

**Scorecard**

**USER MANUAL**

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# Introduction

## 1 Introduction

Welcome to Scorecard. We want you to have a great experience with us and our tools so that you can get better at sales and make the world a better place. Your scorecard is a way to plan, track, measure, and execute your sales activities so you can be more strategic with your time to get better results. Scorecard works just as well for individuals as it does for teams. It is about learning what does and does not work in your style to create your own winning methods for gaining new business.

Scorecard is exactly as the name implies. You plan out your sales activities for the day/week/ month, document how well you did, and see how you scored. If you are scoring consistently high and getting good sales, you have a process that works. If not, you can try to change your method on your scorecard until you find something that works and stick with it.

Scorecard is not a CRM and is not intended to be a micromanagement tool. It is a way for you to challenge yourself and others to be the best you can be. Think of it as your scorecard in golf. If you keep track of your progress, you can discover how well changes are working for you to improve your game. Have fun with your Scorecard and keep making the world a better place through sales.

# Organization

## 2 Organization

There are two kinds of users in Scorecard, Standard User and Manager.

Standard User are able to see and edit their Scorecard content.

Manager capabilities include the following:

1. The same capabilities as Standard User.
2. The capability to review/read the Scorecard information for all users in their team.

# Navigation

## 3 Navigation

General pointers about how to navigate the Scorecard application.

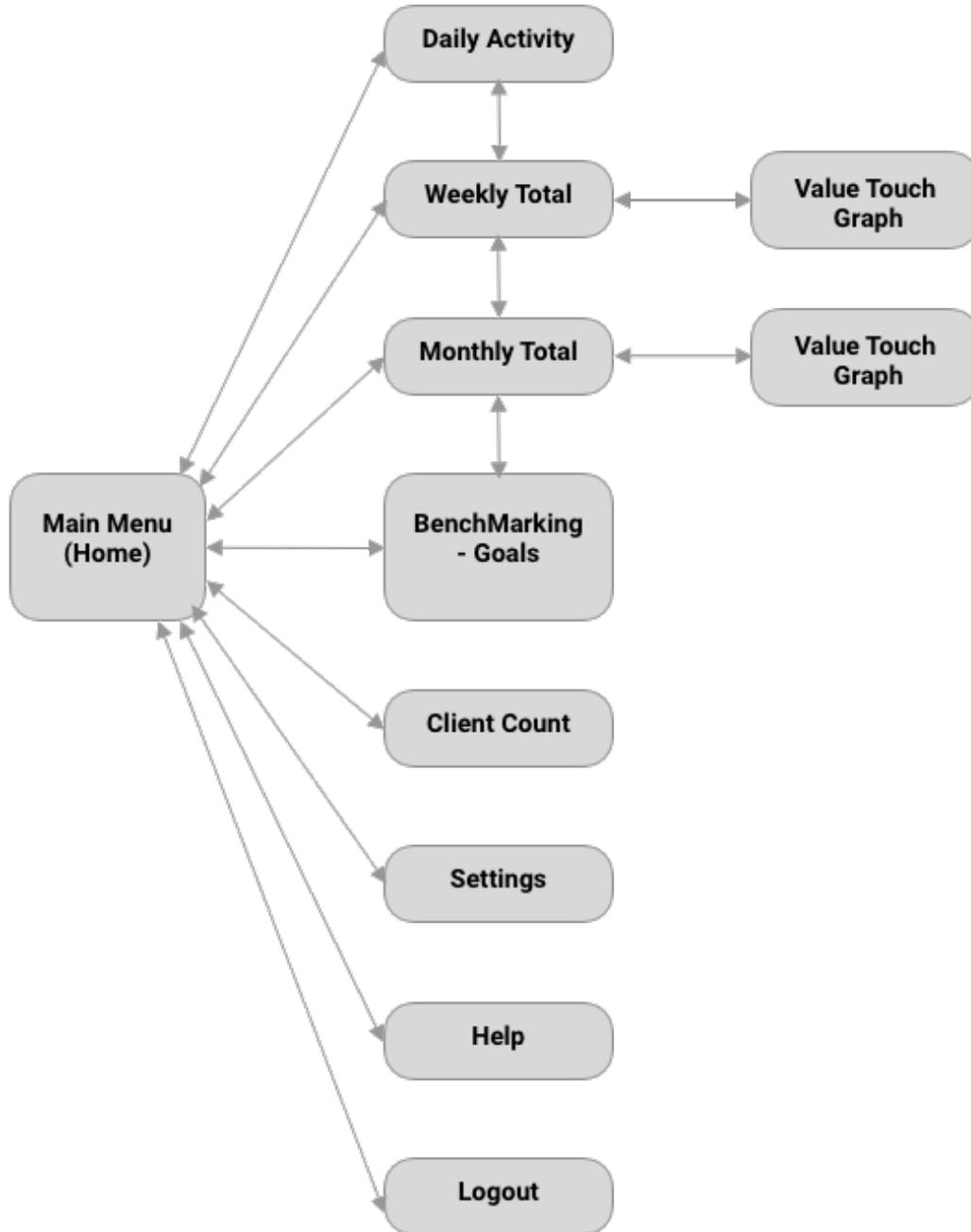
### 3.1 Mobile

After logging in, you start at the Main Menu (Home) screen. Use the menu options shown to navigate between screens. You can also use the "back" button to retrace your navigational steps from screen to screen.

The following Navigation Diagram shows the screens used and how you can navigate between them.

Show Scorecard for:

### Navigation Diagram



In the Daily, Weekly, Monthly, and Benchmarking screens you can change the selected day, week, or month in the following ways:

1. Swipe left to move to the next day, week, or month.
2. Swipe right to move to the prior day, week, or month.

3. Change the date, or month using the drop-down option on the screen.

# Screens

## 4 Screens

The following topics describe the various screens used in the mobile app.

### 4.1 Login

*(login screen image coming)*

Your credentials (user name and password) will be provided by your team leader.

## 4.2 Daily Activity

9:41

< Daily Activity

Current User Name

Monday, May 25, 2020

Day off

Comment for Day off

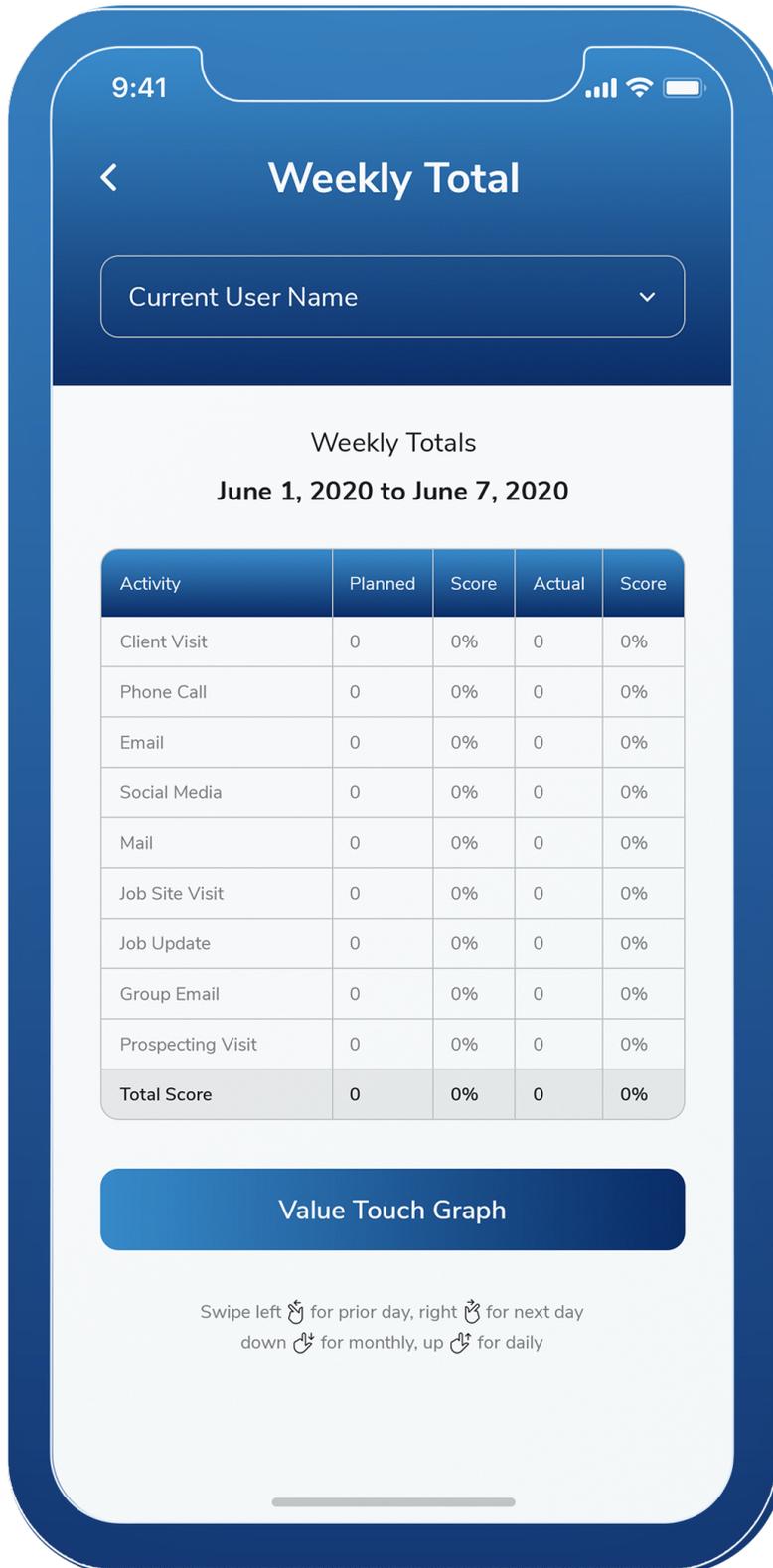
**History / Activity Entry / Planning Entry**

Activity	Planned	Score	Actual	Score
Client Visit	0	0%	0	0%
Phone Call	0	0%	0	0%
Email	0	0%	0	0%
Social Media	0	0%	0	0%
Mail	0	0%	0	0%
Job Site Visit	0	0%	0	0%
Job Update	0	0%	0	0%
Group Email	0	0%	0	0%
Prospecting Visit	0	0%	0	0%
Lunch	0	0%	0	0%

The daily activity screen is used to view and enter the following information:

- Day off: The application will send you reminder emails for normal work days that are not marked as completed. Mark the day as "Off" to not be alerted to missing data entry.
- Comment for Day off: This allows a note about why taking the day off. It may be used for your own purposes as well as a note to your team leader.
- Planned (Activity): Note the number of each activity that you have planned for the day. Planned activity can be entered only on future dates. The Planned column will be grayed out and read-only for the current day and prior days.
- (Planned) Score: Provides the adjusted weight of the activity based on the entered planned count and the weight of the activity.
- Actual (Activity): Note the number of each activity that you have actually done for the day. Actual activity can be entered only on the current date or prior dates. The Actual column will be grayed out and read-only for future dates.
- (Actual) Score: Provides the adjusted weight of the activity based on the entered actual count and the weight of the activity.
- Optional Activities. In addition to the standard list of activities shown on the screen, there are also optional activities that you can enter. For each optional activity, select the desired activity in the drop-down. Then fill in the planned and/or actual count as appropriate. Note, the optional activities will be listed in alphabetical order.
- Sales Rep Comments: Use this option field to enter victories, challenges, or other activities not available in the standard or optional lists.
- Entry Completed: Check this box when the day's entry is complete. This will tell the application not to send you a reminder for the day (when it is not a day off).

### 4.3 Weekly Activity



This screen shows a summary of planned and actual activities and their scores for the week. Nothing can be changed on this screen. It's purpose is to give you an overview of planned and actual activities for the week.

The Value Touch Graph is a visual presentation of the scores per activity.

## 4.4 Monthly Total



This screen shows a summary of planned and actual activities and their scores for the month. Nothing can be changed on this screen. It's purpose is to give you and overview of planned and actual activities for the month.

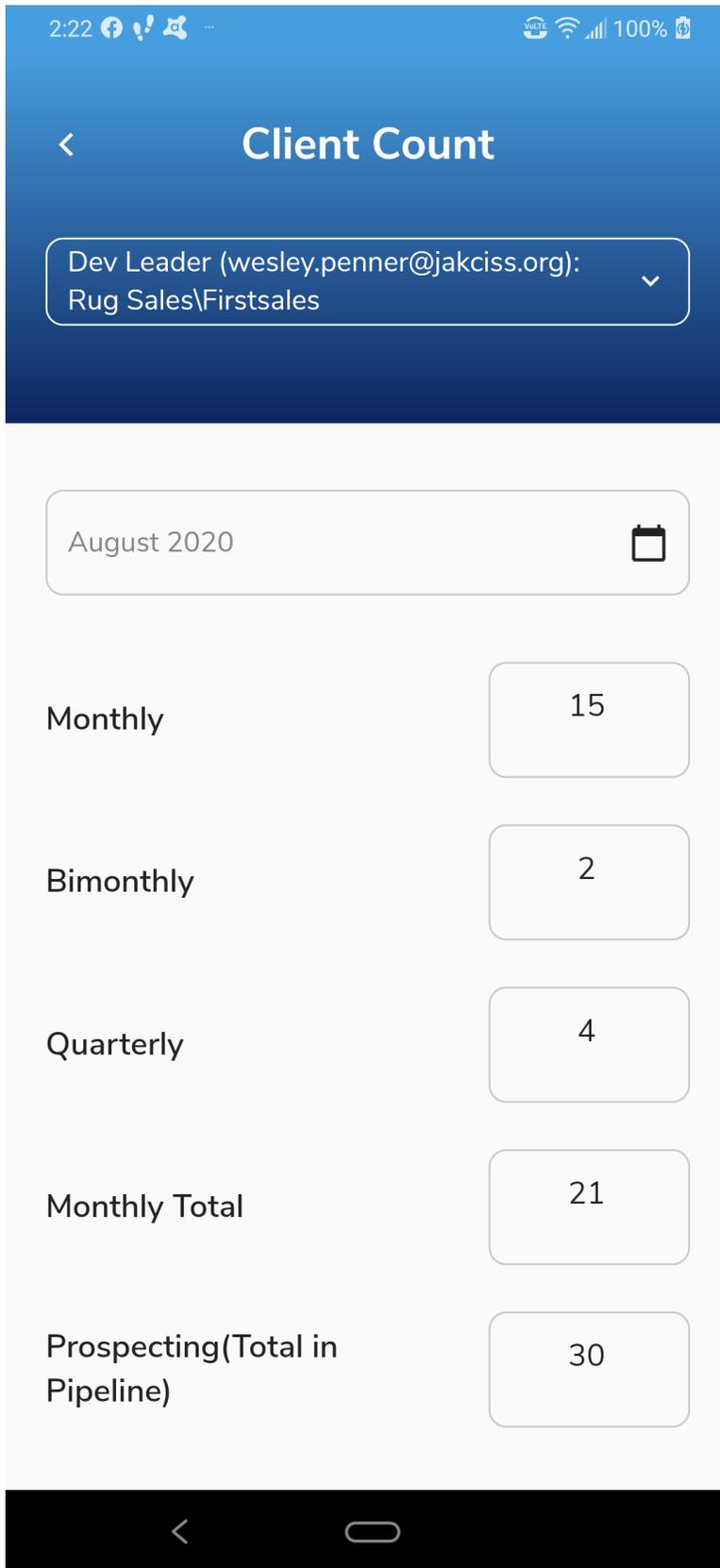
The Value Touch Graph is a visual presentation of the scores per activity.

## 4.5 Benchmarking Goals

Benchmarking	Monthly goals					# of days	Daily Score	# of weeks	
	Monthly	Bimonthly	Quarterly	Monthly Total	Actual	20	Forecast	4	Difference
Total Clients	3	5	8	16		Daily Goal		Weekly Goals	
Client Visit	3	2	1	6	3	0	4	1	-45
Phone Call	27	10	24	61	5	3	6	12	-92
Email	15	5	8	28	7	1	3	6	-75
Social Media	3	5	8	16	9	1	0	3	-44
Mail	4	1	1	6	6	0	1	1	7
Job Site Visit	3	1	1	4	7	0	2	1	66
Job update/ Engage	6	8	12	26	8	1	6	5	-69
Group Email	6	8	12	26	9	1	3	5	-65
Other	4	2	1	7	2	0	12	1	-72
Prospecting (total in the pipeline)	12			24	10	1	6	2	-58
<b>Total Marketing Activity Rating</b>				<b>203</b>	<b>66</b>	<b>10</b>	<b>43</b>	<b>38</b>	

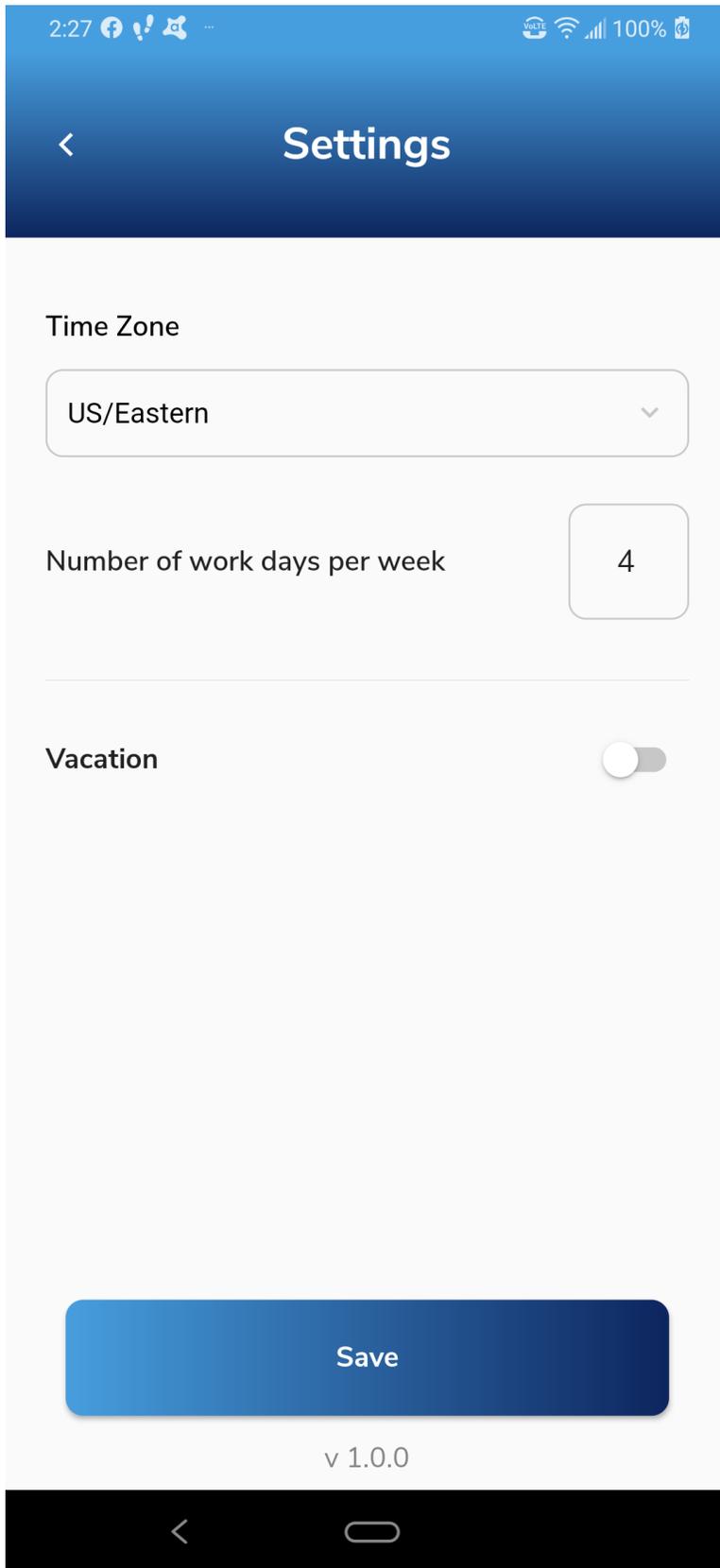
Benchmarking is a way for you to establish your own best practices based upon the different types of clients/ prospects you may have and the type of sales sequence you prefer execute. Benchmarking makes a diversified range of sales activities based on your portfolio and sales pipeline to give you an outline for how to plan your days, weeks and months.

4.6 Client Count



Everyone in sales has their own diversified client portfolio in their book of business. For someone new to sales, you may only have prospects in your pipeline and no clients to start with while veteran salespeople must serve existing clients while still trying to build their book of business. The Scorecard assumes that each of your clients need to be touched one or more times during a year. When you evaluate your book of business, first determine how many clients that you have. How many of them need to be touched quarterly? Monthly? Bimonthly? Divide your clients into those categories and enter them on the Scorecard accordingly and the Scorecard will automatically include them in your benchmarking goals along with your new business goals

### 4.7 Settings



Time zone: Used the application to know when to send you reminders, if necessary.

Number of work days per week: used for the monthly totals screen to correctly calculate the month's scores based on the daily activity.

Vacation: set this to true when you are on vacation. This can be used instead of the day off to avoid needed to set the day off for each day of your vacation.

**- A -**

Actual activity 15

**- B -**

Bonus Points 15

**- C -**

Comments 15

**- D -**

Day off 15

**- P -**

Planned activity 15