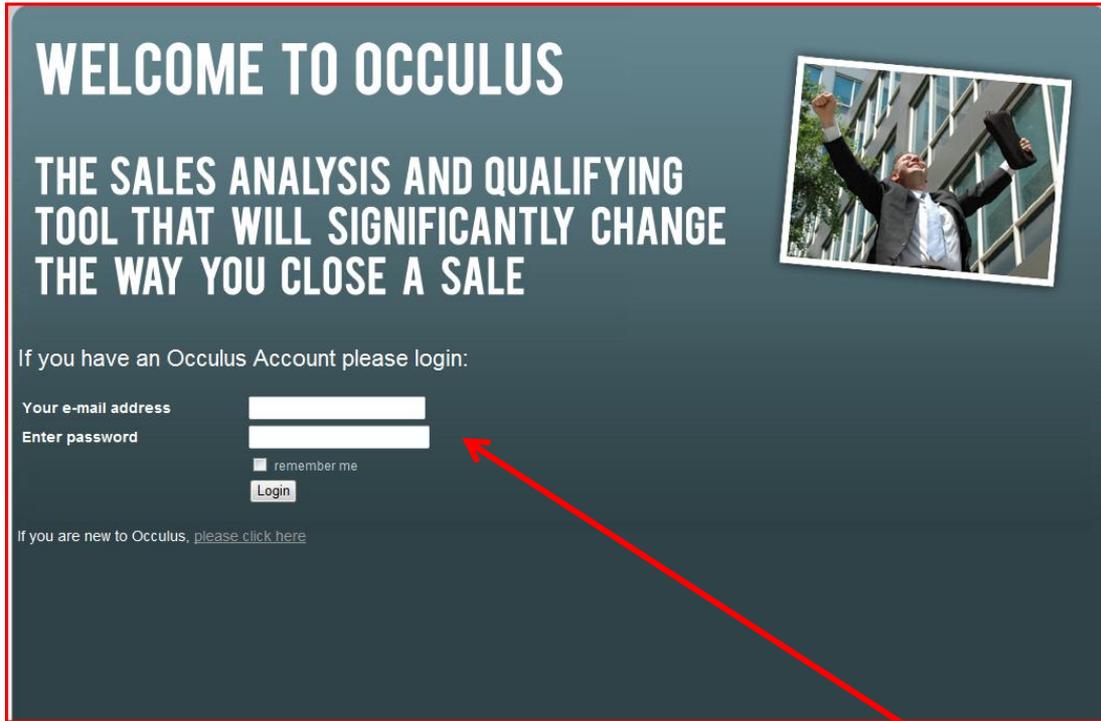




Sales Rep
Getting Started with Occulus

Support@OcculusSales.com



Go to:
www.OcculusSales.com

Figure 1: Oculus Home Page

Enter your email address and password; click "LOGIN" and your Dashboard will appear, Figure 2.

A temporary password has been assigned to you. It should be changed when you first log in – see Figure 3, Click ACCOUNT DETAILS, for instructions on how to change your password.

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DASHBOARD OPPORTUNITIES MESSAGES ACCOUNT DETAILS LOGOUT

DASHBOARD

The following opportunities have Close Dates that are past due:

Opportunity Name	Amount	Current Close Date	Last Updated
Firefly	R/c276,000	12-Apr-11	26-Apr-11
Positron	R/c1,000,000	15-Apr-11	27-Apr-11

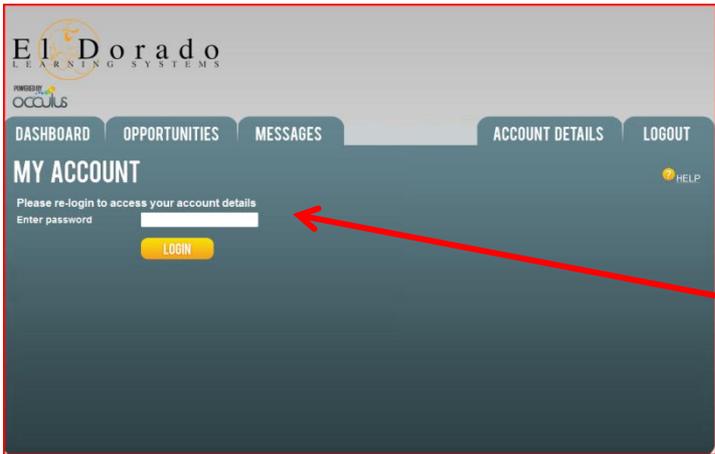
Figure 2: DASHBOARD

Dashboard shows any Opportunities that have a Close Dates that are past due.

Click on the Opportunity Name to see the details.

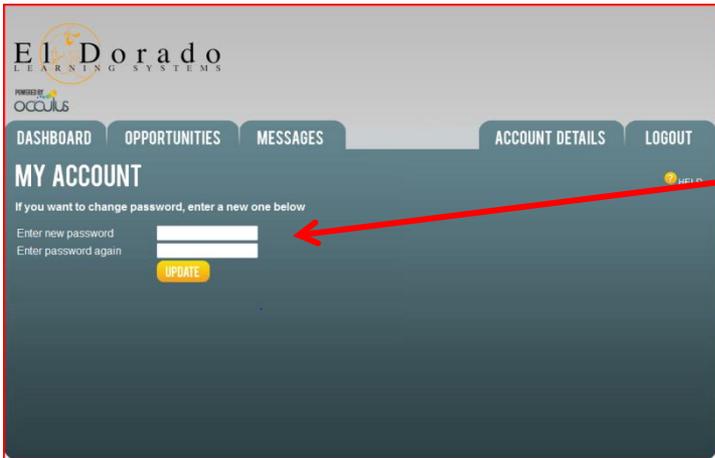
The Sales Rep can change the Close Date and any other information.

Changing your Password



Click ACCOUNT DETAILS:
Enter your password

Fig 3: Account Details



Enter your new Password
Confirm the Password

Click OPPORTUNITES

Fig 4: Change Password

OPPORTUNITIES List (Sales Rep)

Close Date Range: Start -> End
Selects ACTIVE or CLOSED Opportunities with a
Close Date in this date range.

Company Name	Opportunity Name	Type of Sale	Owner	Amount	Close Date	DoQ	Win	Log	CF	Close	Last Updated	
Smith & Jones	Firefly	Consulting	Denham, John	R/c276,000	13-May-11	86%	76%	75%	82%	27-Apr-11		VIEW NOTES
Lasiter Inc.	Six P2	Software	Denham, John	R/c300,000	31-May-11	65%	66%	64%	74%	27-Apr-11		VIEW NOTES
Longfellow Industries	Live Wire	Systems	Denham, John	R/c75,000	31-May-11	82%	79%	78%	58%	27-Apr-11		VIEW NOTES
TOTAL				R/c651,000								

The OPPORTUNITY LIST all the sales opportunities you are pursuing and gives the following summary Information:

- Company Name
- Opportunity Name
- Type of Sale
- Owner
- Opportunity Amount
- Close Date
- Degree of Qualification (“DoQ”)
- Probability of Winning (“Winning”)
- Confidence Factor (“CF”)
- Probability of Closing by the Close Date (“Closing”)
- Last Updated
- NOTES

Fig 5: OPPORTUNITIES

EXPORT the List to an Excel file for integration into other applications.

PRINT SUMMARY allows you to print the List.

Displays ACTIVE or CLOSED Opportunities.
Default = ACTIVE Opportunities

To add a new opportunity click “>>NEW OPPORTUNITY”

Lists all **ACTIVE** Opportunities with Close Dates between April 27 and May 31.

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DASHBOARD OPPORTUNITIES MESSAGES ACCOUNT DETAILS LOGOUT

OPPORTUNITIES

Close date between and
Show opportunities with status: >>

Company Name	Opportunity Name	Type of Sale	Owner	Amount	Close Date	DoQ	Winning	CF	Close	Last Updated	
Smith & Jones	Firefly	Consulting	Denham, John	R/c276,000	13-May-11	86%	76%	75%	62%	27-Apr-11	VIEW NOTES
Lasiter Inc.	Six P2	Software	Denham, John	R/c300,000	31-May-11	65%	68%	64%	74%	27-Apr-11	VIEW NOTES
Longfellow Industries	Wire	Systems	Denham, John	R/c75,000	31-May-11	82%	79%	78%	58%	27-Apr-11	VIEW NOTES
TOTAL				R/c651,000							

EXPORT TO EXCEL
PRINT SUMMARY

DoQ = Degree of qualification
CF = Confidence factor

>>NEW OPPORTUNITY

Can change the Close Date Range with the drop-down calendars

Can select ACTIVE Opportunities or CLOSED Opportunities

Click >> to refresh page

Can create a NOTE for each Opportunity

Fig 6: OPPORTUNITIES – con't

To review/update an ACTIVE Opportunity click on the Opportunity Name

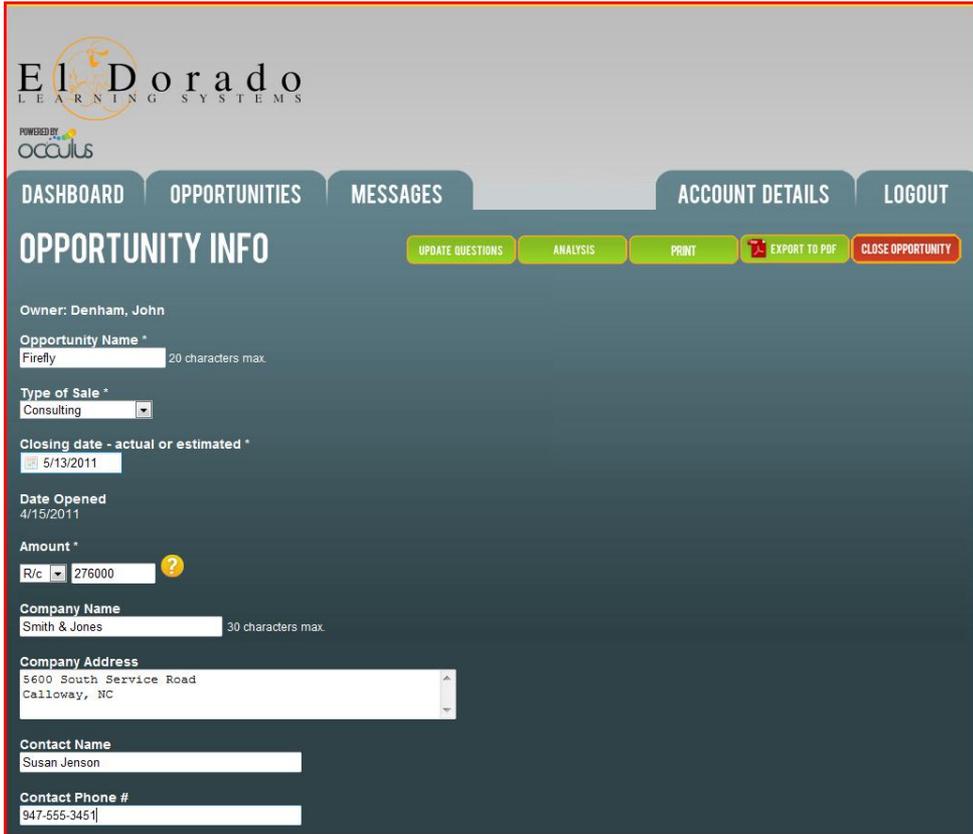
To analyze a new Opportunity, click NEW OPPORTUNITY

NOTE:

An **ACTIVE** Opportunity is one that you are **currently pursuing**.

A **CLOSED** Opportunity is one that you are **no longer pursuing**.

Click Opportunity = Firefly



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DASHBOARD OPPORTUNITIES MESSAGES ACCOUNT DETAILS LOGOUT

OPPORTUNITY INFO

UPDATE QUESTIONS ANALYSIS PRINT EXPORT TO PDF CLOSE OPPORTUNITY

Owner: Denham, John

Opportunity Name *
Firefly 20 characters max.

Type of Sale *
Consulting

Closing date - actual or estimated *
5/13/2011

Date Opened
4/15/2011

Amount *
R/c 276000 ?

Company Name
Smith & Jones 30 characters max.

Company Address
5600 South Service Road
Calloway, NC

Contact Name
Susan Jenson

Contact Phone #
947-555-3451

Opportunity = Firefly

Click UPDATE QUESTIONS to update your question answers.

Click ANALYSIS to review the analysis.

Click PRINT to print a copy of the Analysis

Click EXPORT TO PDF to create a PDF of the Analysis.

Click CLOSE OPPORTUNITY to close Firefly.

Note: Opportunities are **NOT** deleted they are closed.

Fig 7: Reviewing/Updating an ACTIVE Opportunity

Click CLOSE OPPORTUNITY

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DASHBOARD OPPORTUNITIES MESSAGES ACCOUNT DETAILS LOGOUT

Opportunity Name	Firefly
Reason for Closing	Closed - Won
Actual Close Date	5/13/2011
Amount	276000
Winning Vendor	Us
Comments	no comment

CLOSE OPPORTUNITY

Closing Opportunity = Firefly

1. Select the Reason for Closing from drop-down box; options are;
WON
LOST
CANCELLED
No Bid
2. Enter the Actual Close Date
3. Enter the Final Order Amount
4. Enter the Winning Vendor
5. Add any comments that are appropriate

This information will be displayed in the Opportunities page when CLOSED Opportunities are selected.

Fig 8: CLOSING an ACTIVE Opportunity

Note: Opportunities are NOT deleted they are closed.

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DASHBOARD OPPORTUNITIES MESSAGES ACCOUNT DETAILS LOGOUT

CLOSED OPPORTUNITIES

Close date between and
 Show opportunities with status >>

Company Name	Opportunity Name	Status	Type of Sale	Amount	Winning Vendor	Actual Close Date	Comment	
Smith & Jones	Firefly	Won	Consulting	R/c276,000	Us	22-Apr-11	no comment	VIEW NOTES
Montreal Inc.	MOO	Won	Outsourcing	R/c350,000	We won	15-Apr-11	First of many	VIEW NOTES
TOTAL				R/c626,000				

[EXPORT TO EXCEL](#)

[PRINT SUMMARY](#)

DoQ = Degree of Qualification [?]
 CF = Confidence Factor [?]

[>> NEW OPPORTUNITY](#)

From the OPPORTUNITIES Page select the Close Date Range and CLOSED Opportunities.

- You can select:
- CLOSED – ALL
 - CLOSED - WON
 - CLOSED – LOST
 - CLOSED – CANCELLED
 - CLOSED – No Bid
 - CLOSED – Other
 - Archived

Fig 9: Reviewing a CLOSED Opportunity

Click Opportunity = Firefly

OPPORTUNITY INFO

Owner: Denham, John
Opportunity Name *
Firefly
Type of Sale *
Consulting
Closing date - actual or estimated *
4/22/2011
Date Opened
4/15/2011
Amount *
R/c276000
Company Name
Smith & Jones

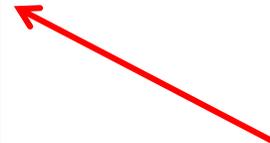
OPPORTUNITY INFO

Opportunity Name	Firefly
Actual Close Date	4/22/2011
Amount	276000
Winning Vendor	Us
Comments	no comment

RE-ACTIVATE

CLOSED Opportunities are READ ONLY.

If you wish to change some information about this opportunity you must REACTIVE it first..



Click RE - ACTIVATE

Confirm you wish to Re-Activate this Opportunity.

When an Opportunity is reactivated it is moved from the CLOSED Opportunity list and placed in the ACTIVE Opportunity list.

Fig 10: Reactivating a CLOSED Opportunity

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DASHBOARD OPPORTUNITIES MESSAGES ACCOUNT DETAILS LOGOUT

OPPORTUNITIES

Close date between and
Show opportunities with status >>

Company Name	Opportunity Name	Type of Sale	Owner	Amount	Close Date	DoQ	Winning	CF	Close	Last Updated	
Smith & Jones	Freely	Consulting	Denham, John	R/c276,000	13-May-11	86%	76%	75%	62%	27-Apr-11	VIEW NOTES
Lasiter Inc.	Six P2	Software	Denham, John	R/c300,000	31-May-11	65%	68%	64%	74%	27-Apr-11	VIEW NOTES
Longfellow Industries	Live Wire	Systems	Denham, John	R/c75,000	31-May-11	82%	79%	78%	58%	27-Apr-11	VIEW NOTES
TOTAL				R/c651,000							

EXPORT TO EXCEL
[PRINT SUMMARY](#)

DoQ = Degree of Qualification ?
CF = Confidence Factor ?

[>>NEW OPPORTUNITY](#)

Fig 11: Analyzing a NEW Opportunity

Click NEW OPPORTUNITY

NEW OPPORTUNITY

Opportunity Name *
 20 characters max

Type of Sale (what are you selling) *
 ?

Close Date *

Amount *
 ?

Company Name
 30 characters max

Company Address

Contact Name

Contact Phone #

Contact Email

Notes

NEXT >>

Enter data about the opportunity .

Note: The following information is required (as indicated with a *)

- Opportunity Name
- Type of Sale
- Close Date
- Amount

Type of Sale:

The Type of Sale is an important consideration as you use different selling strategies when selling different types of products and services.

Occlus accommodates 7 different Types of Sale

- Products
- Software
- Consulting
- Solution
- Systems Integration
- Outsourcing
- Services

Select the Type of Sale that best fits what you are selling. If you are unsure as to which Type of Sale fits best, click the ' ? ' for an explanation of each type and some examples.

Fig 12: Analyzing a NEW Opportunity – Con't

Click NEXT when complete.

Please note that all questions MUST be answered before the analysis can be run. A checkmark appears next to those categories where all questions have been answered. Thank you.

OPPORTUNITY DESCRIPTION

1. Do you know the Compelling Event that is driving this project? [?]
 YES NO UNCERTAIN

2. Do you know what problem(s) the Prospect is trying to solve? [?]
 YES NO UNCERTAIN

3. Do you know who is responsible within the Prospect's organization for solving these problems? [?]
 YES NO UNCERTAIN

4. Is this project part of or linked to another other project currently underway in the Prospect's company? [?]
 YES NO UNCERTAIN

5. Is the project funded? [?]
 YES NO UNCERTAIN

6. Has the Prospect determined a vendor selection date (your opportunity Close Date) for the project? [?]
 YES NO UNCERTAIN

7. How important (what priority) is this project to the prospect? [?]
 HIGH MEDIUM LOW UNCERTAIN

8. Has a Statement of Requirements (SOR) been created for this project? [?]
 YES NO UNCERTAIN

9. To what degree has the Prospect defined the requirements of this project? [?]
 HIGH MEDIUM LOW UNCERTAIN

10. To what degree has the Prospect defined the project objectives? [?]

Figure 13: Answering the Questions

There are 2 types of Occulus questions:

1. Absolute Questions (Yes / No / Uncertain)
 Answer these questions based on the factual information you have. **DO NOT GUESS**
 If you haven't asked the question, answer 'Uncertain'
2. Relative Questions (High / Medium / Low / Uncertain)
 Answer these questions based on your judgement, make an 'educated guess' if necessary
 If you haven't asked the question, answer 'Uncertain'

The Occulus analysis of the opportunity is based on the specific information you provide.

You will be asked a number of multiple choice questions about the opportunity, the prospect and who you're competing against.

Select the answer that is most appropriate.

If you are unsure as to what the question is asking, click the '?' next to the question for a detailed explanation.

The questions are divided into 7 categories, each dealing with an important dimension of the sale.

Occulus does not provide partial analysis and you must answer all the questions in all categories. (The typical Occulus user takes about 10 to 15 minutes to answer all the questions.)

When a category is complete a checkmark will appear next to the category.

When you have answered all the questions, click NEXT at the bottom of the of the page to move to the next question category.

The analysis can not be run until all questions are answered.

Please note that all questions MUST be answered before the analysis can be run. A checkmark appears next to those categories where all questions have been answered. Thank you.

- ✓ OPPORTUNITY DESCRIPTION
- ✓ PROPOSED SOLUTION
- ✓ DECISION PROCESS
- ✓ RELATIONSHIP
- ✓ COMPETITION
- ✓ TIMING

TIMING

1. Do you know why the Prospect is implementing this project now? ?

YES NO UNCERTAIN +ADD COMMENT

2. Have the project timeframes been defined? ?

YES NO UNCERTAIN +ADD COMMENT

3. Is the project on schedule? ?

YES NO UNCERTAIN +ADD COMMENT

4. Do the decision makers agree with the Close Date for this project? ?

YES NO UNCERTAIN N/A +ADD COMMENT

5. What is the Prospect's 'sense of urgency' (inclination to act) with this project? ?

HIGH MEDIUM LOW UNCERTAIN +ADD COMMENT

6. How would you rate the negative impact on the Prospect's business if this project was delayed or cancelled? ?

HIGH MEDIUM LOW UNCERTAIN +ADD COMMENT

7. Are there any internal issues that could stop or delay this project? ?

YES NO UNCERTAIN +ADD COMMENT

8. Are there any external/economic issues that could stop or delay this project? ?

YES NO UNCERTAIN +ADD COMMENT

9. Are there any other projects underway within the Prospect's organization that could delay this project? ?

YES NO UNCERTAIN +ADD COMMENT

PREVIOUS

VIEW RESULTS >>

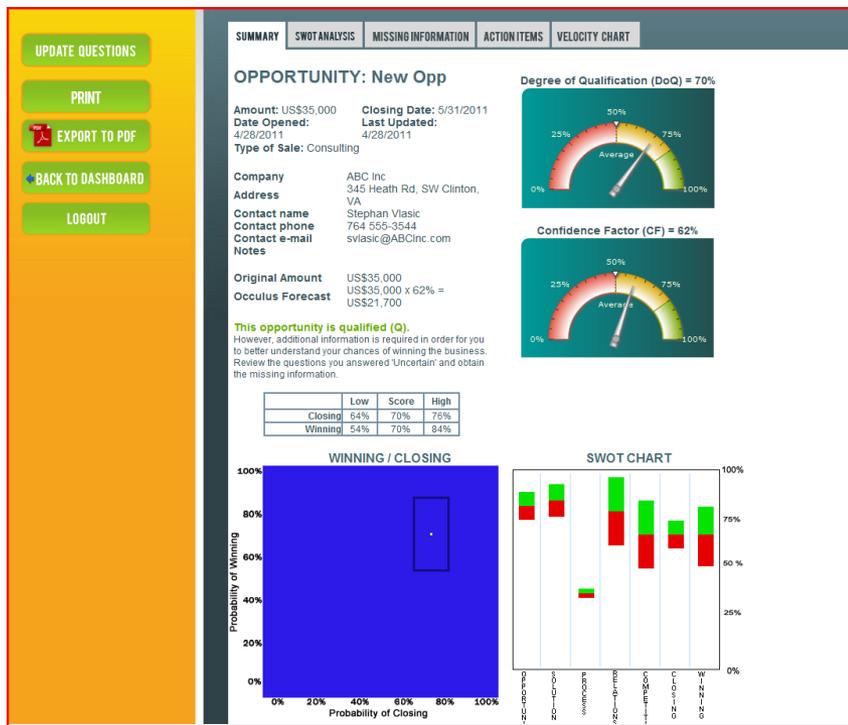
BACK TO DASHBOARD SAVE

Upon completing all the questions (notice the checkmarks Next to each category) you may view the results by clicking VIEW RESULTS.

You will be asked to confirm that you wish to SAVE the information you have entered, click YES.

Figure 14: Completing the questions

Note: A number of questions are 'linked' to other questions in Occulus. Depending on how you answered a question, Occulus may automatically insert a 'N/A' (Not Applicable) answer in a different question. You can not override an Occulus inserted N/A answer. If you change an answer that caused an automatic 'N/A' Occulus will remove the N/A. You are now required to answer that question. The checkmark will be removed from the category where the N/A was removed.



The analysis is divided into 5 parts;

1. Summary:
A high level view of the Opportunity
2. SWOT Analysis:
Details of the SWOT analysis by category
3. Missing Information:
Information about the opportunity that is missing or incomplete
4. Action Items:
A list of Actions Items to move the opportunity forward
5. Velocity Chart:
Tracks your progress with the opportunity as you move it through the sales cycle. Note: the Velocity Chart is updated when you exit the Opportunity File

For details on how to interpret the charts and data, refer to the Occulus User Guide.

You can print or export the complete analysis from your dashboard

Figure 15: Reviewing the Analysis

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OPPORTUNITIES

OPPORTUNITY INFO

Owner: Morton, Jim

Opportunity Name *
Name 30 characters max.

Type of Sale *
Outsourcing

Closing date - actual or estimated *
5/31/2011

Date Opened
4/16/2011

Amount *
USD 200000

Company Name
Vida Inc. 30 characters max.

Company Address
235B Williams St East
Stearford, MA

Contact Name
Bill Johnston

UPDATE QUESTIONS ANALYTICS PRINT REPORT TO PDF CLOSE OPPORTUNITY

Fig 16: Updating a Current Opportunity

From the OPPORTUNITIES page, click on the Opportunity name, and the opportunity file is opened.

You can update the Opportunity Information or update the question answers or view the analysis

From this screen you can:

- update the questions with new information
- view the current detailed analysis,
- print the detailed analysis
- export the detailed analysis
- go back to the dashboard
- log out

Please note that all questions MUST be answered before the analysis can be run. A checkmark appears next to those categories where all questions have been answered. Thank you.

OPPORTUNITY DESCRIPTION

1. Do you know the Compelling Event that is driving this project? [?]

YES NO UNCERTAIN +ADD COMMENT

2. Do you know what problem(s) the Prospect is trying to solve? [?]

YES NO UNCERTAIN +ADD COMMENT

3. Do you know who is responsible within the Prospect's organization for solving these problems? [?]

YES NO UNCERTAIN +ADD COMMENT

4. Is this project part of or linked to another other project currently underway in the Prospect's company? [?]

YES NO UNCERTAIN +ADD COMMENT

5. Is the project funded? [?]

YES NO UNCERTAIN +ADD COMMENT

6. Has the Prospect determined a vendor selection date (your opportunity Close Date) for the project? [?]

YES NO UNCERTAIN +ADD COMMENT

7. How important (what priority) is this project to the prospect? [?]

HIGH MEDIUM LOW UNCERTAIN +ADD COMMENT

8. Has a Statement of Requirements (SOR) been created for this project? [?]

YES NO UNCERTAIN +ADD COMMENT

OPPORTUNITY DESCRIPTION
PROPOSED SOLUTION
DECISION PROCESS
RELATIONSHIP
COMPETITION
TIMING

Fig 17: Updating the Questions

When all the questions for a category have been answered a 'check-mark' appears next to the category name.

Scroll to the bottom of the page and click VIEW RESULTS.

NOTE: All questions MUST be answered for for the analysis to be performed.

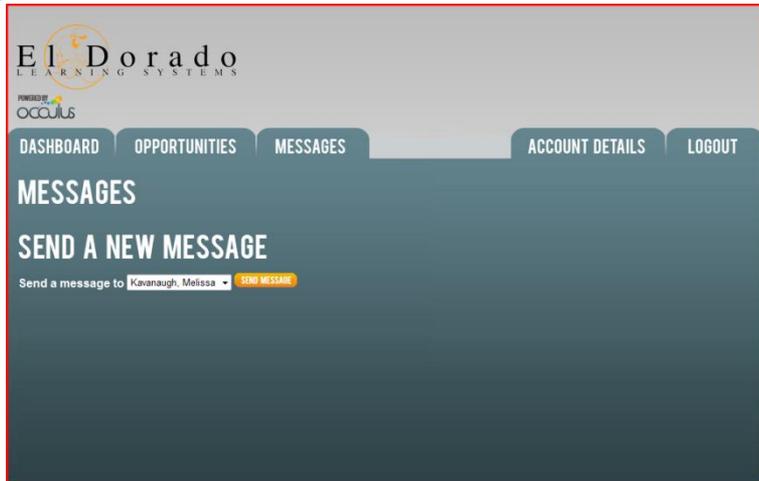


Fig 17: Creating a MESSAGES

Occlus has a built-in messaging system that allows you to exchange messages to your manager

Click MESSAGES:
The Message page will appear.

In Figure 17, as this person is a Sales Rep (with no Direct Report), the only person he/she can send a message to is his/her manager.

Click, SEND MESSAGE

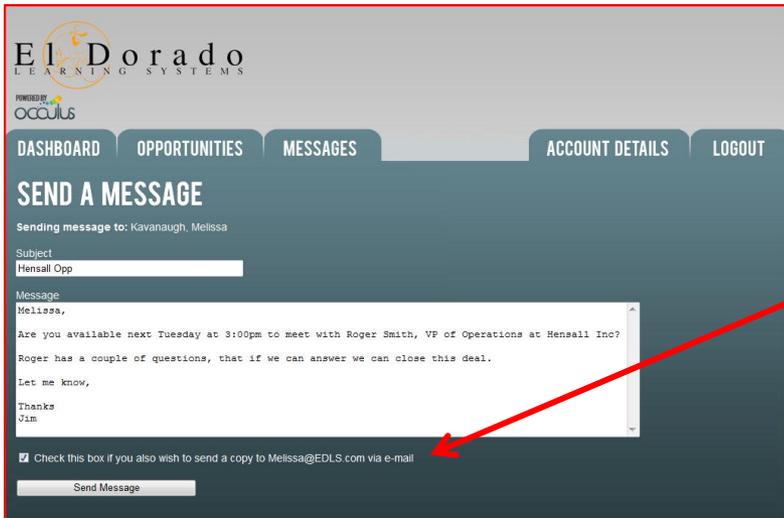


Fig 17: Creating a MESSAGES – Con't

Create the Message

Note that you can also send a copy of the message to the person's email, by checking this box.



*Analyze the sale;
Close the deal!*