



Kraytix
FRONTRUNNER

Kraytix FrontRunner Scorecard Guide

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Document Version

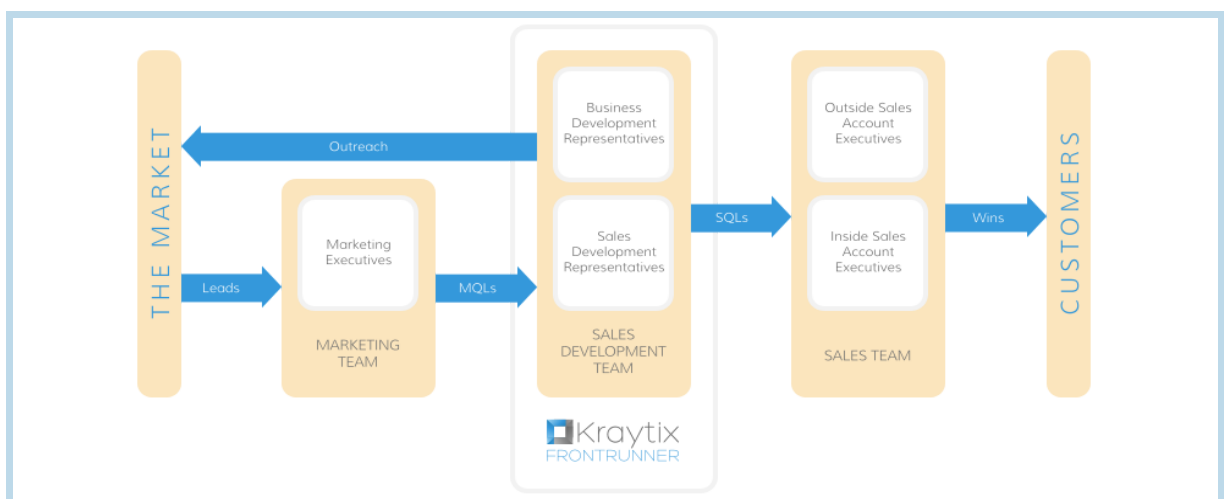
This document is compatible with Kraytix FrontRunner Version 1.11.

1 About FrontRunner

FrontRunner is a 100% native Salesforce® app that helps sales development teams consistently generate higher quality leads. It uses a structured approach to lead qualification to build a more accurate pipeline, improve close rates and increase revenue. With FrontRunner, companies can:

1. Build a library of Template Scorecards tailored to its products or services and to its ideal customer profiles. FrontRunner comes preconfigured with BANT, MAN and SCOTSMAN sample Template Scorecards that can be used as-is or cloned and modified. New Template Scorecards can also be created from scratch.
2. Create Snapshot Scorecards to see current, historical and trended levels of qualification using FrontRunner's red/amber/green traffic light views. Use Salesforce's standard and custom reports to analyse lead qualification performance.
3. Integrate FrontRunner with other apps; for example, automatically attach a Scorecard to a Lead when a marketing automation app nurtures a lead to a predefined score or convert Lead to an Opportunity when the lead becomes qualified.

FrontRunner helps sales development teams to convert leads received from the marketing team into qualified leads to pass over to the sales team. The result is a more effective sales development team, a sales team that wastes less time on poorly qualified leads and a better customer experience.



Companies define their ideal customer profile and qualification criteria in FrontRunner, enabling sales development and business development representatives to have a dialogue with a prospect to determine the level of fit between the prospect's needs and the products/services offered by the business.

FrontRunner provides a repeatable, scalable workflow that can be measured and improved to support performance management, on-boarding, coaching, demonstrable team ROI and more accurate pipelines and forecasts.

2 Introduction

FrontRunner Scorecards can be attached to Salesforce Leads and Opportunities so that you can easily track sales qualification against an ideal customer profile and qualification criteria.

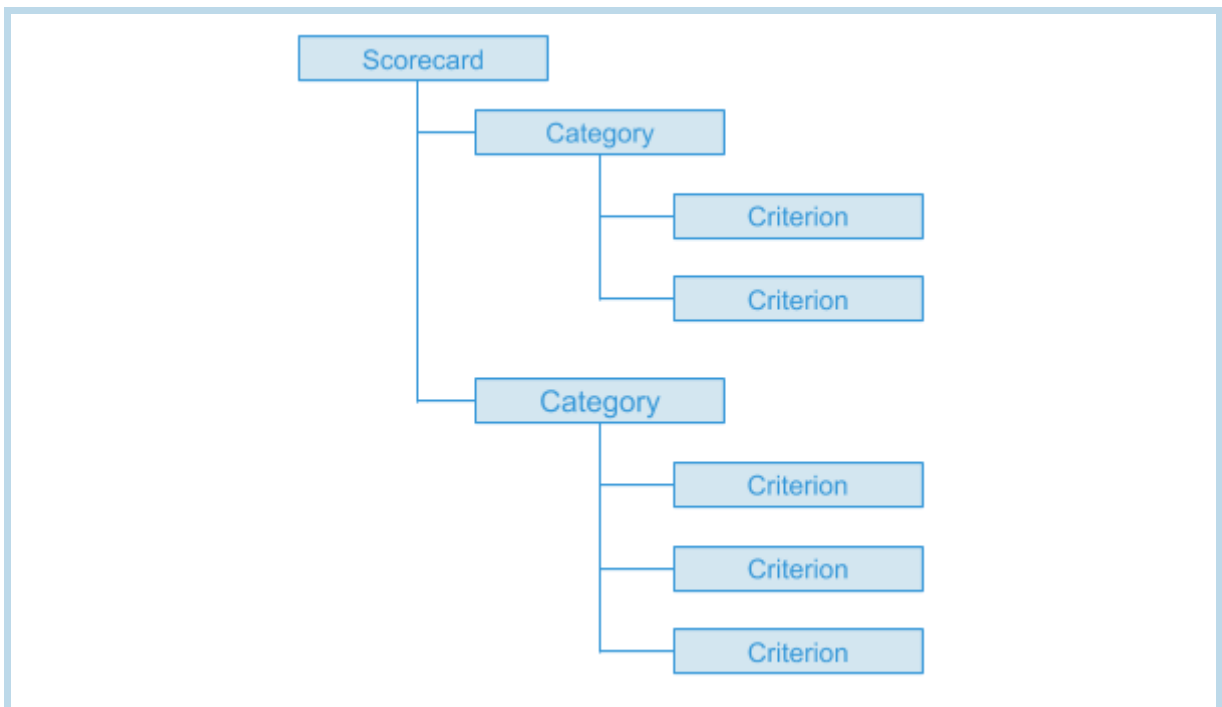


Note: For an introduction to sales development and lead qualification, please read the *Kraytix FrontRunner - Introduction to Lead Qualification*, which can be found on the Kraytix website (<http://www.kraytix.com/>) or on the Kraytix FrontRunner Salesforce® AppExchange® listing (<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DvLDWUA3>).

This document describes how FrontRunner Scorecards are structured and the supporting roles that Template Scorecards and Snapshot Scorecards play.

3 Scorecards, Categories and Criteria

FrontRunner Scorecards use a Scorecard→Category→Criteria hierarchical structure so that groups of related Criteria can be organised into Categories. Each Scorecard can have multiple Categories and each Category can have multiple Criteria as illustrated below.



For example, a FrontRunner Scorecard that implements the BANT lead qualification framework might use the following Categories and Criteria:

Categories	Criteria
Budget	<ul style="list-style-type: none"> Does the customer have a budget for this opportunity? Is the budget sufficient to procure our solution?
Authority	<ul style="list-style-type: none"> Is the customer's authorisation process understood? Do we know who has the authority to make the purchase?
Need	<ul style="list-style-type: none"> Do we know why the customer needs to make this purchase?
Timing	<ul style="list-style-type: none"> Is the customer's buying timeline understood?

4 Criterion Outcomes and Scores

Each Criterion can have multiple Criterion Outcomes, each with a different Criterion Score. Think of a Criterion as a question that you need your prospect to answer and Criterion Outcomes are the possible answers to those questions. For example, in answer to the 'Authority' Category's Criterion 'Do we know who has the authority to make the purchase?', potential Criterion Outcomes might be:

Criterion Outcome	Criterion Score
Yes and we have a good relationship with the budget holder	10
Yes but we have no relationship with the budget holder	6
No and customer will not share the budget holder's details with us	-5

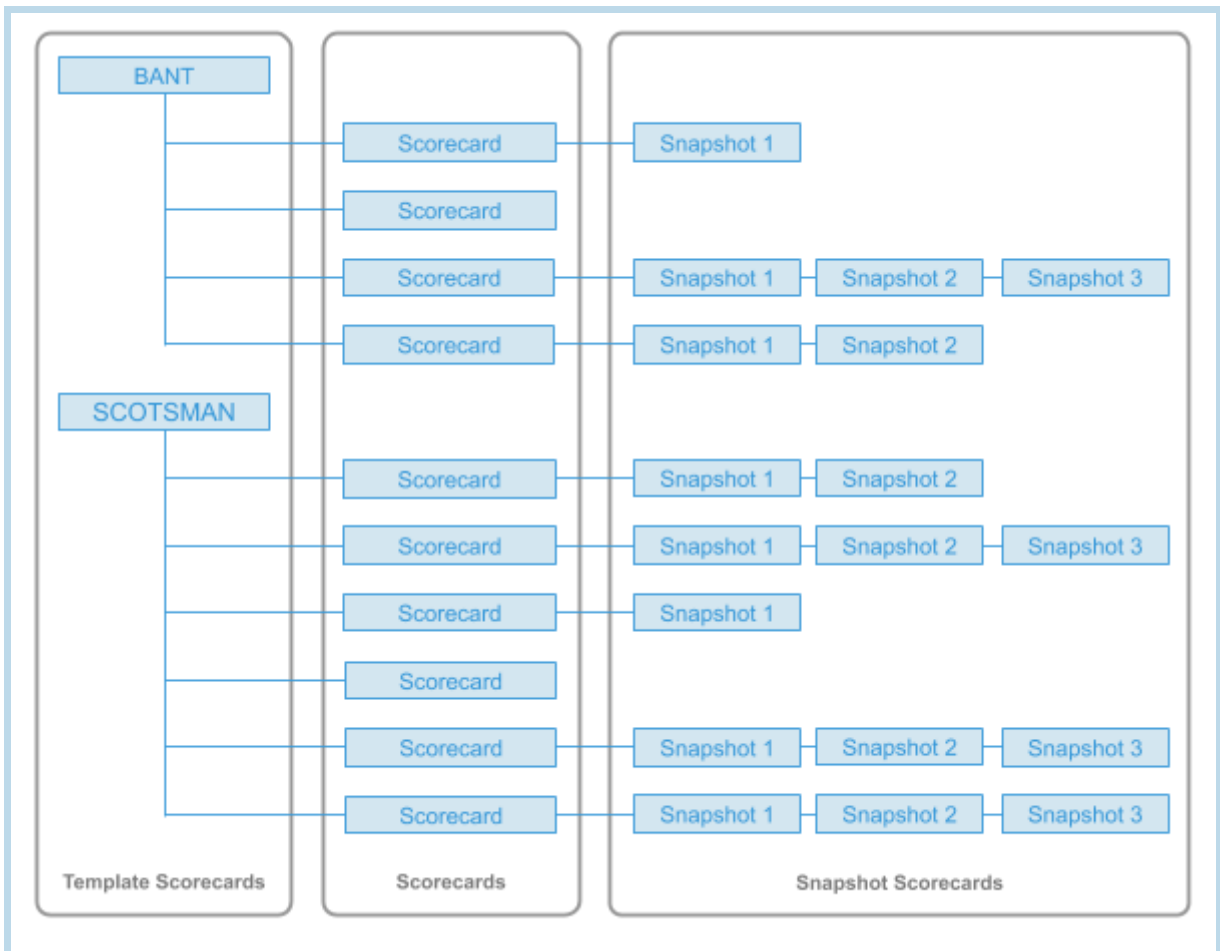
The Criterion Scores for all Criteria in each Category are added together to give a Category Score and all Category Scores are added together to give an overall Scorecard Score. As you populate your FrontRunner Scorecard you will see the Criterion, Category and Scorecard Scores change. The higher the scores, the better qualified your Lead or Opportunity is!

5 Template and Snapshot Scorecards

Scorecards are created from Template Scorecards that define the structure and properties of a Scorecard, including its Categories, Criteria, Criterion Outcomes and the score thresholds that cause the Scorecard to change from red to amber to green. FrontRunner uses traffic light colours to give a visual indication of how well qualified a Lead or Opportunity is.

Your FrontRunner Administrator will build a library of Template Scorecards that you can create Scorecards from. Although it is possible to have a single Template Scorecard, most companies will have multiple Template Scorecards that cater for various situations such as different products or services, stages in the sales cycle or channels to market.

The following diagram shows the relationship between Template Scorecards, Scorecards and Snapshot Scorecards.

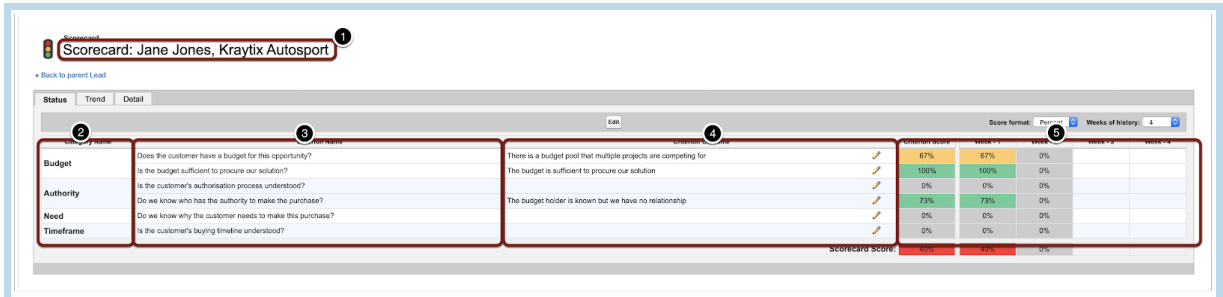


Snapshot Scorecards help you track how a Scorecard is trending over time. Snapshot Scorecards can be created at any time; however, most sales development teams will snapshot their Scorecards at the end of the week or just before their weekly team status meeting. As you populate your Scorecard with Criterion Outcomes and you snapshot your Scorecards, you will be able to see how the scores change over time and how the Scorecard changes from predominantly red to amber and hopefully to green.

Note that the hierarchical structure of Template Scorecards and Snapshot Scorecards is the same as the hierarchical structure of Scorecards. For example, a Scorecard’s Criterion is created from a Template Scorecard’s corresponding Template Criterion and a Snapshot Scorecard’s Snapshot Criterion is created from the Scorecard’s corresponding Criterion.

6 Example FrontRunner Scorecard

To pull everything together, below is a screenshot of a FrontRunner Scorecard that is attached to a Salesforce® Lead and implements the BANT lead qualification framework:



The Scorecard has been created from a BANT Template Scorecard and consists of the following:

Item	Field	Value
1	Scorecard Name	A meaningful name for the Scorecard so that it can be identified in a list of Scorecards.
2	Categories	A grouping of related Criteria, such as those associated with 'Authority'.
3	Criteria	Individual Criteria, or questions, that must be answered.
4	Criterion Outcomes	The answers to the Criteria questions.
5	Snapshot Scorecards	Snapshot Scorecards for the preceding weeks to show how a Scorecard is evolving over time.

7 Summary

FrontRunner Scorecards provide a simple way to manage Salesforce® Lead and Opportunity qualification. FrontRunner Administrators build a library of Template Scorecards from which FrontRunner Users can create Scorecards and attach them to Leads and Opportunities. Snapshot Scorecards allow FrontRunner Users to track the level of qualification of Leads and Opportunities over time. FrontRunner's Scorecard→Category→Criteria hierarchical structure and traffic light scoring allow a Scorecard's status to be easily viewed and understood by anyone in your company.



Note: For further information about building a library of Template Scorecards, please refer to the *Kraytix FrontRunner - Administration Guide*. To learn how to create and use Scorecards, please refer to the *Kraytix FrontRunner - User Guide*. Both guides can both be found on the Kraytix website (<http://www.kraytix.com/>) or on the Kraytix FrontRunner Salesforce® AppExchange® listing (<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DvLDWUA3>).