SALESONE

counterparty naming system

Email / Wireless Alerts · **Target Navigation** · **Security Controller** · **Report Builder**

web presentation designer	*business object layer coder*	*database object layer coder*	*sql server database administrator*
xml · html · dhtml · graphics calling business objects & binding	*asp.net · caching · classes data collection & site performance*	*activeX data objects [ado.net] design data-to-site flow*	*backups · dts packages ensure peak performance*

TARGET ADMINISTRATION

Setup and maintain targets directly from web site; reports on missing data and feeds by target; target maintenance can be distributed over multiple employees
Report card reports on integrity of target setup

ADMINISTRATORS	SYNCHING	NAME MATCHING

Publication Ordering System

View most recent and categorized publications; user can click on the publication, review it, compose a cover letter and mail to any executive

Target Credit Ratings

Provide target teams with access to credit ratings by target; can assist team with targeting strategy and setting fee level based on credit risks

Top Headlines

BUSINESS · SCIENCE & TECH · MEDIA · HEALTH · U.S. · GLOBAL

Track significant developments on Wall Street and across globe; use to start and drive conversations with targets; shows partner is well-informed

news feeds update every 15 minutes

Alumni Data Center

Load all firm alumni data and filter by target name; display legacy employment information and current position at target; tie alumni to relationship maps

Financial Graphing

Graphs any of 500 different items from balance sheet, income and cash flow statement; then calculates performance against SIC group for each measure

Spot Targeting

OFFICERS · 8K/FORM 4 FILINGS · SIGNIFICANT DEVELOPMENTS · NEWS ARTICLES · ANALYST REPORTS

tool analyzes formulas

Right on the home page is a list of significant events, ranked from 100-1 and filtered to the partner's specific targets; tracks critical events of the day

process data every 24 hours

SEC Center

All SEC filings by target in six different categories; includes ability to full-text search any filing or across any target or find a single term across all U.S. filings

Analyst Reports

EQUITY REPORTS · MORNING NOTES · ANALYST CALL TRANSCRIPTS

Reports are segmented by target; used to generate touchpoint ideas and identify selling opportunities;

Target Calendar

All activities are automatically added to a monthly calendar; industry leaders can add firm events across target groups; calendars are rolled-up for reporting

Activity Management

BLACKBERRY · EMAIL · EMAIL CALENDAR

Input on-going activities at each target by team member and target executive; provides reporting by salesperson; users can email or Blackberry in activit

Billed Services

View of what is effectively selling in target's specific industry; idea is to leverage the firm's success to build market share across SIC industry codes

SERVICES AT COMPETITORS · SERVICES AT TARGET

Product/Service Penetration

MARKET SHARE · MULTIPLE GROWTH · SINGLE HIGH VALUE

Analysis of all firm's products and services; displays top 50 firm services by year and month; also shows services with highest growth year-over-ye

Product/Service Centers

Match firm's major service offerings to specific targets and/or industries; provide coaching/ideas at the target level for selling high demand firm servi

Search Engine

COMPANY FINDER · NEWS FINDER · PEOPLE FINDER

Search for any employee in firm by 6-8 criteria; users have full access to analyst reports and news articles to create very specific topic searches

Connections

Catalogs all partner relationships with "client" executives using firm billing system; calculates 1,2, and 3 degrees of separation for every "target" executive

Contact Management

Catalog of key information for each target executive, including degree of influence and level of relationship with firm; ties into activity system

Market Capitalization

Target team members can track sudden shifts in stock price; Shifts usually mean an uptick in target activity and potential sales opportunity

Document Store

ACCESS FOR ALL USERS · TARGET SPECIFIC

One area for target-specific documents that can only be viewed by team members; another area stores proposals, etc. that can be full-text arc

SALES PIPELINE

IDENTIFIED · CONTACTED · DEVELOPED · PROPOSED · CLOSED

PROJECT NAME · LEADER · ESTIMATED FEES · RELATIONSHIPS · PRODUCT

ticker · sanitized name · manual synch · sic code · not applicable · ultimate duns · share price throughout day filtered by user's targets · target id

DSGN *David Gossett*	EDM LOGIC		PRESENTATION
PROG	**MARKETONE STRATEGIC PLAN**		
DATA	DESC *Before an IT project can be blueprinted, there is often strategic planning that educates executives on what is possible with the latest advances in technology. Blueprints for strategic planning help IT scope executive needs, before designing interfaces.*		
CODE			
HRDW			
APPR			
DATE *06-FEBRUARY-2007*			
COMP	SIZE 36 / 54	CODE **EDM MSP**	DRAWING NO **EDM.MSP.1.SS**
			ARCH *David Gossett*
DEVELOPMENT PURPOSES ONLY	SCALE	SPEC *Blacklines*	SHEET **1** OF **1**