

Manage Resources

- o Mouse over **Admin Access** and click on **Application Manager**
- o Click on **Manage Resources** and review the pre-formatted Resources below **Add New Resource**.

The screenshot shows the 'Application Manager' interface. At the top, there is a navigation menu with items like Home, About, Testimonials, FAQs, Contact, My Plan, Coach Console, Admin Access, and Logout. The 'Admin Access' dropdown menu is open, showing 'Application Manager', 'Test Page', and 'Quick Links'. Below the navigation, there are several tabs: 'Backup Databases', 'Manage Resources' (highlighted in red), 'Manage Uploads', 'Manage Users', and 'Manage News Board'. A message box says: 'Use the "Master List" tab to add resources to the Master List. Then use the "Intersection Points" tab to add resources to specific intersections.' Below this, there are two sub-tabs: 'Master List' (highlighted in red) and 'Intersection Points'. A note says: 'Double click on any line to edit the resource name, description and/or status box.' There is an 'Add New Resource' button. Below that is a table with three columns: 'Name', 'Description', and 'Status Box'. The table contains one row with the following data:

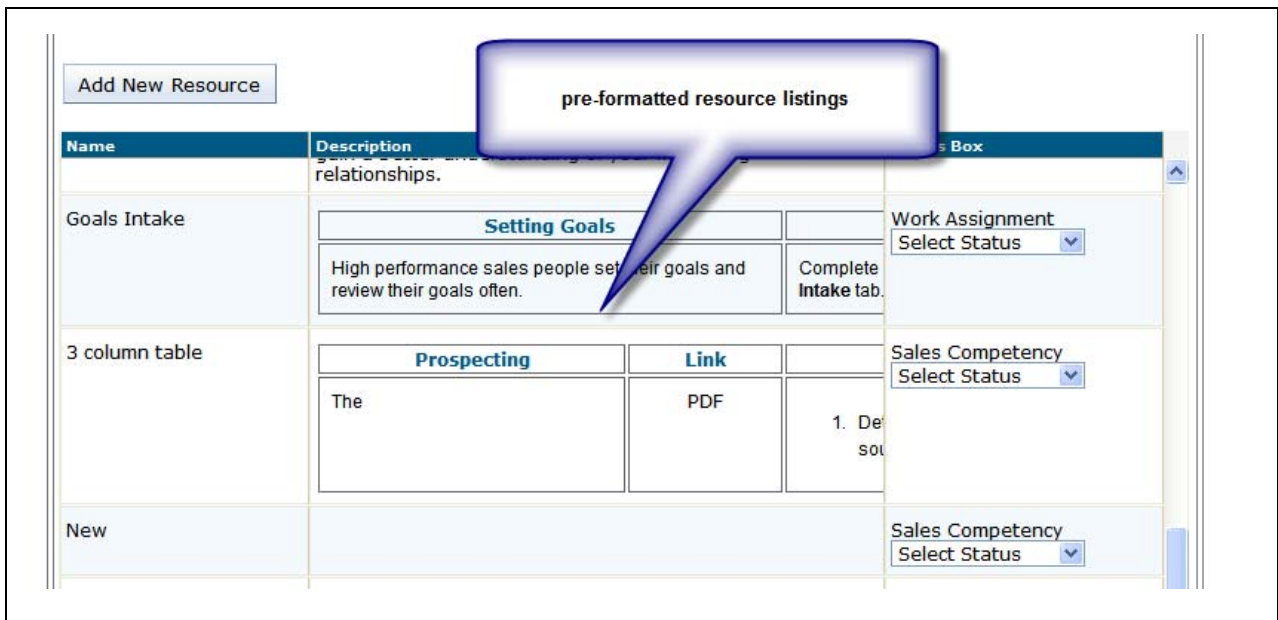
Name	Description	Status Box
Top Performance	Selecting and Developing Top Performance: Measure suitability (will the person perform) and eligibility (can the person perform).	Participation Available

- o See Examples

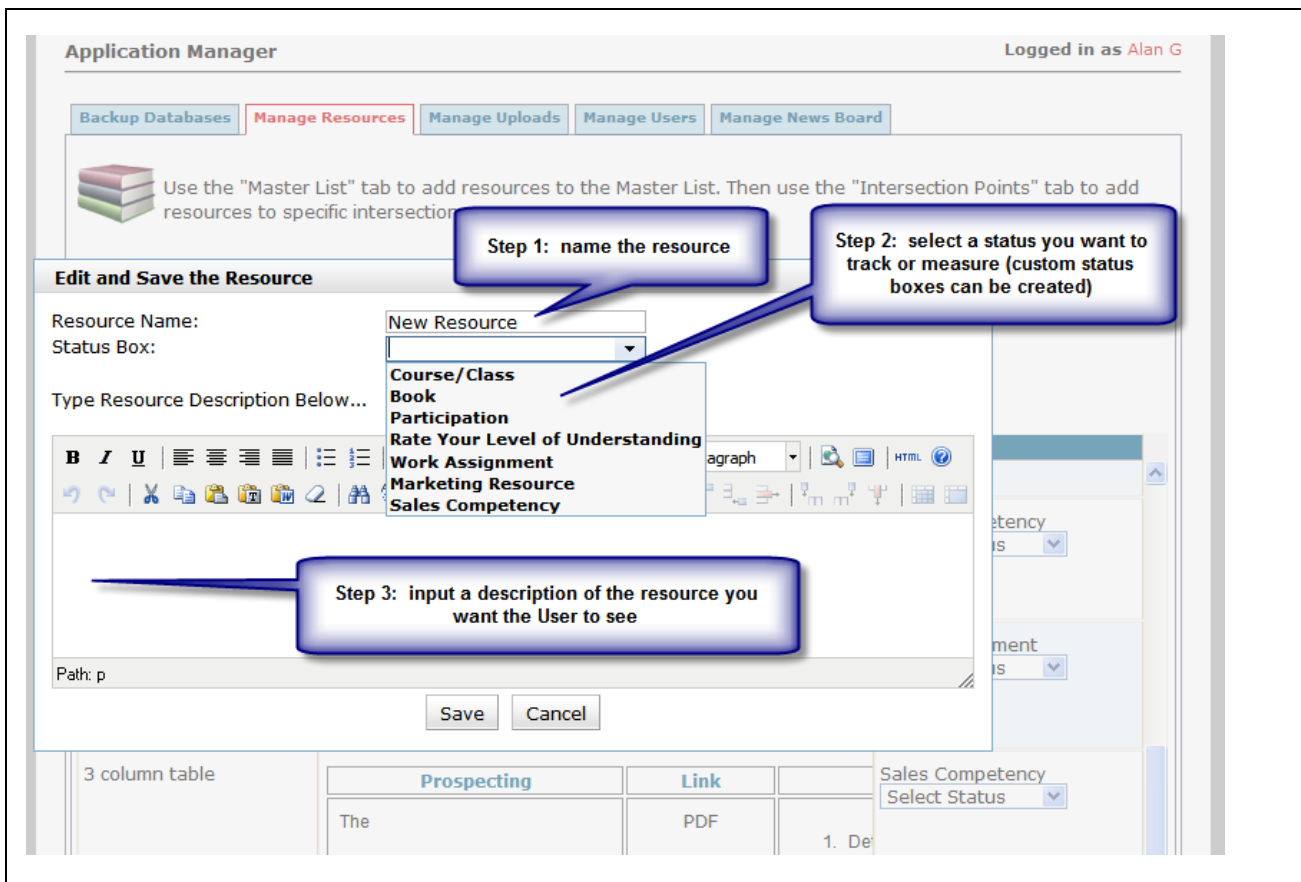
The screenshot shows the 'Examples of Resources' section. It features an 'Add New Resource' button and a callout box titled 'Examples of Resources' pointing to the table below. The table has three columns: 'Name', 'Description', and 'Status Box'. It contains three rows of pre-formatted resources:

Name	Description	Status Box
Top Performance	Selecting and Developing Top Performance : Measure suitability (will the person perform) and eligibility (can the person perform).	Competency Select Your Focus Select Status
Learning Resource	Add Your Learning Resource Here: Upload or link to targeted learning resources. These could be training materials, video or audio files, or other websites that will enhance and accelerate the learning process. Track progress through the Status drop down box.	Work Assignment Select Status
Marketing Resource	Add Your Sales and Marketing Resources Here Target sales and marketing resources to meet the needs of where the salesperson is in their sales skill development. Track their use of the materials.	Marketing Resource Select Status

- o Pre-formatted Resource descriptions on next page.



- o Add a New Resource – Step 1



- Add Resource into XY Framework Organizer

Application Manager Logged in as Alan G

Backup Databases **Manage Resources** Manage Uploads Manage Users Manage News Board

Use the "Master List" tab to view resources to specific intersection points. Then use the "Intersection Points" tab to add resources to specific intersection points.

Step 1: click on "Intersection Points"

Master List **Intersection Points**

- ▶ Right-click on any intersection point to view resources by category for that intersection.
- ▶ Right-click on one of the categories in the pop-up to add resources to that category for that intersection point.
- ▶ Right-click on any resource to remove it from that category for that intersection point.

Step 2: right click on the intersection point you want to place the resource

Step 3: click on "Add/Remove Resources"

Prospecting Plan/Deep Understanding of the Buyer
Add/Remove Resources
 Send Email to Intersection Point
 Send Email to Quadrant
 Send Email to Row
 Send Email to Column

Skills

Deep Understanding of the Buyer
 Know Customers Needs
 Personal Sales Process

+

+

You are here

+

Master List **Intersection Points**

- ▶ Right-click on any intersection point to view resources by category for that intersection.
- ▶ Right-click on one of the categories in the pop-up to add resources to that category for that intersection point.
- ▶ Right-click on any resource to remove it from that category for that intersection point.

After you right click on "Add/Remove Resources" this window pops up - "Resources for This Intersection"

Right Click on Learning Tools or Sales Success [these titles can be customized to fit your descriptions]

Resources for This Intersection

Learning Tools and
 Sales Success [these titles can be customized to fit your descriptions]

Add..
 Remove

here

Master List Intersection Points

- ▶ Right-click on any intersection point to view resources by category for that intersection.
- ▶ Right-click on one of the categories in the pop-up to add resources to that category for that intersection point.
- ▶ Right-click on any resource to remove it from that category.

When you click "Add" your list of resources you have created appear in the pop up window.

Click on the resource you want to "Add" to this intersection point.

Select the Resource You Want to Add

- Top Performance
- Learning Resource
- Marketing Resource
- Understanding an Organizational Chart
- The Role of Sales and Marketing
- Goals Intake
- 3 column table
- New
- Prospecting
- Greatest Salesman in the World

Skills

Deep Understanding of the Buyer

Know Customers Needs

Personal Sales Process

Fill the Pipeline

Prospect

Plan

Action

Referrals

Close

Master List Intersection Points

- ▶ Right-click on any intersection point to view resources by category for that intersection.
- ▶ Right-click on one of the categories in the pop-up to add resources to that category for that intersection point.
- ▶ Right-click on any resource to remove it from that category.

Organize your resources based upon the process or workflow.

You can edit the labels on the xy graph.

Skills

Week 4

Week 3

Week 2

Week 1

Work Kit 1

Work Kit 2

Work Kit 3

Work Kit 4

You started here

You are here

This is your NEXT GOAL