Spring ’21 Release Notes (v9.8)

Altify

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Release Overview

Significant improvements are delivered with the Spring '21 release.

With shared account questions in Altify Account Manager, users with different roles working with different account plan types can now instantly share important information relating to accounts and account divisions. This will drive efficiency and consistency in your organization's interactions with customers.

For organizations that do not engage with potential opportunities in Account Manager, a simple setting now exists to remove unused screen estate from the interface across the product and bring clear focus to the current and won opportunities that you work with. In addition, a number of small but valuable changes, such as capturing comments about competitors in the market landscape view, enhance the user experience of opportunity maps.

Sorting of prime actions is now possible in Opportunity Manager, allowing you to quickly analyze the open and completed actions for any opportunity.

In Relationship Maps, we have introduced quicklinks in contact information panels which can easily be configured to link to customized pages that provide data specific for the contact. Also, this change paves the way for Kapost users to surface customer specific content in their relationship maps. The increased number of contacts displayed when importing contacts improves usability when managing large customer accounts and opportunities.

For organizations with Altify Max, the Suggested Target content shown for contacts on the relationship map is now configurable and translatable. By editing and creating new Max insights you can customize the sales guidance that is presented to your users so that it aligns exactly with your organization's relationship management strategies.

A major step is taken toward resolving the difficulty of including non-license holding users in T&Is. A named T&I admin is notified when users without an Altify license are added to a T&I, allowing the admin to perform a quick and guided process to set up and validate the user's access.

Finally, with reporting we are providing a swathe of new scoring statistical fields to enhance your organization's reporting of account and opportunity completeness.

Watch a video describing the key changes delivered with Spring '21.

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Summary of all changes

The following lists outlines all the changes introduced with Altify 9.8:

Account Manager

- Sharing account answers – share account information instantly across your account plans.
- Accessing segmentation help – direct access to segmentation guidance from relevant areas of Altify Account Manager.
- Capturing competitor comments – record additional information about competitors in the opportunity map with a new comment feature.
- Turning off potential opportunities – remove potential opportunities from specific account plan types.
- Reading blocked intersection messages – messages in blocked intersections of an opportunity map are no longer truncated.
- Accessing Opportunity Manager – users can now easily navigate from an opportunity in the opportunity map to the relevant page in Altify Opportunity Manager.

Opportunity Manager

- Sorting actions for an opportunity – sort opportunity actions according to any column heading.
- Quicker completion of prime actions – a minor change has speeded up the process of marking an action as complete.

Max

- Translating or editing Suggested Target insights – use Altify Max to translate, edit or create new contact insights on a relationship map.

Test & Improve

- Inviting users without Altify access – a new streamlined process for inviting Salesforce users, who do not yet have an Altify license, to T&Is.

Relationship Map

- Surfacing links in contact information panels - show links to useful resources in a contact's information panel, including links to customized pages with contact-specific information.
- Hiding long salutations – salutations of more than five characters hidden so that contact information is not obscured.
- More contacts displayed when importing – up to 200 contacts now displayed when importing in a relationship map.

- Removing Opportunity filter from Import Contacts dialog – simplify the Import Contacts dialog on relationship maps for accounts by removing the Opportunity filter.

Core product

- Visual of indication of exceeded text limit – users are made instantly aware when a text limit is exceeded and cannot save until they have rectified the issue.

Reporting

- New account and opportunity completeness fields – new percentage score and statistical fields are available to inform reporting.

Account Manager

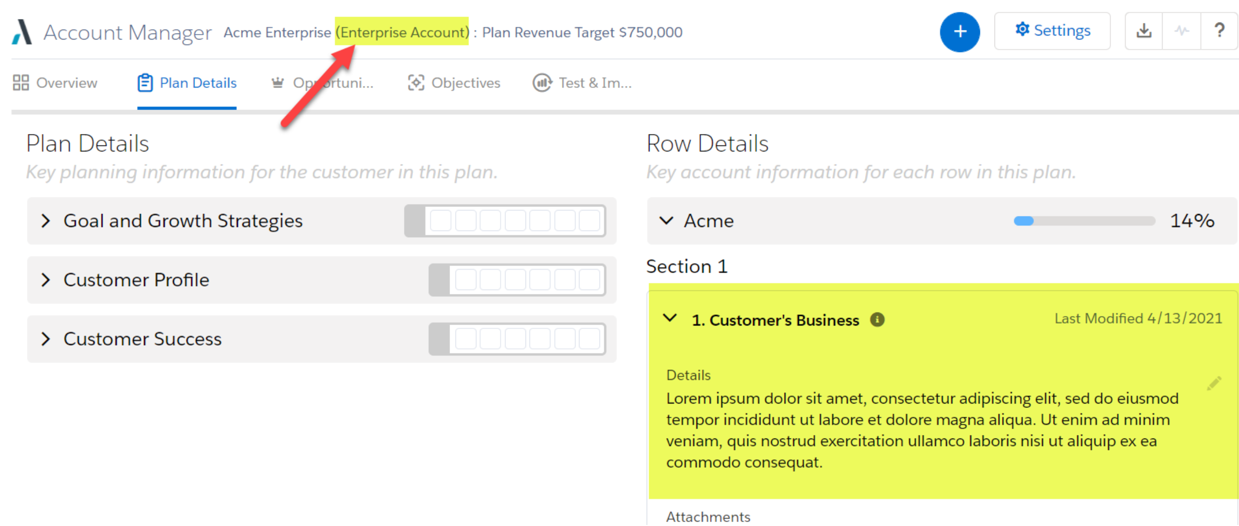
New user functionality

Sharing account answers

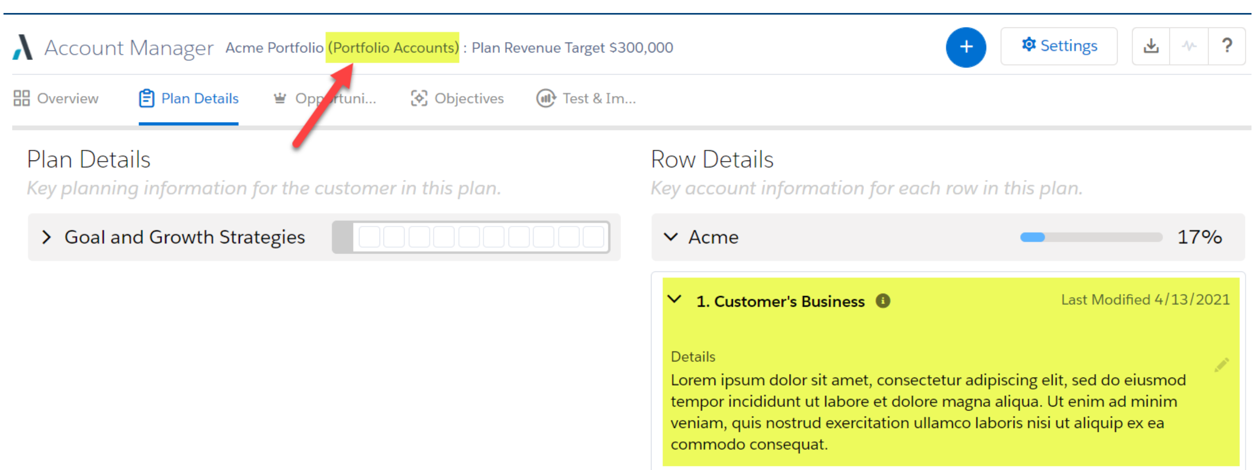
All members of the revenue team can now access the same important account information, and that information can be structured and displayed in ways that are appropriate for different roles.

The same Altify Account Question can now be shared among different Account Plan Types. In the example below, the account question 'Customer Business' is shared by Enterprise and Portfolio plan types.

For example, an account executive provides an answer in an enterprise account plan...

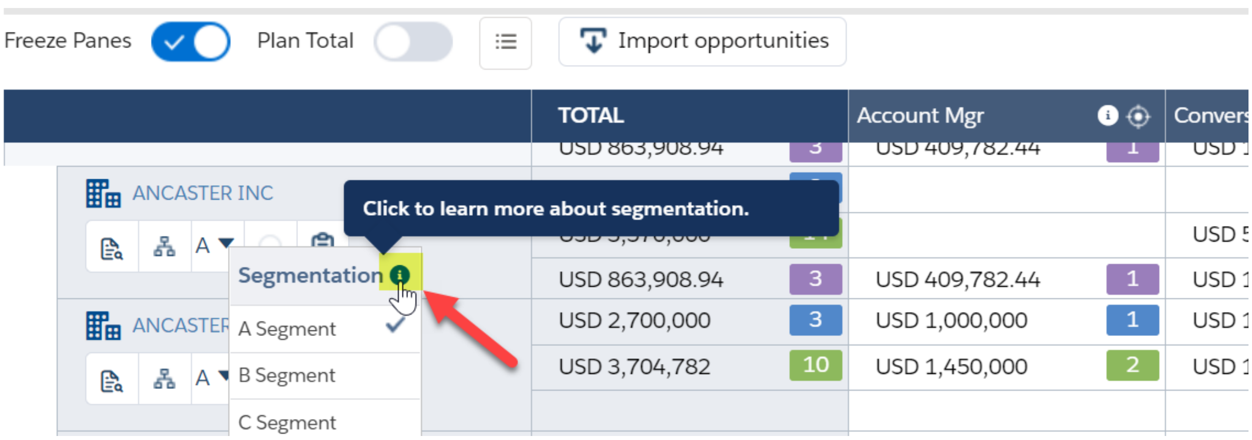


The answer is automatically displayed for the same question and account when a customer success manager looks at a portfolio account...



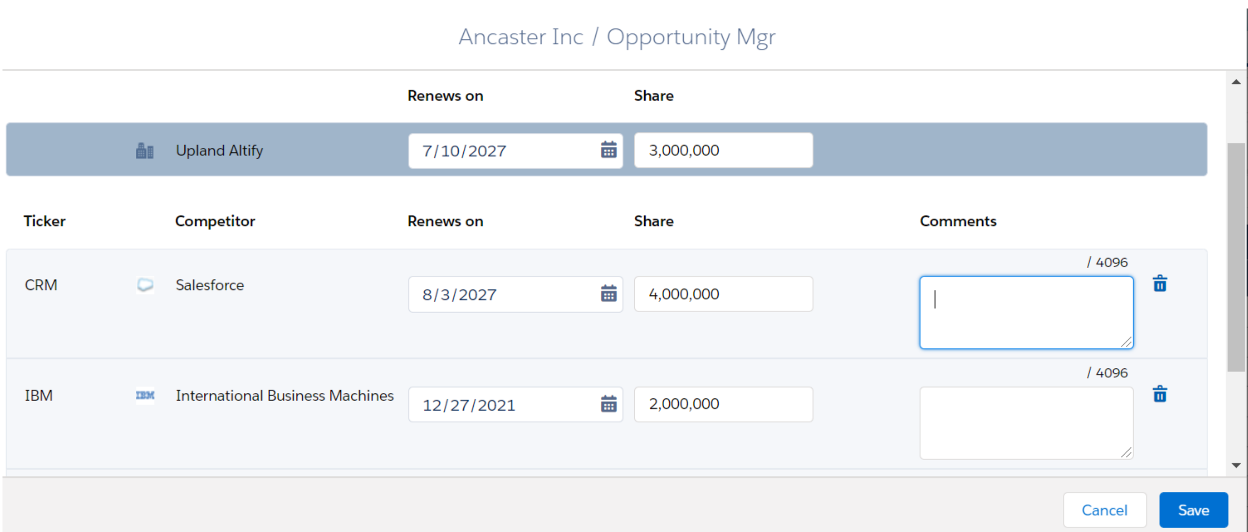
Accessing segmentation guidance

Links are provided in Altify Account Manager that give direct access to a topic in the help center which explains how and why segmentation is applied to accounts and account divisions. The links are on the Account Summary launchpads on an Account record and on the Overview tab of an account plan, and in the opportunity map (as highlighted below).



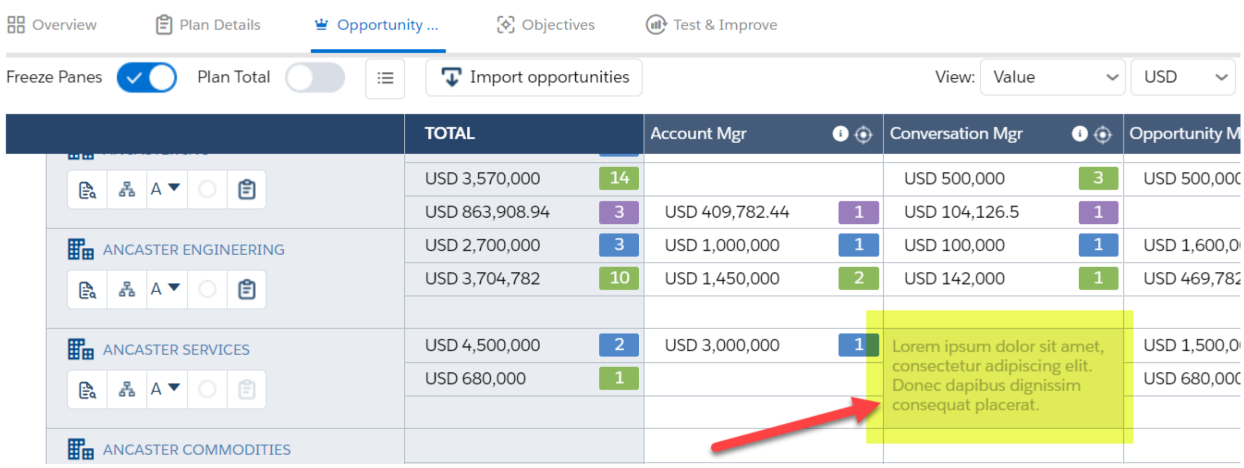
Adding comments to market landscape

Users can now add comments to intersections in the market landscape view of the opportunity map. This helps to capture additional information about competitors.



Viewing blocked intersection messages in full

The user inputted messages on blocked intersections are no longer truncated – as shown in the example below.



Access to Opportunity Manager

From the Current or Won tabs in an opportunity map intersection, a user can now click the link to go directly to the opportunity in Altify Opportunity Manager.

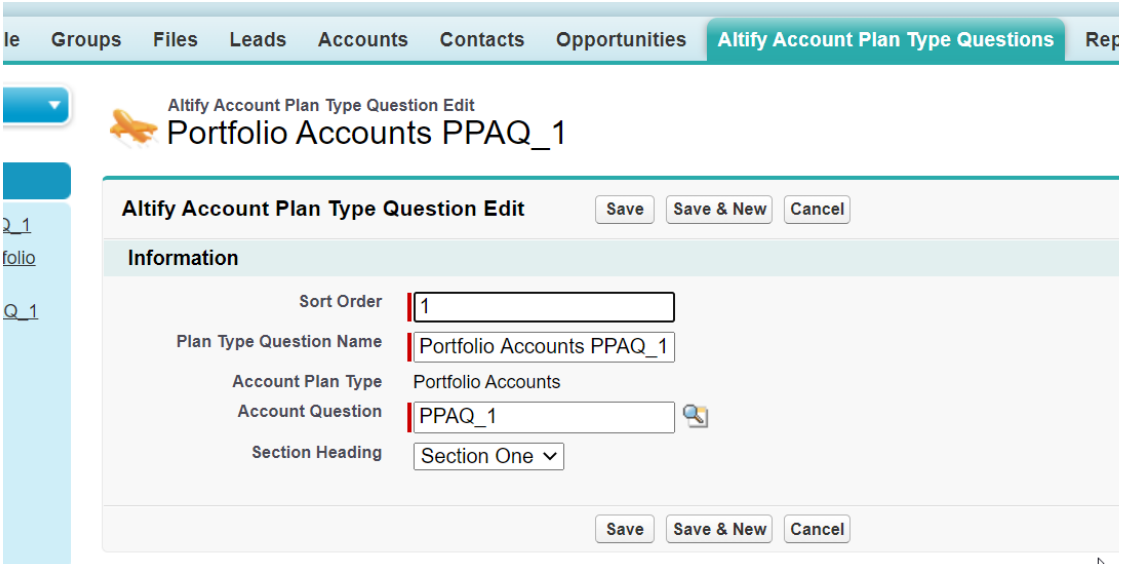
This column is only displayed to customers with an Opportunity Manager license.

New functionality to be administered

Sharing account questions

Previously the relevant plan type was defined on the Altify Account Question record. Now a new 'join' record, the Altify Account Plan Type Question, allows you link an Altify Account Question with the Altify Account Plan Type. In this way you can make a single account question appear in multiple account plan types. On the Altify Account Plan Type Question, you can also configure how the question is displayed (in terms of order and the section) in the associated plan type.

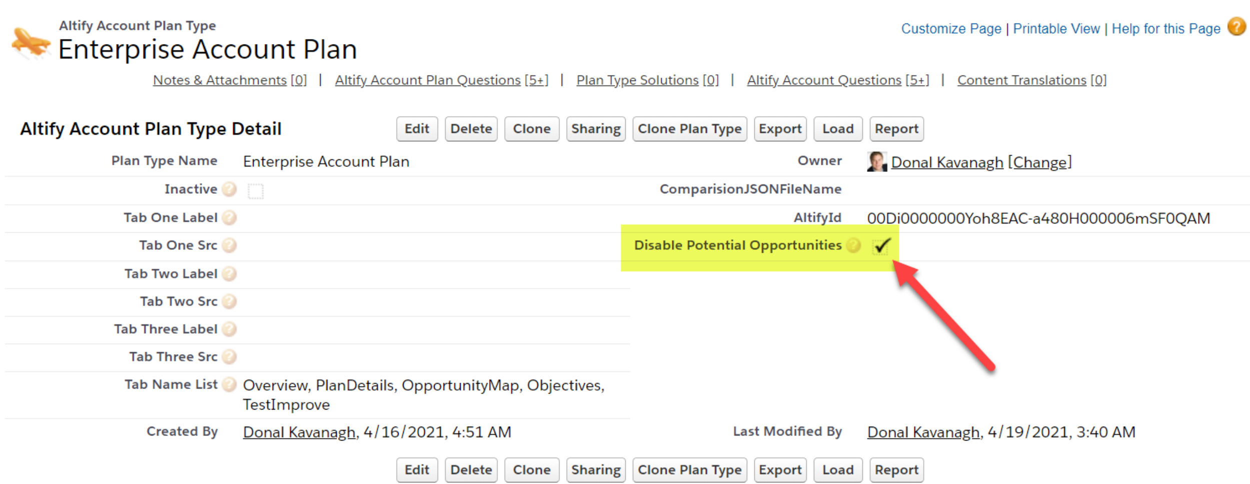
To create an Altify Account Plan Type Question, go to the **Altify Account Plan Type Questions** tab.



For assistance with configuration of your account questions, go to the [online help site for admins].

Switching off potential opportunities

To switch off potential opportunities in all account plans of a particular type, simply enable the setting **Disable Potential Opportunities** in the relevant Altify Account Plan Type record – as shown below.

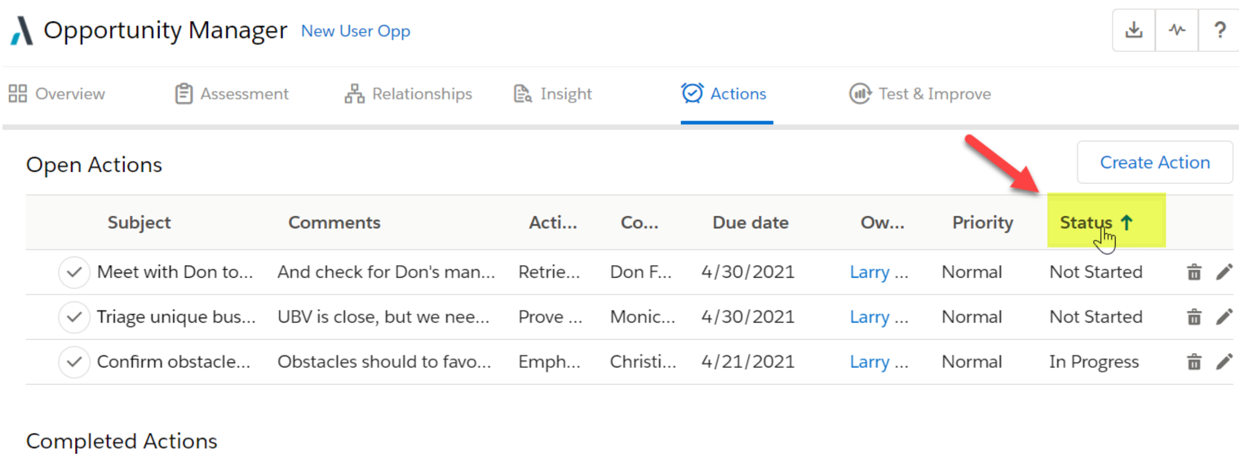


Opportunity Manager

New user functionality

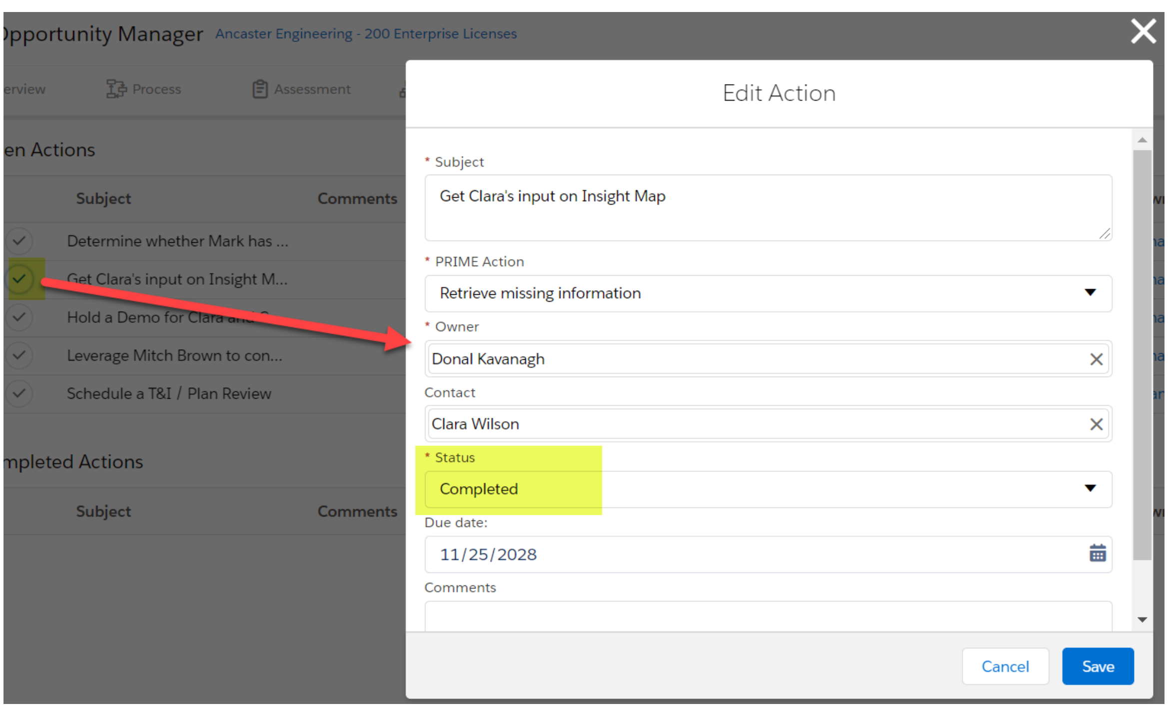
Sorting actions for an opportunity

You can now sort the actions that are displayed on the Actions tab in Opportunity Manager. The actions are sortable by any column - such as Status in the example below.



Quicker completion of actions

A small change is made to speed up the process of marking actions as complete. When the user clicks the tick next to an open action, the **Status** field is automatically set to 'Completed' in the Edit Action dialog that is displayed.



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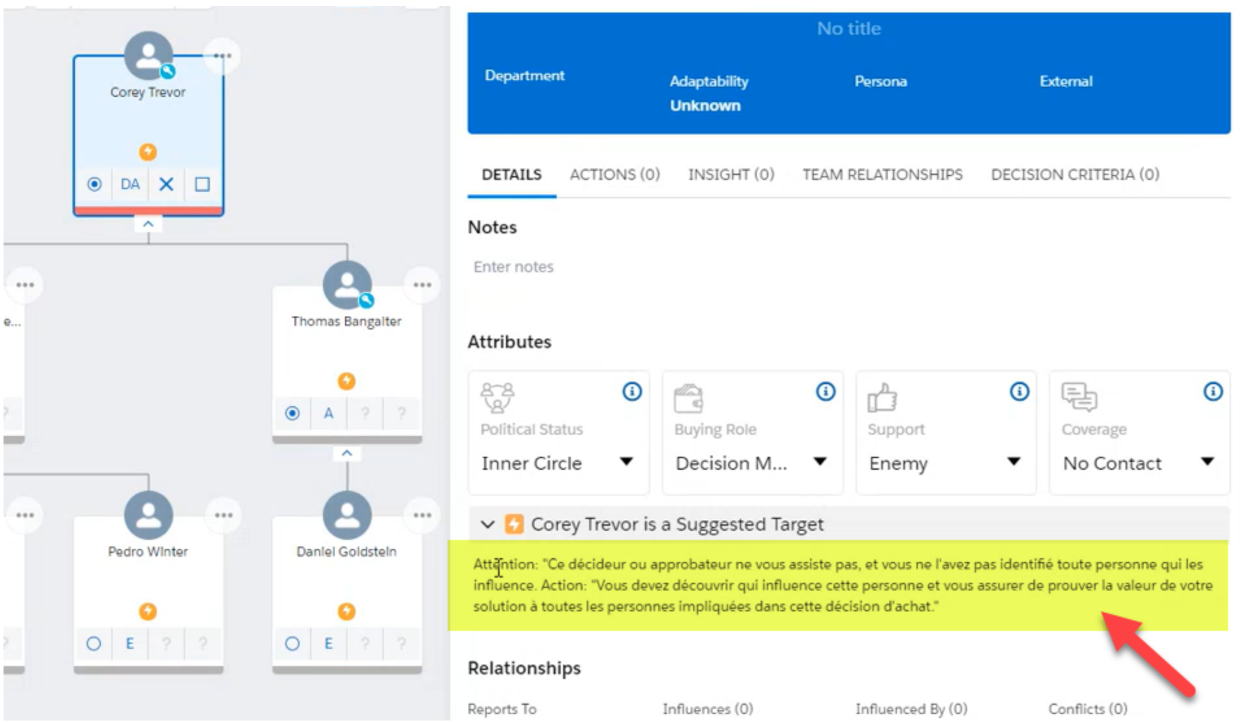
Altify Max

New user functionality

Access contact insights customised for your organization

A user can now access customized or translated Suggested Target content on an AM or OM relationship map.

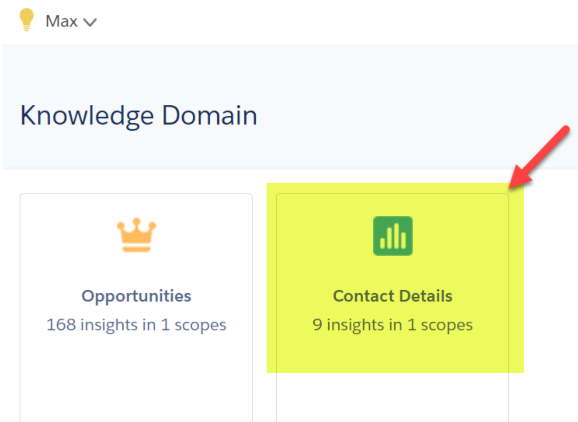
An example of Suggested Target content translated into French is shown below.



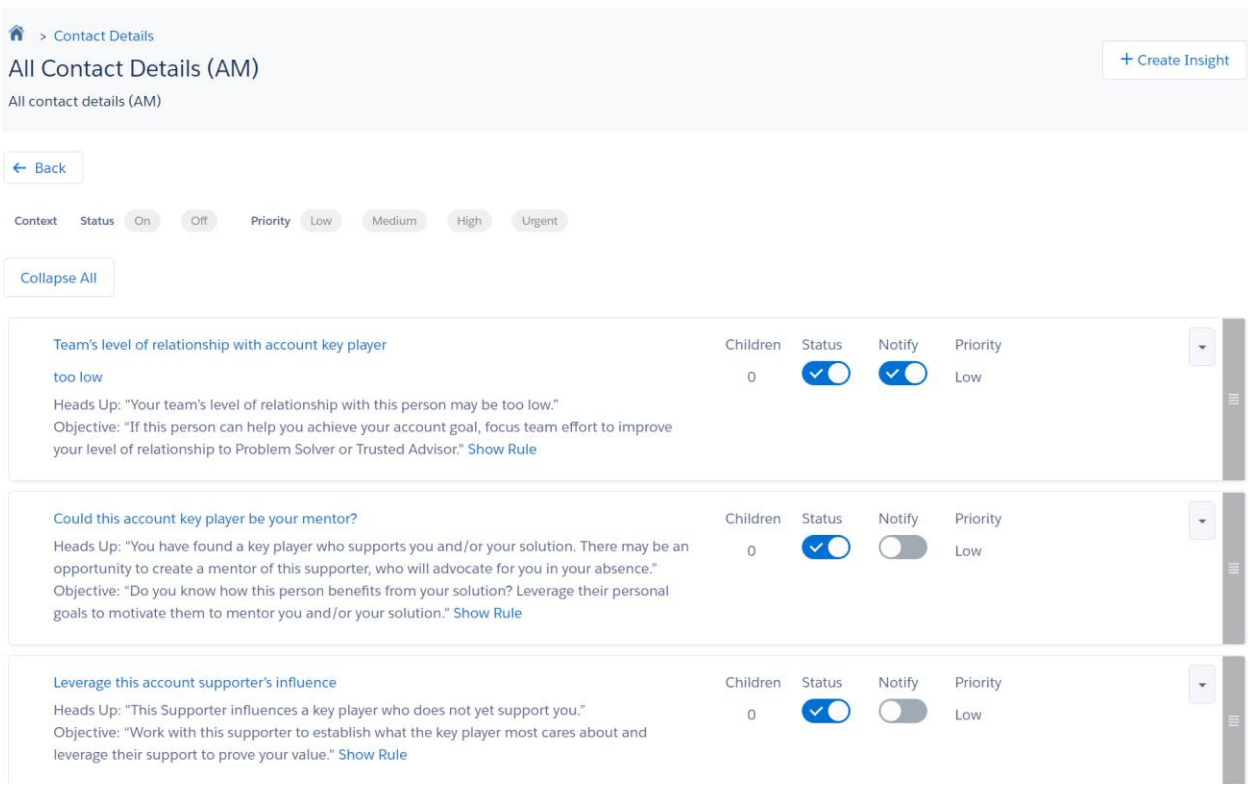
New functionality to be administered

Setting up editable and translatable contact insights

Contact insights, displayed as Suggested Target content on relationship maps, are now available to Altify Max customers. As with existing insight scopes, contact insights are accessible through the Knowledge Domain (as shown below).



On clicking through, the scopes for AM and OM are displayed, where the corresponding JSON files can be uploaded. After uploading, contact insights can be created, edited and translated in the same manner as opportunity insights.



Note: Contact insights are not included in the Max email notification system. Therefore, the **Notify** toggle (shown above) does not have any affect when activated.

The final step is for the administrator to enable their new or edited insights in their org. This is done by activating the following Altify Core Setting: *Enable Max for Contact Insights*.

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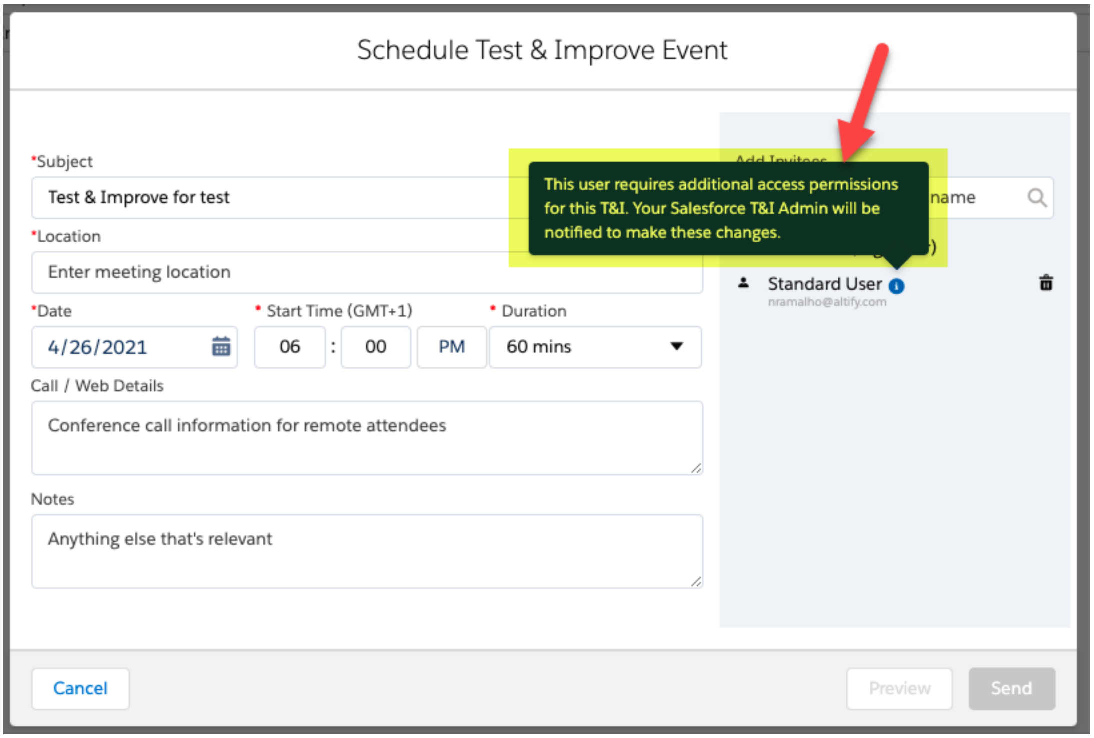
Test & Improve

New user functionality

Inviting users without Altify access

Users can add non-license holding Salesforce users to their Opportunity Manager or Account Manager T&Is without concerns regarding access. When a user who does not have an Altify license or permission set is added to a T&I, an admin is notified and guided through the quick process of setting up the user with the necessary license and permissions so that they can access the presentation.



In Account Manager, a user is automatically added to the account plan team when the T&I organizer sends the invitation. This is an additional enhancement delivered with this release.

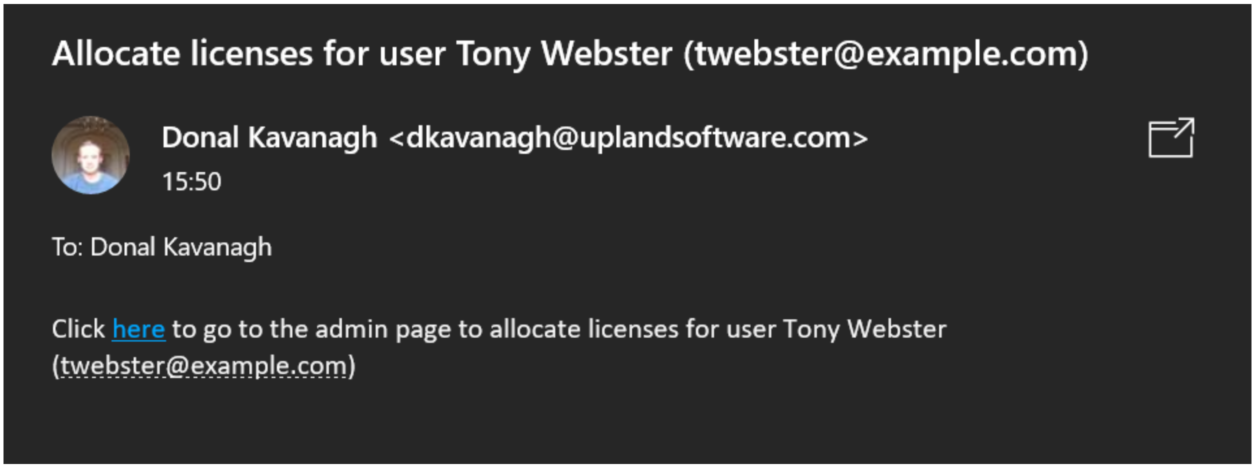
New functionality to be administered

Setting up T&I access for non-license holders

A designated T&I administrator is responsible for organizing access when a non-license holder is added to a T&I.

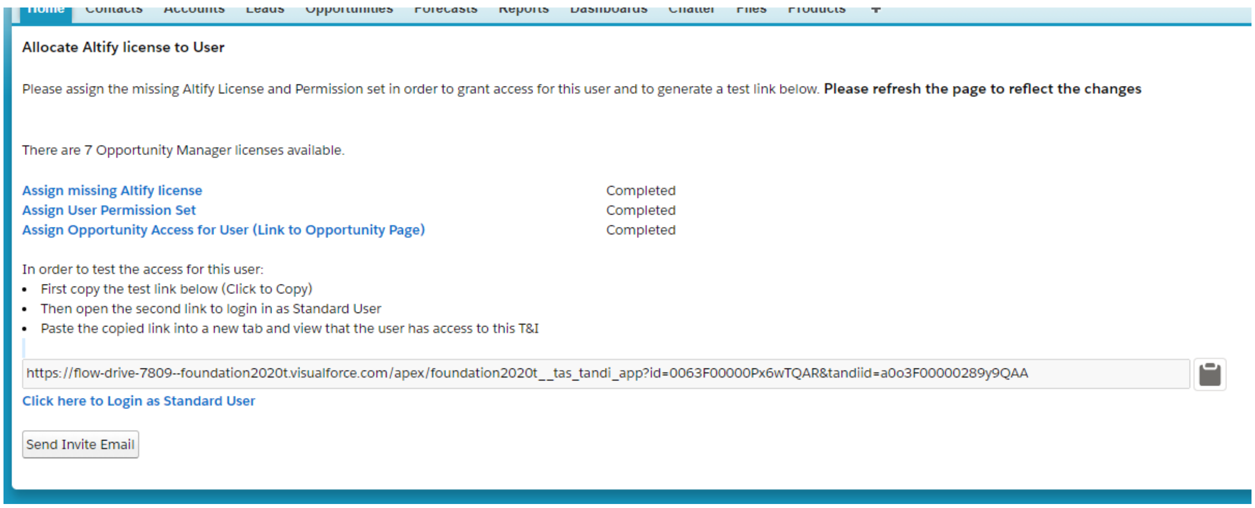
The T&I admin's username is recorded in the Altify Core Setting *TANDI Admin Username*. This admin receives an email when a user without the relevant license, permission set (AM or OM) or opportunity access (OM only) is added to a T&I.

Below is an email example.

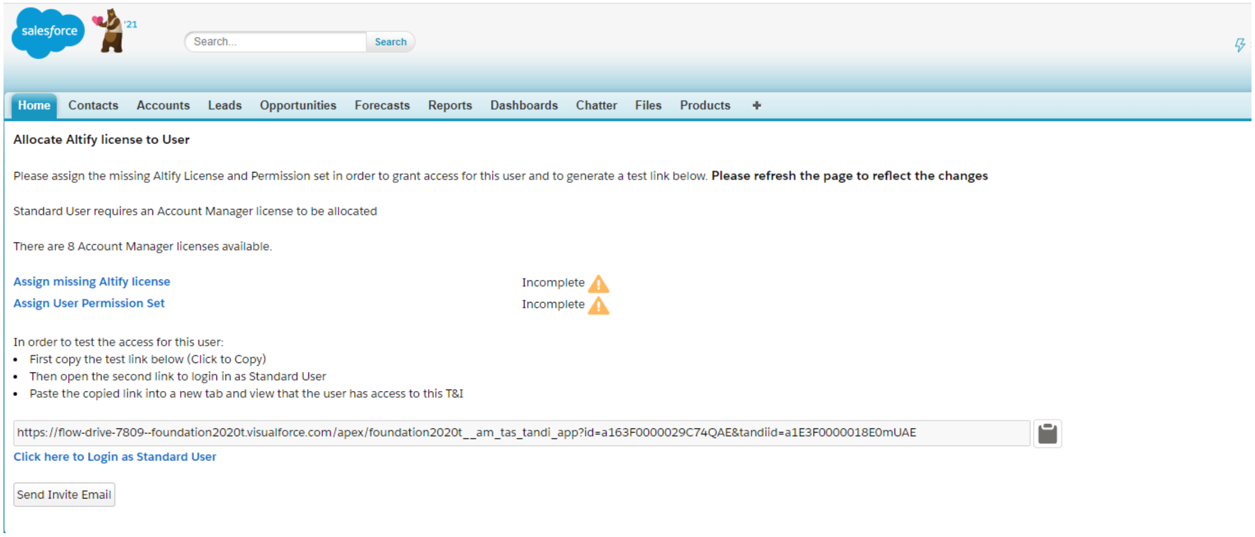


On clicking the link, the admin is brought to a Salesforce page with links to the relevant set up tasks, validation of those tasks ('Completed'), and guidance on testing the user's access to the T&I. From this page, the admin can also send an email to the invitee prompting them to test their access. This email is also received by the T&I organizer.

The following is the task page for an OM T&I.



And the following is the task page for an AM T&I.



For more information, see the following:

- Allocating permissions for access in Account Manager
- Allocating permissions for access in Opportunity Manager

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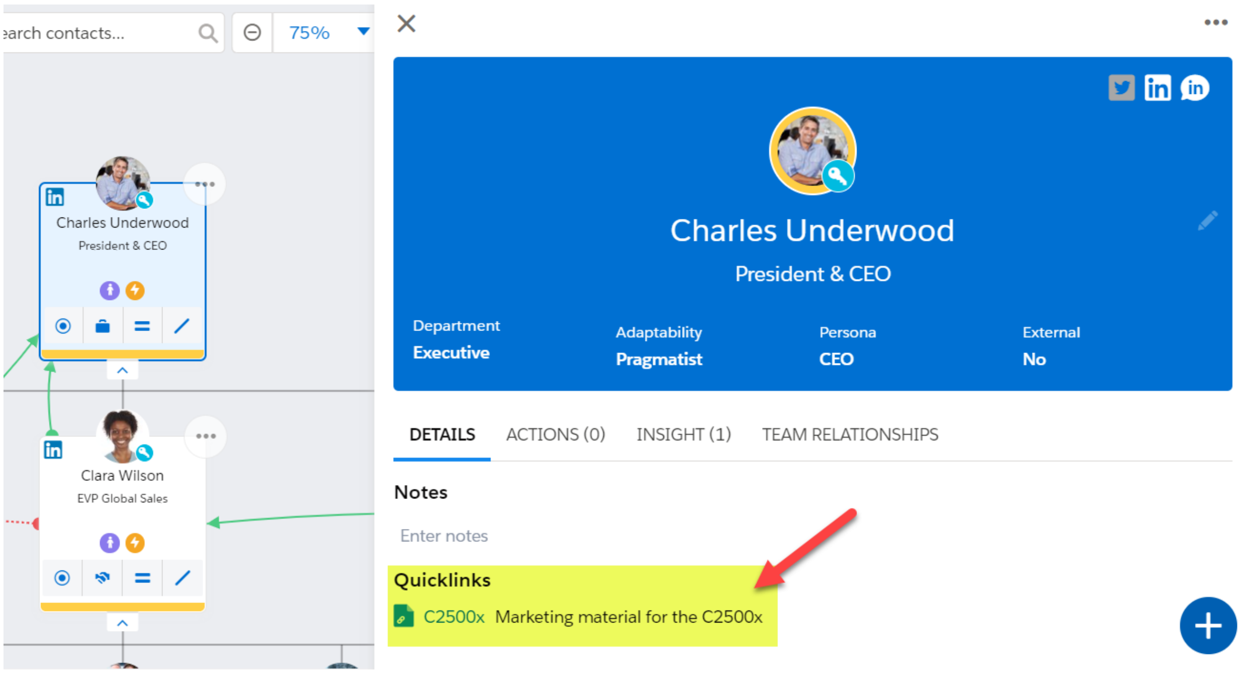
Relationship Map

New user functionality

Access links in contacts' information panels

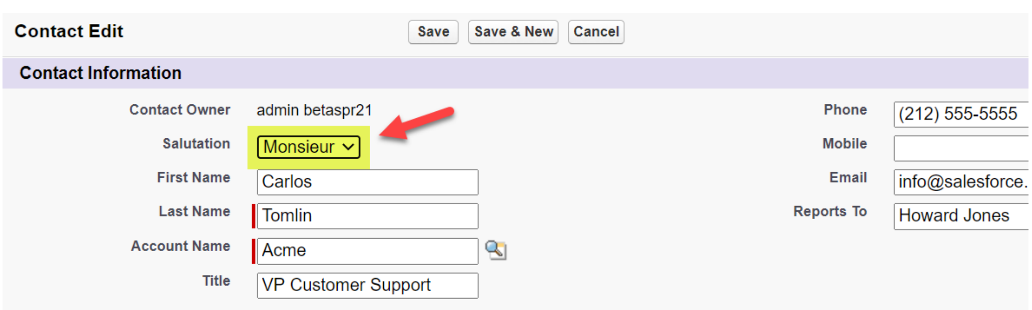
Users can access links to useful resources in a contact's information panel. These links can be configured so that they point to a custom page with information specific to the relevant contact.



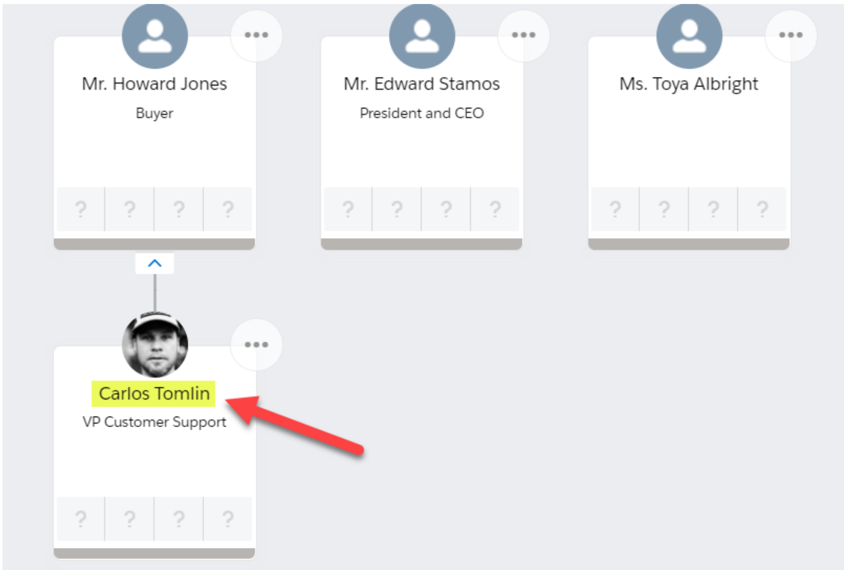
Hiding long salutations

An issue was occurring whereby contact information was obscured when a long salutation was recorded for a contact. Now, salutations of longer than five characters are not displayed in a relationship map.

A salutation of greater than five characters...

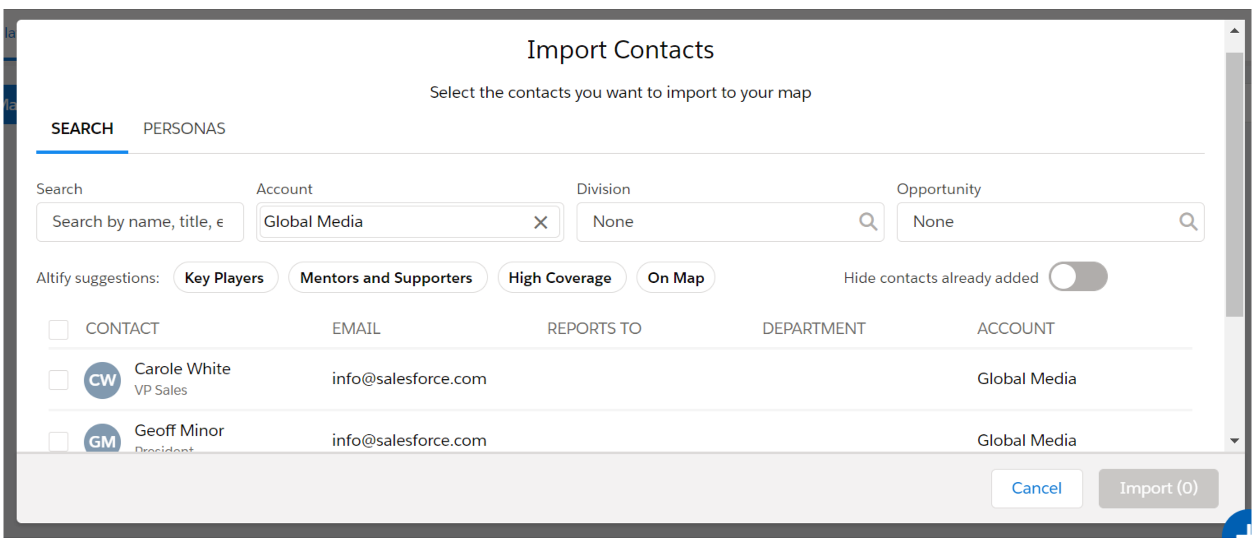


The salutation is hidden on the relationship map....



More contacts displayed when importing

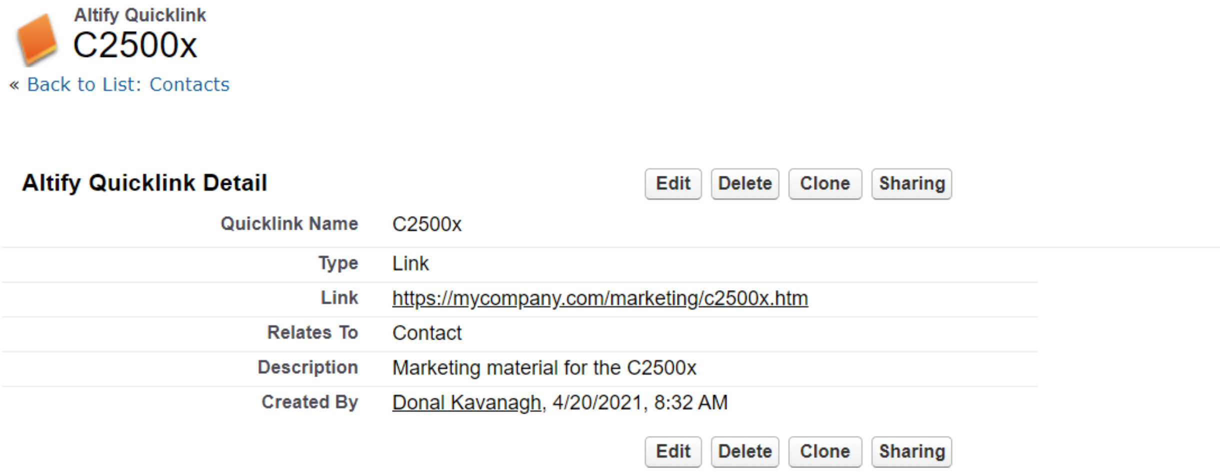
The maximum number of contacts displayed when importing contacts into a relationship map is increased from 50 to 200.



New functionality to be administered

Setting up rel map quicklinks

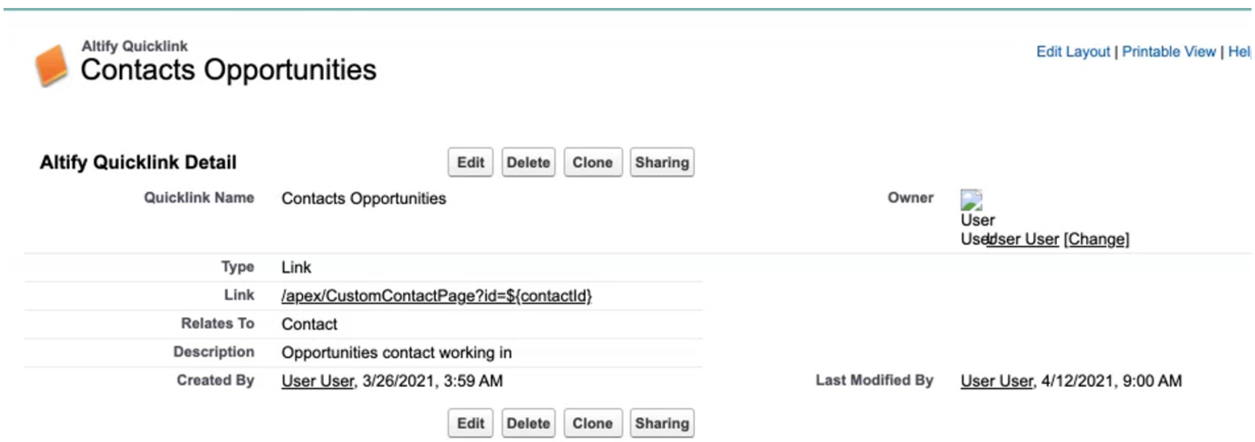
An administrator can set up a quicklink to be displayed on every contact's information panel by creating the necessary Altify Quicklink record and setting **Relates To** to 'Contact' (as shown in the example below).



In addition, the administrator can set up a quicklink that navigates to a custom page that references the relevant contact.

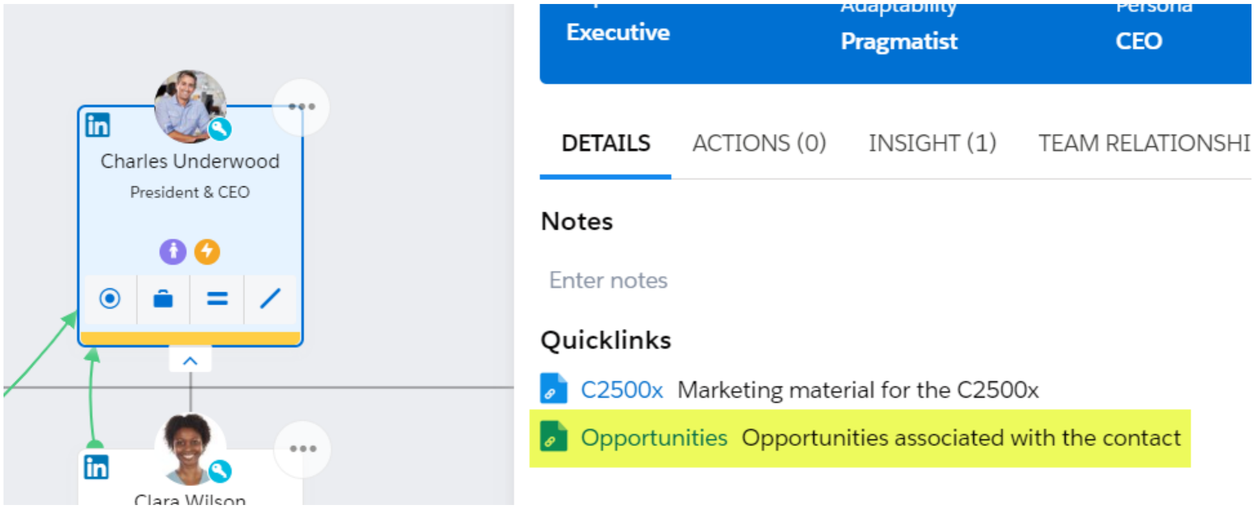
Note: the creation of custom page is a task for your own organization.

For example, the link below navigates to a custom page that displays the opportunities associated with the relevant contact on the map.

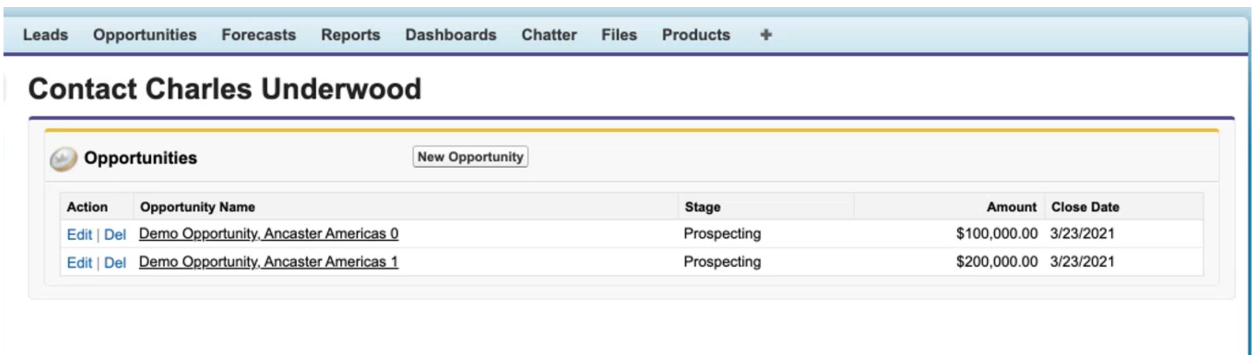


Note: the relevant contact is identified by the following part of the above Link: '${contactId}'.

The user clicks on a link on the contact's information panel...



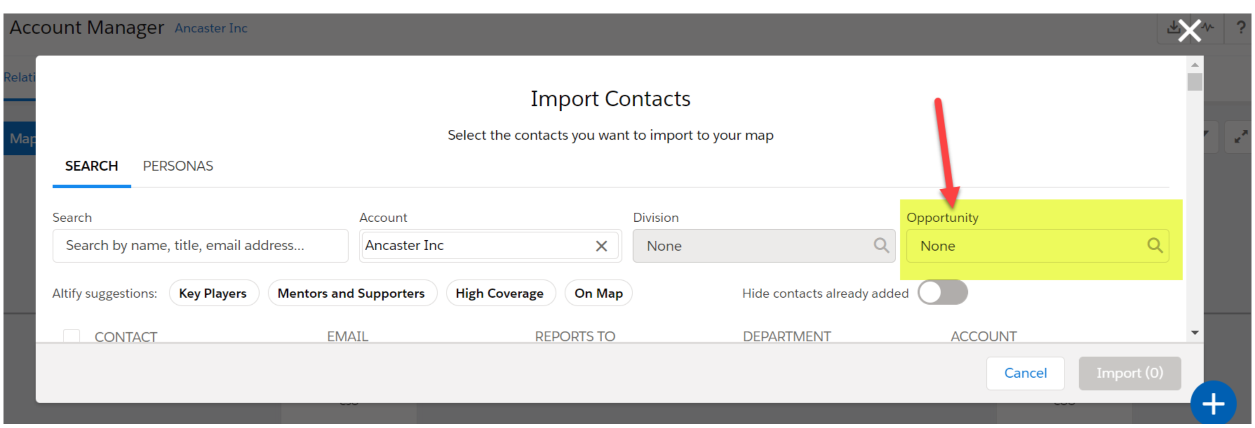
And is brought to the custom page that references the specific contact's information…



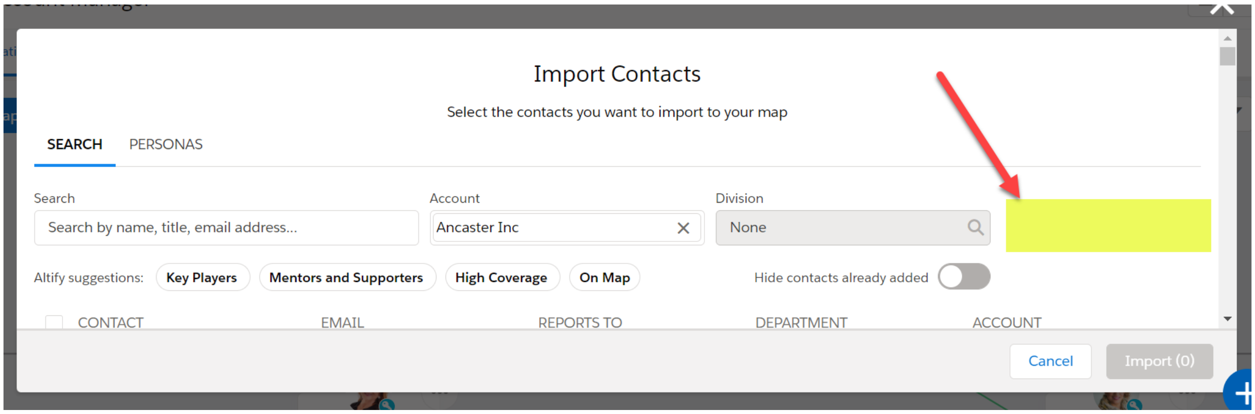
Disable Opportunity Filter on Contact Import Dialog [9.8.12]

Note: This configuration only applies to Relationship Maps for Accounts. It does not apply to Relationship Maps for Opportunities.

On account maps, an Opportunity filter (highlighted below) is displayed to help users searching for contacts to import into their map.



An administrator can remove this filter by enabling the Altify Core Setting *Disable Import Contact Opp Search* [Temp6]. The Opportunity filter is no longer displayed in the Import Contacts dialog (as shown in the example below).



Core product

New functionality to be administered

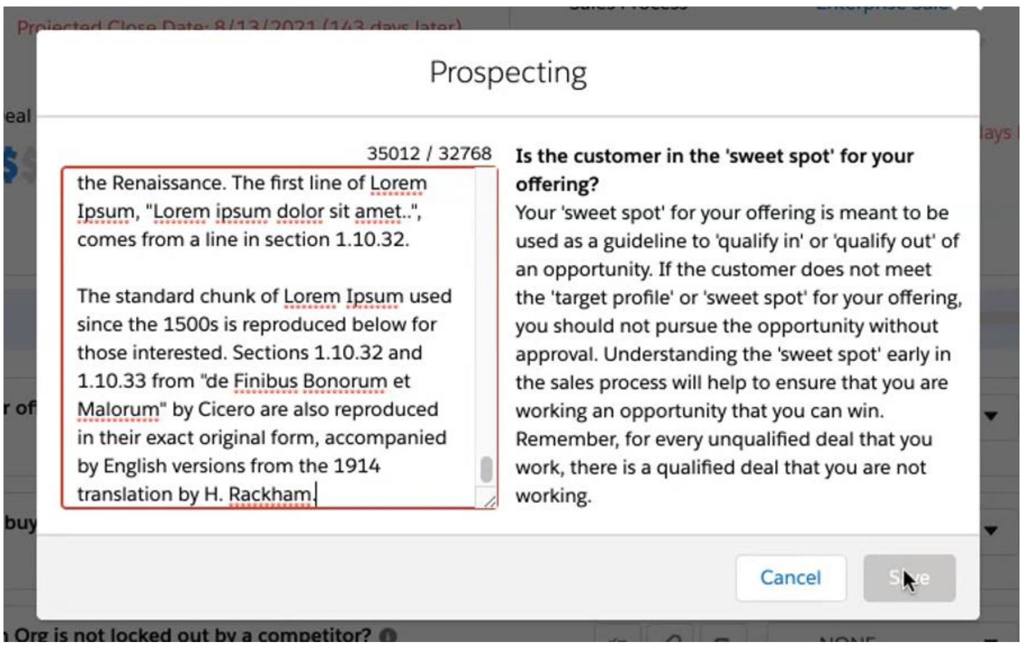
Removal of print option from insight & relationship maps [9.8.11]

A new Altify Core Setting, *Disable Print Buttons*, allows an administrator to remove the print option from the org's insight maps and relationship maps.

New user functionality

Visual indication of exceeded text limits

When a user enters text in a text field and they exceed the character limit, the text box is highlighted in red and the **Save** button is disabled (as shown in the example below).



Reporting

New completeness fields available

The following new fields are added to the Opportunity Completeness and the Account Completeness records.

Altify_Account_Completeness__c new score fields

These fields hold the percentage scores behind the corresponding RAG status fields.

- Answers Score (*Answers_Score__c*)
- Insights Score (*Insights_Score__c*)
- Most Recent Plan Answers Score (*Most_Recent_Plan_Answers_Score__c*)
- Objectives Score (*Objectives_Score__c*)
- Relationships Score (*Relationships_Score__c*)
- Whitespace Score (*Whitespace_Score__c*)

Altify_Account_Completeness__c new summary statistic fields

- Answers Last Updated (*Answers_Last_Updated__c*): the date the account answers were last updated.
- Insights Map Card Count (*Insights_Map_Card_Count__c*): a count of all insights for this account
- Insights Map Card Owned And Validated (*Insights_Map_Card_Owned_And_Validated__c*): a count of all the insights that are confirmed and have owners.
- Insights Map Last Updated (*Insights_Map_Last_Updated__c*): the date the insight map was last modified.
- Insights Map Section Count (*Insights_Map_Section_Count__c*) : a count of all the insight map sections for this account.
- Objective Actions Closed Count (*Objective_Actions_Closed_Count__c*) : a count of all objective actions that are closed against this account.
- Objective Actions Last Updated (*Objective_Actions_Last_Updated__c*) : the most recent update date of an account objective action for this account.
- Objective Actions Open Count (*Objective_Actions_Open_Count__c*) : a count of all objective actions that are open against this account.
- Objective Actions Overdue Count (*Objective_Actions_Overdue_Count__c*): a count of all objective actions that are overdue against this account.
- Objectives Closed Count (*Objectives_Closed_Count__c*): a count of all objectives that are closed against this account.
- Objectives Last Updated (*Objectives_Last_Updated__c*): the most recent update date for an account objective.

- Objectives Open Count (*Objectives_Open_Count__c*): a count of all objectives that are open against the account.
- Objectives Overdue Count (*Objectives_Overdue_Count__c*): a count of all objectives that are overdue against this account.
- Relationship Supportive Key Player[1] Count (*Relationship_Supportive_Key_Player_Count__c*): a count of all relationship map contacts who are both a key player and a supporter/mentor.
- Relationships Contact Count (*Relationships_Contact_Count__c*): a raw count of all contacts on this account's relationship map.
- Relationships Key Player Count (*Relationships_Key_Player_Count__c*): a count of all relationship map contacts who are key players.
- Relationships Map Last Updated (*Relationships_Map_Last_Updated__c*): the date a relationship map contact was last updated

Opportunity__c new score fields

These fields hold the % scores behind the corresponding RAG status fields.

- Assessment Score (*Assessment_Score__c*)
- Decision Criteria Score (Decision_Criteria_Score__c
- Insights Score (*Insights_Score__c*)
- PRIME Score (*PRIME_Score__c*)
- Relationships Score (*Relationships_Score__c*)
- Strategy Score (*Strategy_Score__c*)

Opportunity__c new summary statistics fields

- Assessment Answer Count (*Assessment_Answer_Count__c*): a count of all assessment answers with Yes/No answers.
- Assessment Answer Last Updated (*Assessment_Answer_Last_Updated__c*): the date the assessment was last modified.
- Assessment Competitor Answer Count (*Assessment_Competitor_Anwser_Count__c*): a count of all competitor assessment answers with Yes/No answers.
- Assessment Competitor Count (*Assessment_Competitor_Count__c*): a count of competitors for this opportunity.
- Decision Criteria Last Updated (*Decision_Criteria_Last_Updated__c*): the date the decision criteria were last updated.
- Formal Decision Criteria Contact Count (*Formal_Decision_Criteria_Contact_Count__c*): a count of the contacts associated with formal decision criteria.

[1] A Key Player is a contact whose Political Status is Inner Circle or Political Structure.

- Formal Decision Criteria Count (*Formal_Decision_Criteria_Count__c*): a count of all the formal decision criteria identified.
- Informal Decision Criteria Contact Count (*Informal_Decision_Criteria_Contact_Count__c*): a count of the contacts associated with informal decision criteria.
- Informal Decision Criteria Count (*Informal_Decision_Criteria_Count__c*): a count of all the informal decision criteria identified.
- Insight Map Card Count (*Insight_Card_Count__c*): a count of all insights for this opportunity.
- Insight Cards Owned and Validated (*Insight_Cards_Owned_And_Validated__c*): a count of all confirmed insights with owners for this opportunity.
- Insight Map Last Updated (*Insight_Map_Last_Updated__c*): the date the insight map was last updated.
- Insight Map Section Count (*Insight_Section_Count__c*): a count of all insight map sections for this opportunity.
- PRIME Action Closed Count (*PRIME_Action_Closed_Count__c*): a count of all closed prime actions for this opportunity.
- PRIME Action Open Count (*PRIME_Action_Open_Count__c*): a count of all open prime actions for this opportunity.
- PRIME Action Overdue Count (*PRIME_Action_Overdue_Count__c*): a count of all overdue prime actions for this opportunity.
- PRIME Actions Last Updated (*PRIME_Actions_Last_Updated__c*): the date a prime action was last updated.
- Rel Map Key Roles Uncovered Count (*Rel_Map_Key_Roles_Uncovered_Count__c*): a count of all the contacts with key buying roles identified for this opportunity.
- Rel Map Supportive Key Player Count (*Rel_Map_Supportive_Key_Player_Count__c*): a count of all relationship map contacts who are both a key player and a supporter/mentor.
- Relationship Map Contact Count (*Relationship_Map_Contact_Count__c*): a raw count of all contacts on this opportunity's relationship map.
- Relationship Map Key Player Count (*Relationship_Map_Key_Player_Count__c*): a count of all contacts on this opportunity's relationship map who are key players.
- Relationship Map Last Updated (*Relationship_Map_Last_Updated__c*): the day the relationship was last updated.

Changes to completeness scoring [9.8.18]

The following changes make completeness more achievable for Altify users:

Account Manager

- Account Details questions are regarded as complete if a note or an attachment is provided. Previously, a note and an attachment were required.
- Segmentation and Level of Relationship are no longer included in the overall account completeness calculation.
- New Altify Account Manager Settings allow for custom Objective Types to be identified as Revenue, Relationships or Business Development types. This will ensure their inclusion in completeness calculations.

For more information, see the online help for administrators.

Opportunity Manager

- For Relationships Status, amber is now achieved if at least one contact is both a key player and a mentor/supporter. Previously, a contact who is both an approver and a mentor/supporter was required to achieve amber status.
- For actions, all actions (and not just PRIME actions) are now included in the completeness calculation.

For more information, see the online help for administrators.