

## Open Player Map in PMX

# PLAYER MAP X-RAY

[My Player Maps](#) | [Org Player Maps](#) | [Org Admin](#) | [My Profile](#) | [Help](#)

Folders & Player Maps		<a href="#">Create New Folder...</a>	<a href="#">Create New Player Map...</a>
Solo			
Vista_Project 1, \$ TBD, Date TBD (06/11/2017 08:47 AM)			Action...
Vista_Project 2, \$2.5M, 11/17 (06/08/2017 12:24 PM)			Action...
Leland Q3 2017	Shared with 2 others		Action...
Player Maps			Action...

### Tips ::

[Share Player Maps with your team](#)

Add people from Multiple Accounts

Use PMX "IQ" Real-time Coaching

### Latest News ::

[NEW Account & Opportunity Search](#)

[About](#) | [Contact](#)

## Click Standalone Player Map ([change](#)) to link to SFDC

# PLAYER MAP X-RAY

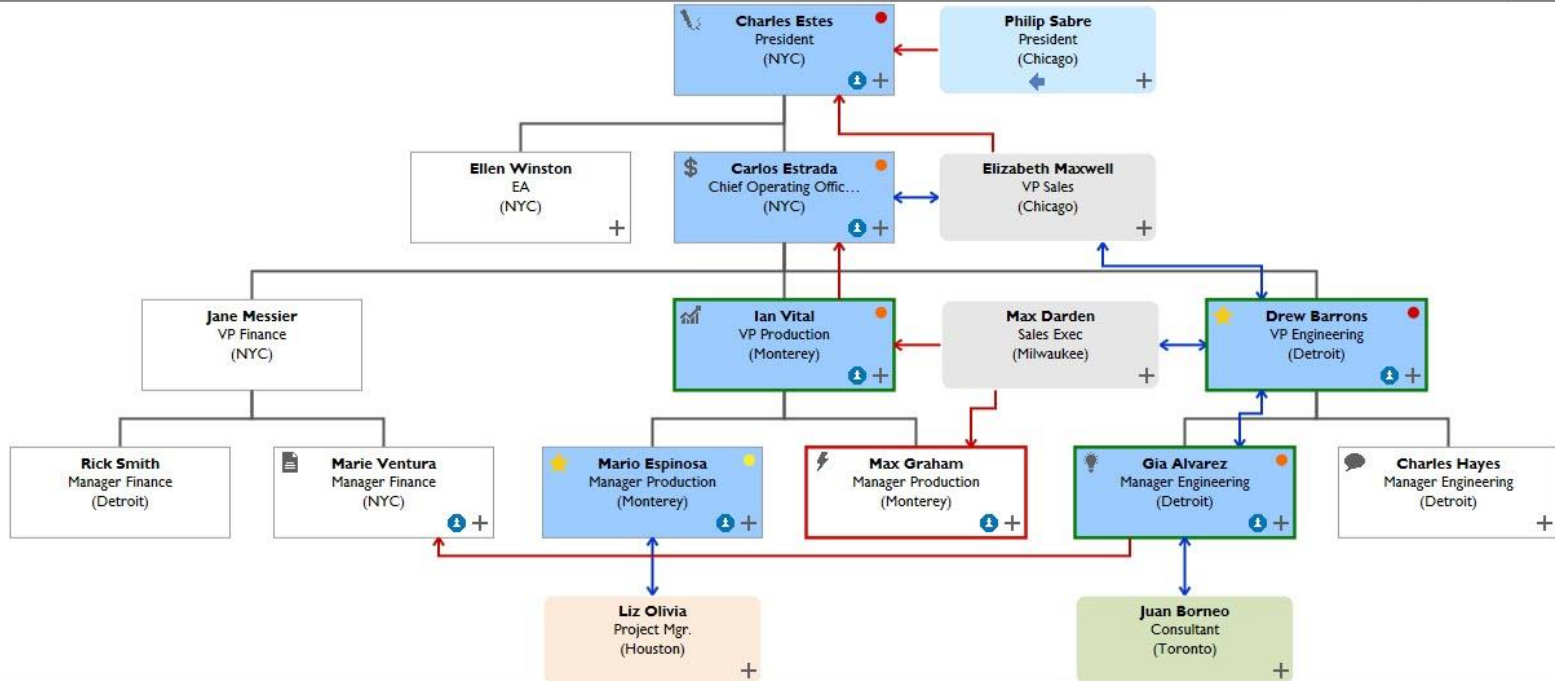
Add Person saved on 06/11/17 10:20AM

Standalone Player Map [change](#)


[My Player Maps](#) | [Org Player Maps](#) | [Org Admin](#) | [My Profile](#) | [Help](#)

Vista, Project Name, Price, Close Date - rename

Legend  Action... Save & Return Return



## Select Account or Opportunity




The "Vista, Project Name, Price, Close Date - Rename" Player Map is currently not associated with an existing Player Map, Salesforce opportunity or Salesforce account.

**To add an association, select an option below:**

- **Account**  
Update this Player Map to use contacts from a specific Salesforce Account
- **Opportunity**  
Update this Player Map to use contacts from a specific Salesforce Opportunity that is a subset of an Account
- **Existing Player Map**  
Update this Player Map to use contacts from an existing Player Map
- **Standalone**  
Update this Player Map to be a standalone Player Map without access to contacts in an existing Player Map, Salesforce opportunity or Salesforce account

[Cancel](#)

## Choose Account or Opportunity



Select the Account to associate the "Vista, Project Name, Price, Close Date - Rename" Player Map with:

Search Accounts:

Limit to accounts that I own

**My Accounts:**

Alpha — San Francisco, USA  
Beta — Zurich, Switzerland  
Vista — New York, United States

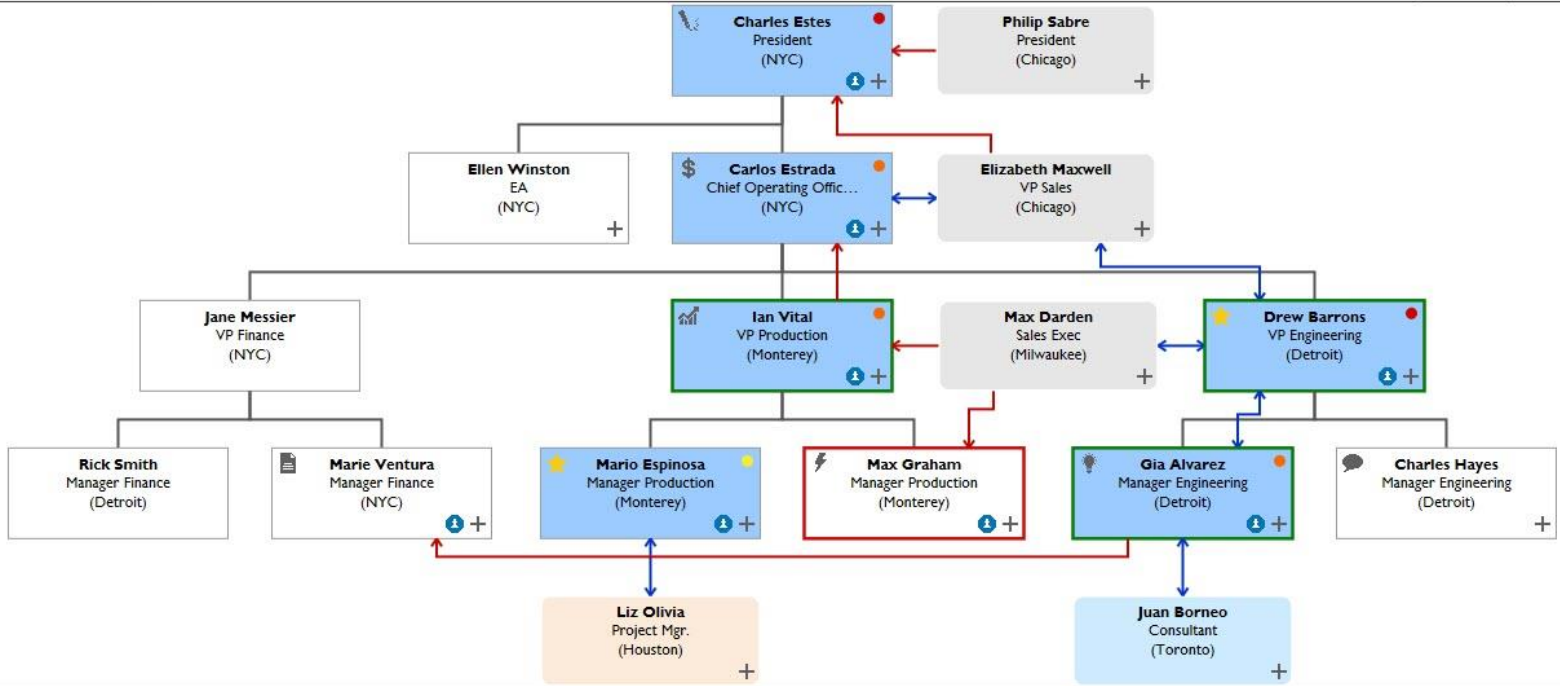
[Cancel](#) [< Back](#)

Account or Opportunity the Player Map is linked to in SFDC

Add Person saved on D6/11/17 11:14AM

Vista, Project [View, Price, Close Date]

Legend  Action... Save & Return [Return](#)



Select person if exist in SFDC  
(search by name or Show All)

PLAYER MAP X-RAY Account: Vista [change] My Player Maps | Create Player Maps | Create Admin | My Profile | Help

Add Person saved on 06/11/17 11:14AM Vista, Project Name, Price, Close Date - Rename Legend Action... Save & Return Return

**Edit Person**

Person:  in Organization  on Our Team

Search SF Contacts:  in associated Account  across all Accounts

11 Contacts found...

Name: Carlos Estrada (COO) - NYC  
Charles Estes (CEO) - NYC  
Reports to: Charles Hayes (Manager Engineering) - Detroit  
Title: Drew Barrons (VP Engineering) - NYC  
Location: Ellen Winston (EA) - NYC  
Contact: Gia Alvarez (Manager Engineering) - Monterey  
Jane Messier (VP Finance) - NYC  
Marie Ventura (Manager Finance) - NYC  
Mario Espinosa (Engineer Networking) - Monterey  
Player: Max Graham (Manager Production) - Monterey  
Rick Smith (Manager Finance) - Detroit  
Power:  None  Low  Medium  High

Preference:  Positive  Neutral  Negative

Roles:  Business  Champion  Competitor  
 Contract  Funds  Pen Power  
 Solution  Source

Player Plan:  
What do they want to achieve professionally and personally via the project?  
Will be retiring in 3 years, and Estes wants to go out on top.  
How does your value clearly show "Why work with you?" vs competitors?  
Our solution is proven, and Estes will not "lose sleep" working with us, plus we project a 2 year payback.

Notes:  
Turned around the company.  
Goal is Vista 1 in industry.  
Formula 1 fan.

Bridges: Add Bridge Add notes on bridges to clarify the foundation for your existing bridges or how you will build required bridges.

DELETE Cancel Update

Click "Update" to link to SFDC

PLAYER MAP X-RAY Account: Vista [change] My Player Maps | Create Player Maps | Create Admin | My Profile | Help

Add Person saved on 06/11/17 11:14AM Vista, Project Name, Price, Close Date - Rename Legend Action... Save & Return Return

**Edit Person**

This person is an existing contact in Salesforce; changes to their Name, Title, Phone or Email will get updated in Salesforce.

Person:  in Organization  on Our Team

Search SF Contacts:  in associated Account  across all Accounts

11 Contacts found...

Name: First: Charles Last: Estes  
Reports to:   
Title: CEO  
Location: NYC  
Contact: Phone: 212-555-1111  
Email: cestes@vista.com  
Player:   
Power:  None  Low  Medium  High

Preference:  Positive  Neutral  Negative

Roles:  Business  Champion  Competitor  
 Contract  Funds  Pen Power  
 Solution  Source

Player Plan:  
What do they want to achieve professionally and personally via the project?  
Will be retiring in 3 years, and Estes wants to go out on top.  
How does your value clearly show "Why work with you?" vs competitors?  
Our solution is proven, and Estes will not "lose sleep" working with us, plus we project a 2 year payback.

Notes:  
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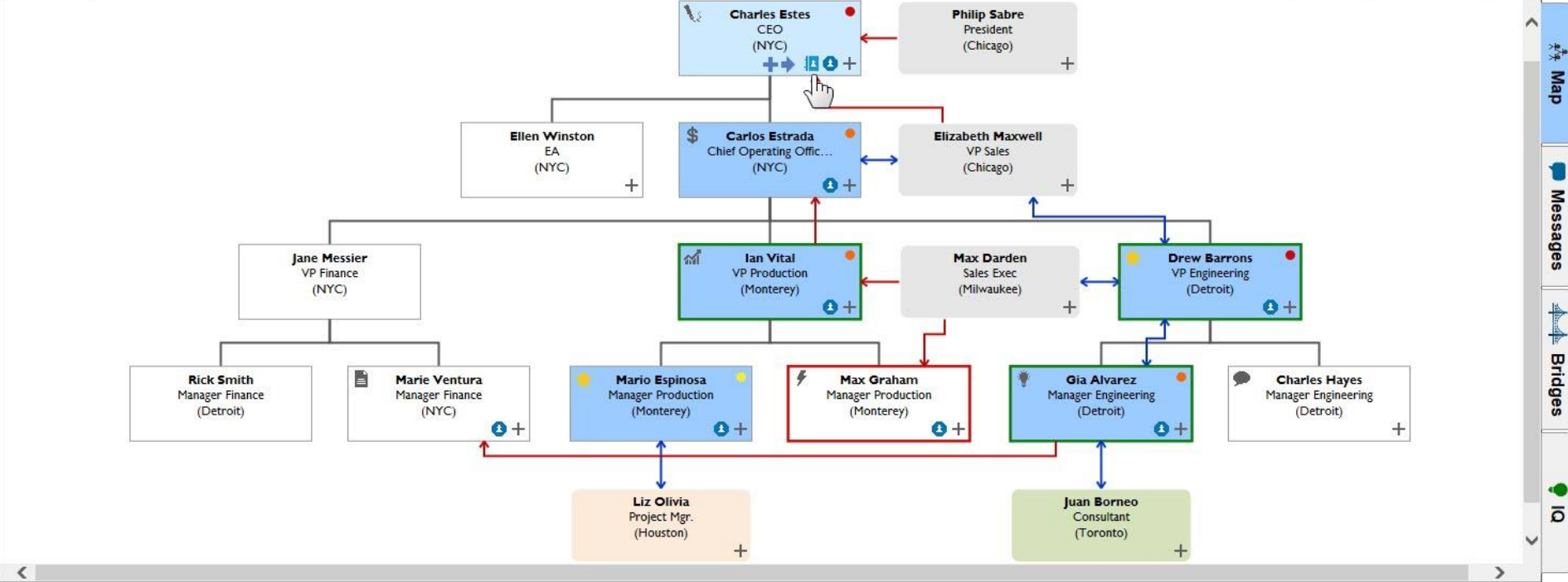
DELETE Cancel Update

Linked to SFDC per Symbol

Add Person saved on 06/11/17 11:14AM

Vista, Project Name, Price, Close Date

Legend  Action... Save & Return Return



Map  
Messages  
Bridges  
IQ

## Create contact if not in SFDC

Account: Vista [change] My Player Maps | Orq Player Maps | Orq Admin | My Profile | Help

Add Person saved on 06/11/17 11:27AM Vista, Project Name, Price, Close Date Legend Action... Save & Return Return

**Add Person**

Person:  in Organization  On Our Team  as SF Contact

Search SF Contacts:  in associated Account  across all Accounts  Show All

Name: First: John Last: Smith

reports to: Charles Estes (CEO)

Title: CIO

Location: NYC

Contact: Phone: 212-555-1111 Email: jsmith@vista.com

Player:

Power:  None  Low  Medium  High

Preference:  Positive  Neutral  Negative

Roles:  Business  Champion  Competitor  Contract  Funds  Pen Power  Solution  Source

Player Plan: What do they want to achieve professionally and personally via the project? How does your value clearly show "Why work with you?" vs competitors?

Notes:

Bridges: Add Bridge Add notes on bridges to clarify the foundation for your existing bridges or how you will build required bridges.

Cancel Add

## New Contact linked to SFDC

Account: Vista [change] My Player Maps | Orq Player Maps | Orq Admin | My Profile | Help

Add Person saved on 06/11/17 11:30AM Vista, Project Name, Price, Close Date Legend Action... Save & Return Return

Charles Estes CEO (NYC)

Philip Sabre President (Chicago)

Ellen Winston EA (NYC)

Carlos Estrada Chief Operating Officer (NYC)

Elizabeth Maxwell VP Sales (Chicago)

John Smith CIO (NYC)