



IBM Systems and Technology Group University 2005

# IBM Systems and Technology Group University 2005

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IBM Systems and Technology Group University 2005

# How to Increase Your Earnings by Selling Services

Course #: CB76

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Global Solution Executive  
Integrated Technology Services



# Agenda

- **Overview of new 2005 ITS bonus plans for STG personnel**
- **Making money**

## Learning Objectives

**At the conclusion of this material, you should be able to:**

- Explain the 2005 bonuses for selling ITS services
- Name the qualifying services
- Find additional information on the qualifying services

## Overview

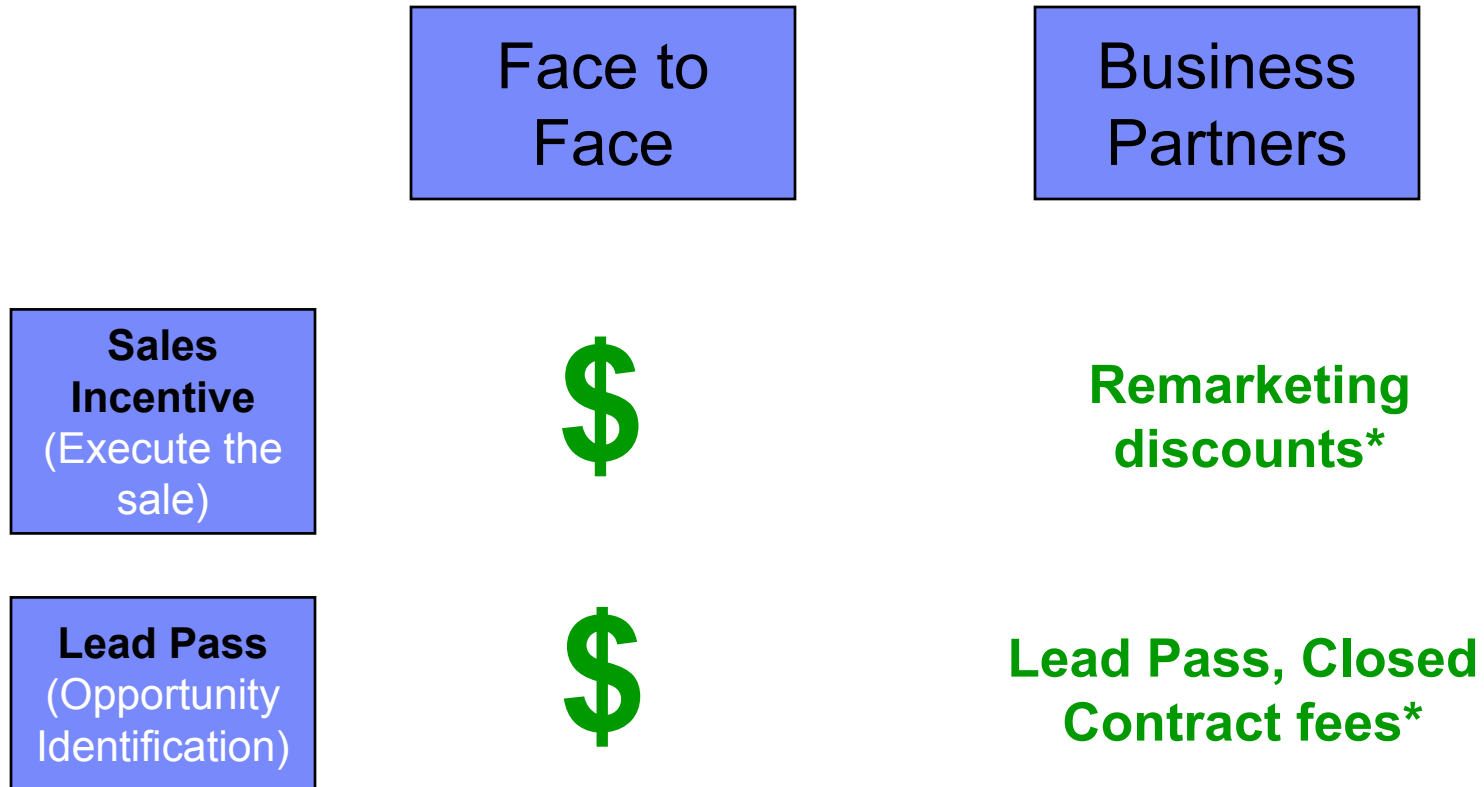
- **Selling product and services together is not a program, but a way of doing business**
- **Brand sellers need to see the value proposition of improving attach rates**
- **ITS should view brand sellers as a new sales channel that requires support and investment**
- **ITS is striving to be easier to do business with**
- **Teaming is occurring in programs, but the culture shift has not yet happened at the seller level**
- **Sales channels have been very clear that teaming requires compensation**

IGS and STG marketing have been working on joint plans to support our growth initiatives

And when we work together, we can



# The general 2005 approach ....



\* as defined by Business Partner Agreement and exhibits

## The 2005 incentives

2005 ITS Sales  
Incentive

2005 ITS Lead Pass  
Incentive

**Note:** These bonuses do not change  
your STG routes to market!!





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## 2005 ITS Sales Incentive

**ON** DEMAND BUSINESS™

## 2005 ITS Sales Incentive for STG Brand Sales Specialists

You sell

- Maintenance and/or key product support services
- As part of your product sale

You earn

- 1.5% of value of ITS services
- Limit of 10% TI per transaction\*

\* Maximum total bonuses of 41% of TI per individual for ITS Lead Pass Incentive and ITS Sales Incentive

# Services that qualify for the 1.5% Sales Incentive

<b>xSeries</b>	<b>iSeries</b>	<b>pSeries</b>	<b>zSeries</b>	<b>TotalStorage</b>
Hardware maintenance (GS/SM) (GS/MANET in US only)	Hardware maintenance (GS/SM) (GS/MANET in US only)	Hardware maintenance (GS/SM) (GS/MANET in US only)	Hardware maintenance (GS/SM) (GS/MANET in US only)	Hardware maintenance (GS/SM) (GS/MANET in US only)
Software maintenance (GS/RTSW) (GS/RDS in US only)	Software maintenance (GS/RTSW) (GS/RDS in US only)	Software maintenance (GS/RTSW) (GS/RDS in US only)	Software maintenance (GS/RTSW) (GS/RDS in US only)	Software maintenance (GS/RTSW) (GS/RDS in US only)
			Remote Technical Support/ Support Line (GS/SRSE) (GS/RDS in US only)	
Education Pack (GSPT/UNK) (GS/BCRS2 in US only)	Education Pack (GSPT/UNK) (GS/BCRS2 in US only)	Education Pack (GSPT/UNK) (GS/BCRS2 in US only)	Education Pack (GSPT/UNK) (GS/BCRS2 in US only)	Education Pack (GSPT/UNK) (GS/BCRS2 in US only)
Implementation Services (GSPT/UNK) (GS/EXWS2 in US only)	Implementation Services (GSPT/UNK) (GS/EXWS2 in US only)	Implementation Services (GSPT/UNK) (GS/EXWS2 in US only)	Implementation Services (GSPT/UNK) (GS/EXWS2 in US only)	Implementation Services (GSPT/UNK) (GS/EXWS2 in US only)
Enhanced Technical Support (ETS) – EMEA only (GS/SRT)	Enhanced Technical Support (ETS) – EMEA only (GS/SRT)	Enhanced Technical Support (ETS) – EMEA only (GS/SRT)	Enhanced Technical Support (ETS) – EMEA only (GS/SRT)	Enhanced Technical Support (ETS) – EMEA only (GS/SRT)
			SystemPac Software Migration Offering (GS/MIGOT)	

## How it works (your part)....

- **When selling a product, include qualifying services in your proposals (you perform the sales activities)**
- **Enter services into parent/child opportunity record**
  - Use same customer number as hardware opportunity
  - You are the opportunity owner or a team member
  - No ITS sales personnel can be opportunity owner or team member
  - Keep the data accurate
  - Use the correct product codes
- **Close the product and services together**
  - You create contracts using ITS tools
  - You obtain signatures (if needed)
- **Provide opportunity number to CSO for contract processing**

## How it works (our part) ...

- **Systems will check for matching contract and opportunity records**
- **When there is a match, then quarterly reporting will indicate transaction qualifies**
- **Send quarterly report to manager of qualifying individuals**
- **Your manager will process the payment based on reports pulled from the contract and opportunity management systems (one payment for all qualifying transactions)**
- **Payment made for quarter when contract entered in IBM system**

## Example

- **pSeries hardware sale of \$1,000,000**
- **Services included:**
  - 3-year prepaid maintenance/ETS \$210,000
  - Education Pack \$ 9,000
- **Bonus (1.5% of \$219,000) \$ 3,285\***
- **If contract date is January 1 – March 31, payment made in April**
- **If contract date is April 1, payment made in July**

**\* Bonus limited to 10% of TI**



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## 2005 ITS Lead Pass Incentive

**ON** DEMAND BUSINESS™

## 2005 ITS Lead Pass Incentive for STG Brand Sales Specialists and eSMs

You

- Identify an ITS opportunity and pass to ITS using Siebel

ITS

- Closes opportunity within 90 days

You earn

- 1% of value of ITS services
- Limit of 7.5% TI per transaction\*

\* Maximum total bonuses of 41% of TI per individual for ITS Lead Pass Incentive and ITS Sales Incentive



# Services that qualify for the 1% Lead Pass Incentive

<b>xSeries</b>	<b>iSeries</b>	<b>pSeries</b>	<b>zSeries</b>	<b>TotalStorage</b>
<b>JumpStart Services</b> (GS/EXWS2)	<b>Microsoft Exchange services</b> (GS/MIGMI)	<b>Jump Start Services</b> (GS/EXWS2)	<b>GDPS</b> (GS/IMP GD)	<b>GDPS</b> (GS/IMP GD)
		<b>Resilient Business and Infrastructure Analysis</b> (GS/BRCO)	<b>GDPS HyperSwap</b> (GS/IMP GD)	<b>GDPS HyperSwap</b> (GS/IMP GD)
<b>Linux Support Line/Subscription</b> (GS/SRSE)	<b>Linux Support Line/Subscription</b> (GS/SRSE)	<b>Linux Support Line/Subscription</b> (GS/SRSE)	<b>Linux Support Line/Subscription</b> (GS/SRSE)	<b>RCMF for open systems</b> (GS/SYSM)
<b>Linux Installation Services</b> (GS/ITO)	<b>Implementation Services for i5 and LPAR</b> (GS/EXWS2)	<b>Implementation Services for p5 and LPAR</b> (GS/EXWS2)	<b>Server and Storage consolidation</b> (GS/EXWS3) (GS/ASSC – EMEA only) (GS/ASSMB – EMEA only)	<b>Server and Storage consolidation</b> (GS/EXWS3) (GS/ASSC – EMEA only) (GS/ASSMB – EMEA only)
		<b>Customer Set Up Services</b> (GS/EXWS2)	<b>IT optimization</b> (GS/ITCON)	<b>Systems Management</b> (GS/SYSM)
	<b>Migration services</b> (GS/EXWS4)	<b>Migration services</b> (GS/EXWS4)	<b>Migration services</b> (GS/EXWS4)	

## How it works (your part)....

- **When calling on a customer, you identify a services opportunity with your hardware opportunity**
- **Enter opportunity record in Siebel using parent/child**
  - Same customer number as corresponding product opportunity
  - Use correct product codes
  - Ensure you're listed as opportunity identifier
  - Must be new opportunity to ITS
- **Send to ITS integrated lead management “desk”**

## How it works (our part) ...

- **ITS examines lead and sends to appropriate channel to**
  - Perform sales activities
  - Scope, price, and quality assurance
- **When opportunity closes, normal ITS processing occurs**
  - ITS creates contracts and obtains signature
  - Opportunity ID in contract records

## How it works (part 2) ...

- **At the beginning of each quarter, ITS operations creates report of closed contracts that had an STG category leader or sales specialist as the opportunity identifier**
- **If contract date is within 90 days of opportunity identification date, transaction qualifies**
- **Your manager will process the payment based on reports pulled from the contract and opportunity management systems (one payment for all qualifying transactions)**
- **Payment made for quarter when contract entered in IBM system**

## Example

- **Siebel opportunity entered on 1 February 2005**
- **Closes 1 April 2005**
- **Services opportunity identified:**
  - ITS resilience consulting services \$100,000
  - IT Optimization \$100,000
- **Bonus (1% of \$200,000) \$ 2,000\***
- **Payment made July 2005**

\* Bonus limited to 7.5% of TI

## Simple to Remember!!

### ■ PASS A LEAD

- OI a Service Opportunity (eSMs and BSS)
  - Pass it on to ITS to close
  - Earn 1% (up to 7.5% TI) of Total Services Value

### ■ CLOSE A DEAL

- OO a Hardware PLUS Service Opportunity (BSS)
  - Earn 1.5% (up to 10% TI) of Total Services Value



Maximum total bonuses of 41% of TI per individual.

Select service products apply. Check the fine print!



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# Additional Details for Qualifying Services



# Services Qualifying for Sales Incentive

## ■ Hardware maintenance

- IBM Maintenance Services provides worldwide warranty and maintenance support services on IBM and selected OEM hardware products.
- Maintenance programs include Remote Support, Predictive, Preventative, Depot and Onsite support.
- Can cover IBM and selected non-IBM equipment
- Recommended focus: 3-year prepaid, 24x7 offerings
- Web resources
  - <http://www-1.ibm.com/services/us/index.wss/it/its/a1000418>
  - <http://w3-3.ibm.com/services/cwi/portal/do?action=viewcat&cat=RootCategory%23offeringsandsolutions%23ibmglobalservicesofferingsandsolutions%23integratedtechnologyservices%23ibmmaintenanceservices&industry=all&sector=crosssector&organization=integratedtechnologyservices&location=AGR&sectorIndustry=crosssector%7Call>



## Services Qualifying for Sales Incentive

- **Software maintenance, Remote Technical Support/Support Line**
  - Offers clients a consistent source of remote technical support for IBM and select multivendor software
  - Covers most popular multivendor platforms and middleware, including Microsoft Windows and Linux
  - Web resources
    - [http://w3-3.ibm.com/services/salesone/S1\\_US/downloadable/pdf/s\\_to\\_z/SupportLine\\_swtpot.pdf](http://w3-3.ibm.com/services/salesone/S1_US/downloadable/pdf/s_to_z/SupportLine_swtpot.pdf)
    - <http://www-1.ibm.com/services/us/index.wss/so/its/a1000030>

## Services Qualifying for Sales Incentive

### ■ **SystemPac Software Migration Offering**

#### – Highlights

- Includes installation of IBM and independent software vendor products in a single package
  - Comes customized according to your specific needs
  - Provides fast and easy exploitation of new z/OS and z/OS.e functions
  - Helps stabilize systems over time using customized packages
- <https://www.ibm.com/ca/custompac>

# Services Qualifying for Sales Incentive

## ■ Education Pack

- Provides convenient way for clients to purchase IBM IT Education Services offerings and manage their training budgets.
- Prepaid discount program that gives your clients' employees access to the top-notch classroom training, technical conferences and e-learning offerings
- Web resources
  - <http://www-306.ibm.com/services/learning/ites.wss/tp/en?pageType=page&c=a0002174>
  - <http://w3-3.ibm.com/services/cwi/portal/do?action=viewdoc&doc=S1USdownloadablefilekcaPnoitacudEsecivreSsnoitacudETIMBLEhtgnilleSitssalesstoz&organization=ibmglobalservices&location=AGR&sector=crosssector&industry=all&includeMultiIndustry=false&includeTopOrganization=true&includeTopLocation=true>

# Services Qualifying for Sales Incentive

## ■ Implementation services

- Perform the implementation activities (planning and design, installation, configuration, set up) to help customers ready their IT environments for operation
- Can include an operating system, network operating system, database, middleware, software packages, or basic installation of IBM hardware or software products and selected non-IBM products
- Web resources
  - <http://w3-3.ibm.com/services/cwi/portal/do?action=viewcat&cat=RootCategory%23offeringsandsolutions%23ibmglobalservicesofferingsandsolutions%23integratedtechnologyservices%23ibmtechnicalsupportservices%23ibmimplementationsservices%23implementationservices&organization=ibmglobalservices&location=AGR&sector=crosssector&industry=all&includeMultiIndustry=false&includeTopOrganization=true&includeTopLocation=true>
  - <http://www-1.ibm.com/services/us/index.wss/az#l>

# Services Qualifying for the Lead Pass Incentive

## ■ IT Optimization

- Help your customers identify significant opportunities to help optimize their IT environment, review their current IT architecture and assess the full range of IT and business assets
- Web resources
- [http://w3.ibm.com/services/salesone/S1\\_US/downloadable/word/word\\_new/itosf-swtspot.doc](http://w3.ibm.com/services/salesone/S1_US/downloadable/word/word_new/itosf-swtspot.doc)<http://www-1.ibm.com/services/us/index.wss/so/its/a1000204>

# Services Qualifying for the Lead Pass Incentive

## ■ Migration Services

- Make it easy for customers to migrate to an IBM platform
- Complete set of migration services and tools that can help your customers achieve a seamless, efficient and comprehensive migration that that can help decrease downtime and data loss
- Web resources
  - <http://www-1.ibm.com/services/us/index.wss/az#m>
  - <http://www-1.ibm.com/services/us/index.wss/so/its/a1000119>
  - <http://w3-3.ibm.com/services/cwi/portal/do?action=viewcat&cat=RootCategory%23offeringsandsolutions%23ibmglobalservicesofferingsandsolutions%23integratedtechnologyservices%23storageservicesits&organization=integratedtechnologyservices&location=4U&sector=crosssector&industry=all&includeMultiIndustry=false&includeTopOrganization=true&includeTopLocation=true>
  - <http://w3-3.ibm.com/services/cwi/portal/do?action=viewdoc&doc=S1USflexiblescvSdorPtgMrotSPEitssalesatoh&organization=integratedtechnologyservices&location=4U&sector=crosssector&industry=all&includeMultiIndustry=false&includeTopOrganization=true&includeTopLocation=true>

# Services Qualifying for the Lead Pass Incentive

## ■ **Linux Support Line/Subscription**

- Provides comprehensive, around-the-clock remote technical support to help you manage distributions of the Linux operating system, and all IBM and most non-IBM applications that operate in a Linux environment.
- Web resources
  - <http://www-1.ibm.com/services/us/index.wss/so/its/a1000030>
  - [http://w3-3.ibm.com/services/salesone/S1\\_US/downloadable/pdf/g\\_to\\_/linuxsupline.pdf](http://w3-3.ibm.com/services/salesone/S1_US/downloadable/pdf/g_to_/linuxsupline.pdf)

## Services Qualifying for the Lead Pass Incentive

### ■ **Server and Storage Consolidation**

- enabling methodology designed to optimize the IT infrastructure by leveraging existing skills and resources and simplifying existing architectures across applications and data
- Web resources
  - <http://www-1.ibm.com/services/us/index.wss/so/its/a1000016>
  - [http://w3.ibm.com/services/salesone/S1\\_US/downloadable/word/word\\_new/storcon-lifecycle\\_swtpot.doc](http://w3.ibm.com/services/salesone/S1_US/downloadable/word/word_new/storcon-lifecycle_swtpot.doc)



# Services Qualifying for the Lead Pass Incentive

## ■ Microsoft Exchange Services

- Offers end-to-end solutions for those clients who have chosen Microsoft technologies for all or part of their IT solution
- Web resources
  - <http://www-1.ibm.com/services/us/index.wss/of/its/a1000430>
  - <http://w3-3.ibm.com/services/cwi/portal/do?action=viewdoc&doc=S1U5flexibleseigolonhceTtfosorciMrofsecivreSesirpretnEitssalesatoh&organization=integratedtechnologyservices&location=AGR&sector=crosssector&industry=all&includeMultiIndustry=false&includeTopOrganization=true&includeTopLocation=true>

## Services Qualifying for the Lead Pass Incentive

### ■ **Implementation Services for i5 or p5 and LPAR**

- Plan and install logical partitioning on your new or existing IBM iSeries servers
- Web resources
  - <http://www-1.ibm.com/services/us/index.wss/so/its/a1000077>
  - <http://www-1.ibm.com/services/us/index.wss/so/its/a1000124>
  - [http://w3-3.ibm.com/services/salesone/S1\\_US/downloadable/word/word\\_new/pseries-SS-IMPService-111804.doc](http://w3-3.ibm.com/services/salesone/S1_US/downloadable/word/word_new/pseries-SS-IMPService-111804.doc)

## Services Qualifying for the Lead Pass Incentive

- **Installation Services (Jump Start and Customer set up services)**
  - Comprehensive set of capabilities to assist customers with changes to their physical IT infrastructure
  - Web resources
    - <http://www-1.ibm.com/services/us/index.wss/az#l>
    - [http://w3-3.ibm.com/services/salesone/S1\\_US/downloadable/pdf/s\\_to\\_z/tssataglance.pdf](http://w3-3.ibm.com/services/salesone/S1_US/downloadable/pdf/s_to_z/tssataglance.pdf)

# Services Qualifying for the Lead Pass Incentive

## ▪ Resilient Business and Infrastructure Analysis

- Helps client evaluate the ability of the infrastructure to:
  - Provide a data and application environment that consists of systematic methods, processes and technologies and that is designed to be security-rich, agile, available and recoverable
  - Enable changing business models and strategies and link business strategy to risk tolerance and IT readiness levels
- Web resources
  - <http://www-1.ibm.com/services/us/index.wss/so/its/a1000230>
  - <http://w3-3.ibm.com/services/cwi/portal/do?action=viewdoc&doc=S1USflexibleisylanAerutcurtsarfnIdnassenisuBtneiliseRoiloftroPtnemegagnEitsalesatoh&organization=integratedtechnologyservices&location=AGR&sector=crosssector&industry=all&includeMultiIndustry=false&includeTopOrganization=true&includeTopLocation=true>

# Services Qualifying for the Lead Pass Incentive

## ■ Linux Installation Services

- Helps companies in the analysis, design and implementation of installing or migrating to Linux.
- Web resources
  - <http://www-1.ibm.com/services/us/index.wss/so/its/a1000192>
  - <http://w3-3.ibm.com/services/cwi/portal/do?action=viewdoc&doc=S1USflexiblergiMtsnlvresxuniLPEitssalesatoh&organization=integratedtechnologyservices&location=AGR&sector=crosssector&industry=all&includeMultiIndustry=false&includeTopOrganization=true&includeTopLocation=true>

# Services Qualifying for the Lead Pass Incentive

## ▪ **GDPS and GDPS HyperSwap**

- Plan and install an availability and recovery solution designed to meet disaster recovery business requirements quickly and effectively
- Gain more control over availability and recovery testing and parameters
- Ensure data consistency and integrity with little or no data loss after a disaster
- Simplify resource management giving automated single point of control
- Web resources
  - <http://www-1.ibm.com/services/us/index.wss/so/its/a1000189/dt002>
  - <http://w3-3.ibm.com/services/cwi/portal/do?action=viewdoc&doc=S1USflexibleSPDGxelpsySlellaraPdesrepsiDyllacihpargoeGoiloftroPtnemegagnEitssalesatoh>

## Services Qualifying for the Lead Pass Incentive

### ■ eRCMF for open systems

– Plan and install RCMF solution.

– Web resources

- <http://w3-3.ibm.com/services/cwi/portal/do?action=viewdoc&doc=S1USdownloadablefilethsofniselasytilicaFtgMypoCetomeResirpretnErofsecivreSnoitatnemelpmlitssalesitol&organization=integratedtechnologyservices&location=4U&sector=crosssector&industry=all&includeMultiIndustry=false&includeTopOrganization=true&includeTopLocation=true>
- <http://w3-3.ibm.com/services/cwi/portal/do?action=viewcat&cat=RootCategory%23offeringsandsolutions%23ibmglobalservicesofferingsandsolutions%23integratedtechnologyservices%23storageservicesits%23ibmimplementationservicesforenterpriseremotecopymanagementfacilityduplicate1&organization=integratedtechnologyservices&location=4U&sector=crosssector&industry=all&includeMultiIndustry=false&includeTopOrganization=true&includeTopLocation=true>
- <http://www-1.ibm.com/services/us/index.wss/so/its/a1000110>

# Services Qualifying for the Lead Pass Incentive

## ▪ **Systems Management**

### – Helps to

- Optimize the management of IT infrastructure and systems
- Align IT infrastructure and systems management strategy with business goals
- Improve infrastructure reliability, availability and security through scalable, integrated solutions
- Enhance systems support through skills transfer
- Apply proven methods, tools and leading-edge systems management software

### – Web resources

- <http://www-1.ibm.com/services/us/index.wss/so/its/a1000023>
- <http://w3-3.ibm.com/services/cwi/portal/do?action=viewcat&cat=RootCategory%23offeringsandsolutions%23ibmglobalservicesofferingsandsolutions%23integratedtechnologyservicesscl3%23infrastructureandsystemsmanagement%23systemsmanagementservices%23ibmsystemsmanagementservicesforinfrastructureavailability&organization=ibmglobalservices&location=AGR&sector=crosssector&industry=all&includeMultiIndustry=false&includeTopOrganization=true&includeTopLocation=true>





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# Entering A Services Opportunity Into Siebel



## How to Create an “Attached” Opportunity for These Bonuses Using Parent/Child in Siebel

- **Reference the existing opportunity for hardware**
- **Create a new opportunity record for services using **the same** Customer Number as the opportunity record for the Server / Storage product**
- **Link this new services opportunity record as a “child” to the “parent” STG opportunity record.**

To create a child opportunity, create a new opportunity record as normal. In this example, a new opportunity record for services has been created.

When the opportunity record has been created, select the record from your list of opportunities by clicking on it once to highlight it.

Opportunity: **Opportunities**

1 - 7 of 7+

New	Priorit	Oppty Num	Opportunity	Decision Date	Account	Sales Stage	Account Status	Customer Num	Pe
<input type="checkbox"/>	<input type="checkbox"/>	1-BKYB7Y	NEW	10/5/2004	Peterson Enterprises	03-Identified/Validating	Active		
*	<input type="checkbox"/>	1-ER5PEQ	Really Big Deal	9/19/2004	999 Test Atlanta clas	09-No Bid	Active		
*	<input type="checkbox"/>	1-ER5PHI	ThinkPads for computer lab	9/19/2004	999 Test Atlanta clas	04-Validated/Qualifying	Active		
*	<input type="checkbox"/>	1-EK2VVF	zSeries for SAP	9/1/2004	999 Test Atlanta clas	03-Identified/Validating	Active		
<input type="checkbox"/>	<input type="checkbox"/>	1-CYOZND	BladeCenter Opportunity	6/13/2004	Peterson Enterprises	03-Identified/Validating	Active		
*	<input type="checkbox"/>	1-C6N2XR	xSeries for Siebel	5/23/2004	999 Test Atlanta clas	03-Identified/Validating	Active		
<input type="checkbox"/>	<input type="checkbox"/>	1-BY3K99	xSeries for SAP	5/17/2004	999 Test Atlanta clas	03-Identified/Validating	Active		

Revenues Activities Activity Plans Assessments Attachments Service Requests Categories Child Opportunities Compet

1 of 7+

**\*Opportunity:** NEW

**Sales Stage:** 03-Identified/Validating

**Sales Team:** rpeterso@us.ibm.com

**Channel:**

**Revenue:** \$100,000.00

**Prob %:** 10%

**\*Decision Date:** 10/5/2004

**Source:**

**Total Deal Value:**

**OMDT:**

**Pact Number:**

**Organization:** US

**\*Oppty Num:** 1-BKYB7Y

**Status:** Active

**Account:** Peterson Enterprises - Test

**Financing Prospect:**

z le centre de dépannage de CRM Siebel au 1 888 426-4357. Raccourci :4-1-1

Need help? Call the CRM Siebel help desk at: 888- 1 of 2

Shortcut to javascript:App().GotoViewLink("Opportunity Detail - Revenue Schedule View", "", "/transform/crm/americas/us/sales/s

Local intranet

start

Address

Go 98%

11:26 AM Friday 7/2/2004

AT&T Network Cli... Roger Peterson ... Internet Expl... 3 Sametime Co... Microsoft PowerP...

CRM Siebel - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media

Address: **Scroll to the right until you see the "Parent Opportunity" field. Click on it once to make it active; then click on the Multi-value Group icon to open it.**

Links

File Edit View Help

Activities Products Home Service Employee Administration Employees Opportunities Co

Show: My Opportunities History: Question

Opportunity: **Scroll arrow**

Opportunities

New Query 1 - 7 of 7+

Decision Date	Account	Sales Stage	Account Status	Customer Num	Parent Opportunity	Parent Oppty Num	Revenue	Pr
10/5/2004	Peterson Enterprises	03-Identified/Validating	Active				\$100,000.00	10%
9/19/2004	999 Test Atlanta clas	09-No Bid	Active				\$600,000.00	25%
9/19/2004	999 Test Atlanta clas	04-Validated/Qualifying	Active				\$120,000.00	50%
9/1/2004	999 Test Atlanta clas	03-Identified/Validating	Active				\$70,000.00	23%
6/13/2004	Peterson Enterprises	03-Identified/Validating	Active				\$100,000.00	25%
5/23/2004	999 Test Atlanta clas	03-Identified/Validating	Active				\$50,000.00	25%
5/17/2004	999 Test Atlanta clas	03-Identified/Validating	Active				\$120,000.00	25%

Revenues Activities Activity Plans Assessments Attachments Service Requests Categories Child Opportunities Compet

New Delete Query Copy Cancel Assign 1 of 7+

\*Opportunity: NEW

Revenue: \$100,000.00

Sales Stage: 03-Identified/Validating

Sales Team: rpeterso@us.ibm.com

Channel:

Revenue: \$100,000.00

Prob %: 10%

\*Decision Date: 10/5/2004

Source:

Total Deal Value:

OMDT:

Pact Number:

Organization: US

\*Oppty Num: 1-BKYB7Y

Status: Active

Account: Peterson Enterprises - Test

Financing Prospect:

path: 4-1-1-1

Besoin d'aide? Contactez le centre de dépannage de CRM Siebel au 1 2 of 2

Local intranet

start

Address: 98%

3:00 PM Friday 7/2/2004

AT&T Network Cli... Roger Peterson ... Internet Expl... 3 Sametime Co... Microsoft PowerP...

In the "Pick Opportunity" window, find the opportunity record that you want to be the Parent. You can search on opportunity number or opportunity name, or account name. Recommended: search on opportunity number.

CRM Siebel - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address Links

Activities Products Home Service Employee Administration Employees Opportunities Communications SmartScripts

Show: My Opportunities History: Queries: My Opportunities

Opportunity:

**Opportunities**

Pick Opportunity - Microsoft Internet Explorer

Decision Date: 10/5/2004, 9/19/2004, 9/19/2004, 9/1/2004, 6/13/2004, 5/23/2004, 5/17/2004

Oppty Num Opportunity Account

Oppty Num	Opportunity	Account
1-2I3ACN	IntelliStation Worksta	Fountain Head Group
1-3Y4LRH	SW Prepay	University of Georgia
1	xServer (model 220	Advanced Air Products Co.
1-10000P	OM#16SGY586 XSe	Security Service Federal Credit Union
1-1000HF	iSeries 830	Charleston Commissioners of Public Works
1-1000PQ	pSeries	Timber Hill
1-1000Q9	Passport Renewal	George Weiss Associates

Find Oppty Num starting with Find

Pick Close

\*Opportunity: NEW

Sales Stage: 03-Identified/Validating

Sales Team: rpeterso@us.ibm.com

Channel:

Revenue: \$100,000.00

Prob %: 10%

\*Decision Date: 10/5/2004

Source:

OMDT:

Pact Number:

Organization:

Oppty num.: 1-BKYB7Y

Status: Active

Account: Peterson Enterprises - Test

Financing Prospect:

help? Call the CRM Siebel help desk at: 888-426-4357 Fastpath: 4-1-1-1

Besoin d'aide 2 of 2

Done Local intranet

start AT&T Network Cli... Roger Peterson ... Internet Expl... 3 Sametime Co... Microsoft PowerP...

Address Go 98%

3:05 PM Friday 7/2/2004



CRM Siebel - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address Links

**The Parent Opportunity information now appears on the opportunity record. This now causes the new opportunity record for services to be the "Child" opportunity of the "Parent".**

Activities Products Home Service Employee Administration Employees Opportunities Communications SmartScripts

Show: My Opportunities History: Queries: My Opportunities

Opportunity:

**Opportunities**

Account	Sales Stage	Account Status	Customer Num	Parent Opportunity	Parent Oppty Num	Revenue	Probability	Ex
Peterson Enterprises	03-Identified/Validating	Active		pSeries for Siebel	1-BVD26Z	\$100,000.00	10%	
999 Test Atlanta clas	09-No Bid	Active				\$600,000.00	25%	
999 Test Atlanta clas	04-Validated/Qualifying	Active				\$120,000.00	50%	
999 Test Atlanta clas	03-Identified/Validating	Active				\$70,000.00	23%	
Peterson Enterprises	03-Identified/Validating	Active				\$100,000.00	25%	
999 Test Atlanta clas	03-Identified/Validating	Active				\$50,000.00	25%	
999 Test Atlanta clas	03-Identified/Validating	Active				\$120,000.00	25%	

Revenues Activities Activity Plans Assessments Attachments Service Requests Categories Child Opportunities Compet

**\*Opportunity:** NEW

**Sales Stage:** 03-Identified/Validating

**Sales Team:** rpeterso@us.ibm.com

**Channel:**

**\*Decision Date:** 10/5/2004

**Source:**

**Pact Number:**

**Organization:** US

**Account:** Peterson Enterprises - Test

**Financing Prospect:**

**Be sure to add the IBM Global Services sales person to the sales team so that he/she can work the opportunity.**

Besoin d'aide? Contactez le centre de dépannage de CRM Siebel au 1 888 426-4357. Raccour 2 of 2

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3:17 PM Friday 7/2/2004

Now, when the Parent opportunity record is selected in the list of opportunities, and the "Child Opportunities" tab is selected, the child opportunity information will appear.

CRM Siebel - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address Links

Activities Products Home Service Employee Administration Employees Opportunities Communications SmartScripts

Show: History: Queries: My Opportunities

### Parent Opportunities

New Query 8 - 14 of 14+

New	Priority Flag	Oppty Num	Opportunity	Decision Date	Account	Account Status	Customer Num	Parent Opportu	Parent O
<input type="checkbox"/>	<input type="checkbox"/>	1-BVD26Z	pSeries for Siebel	5/16/2004	999 Test Atlanta cla	Active			
<input type="checkbox"/>	<input type="checkbox"/>	1-BGSS3X	Test for ISV	5/6/2004	Peterson Enterprise	Active			
<input type="checkbox"/>	<input type="checkbox"/>	1-ALAP1D	NEW	4/19/2004	SDC North Central	Active			
<input type="checkbox"/>	<input type="checkbox"/>	1-A6Z8BL	Data Center Outsou	4/5/2004	Peterson Enterprise	Active			
<input type="checkbox"/>	<input type="checkbox"/>	1-B9BQUT	zSeries SW Run Ra	3/31/2004	IBM Global Services	Active	4569356		
<input type="checkbox"/>	<input type="checkbox"/>	1-9S88I6	NEW	3/15/2004	Peterson Enterprise	Active			
<input type="checkbox"/>	<input type="checkbox"/>	1-9E1BXC	iSeries for Siebel	3/1/2004	999 Test Atlanta cla	Active			

### Child Opportunities

Query 1 - 1 of 1

New	Priority Flag	Oppty Num	Opportunity	Decision Date	Account	Account Status	Customer Num	Parent Opportunity	Pa
<input type="checkbox"/>	<input type="checkbox"/>	1-BKYB7Y	NEW	10/5/2004	Peterson Enterprise	Active		pSeries for Siebel	1-BVD

Besoin d'aide? Contactez le centre de dépannage de CRM Siebel au 1 888 426-4357 2 of 2

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Address Go 98% 3:30 PM Friday 7/2/2004

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