

[previous](#) [Home](#) [next](#)

2.01.17 Decision Board

The **Decision Board** form administers the persons participating in the sales pipeline (contact person) in the system. The position, the influence, the attitude and various other settings can be entered here.

Tip: For more on this subject see chapter [3.11.04 The Contact System](#).

The screenshot shows a software application window titled "DecisionBoard 2 TLC Telecommunications Corporation". The window has a toolbar with icons for close, minimize, maximize, and a logo. Below the toolbar is a menu bar with "Document", "Edit", "View", and "Back references". The main area contains a table with the following data:

ID	2		
SalesPipeline	1 TLC Telecommunications Corporation		
Customer	TLC Telecommunications Corporation		
Contact	Williams George		
SalesRole	Approver		
Influence	Large		
Attitude	# Positive	Reason	Strong concept
BusinessGoal	New sales distribution in London area		
PersonalGoal	Higher position		
DecisionCriteria	Financing concept		
Note			

The form consists of the following elements:

On the “Main” tab:

- **Number:** The element number defines distinctly the decision boards in the system.
- **Sales Pipeline:** This field assigns a sales pipeline to the the decision board.
- **Customer:** This field assigns a contact to the decision board.
- **Contact:** Here the contact's contact person is defined to the decision board.
- **Sales Role:** The in Collections (see Administration Guide) defined positions of the decision boards (e.g. user, decision board, approver, tester/inspector, etc.) are stored in the field position.
- **Influence:** The in Collections (see Administration Guide) defined influential characteristics (e.g. large, middle, small, etc.) can be stored in the field influence.

- **Attitude and Reason for Attitude:** The in Collections (see Administration Guide) defined attitude of the decision board (e.g. positive, neutral, negative, etc.) can be stored in the field influence. The reason for this attitude can be entered in the text field reason.
- **Business Goal, Personal Goal und Decision Criteria:** Further attitudes of the decision board, such as business goal, personal goal and decision criteria.
- **Note:** Comments concerning the decision board can be entered in this field.

From:
<https://infodesire.net/dokuwiki/> - Projectile-Online-Handbuch



Permanent link:
https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_2:2.01.17_basic_-_entscheidungstraeger&rev=1260370435

Last update: 2019/10/25 14:09