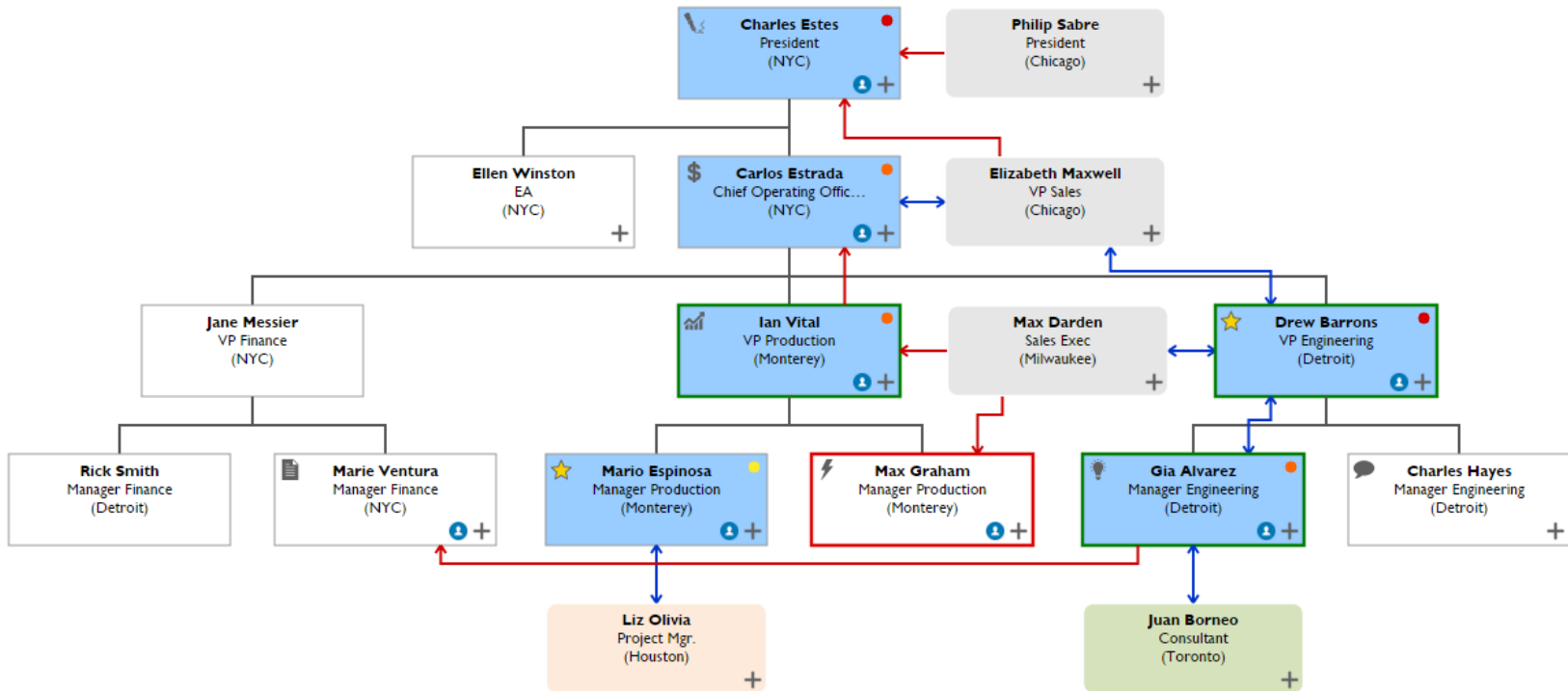


HELP

Player Map X-Ray (PMX) enables you to easily build & manage Player Maps – we suggest you invest 10 minutes now to review Help to save you time later.



Player Map helps you instantly see the people making the decisions and the bridges you need to cross to get to them – an x-ray of precisely how to win.

PLAYER MAP X-RAY

- [Tips & Features](#)

(Page 3)

- [Build & Code](#)

(Page 4)

- [Client Org](#)

(Page 5)

- [Our Team](#)

(Page 6)

- [Home Screen](#)

- [Folder Actions](#)

- [Edit the Folder](#)

- [Share a Folder](#)

(Page 7)

- [Follow a Player Map](#)

- [Folder Info / Remove](#)

- [Player Map Actions](#)

- [Move a Player Map](#)

- [Copy your Contacts](#)

(Page 8)

- [Folders, Quali-5, Share, Edit](#)

(Page 9)

- [Bridges, Plan and IQ Tabs](#)


(Page 10)

Master [Tips & Features](#) and [Build & Code](#) and you will be set (note pages 7-10 simply drill-down on specific PMX topics)

Make sure to click [hyperlinks](#) for more info on using PMX

Remember that you are building Player Maps *not* org charts (i.e. map key Players and your bridges *not* formal structures)

Prefer to watch vs. read? – see [Fast Start](#) video (@ 11 min.)

Click  by page number to return to “Player Map it”

● Focus Player Map Size

- ✓ PMX is for Player Maps, @ **12 wide by 6 deep**, not GIANT org charts
 - * PM may go a bit larger depending on the layout, but we cannot guarantee results
 - * We advise building subset PMs by division, geography, etc. versus one GIANT one

● Create your Player Map

- ✓ 1. Add client first, 2. build top-down, 3. **bridge** [Our Team](#) to Players
 - * PMX draws via connections, so NO STANDALONE BOXES to avoid drawing errors

● Code your Player Map

- ✓ Use [FEWER symbols](#) to increase clarity & save time – “less is more”

● Build Bridges to key Players

- ✓ Click [Add Bridge](#), select Existing or Required, select person, add note

● Add Player LinkedIn® Profiles

- ✓ Add profile  button for 1-click access to [LinkedIn](#)® profile of Players

● Share Player Map in Folder

- ✓ Click [Share](#), enter e-mail of person(s) you authorize, click [Share Folder](#)

● Team Edit a Player Map

- ✓ [Team can edit PM](#): click [Edit](#), edit PM, PMX saves the prior version(s)

● Print your Player Map

- ✓ Click [Print...](#) under **Action** menu to print Player Map to printer or PDF

● Follow a Player Map

- ✓ Click [+Follow](#) to receive Messages update e-mails or Unfollow to stop

Use your Player Map for the following:

- ✓ Plan brainstorming
- ✓ Team collaboration
- ✓ Meeting briefing
- ✓ Executive update
- ✓ Support handoff

PM is great for global/strategic teams.

Player Maps are best focused on specific projects/pursuits not an entire company (i.e. build multiple PMs for each project).

* **Condense PM so @ 12 wide by 6 deep**
Create your Player Map, share with team.

Use PMX on Chrome, Edge or Safari – fast internet connection is advised.

* Note that you can access PMX on a cell phone or tablet

Step 1

1. Add key client Players*
2. Add notes on Players
3. Add LinkedIn® profiles

- * Players active on this project, not everyone on the org chart
- * Abbreviate titles to fit in box and enter the location or TBD

- ✓ Player Maps are NOT org charts, so zero in*
- ✓ **Limit dimensions to @ 12 wide by 6 deep**
- ✓ Code symbols for the project NOT company

- * We advise subset Player Maps for divisions, geographies, etc.

BUILD your client bridges

Add **notes** to key Players

- * Short comments on Players re: professional & personal insight

Player Map Title



Player

“Client, Project, Price, Date” to instantly see Player Maps

MAJOR influence on project direction and final decision



Business

interested in the business impact and ROI of the project



Champion

“wants you & only you to win”, working to help you win



Competitor

backing our competitor and hindering our ability to win



Contract

procurement person finalizes price, contract terms, etc.



Funds

administers funds or secures the funding for the project



Pen Power

one key person who must ultimately endorse the project



Solution

expert chartered with overseeing/designing specifications



Source

shares information, but may also share with competitors



Bridge: existing

identifies existing professional or personal relationship



Bridge: required

professional or personal relationship we must establish



Our Team

our people or partners actively engaged with the client



Note

insight on person, client [Player Plan](#), Our Team bridges



LinkedIn®

indicates hyperlink to that person’s profile on LinkedIn®

Positive Neutral Negative

shows preference and/or relationship strength re: you

High Medium Low

do the key Players exercise high, medium or low power

Step 2

1. Add team & partners*
2. Add bridges to Players
3. Add notes on bridges

- * Your team & partners who are actively working with Players
- * No standalone boxes to help ensure PMX formats correctly

- ✓ You want 1 or more Players & Champions
- ✓ **Apply other symbols to the 1 lead person**
- ✓ Fewer symbols help ensure visual clarity

- * PMX can format a maximum of 3 symbols on any person

SEE your key relationships

Add **notes** to your Bridges

- * Foundation for Existing and how will build for Required



Add Person

Person: in Organization
 on Our Team

Name: First: Last:

Search LinkedIn Contacts (Name and Keywords entered are used for the search)
 Keywords:

LinkedIn URL:

Reports to:

Title:

Location:

Contact: Phone: Email:

Player:

Power: None Low Medium High

Preference: Positive Neutral Negative

Roles: Business Champion Competitor
 Contract Funds Pen Power
 Solution Source

MBTI® Type:

HELP ? Cancel Add

Name Player Map: enter name of new Player Map
 ✓ Format: Client, Project Name, Price, Close Date
Legend: check to see Player Map symbols and text
AutoSave: Player Map autosaves every 30 seconds
 ✓ PMX will timeout if inactive for over 30 minutes

Action...: menu of the key actions for a Player Map
Save & Return: saves Player Map & returns Home
Return: click for Home page with your Player Maps
Q5: download, qualify project for insight and win rate

Person: click if in Organization or on Our Team
 (code Our Team in to highlight your company groups, consultants or partners)
Search: current Account or across SFDC Accounts
Name: enter name of person you want on org chart
 (best to start at the top and then work down)
LinkedIn®: click to search for LinkedIn® profile of Players (use company or city for keywords), copy URL from their LinkedIn® profile page, then paste it into the LinkedIn® URL field

Reports to: click the name of person they report to
Title: abbreviate title to @ 20 characters for instant visibility, or hover to view title showing "..."
Location: city/country (required to print, JPG, PDF)
Contact: enter phone and e-mail for quick access
Player: check if they are a strong influencer
Power: check the Player's degree of power
Preference: check if Player likes you or not
Roles: check role(s) on this specific project
MBTI®: select estimated type – see **MBTI® insight**

Player Plan: you may not know at first, but develop for key Players (see note format to left)
Note: insightful professional or personal information (e.g. ex-ABC, 25 years HR, likes soccer, etc.)
Add: click to add a person to your Player Map
Delete: click to delete person from Player Map
Cancel: click to cancel you adding or updating
Update: click to update information on person

Size: limit the PM dimensions to @ 12 wide by 6 deep to optimize PM building, viewing & printing
 ➤ PMX is designed to create PMs but not GIANT org charts, and while PMX may go a bit larger depending on the PM layout, we do not guarantee results
Building: start building client org top down (NO standalone boxes)
 ➤ Enter "TBD" vs. blank field or special characters to ensure PMX formats the PM correctly
Scope: multiple PMs for account not one PM for account is advised
 ➤ PMs for key projects/pursuits or divisions, geographies, etc. organized in your PMX **folders**

Slash: use slash "/" in titles *not* pipe "|" which is a code redirect
Roles: assign to a **primary person** for each role (some people have several roles, e.g. Champion and Funds), but we suggest a maximum of 3 symbols on any person – limit your role coding
Editing: to edit person on the Player Map...click their box, edit information and click Update; delete a person by clicking Delete

*** Client Note Player Plan**

Charles Estes
 President (NYC)

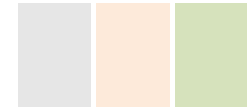
Notes Player Plan

What: Will be retiring in 3 years, and Estes wants to go out on top.

How: Our solution is proven, and Estes will not "lose sleep" working with us, plus we project a 2 year payback.

Person: click on **Our Team** to add your team (code in colors to highlight company groups, consultants or key partners)

Notes: insightful professional and personal info (e.g. ex-ABC, 25 years, likes soccer, etc.)



* Your color, your way

Our Team: move your team by using the **Placement** buttons, placing +/-1 level above or below to add bridges

Bridge your team to the key client Players to evolve a static org chart into a Player Map so you can see key relationships in one quick look!

Bridges are the **most important element** on a Player Map, so brainstorm your crucial bridges!

* Note on Our Team bridges

Bridges: create a bridge to person +/-1 level above or below, (a.) move person a bridge is from up or down (b.) copy person on same level as person you want to bridge to then add bridge

Home Screen

Folders & Player Maps		Create New Folder...	Create New Player Map...
Solo			
	Alpha	Project Name	Price, Close Date (06/05/2017 03:58 PM)
			Action...
	Vista	Project Name	Price, Close Date (06/05/2017 03:41 PM)
			Action...
	Acme		Action...
	Monique		Action...
	Top 10		Action...

Home: here you can create a new folder or Player Map, or select from your database of folders & Player Maps

Folders & Player Maps: lists your folders & Player Maps

✓ Maximum of 75 PMs and 25 folders – you can share 1 folder with 40 people, and unlimited folders can be shared with you

Create New Folder: create a folder to store or share PMs

Create New Player Map: opens PM menu to build new PM

Solo: your main folder, it contains all of your unfiled PMs

Shared with: notes folders you have shared with others

Shared by: notes folders shared with you by other users

Edit: see below re: changing folder name and description

Share: see below re: how to add team members to a folder

➤ Only current PMX users can access folders on PMX

Delete: when you delete a folder you created, all of your PMs are moved back to your Solo folder, all PMs for team members move back to their Solo folder

Edit: enables you to change the folder name and add a description of the contents of that particular folder

Share: authorize PMX users to access a folder by adding their PMX e-mail address (use commas to separate multiple emails) or pull their name from drop-down. An e-mail per below notifies people of new folders:

I have shared the "Alpha" folder with you on PLAYER MAP X-Ray. To access the folder, log into your PLAYER MAP X-Ray account. We can use this folder to share and collaborate on Player Maps.

➤ To stop sharing, click Share, uncheck name, click Update... – person is removed from folder, and any PMs they shared are moved back to their Solo folder

➤ To see who that folder is shared with, click Info under the Action menu for a list of people sharing the folder

✓ To share a folder, the person must be set up on PMX, so if they are not, remind them to please set PMX up

Folder Actions

Folders & Player Maps		Create New Folder...	Create New Player Map...
Solo			
	Alpha	Project Name	Price, Close Date (06/05/2017 03:58 PM)
			Action...
	Vista	Project Name	Price, Close Date (06/05/2017 03:41 PM)
			Action...
	Acme		Action...
	Monique		Action...
	Top 10		Action...

Edit...
 Share...
 Delete

Edit Folder

Edit Folder

Name:

Description:

Share Folder

Share Folder

Folder: Acme

Add people:

- Enter email address of other PMX users in the "Share With" box, use commas to separate multiple emails.
- You can select a PMX user that you currently share a folder with from the list below to add their email to the "Share With" box.

PMX users you are currently sharing folders with:

Share With:

Send email notifications (recommended)

Folder: Acme

Shared with:

- Below are the PMX users this folder is currently shared with. To remove users from sharing this folder, uncheck them and click "Update Folder Sharing".
- Liz Maxwell <liz.maxwell@apollo.com>
- Maria Sanchez <maria.sanchez@apollo.com>

Add people:

- Enter email address of other PMX users in the "Share With" box, use commas to separate multiple emails.
- You can select a PMX user that you currently share a folder with from the list below to add their email to the "Share With" box.

PMX users you are currently sharing folders with:

Share With:

Send email notifications (recommended)



Follow PM



+ Follow click to *receive* Plan emails for a shared Player Map

Following shows you *will* receive emails for shared Player Map

Unfollow click to *not* receive Plan emails on shared Player Map

Info: summarizes the folder name, description & owner (who created it), and who the folder is shared with


Remove: when you remove a folder shared with you by another person, all PMs you shared are moved back to your Solo folder, and you can no longer access the folder (i.e. unless authorized again)

Folder Info and Remove



Move to: move your PM to another folder you create or a folder that has been shared with you – folders you can move to are noted in a drop-down list

Save As: click to create an exact copy of a Player Map – PMX will label “- Rename”, which you can edit

Attach Q5: upload Q5 (or other document) to attach  to a Player Map, then click “Download Q5”

Print: generates a print view of the Player Map, select your configured printer, and print for your records
 ✓ PDF: use Print to save a Player Map to PDF
 ✓ If you should receive a print error message, reopen the Player Map, click on any person, click update, save the Player Map, then print

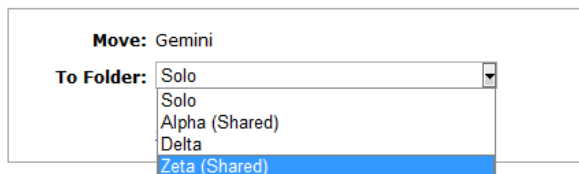
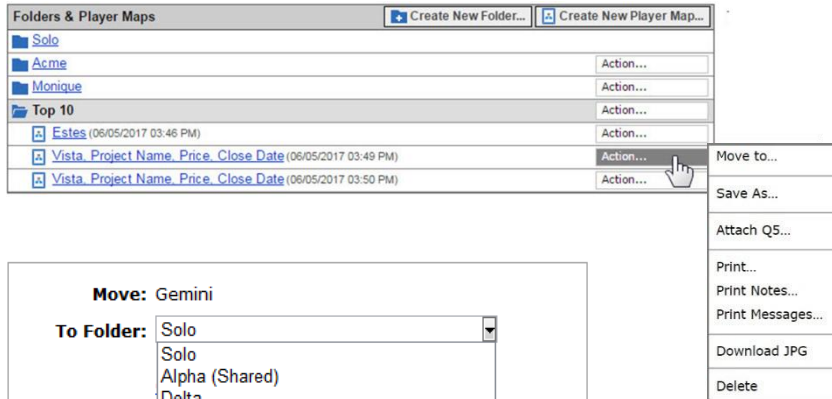
Print Notes: generates a print view of all player & bridge notes, select your configured printer, print

Print Messages: generates a print view of all Messages (listing from oldest note first to newest), select your configured printer and print

Download JPG: downloads Player Map in JPG format

Delete: deletes Player Map permanently from account

PM Actions



Move PM

Copy Contacts

The "Vista" Player Map is currently not associated with an existing Player Map, Salesforce opportunity or Salesforce account.
To add an association, select an option below:

- Opportunity**
Update this Player Map to use contacts from a specific Salesforce Opportunity
- Account**
Update this Player Map to use contacts from a specific Salesforce Account
- Existing Player Map**
Update this Player Map to use contacts from an existing Player Map

[Opportunity: [WinCo \(change\)](#)]
 [Account: [WinCo \(change\)](#)]
 [Existing PM: [Alpha \(change\)](#)]
 [Standalone Player Map [\(change\)](#)]

Vista

Copy Contacts: directly above the PM name, a note will indicate if the PM is a “Standalone PM” (not linked to another PM), or linked to “Existing PM” (linked to the named PM), “Account” or “Opportunity” (linked to another SFDC account or opportunity) – add people previously input into PMX or Salesforce from the drop-down list under “Person” (note their PM data is copied)



Folders, Share, Edit, Quali-5

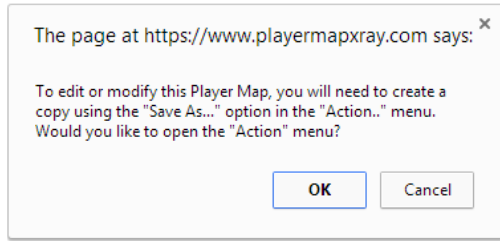
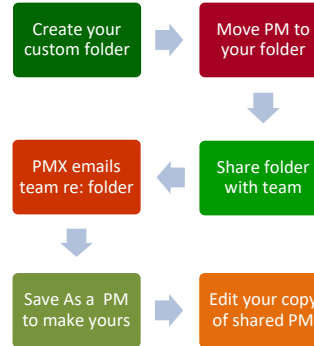
Working with your team on Player Maps

Custom Folders

Folders & Player Maps		Create New Folder...	Create New Player Map...
Solo			
Alpha	Project Name, Price, Close Date	(06/05/2017 03:58 PM)	Action...
Vista	Project Name, Price, Close Date	(06/05/2017 03:41 PM)	Action...
Acme			Action...
Monique			Action...
Top 10			Action...

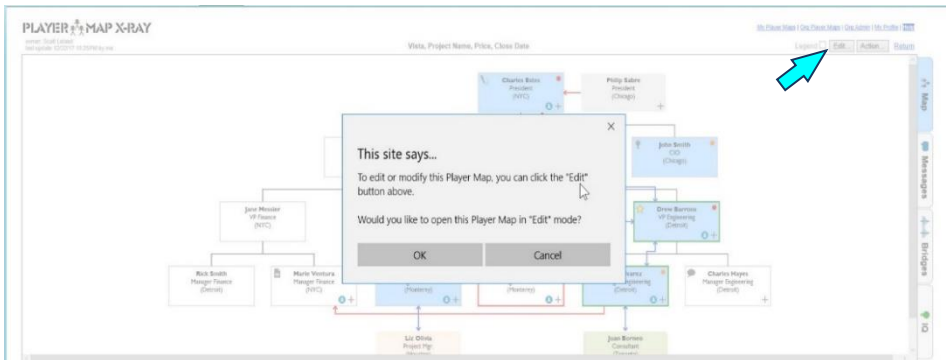
Organize Player Maps in up to 40 folders in your PMX filing cabinet: your Player Maps, key companies, your people, Top 10 pursuits, etc.

Player Map Sharing



Share Player Maps with your team by sharing folders with your team

Player Map Team Edit



Click "Edit" to edit a Player Map using **Team Edit** without sharing

Quali-5 Project

Client	Name, Project Name, Price, Close Date (match with Player Map title); www (URL website)	Team	Name (key people who are actively engaged on project); Name, Name
Scope	Text (one sentence overview of the project scope)		
Why	Business: Text (client business reason for doing this project)		Funding
	Technical: Text (client technical reason for doing this project)		Budgeted/ing
			Budget Owner
What	Value the client is looking for	Value we can deliver the client	Edge
	Quantity		
1. Name - Text	(Player name and the result this Player is looking for)	1. Text	(one sentence Value Proposition re: what we plan to deliver Player)
2. Name - Text		2. Text	
3. Name - Text		3. Text	
4. Name - Text		4. Text	
5. Name - Text		5. Text	
Story	Client, Project Name, Story (that illustrates the value that you will provide this client)	Client	Name (reference person client can't talk to); Name, Name
When	11/11/2X	Milestones	1. Text (note the Top 3 most recent milestones achieved to date re: this client); 2. Text, 3. Text
Who		Strengths	Weaknesses
		Rank	
1. Company	Text (summarize your strengths)	Text (summarize your weaknesses)	#1-3
2. Competitor	Text (summarize their strengths)	Text (summarize their weaknesses)	
3. Competitor	Text (summarize their strengths)	Text (summarize their weaknesses)	
How	Buying Steps Text (What steps will the client take to make a purchase for the project?)		
	Buying Steps Text (People, product, money or time concerns that could delay project?)		
Strategy	Text (note strategy as Push, Piece or Plus); Text (summarize your approach in one sentence on what we have to do to offset key competitors to WIN project)		
Tactics		Owner	Due
1	Text (key tactics to address the Top 3 critical issues with the client, against competitors, or within your company--be specific on what you need to do to WIN)	AA	11/11/2X
2	Text	initials	date
3	Text	who	this
4	Text (additional tactics to help advance the project--if you have more than these five tactics then simply add to your CRM, Outlook, etc. to ensure recorded)	drives	action
5	Text	this	issue

Quali-5 project to ensure you are prepared to win, **attach** to Player Map



Bridges, Plan and IQ Tabs

Using tabs to brainstorm Player Maps



Show Bridges on Player Map:

Required Bridges:

Philip Sabre → Charles Estes
Executive lunch to get to know each other.

Elizabeth Maxwell → Charles Estes
Lunch meeting to discuss account management.

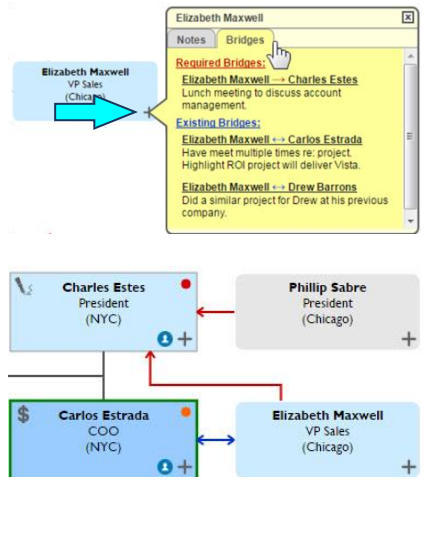
Ian Vital → Carlos Estrada
Ian does not know Carlos very well, so reinforce relationship via an executive dinner.

Max Darden → Max Graham
Keep Graham in front of us as a competitive threat

Max Darden → Ian Vital
Establish relationship, set up exec lunch.

Max Darden → Gia Alvarez
Have met several times, but need to get to know better.

Gia Alvarez → Marie Ventura
Pre-wire Marie that price will be higher than competitors, but ROI justifies.



Write your strategy, tactics and messages here...
(Max 500 chars) [Clear](#) [Post Message](#)

This Player Map does not have an associated plan.

Draft plan for the project related to this Player Map so you & your team can update and track on PMX.

Strategy: Push (power); Piece (part); Plus (unique).
Tactics: top actions, next steps and status updates.

PMX e-mails posts to people you have shared this Player Map with if they are *Following* on their PMX.

Check [Help](#) for more details.

IQ analyzes each Player Map in real-time and coaches you on ways you can improve your position with this opportunity.
- PMX Team

Players:

- Champion identified: Excellent that you have a Champion(s), but do not take them for granted, and make sure you can help them achieve their Player Plan
- Competitor identified: Could you convert them to your side? Can you minimize their negative impact? Should you consider going around them?

Bridges:

- Bridge to Source: Bridge to person who shares information, but may also share with competitors

Value:

- Player Plan Value: Good that you have a Player Plan, but double-check that you are delivering value that clearly answers "Why work with you?"
- Bridge Players re: Value Package: Bridge the Business, Funds & Pen Power Players to discuss the payback timeframe, long term cost of ownership and the ROI your value package will deliver
- Bridge Champion to Pen Power: Suggest your Champion bridges to Pen Power Player to share why they believe your value package is the best investment and why they should sign off on
- High Power Value: Make sure you address the value of the Players you gauge as High Power, as they will push for the value they want

Hover over the bridge and it is highlighted on the Player Map

Click the "Bridges" tab or "+" on "Our Team" to see bridges

Plan messages are e-mailed to people shared on Player Map

* Turn on or off via the check box above

Hover over IQ tip and person is highlighted on the Player Map

* Click IQ tab to see real-time coaching

With Player Map open, Print IQ to use as your "coaching script"

* Click "Action" button at top of page

If we can assist you with Player Map X-Ray please ping us at pmx@playermap.com or 1.414.921.2550



Scott Leland



www.playermap.com