BANZAI PIPELINE

BRINGING NUMBERS TO LIFE
L7.2

View this pdf page-by-page with your
"left" and "right" arrow keys versus with
your "up" and "down" arrow keys.

This best simulates the scenario sequences
and animated transitions.

Banzai Pipeline

The Sales Game

John Armitage, Geff Gilligan, Hamilton Meyer
May, 2011

Rendered in the environment
of SAP's UXNext Team's UX3
Design Language

SAP

Game Mechanics Applied to CRM Sales

Games:

Have a Graphically Rich and Responsive User Interface

Provide Clear and Relevant Purpose, Goals, Status, and Feedback

Thrive with Collaboration and Competition

Leverage Physical Metaphors Where Meaningful

Are Highly Personalized to Users

The Sales Game Premise

Sales is the business activity most closely resembling a game. In fact the cyclical sales quota and pipeline metaphor already leverage real-life metaphors to depict status and progress in a more meaningful way.

The Sales Game focuses on the Pipeline Management use case scenario. For context, the scenario takes place within an overall sales automation application rendered with the UX3 Concept Car environment.

The game element depicted is called the Banzai Pipeline. This is a hybrid game/analytic for visualizing and acting upon an enterprise sales pipeline, from the complete rollup to an individual sales rep.

The Pipeline leverages UX3 concepts of unique spaces dedicated to different work modes, and the collaborative features of Streamwork. However, its primary examples of game mechanics are in its forms of visualization and interaction design, primarily by using the Pipeline metaphor in a non-literal manner, i.e. no need to depict any "pipes".

The Banzai Pipeline is an interactive visualization for sales people to check the status of their deals in various stages. Targeting the use case of a sales team managing their pipeline – the metaphor used to describe the set of deals in various stages of progress – it uses a collaborative "gameboard" visualization.

Here we see a comparison of current deals in each of five pipeline stages, in orange, compared to the previous year, in blue, and the goal, in green. Our user, Melinda, manages a sales team, and this is her view of the overall team's performance. Her staff, and her position in the larger sales org, are shown in the hierarchy on the left.

We can see that we are losing many deals from the Qualification stage to the Analysis stage, to a point well under the goal, and that this can cause underperformance later on in the cycle.

She looks at dropped deals in the Analysis phase and sees that the problem is that they are losing deals in this phase, versus for example not having enough deals coming into the phase.

Melinda decides to take up this issue with her team. She returns to her original view and decides to create a new Streamwork Activity to help find a solution.
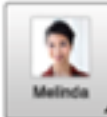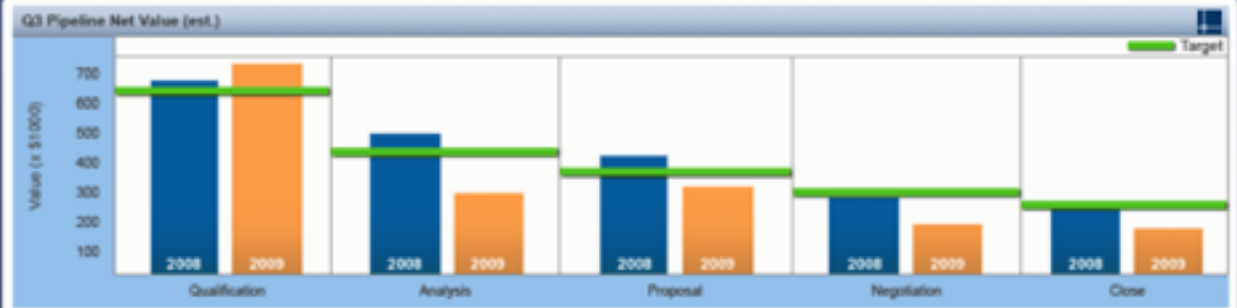
Analysis Shortfall

TEAM WORK   UPDATES   RESOURCES

EDIT

Re-Forecast

Melinda

More deals than ever before are dropping out in the Analysis phase. We need to change our strategy beginning with our Qualification Prospects.
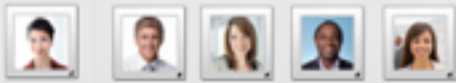
Q3 Pipeline Net Value (est.)

Target

Value (x $1000)

700
600
500
400
300
200
100

| 2008 | 2009 | 2008 | 2009 | 2008 | 2009 | 2008 | 2009 | 2008 | 2009 |

Qualification   Analysis   Proposal   Negotiation   Close

NEWS   SEARCH   RELATED   CRM TOOLS
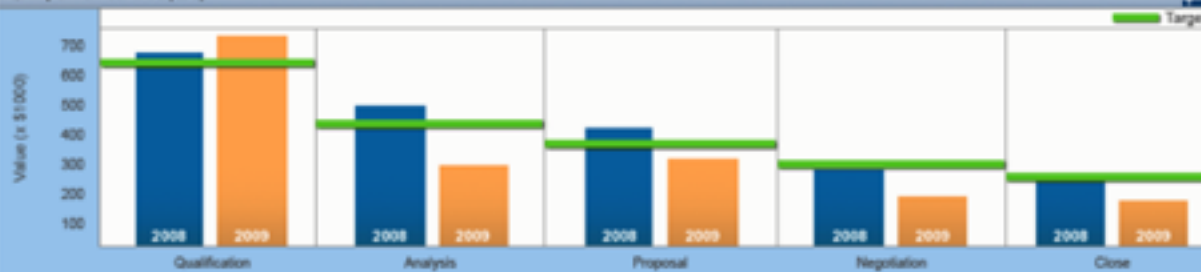
Qualification Phase Deals
Here are our Qualification Phase Deals. The current business climate is calling for more consulting and partner help. Re-calibrate your deals here to show more realistic numbers.

Confidence — High / Medium / Low

Small   Medium   Large
Size

HOST   PARTICIPANTS

Sales   Situations   People   Tools   Territory Re-org   Wells Fargo

Search Everything

SAP

She converts the relevant deals into a working matrix by dragging them onto the canvas, and asks the team to re-calibrate them to create a more accurate forecast.

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Analysis Shortfall

TEAM WORK   UPDATES   RESOURCES

EDIT

SACRAMENTO BANK INTERNET MIGRATION

Deal: C-22987

Sacramento Bank

Prospect: Sacramento Bank   Started: 09/14/2009   Tags: Layoffs, Internet, Partnering
Contact: Eli Moss   Size: Small   Sacramento, Priority, Follow-on
Sales Rep: Rod Beck   Confidence: Medium   more...

● Overview   📠 Activities   📒 Notes   📦 Assets

Deal

Deal: Sacramento Bank Internet Migration
Prospect: Sacramento Bank
Contact: Eli Moss
Deal No: C-22987
Lead Source: Follow-on sale
Phase: Qualification
Size: Small
Confidence: Medium
Industry: Financial Services

Description:
Sacramento Bank, based on the success of our
previous engagement with them, has inquired about
installing five of or A76 units to aid in the Internet-
ready transition of their commercial paper trading
division.

Dates

Started: 09/14/2009
Last Edit: 10/18/2009
Expected Close: Q4 2009

Team

Region: US West
District: Northern California
Sales Rep: Rod Beck

BROWSE RELATED »

Related Items

Deals
● Agilent Technologies
● Avery Dennison
● Brio Technology
● Claim Jumper
● Electra Bicycle Company
● Landmark Education
● Panda Express
● Rosewil Teledyne
● Wells Fargo Bank
● Union Bank of California
● UC Credit Union
See More...

Prospects

Situations

People

HOST   PARTICIPANTS

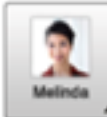Sales   Situations   People   Tools   Territory Re-org   Wells Fargo

Search Everything 🔍 ▾   SAP

This participant can also open the Deal Inspector which contains all system data about this object, plus related items.
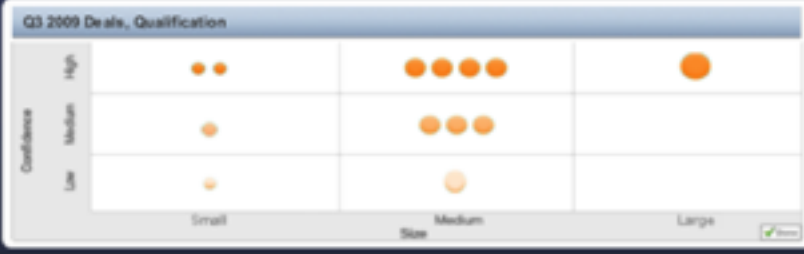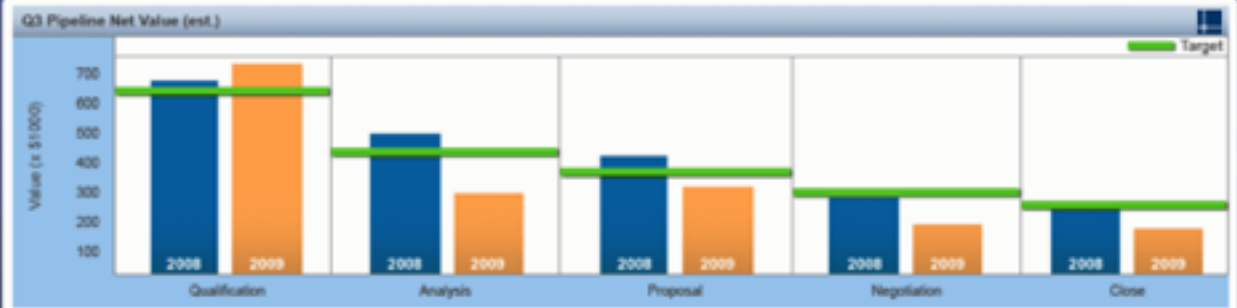
Over time, the team asynchronously drags and drops their own deals to the cells best representing the deals' overall prospects. They do this within the Streamwork Activity.

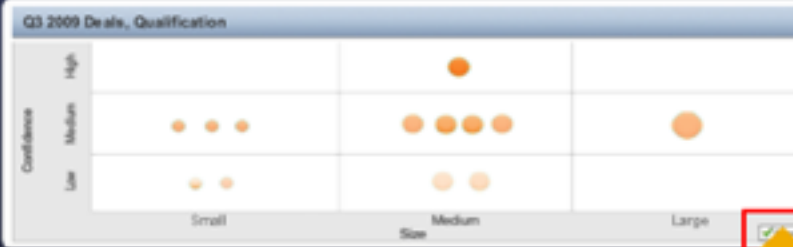The pipeline becomes smaller due to the growing pessimism about closing deals.

Over time, the team asynchronously drags and drops their own deals to to the cells best representing the deals' overall prospects. They do this within the Streamwork Activity.

The pipeline becomes smaller due to the growing pessimism about closing future deals.

As Host, Melinda can commit these data changes to the pipeline database.

A new Streamwork Activity opens and she invites Rod to participate.

Rod's Pipeline

TEAM WORK   UPDATES   RESOURCES

EDIT

Q3 End Game   Status: In Progress Initiated By: Melinda 11/19/2009   ADD

Q3 End Game

Lets plan the rest of your quarter. Can you achieve my plan outlined here?

Rod Beck's Pipeline Q3 2009

Deals: ● Big ● Small   Confidence: ■ High □ Low   ✖ Dropped

	Qualification	Analysis	Proposal	Negotiation	Close
Sacramento Bank	● ➔ ○				
In-N-Out Burger				● ➔ ○	
Juniper Networks			●		
KLA Tencor		✖			
Ingram Micro			● ➔ ○		
Maxygen					
Seagate Technology		●			●
Univsion	○				
Virgin America	● ➔ ○				

HOST   PARTICIPANTS

Sales   Situations   People   Tools   Territory Re-org   Wells Fargo

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NEWS
SEARCH
RELATED
CRM TOOLS

Melinda annotates his quarterly goals by dragging several deals to the phases where she proposes they should reside by quarter's end.

The arrows here would actually display to convey the changes she had made.

Rod sees her proposal and reacts that he will need more resources to do this, and proceeds to inspect his deals to determine the details.
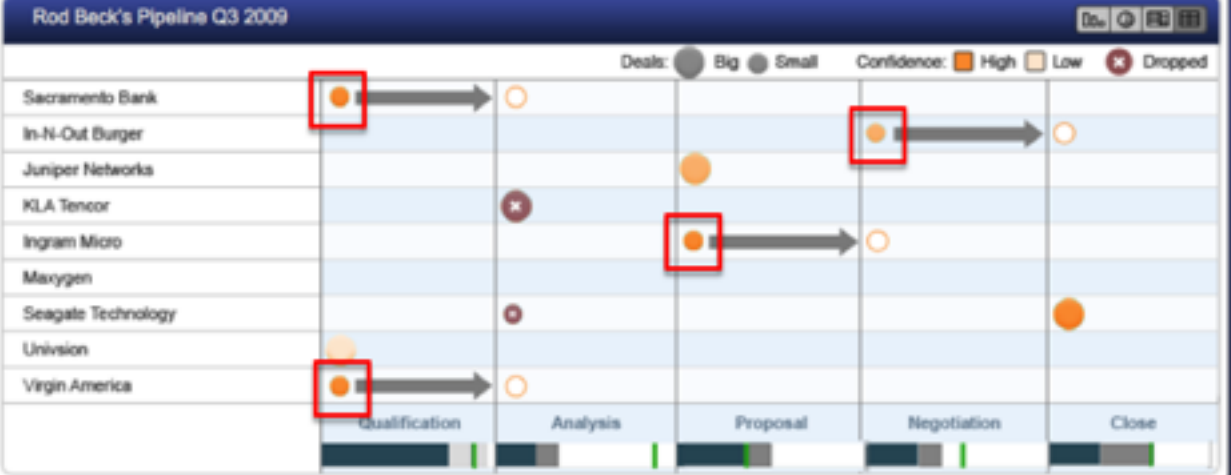
He moves the selected deals out onto the surface to be rendered as a table

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Rod asks for internal and external consultants to help him reach his goal. Melinda ups the ante then agrees.

Rod's Pipeline

TEAM WORK　UPDATES　RESOURCES

EDIT

Q3 End Game

	Qualification	Analysis	Proposal	Negotiation	Close
KLA Tencor		⊗			
Ingram Micro			● ➡ ○		
Maxygen					
Seagate Technology		⊗			●
Univsion	○				
Virgin America	● ➡ ○				

Not without per-sales help and the freedom to partner with consultants. Is that possible?

Show me your plan and we'll discuss.

Deal	Action	Reason	Budget
Esurance	Offload to Research Assistant	Uncertain spendability at prospect	$15k
Sacramento Bank	Partner with Consultech	Implementation Support Needed	$35k
Ingram Micro	Pre-Sales Support	Performance Benchmark	$12k
In-N-Out Burger	Discount Authorization	Competitive Pressure	TBD

Here is what I need.

OK, but I'll be keeping an eye on these deals ;-)

HOST　　PARTICIPANTS

NEWS　SEARCH　RELATED　CRM TOOLS

Sales　Situations　People　Tools　Territory Re-org　Wells Fargo

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Rod's Pipeline

TEAM WORK UPDATES RESOURCES

EDIT

Q3 End Game

	Qualification	Analysis	Proposal	Negotiation	Close
KLA Tencor		✖			
Ingram Micro			● → ○		
Maxygen					
Seagate Technology		✖			●
Univision	○				
Virgin America	● → ○				

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OK, but I'll be keeping an eye on these deals :-)

Budget Approval		OK
Melinda Chan		☐

NEWS SEARCH RELATED CRM TOOLS

HOST PARTICIPANTS

Sales Situations People Tools Territory Re-org Wells Fargo

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25

He uses the Price Configurator to create the different options. The sale is a software product that would involve costs in multiple categories.

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He then commits his changes to the deal proposal.

The Mobile Pipeline

The most game-like element in the Banzai Pipeline is the gameboard view, that renders deals as poker-chip-like tokens. This is easily rendered on a mobile device.
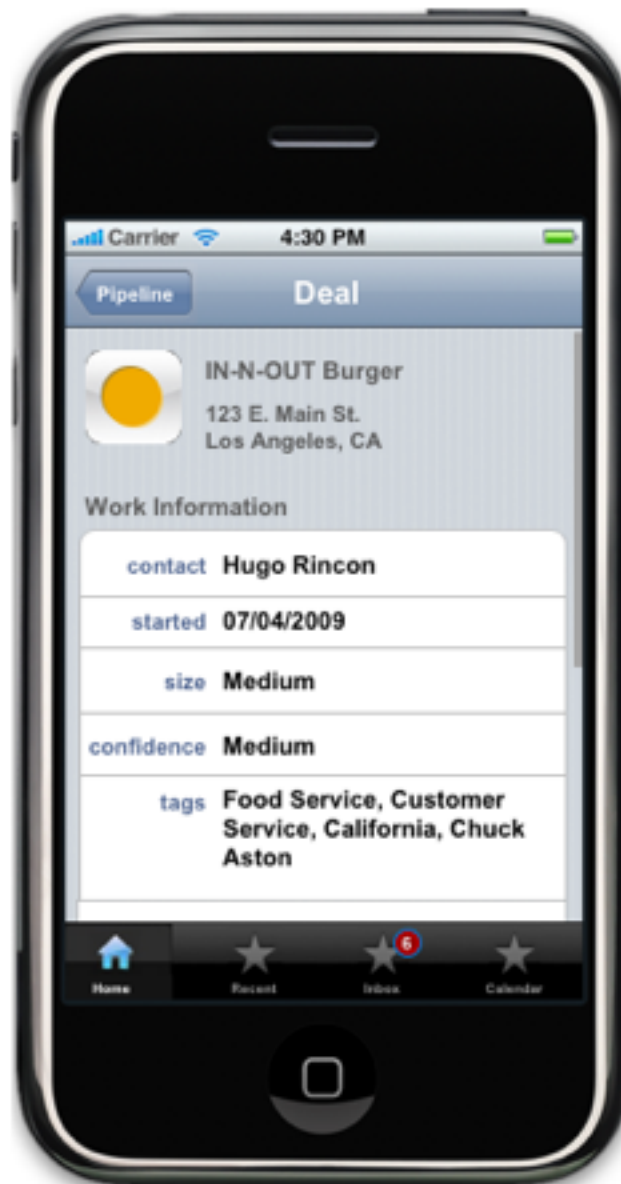
In the mobile version, the same model is used.

Users edit their deal status on the gameboard with gestures.

This is the deal inspector.

Users can also model their bonus compensation by manipulating variables such as closing date and price.

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END