John Hall
US Crop, Business Rep
\$XX.XK
[CY] Total Sales

Sales

- [CY] Planned Sales: **\$XX.XK** (+15.3% PY)
- [CY] All Sales: **\$XX.XK** (+10.4% PY)
- [CY] Top Territory: **Territory 42** (North Carolina)
- [CY] Top BASF Rep: **Hall, John**

Pact Plan

BASF Rep	Status
Hall, John Business Rep	Complete
[LName, FName] [Role]	In-Progress
[LName, FName] [Role]	In-Progress
[LName, FName] [Role]	In-Progress
[LName, FName] [Role]	Not Started

Trending

Policy Stop Shift

Strong Agriculture Fertilizer

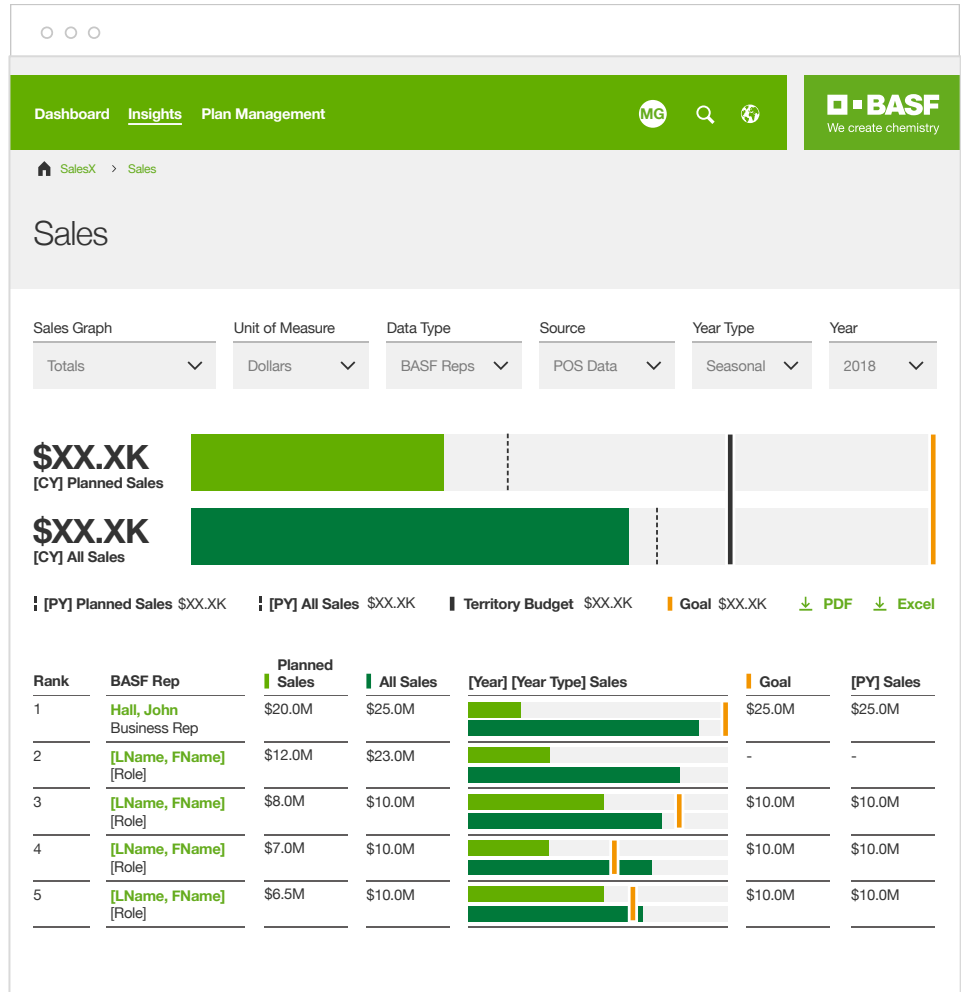
[CY] Sales

Rank	Product	Sales
1	[Product]	\$12.0M
2	[Product]	\$9.0M
3	[Product]	\$9.0M
4	[Product]	\$9.0M
5	[Product]	\$9.0M
6	[Product]	\$9.0M
7	[Product]	\$9.0M
8	[Product]	\$9.0M
9	[Product]	\$9.0M
10	[Product]	\$9.0M

Total Sales

Supported Management

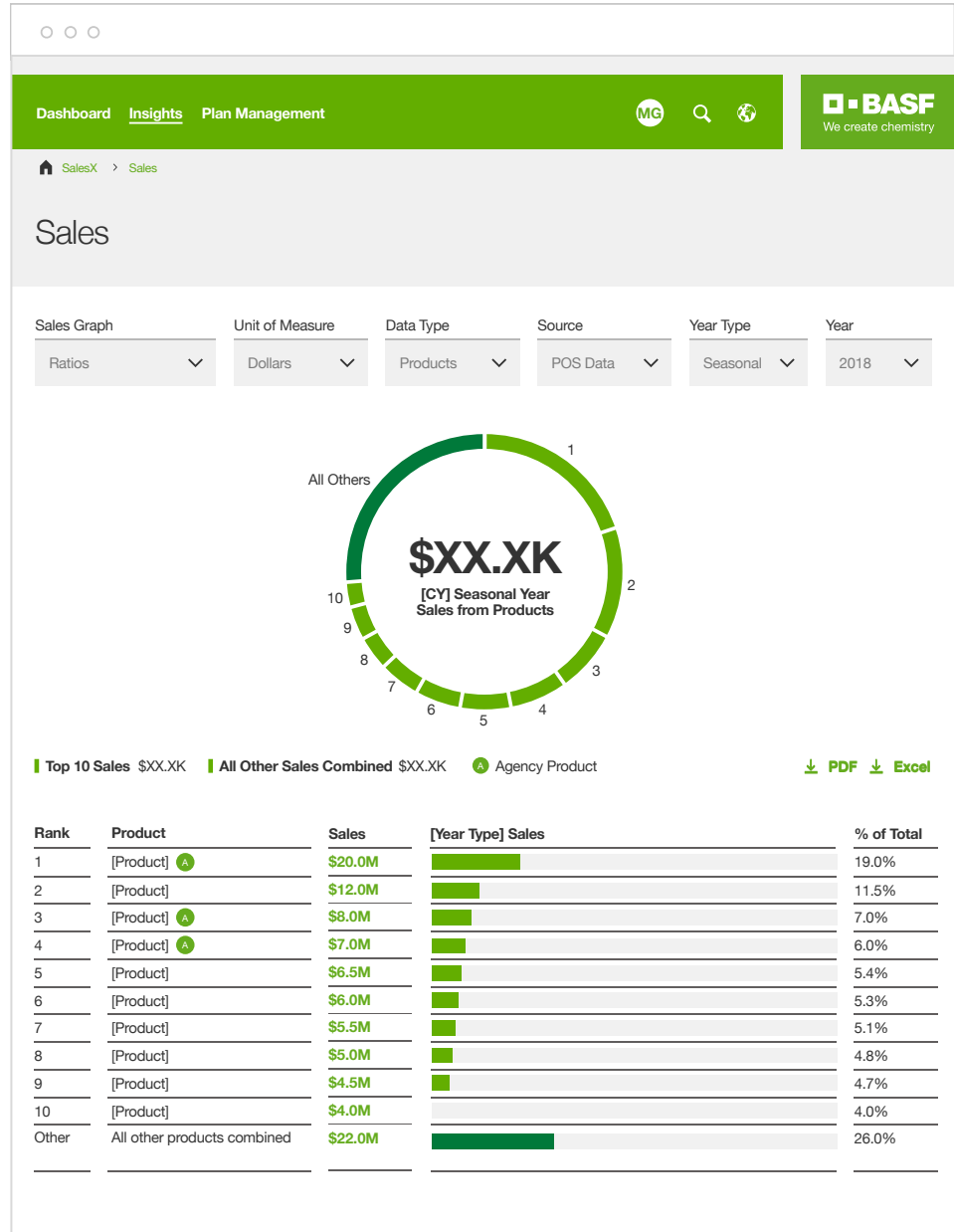
US Crop	VP	RD	DM	RSL	ISAM
P&SS	Dir	NSM	RM		
Canada	N/A				



Sales Ratios

Supported Management

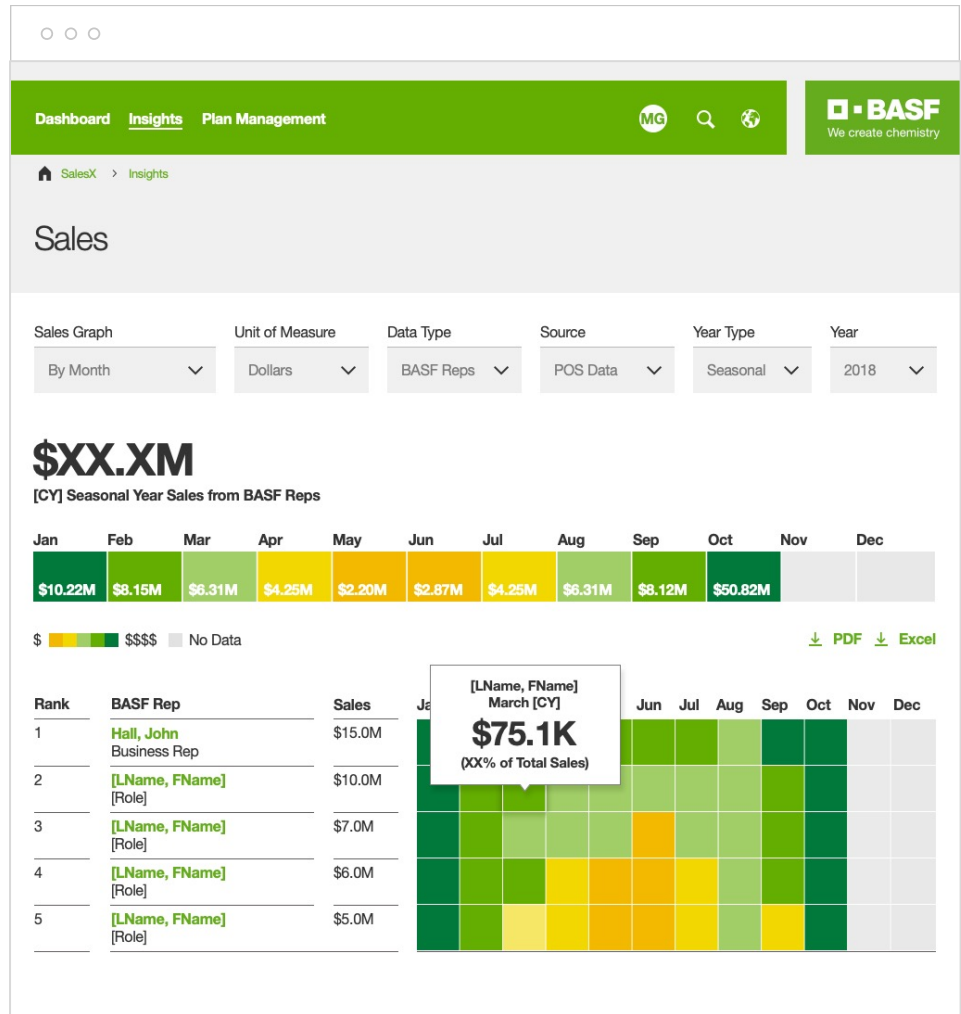
US Crop	VP	RD	DM	RSL	ISAM
P&SS	Dir	NSM	RM		
Canada	N/A				



Sales by Month

Supported Management

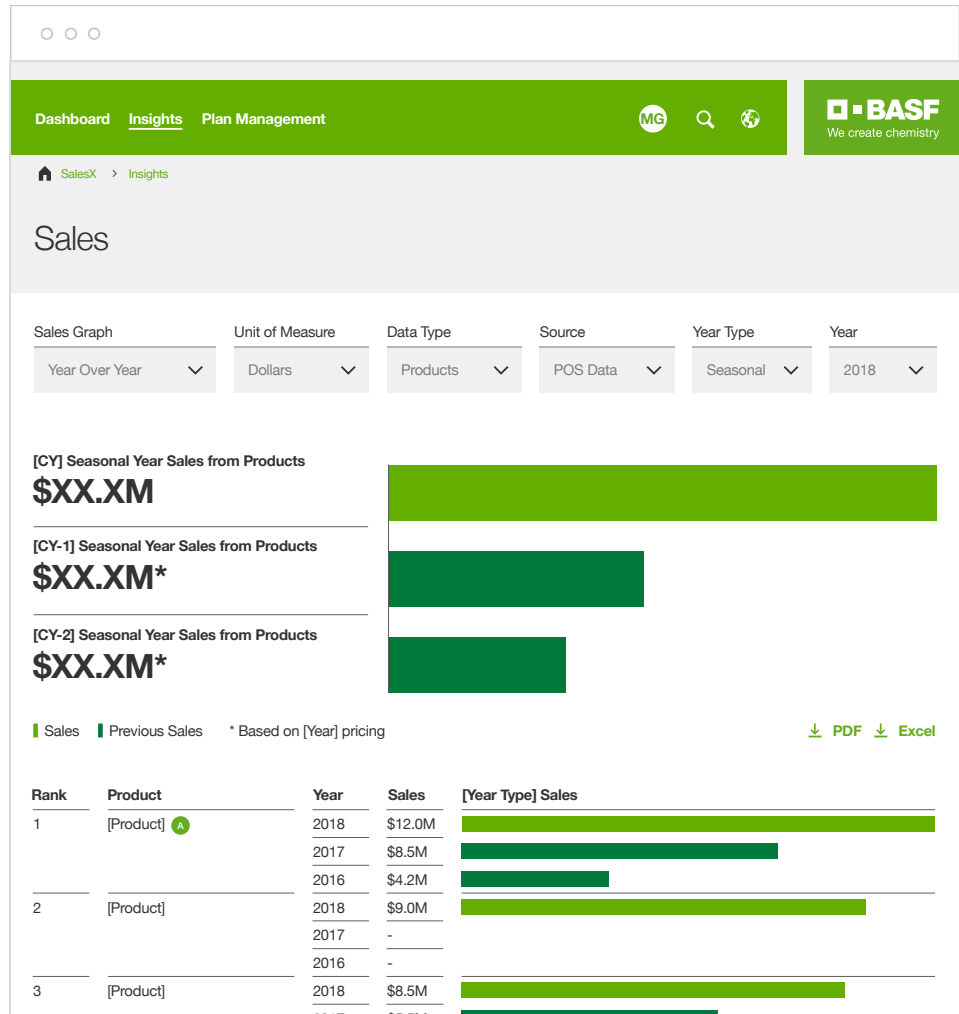
US Crop	VP	RD	DM	RSL	ISAM
P&SS	Dir	NSM	RM		
Canada	N/A				



Sales Year Over Year

Supported Management

US Crop	VP	RD	DM	RSL	ISAM
P&SS	Dir	NSM	RM		
Canada	N/A				



District Manager

Plan Management Overview

Supported Management

US Crop	VP	RD	DM	RSL	ISAM
P&SS	Dir	NSM	RM		
Canada	N/A				

Dashboard Insights Plan Management MG Q G

SalesX > Plan Management

Plan Management [CY] Seasonal Year

Pact Plans **Account Plans**

BASF Rep	SWOT Analysis	Market Trends	Improvement Commitments	Risks & Contingencies	Sales Goals
Rhodes, Ben Business Rep	Not Started	In-Progress [#] Entries	Complete [#] Entries	Complete [#] Entries	Complete [#] Entries
[LName, FName] [Role]	In-Progress [#] Entries	In-Progress [#] Entries	Not Started	In-Progress [#] Entries	Complete [#] Entries
[LName, FName] [Role]	In-Progress [#] Entries	In-Progress [#] Entries	Not Started	In-Progress [#] Entries	In-Progress [#] Entries
[LName, FName] [Role]	Complete [#] Entries	In-Progress [#] Entries	Not Started	In-Progress [#] Entries	In-Progress [#] Entries
[LName, FName] [Role]	Not Started	Not Started	Not Started	Not Started	Not Started
Total Entries	[#]	[#]	[#]	[#]	[#]

Plan Management Overview

Supported Management

US Crop	VP	RD	DM	RSL	ISAM
P&SS	Dir	NSM	RM		
Canada	N/A				

The screenshot shows the 'Plan Management' section of the BASF web application. The interface includes a navigation bar with 'Dashboard', 'Insights', and 'Plan Management' (selected). The BASF logo and tagline 'We create chemistry' are in the top right. Below the navigation, there's a breadcrumb 'SalesX > Plan Management' and a dropdown for '[CY] Seasonal Year'. The main content area has tabs for 'Pact Plans' and 'Account Plans'. A table displays 'BASF Rep' and 'Sales Goals' data for several users, including 'Smith, Ingrid'.

BASF Rep	Sales Goals
Smith, Ingrid Innovation Specialist	Complete [#] Entries
[LName, FName] [Role]	Not Started [#] Entries
[LName, FName] [Role]	Not Started [#] Entries
[LName, FName] [Role]	Not Started [#] Entries
[LName, FName] [Role]	Not Started [#] Entries
Total Entries	[#]

SalesX Future State

Future State

Enhanced Account Overview

Snapshot of what's happening with an account: Account Plan (Status); Total Sales; and Recent Activity.

The screenshot shows a CRM interface for an account named "Annie's Produce Emporium-Harbor Springs". The page is divided into several sections:

- Account Plan:** Shows a "Draft" status with a progress bar and a "View All Account Plans" link.
- Insights:** Features a bar chart comparing "2019 Planned Sales" (green bar) and "2019 All Sales" (dark green bar) against a "Sales Goal" and "Territory Budget". Both sales bars are labeled "\$XX.XK". A "View All Insights" link is provided.
- Recent Activity:** Lists activity from "Sun, Jun 30-Sat, Jul 6, 2019". It includes entries for "Friday, Jun 28" and "Friday, Jun 21" with icons for contact and visit, and "Friday, Jun 18" with a contact icon. A "View All Activity" link is at the bottom.
- Recent Logs:** Shows a log entry from "July 3, 2018 by Ann Hill" with the text "Frankfurter tempor burgdoggen ham hock short ribs sed shoulder spare ribs buffalo." and a "View All Logs" link.
- Account Information:** Lists "DBA [DBA]", "BASF ID 123456789", and "Primary Contact" with a name placeholder and a profile icon.
- Addresses:** Shows "Mailing Physical" and address fields for "[Account Name]", "[Address 1]", "[Address 2]", and "[City], [ST] 92656".
- Representatives:** Lists "Business Representative [Last Name, First Name]", "Innovation Specialist [Last Name, First Name]", and "Seed Advisor [Last Name, First Name]".

The interface includes a top navigation bar with "Overview", "Insights", "Activity", "Account Plan", "Contacts", "Hierarchy", and "Marketing Attributes". A left sidebar contains navigation icons for Dashboard, Bookmarks, Accounts, Planning, Incentives, Resources, and Help. A "Quick Tasks" button is in the top right.

Future State

Enhanced Activity

Updated interface makes understanding which activities are generated by you, the user (green dot), and which activities are happening outside of your control (grey dot).

Timeline not defined.

The screenshot displays a CRM interface for 'Annie's Produce Emporium-Harbor Springs'. The top navigation bar includes 'Overview', 'Insights', 'Activity' (selected), 'Account Plan', 'Contacts', 'Hierarchy', and 'Marketing Attributes'. A 'Quick Tasks' button is visible in the top right. The main content area shows a calendar for September 2019 with a grid of activity dots. A tooltip for a 'Text' activity on September 12, 2019, is shown. Below the calendar is a detailed view of a 'Call' activity from Friday, September 27, 2019, by '[Contact Last, First]'. The activity description includes a note about vinyl banners. Below the description is a list of other activities from various dates in September, including 'Text', 'Visit', 'Email', 'Sale', 'Sample Request', 'Training', 'Campaign', 'Contact Reassigned', 'Offer', 'Claim', and 'Call Center'.

Activity	Total	September 1, 2019	30
Call	1		
Email	1		
Reassign	1		
Text	3		
Sales	1		
Visit	1		
Call Center	1		
Campaign	1		
Complaint	2		
Offer	1		
Samples	1		
Training	1		

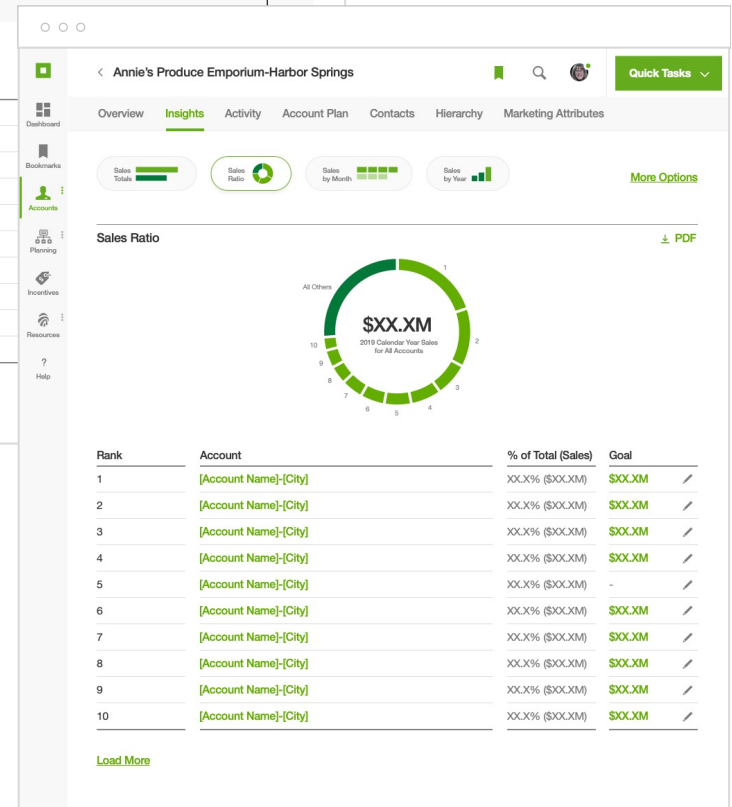
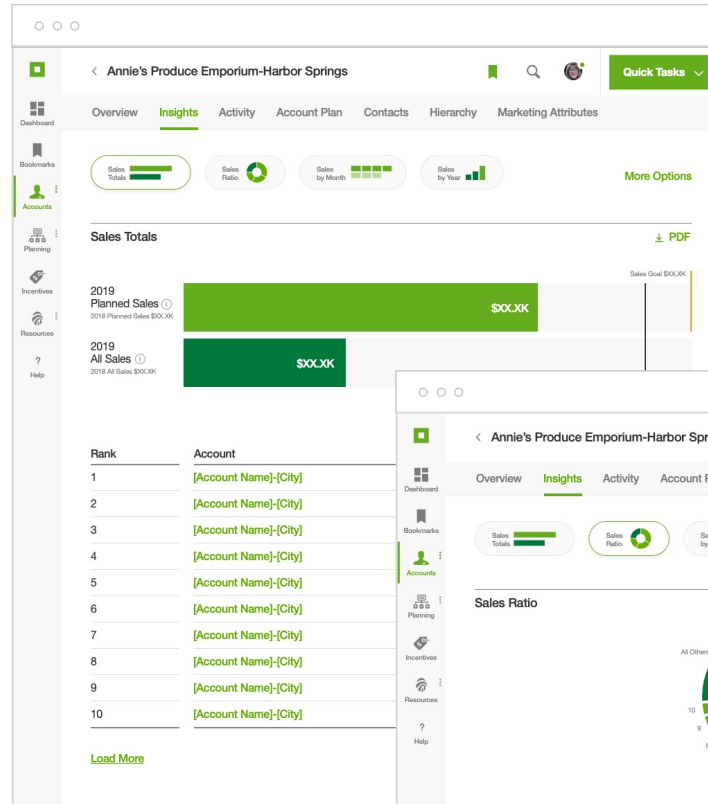
Activity Details:

- Date:** Friday, September 27, 2019
- Description:** Call - [Contact Last, First] (By [Last Name], [First Name])
- Notes:** [Last Name, First Name] (June 26, 2019) - One way to announce or promote a certain new product or special events is perhaps through using of vinyl banners. Large or small size of printing these vinyl banners are can be able to print and in many types of weather it can hold up extremely well.
- Other Activities:** Text - [Contact Last, First] (Notes), Visit - [Visit Subtype] (Notes), Email - [Email Subject] (Notes), Sale - [Amount in Dollars] (Notes), Sample Request, Training - Training day @ RTP, Campaign - [Campaign Subject] (1 attachment), Contact Reassigned - [Contact Last, First] (Notes), Offer - [Offer Subject], Claim - [Product Complaint Title], Call Center - [Call Subject]

Future State

Enhanced Insights

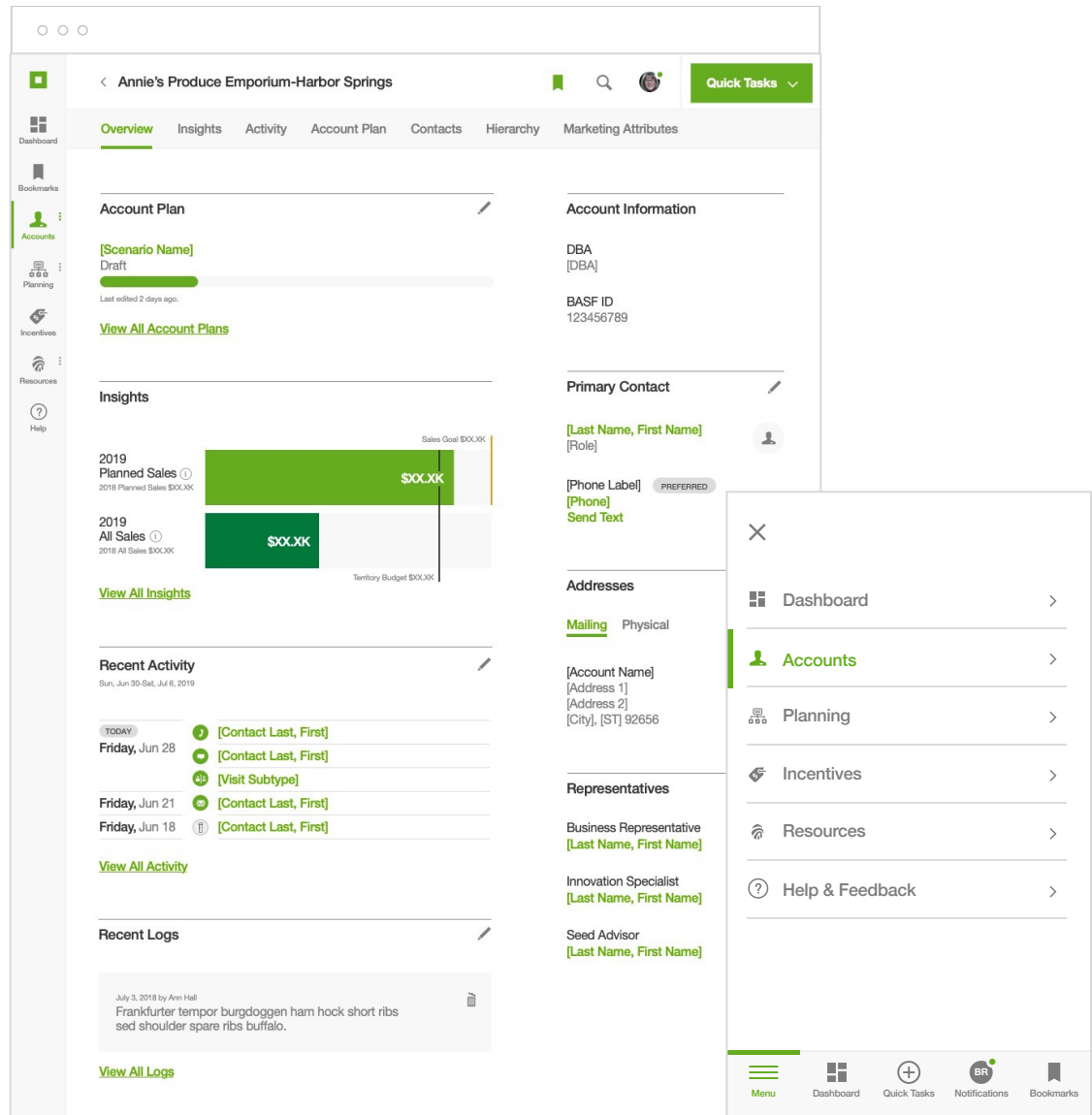
Insights remain just as robust, but selection of filters is less overwhelming. Bookmark your favorite views for easy access.



Navigation Enhancements

Navigation Reorg makes better use of space at all screens sizes and prioritizes features used most.

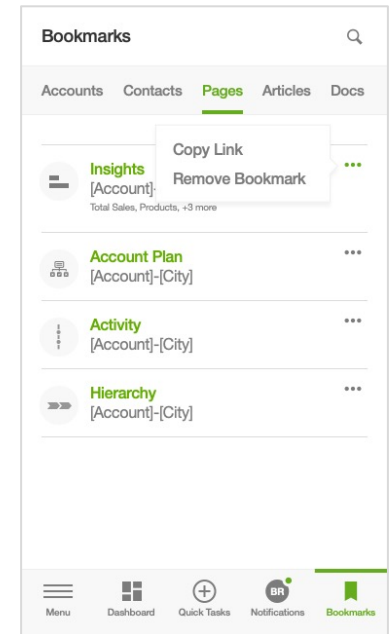
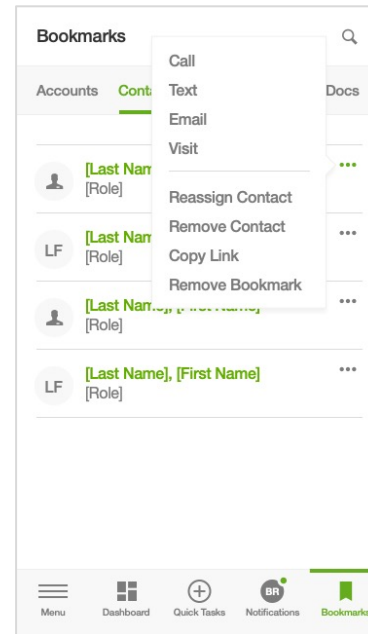
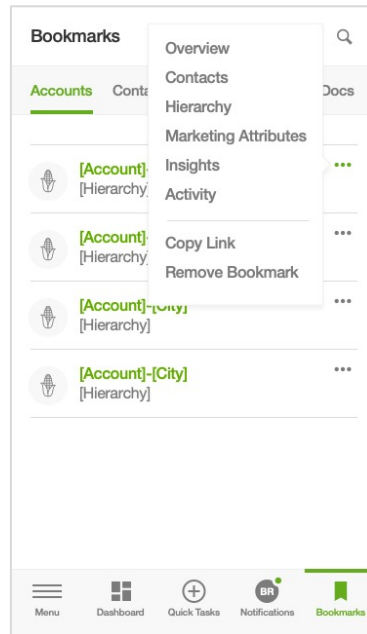
Navigation becomes vertical on Desktop/Tablets, and fixed to the bottom on mobile.



Deep Bookmarks

Save your favorite pages, chart and table views for easy access.

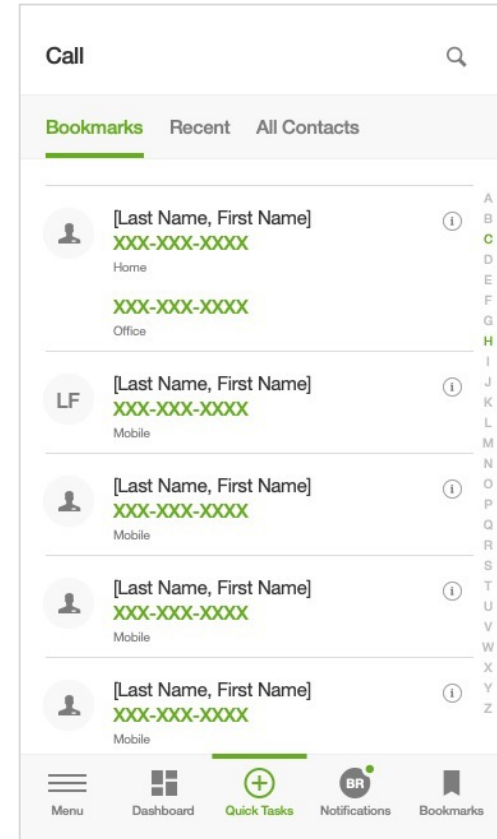
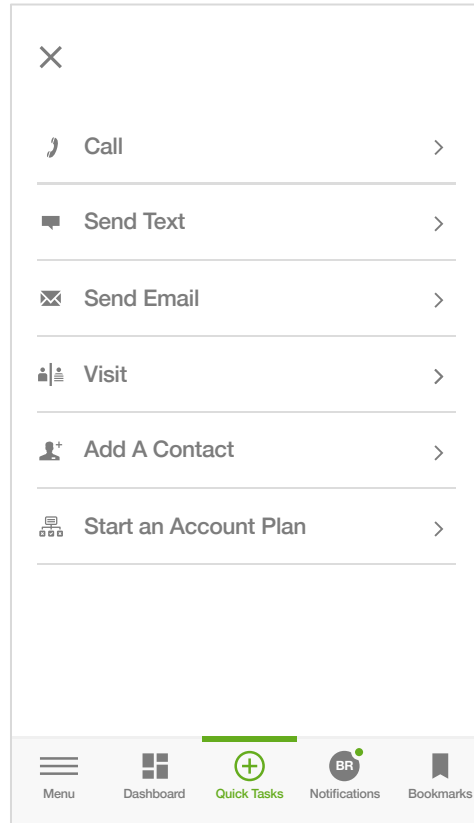
Bookmarks get grouped by *Accounts*, *Contacts*, *Pages*, *Articles* and *Docs*.



Quick Tasks

Completing the most frequent becomes easier with the global “Quick Tasks” menu.

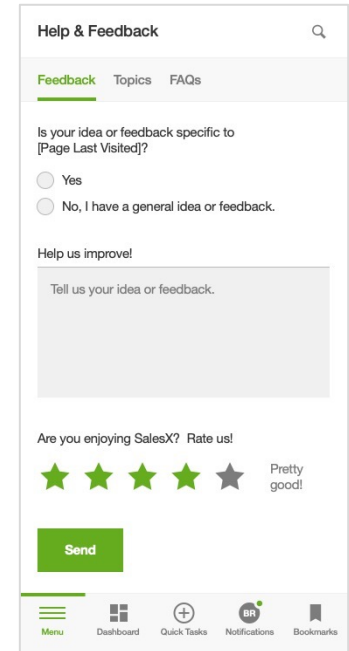
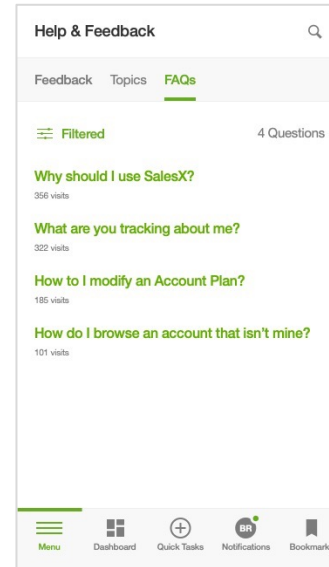
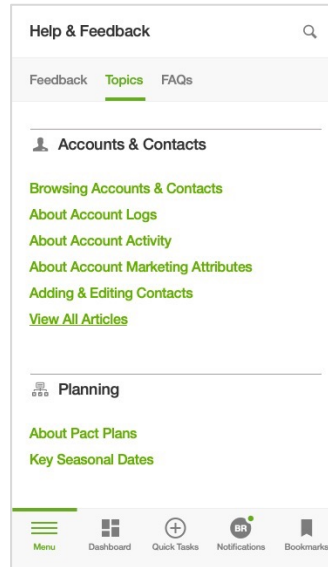
Get access to Call, Text, Email or Visit your bookmarked contacts. Add a Contact or Start an Account Plan.



Help & Feedback

With enhanced Feedback, SalesX will understand which page users are coming from to offer contextual help.

We understand great software is a team sport, which is why we're also creating space to submit improvement suggestions and feature requests.



Access to Resources

Portals & Tools: The sales team will enjoy easier access to other applications sales applications in the BASF ecosystem.

Shared Articles: The sales team can share with one another important internet articles that can affect sales.

Product Training Cards: The sales team can access product information easily.

