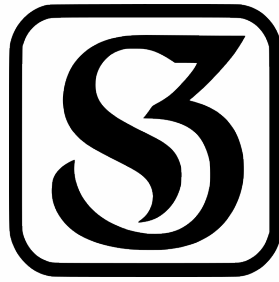


B2B Sales BattleCards User Guide



Version 1.2 | B2B Sales BattleCards by Sales3volution

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Getting Started

First Time Login

1. **Access the Application:** Navigate to the B2B Sales BattleCards web application
2. **Email & Password:** Enter your business email address and a strong password
3. **Account Creation:** If you're a new user, the system will automatically create your account
4. **Email Verification:** Check your email and click the verification link before proceeding
5. **Login:** Return to the app and sign in with your verified credentials

Security Notes

- Use a unique, strong password for your account
 - Always log out when using shared or public devices
 - Your data is encrypted and stored securely in the cloud
 - Only you can access your BattleCards
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Home Dashboard

The Home Dashboard is your command center for managing all BattleCards.

Navigation Controls

Search Bar: Quickly find specific companies by name or notes content

Sort Options:

- **Last Updated (default):** Shows most recently modified cards first
- **Name (A-Z):** Alphabetical sorting by company name

Page Size: Control how many cards display per page (5, 10, 20, or 50)

Card Management

- **View Card:** Click any card to open it for editing
 - **Delete Card:** Use the delete button (cannot be undone)
 - **Create New:** Click "+ New BattleCard" to start a fresh assessment
-

Creating Your First BattleCard

Quick Start Process

1. Click "+ **New BattleCard**" from the Home Dashboard
2. Start with the **Basic** tab to enter company fundamentals
3. Progress through each tab systematically
4. The system auto-saves your work every few seconds
5. Use **Export PDF** or **Export to AI** when complete

Navigation Between Tabs

The application uses a tab-based interface:

- **Basic:** Company profile and relationship data
 - **Channels:** Sales channels and distribution mix
 - **Assessment:** Strategic capability matrix
 - **Products:** Focus products and competitive positioning
 - **Team:** Buying team and stakeholder mapping
 - **Process:** Procurement constraints and risk assessment
 - **Summary:** Automated insights and action planning
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Basic Information Tab

Company Profile

Business Name: The primary identifier for this BattleCard

Company Type: Select all applicable categories

- Manufacturer, Distributor, Retail, Service, Technology, Public

Relationship Status: Define your current relationship

- Existing: Current partner or customer
- New Prospect: Potential new relationship
- Competitor: Competitive intelligence

Market Reach: Geographic scope

- Local, Regional, International

Business Stage: Company maturity level

- StartUp: Early stage, high growth potential
- Growth: Expanding market presence
- Maturity: Established market position
- Portfolio: Declining or restructuring

Company Size & Market Impact

Employees: Total workforce size

Yearly Turnover: Annual revenue in millions of euros

Industry Turnover: Total addressable market size

Market Relevance: Strategic importance to your business (1-10 scale)

Relationship Assessment

Sympathies Level: Current relationship strength (1-10 scale)

- 1-3: Weak or strained relationship
 - 4-6: Professional but limited relationship
 - 7-10: Strong partnership potential
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Channels Tab

Sales Channel Configuration

Active Channels: Select all channels the company uses

- Web: Online sales and e-commerce
- B2B: Business-to-business sales force
- Retail: Physical retail presence
- Other: Custom channel (specify label)

Channel Mix Percentages

Critical Requirement: Channel percentages must total exactly 100%

Enter the percentage split across all active channels:

- Web: % of sales through online channels
- Retail: % through physical retail
- B2B: % through direct business sales
- Other: % through alternative channels

Color Indicators:

- Green checkmark: Totals 100% (ready for analysis)
 - Red warning: Does not total 100% (blocks certain exports)
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Assessment Tab

The Assessment Tab contains the core strategic evaluation using interactive quadrant matrices.

Capability Quadrants

Each quadrant uses a drag-and-drop interface:

Management Quadrant

- X-axis: Capacity (resources, structure, scale)
- Y-axis: Performance (execution, results, efficiency)

Sales Quadrant

- X-axis: Capacity (team size, coverage, tools)
- Y-axis: Performance (results, effectiveness, market penetration)

Marketing Quadrant

- X-axis: Capacity (budget, team, infrastructure)
- Y-axis: Performance (brand strength, campaign effectiveness)

Market Placement Quadrant

- X-axis: Price positioning (1=low price, 10=premium)
- Y-axis: Quality positioning (1=basic, 10=premium quality)

Using the Quadrant Interface

1. **Position the Dot:** Click or drag within each quadrant to set X/Y coordinates
2. **Live Feedback:** Values update in real-time with coordinate display
3. **Sentiment Buttons:** Mark each area as "Good" or "Concern"
4. **Corner Labels:** Reference guides for quadrant interpretation

Quadrant Interpretations

High/High (Top Right): Strong capacity and performance **High/Low (Bottom Right):** Resources available but underperforming **Low/High (Top Left):** Limited resources but efficient execution **Low/Low (Bottom Left):** Weak capacity and poor performance

Products Tab

Focus Product Analysis

Product Portfolio: Add multiple products for comprehensive analysis

For each product, capture:

Product Name: Clear identifier

Market Share (%): Current market position

Potential (%): Realistic growth opportunity

Problem: Key challenges or competitive disadvantages

Plan: Strategic approach to address problems and capture potential

Product Management

- **Add Product:** Click "+ Add Product" to expand your analysis
 - **Delete Product:** Remove products that are no longer relevant
 - **Auto-save:** Changes save automatically as you type
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Team Tab

Buying Team & Power Mapping

Stakeholder Analysis: Map all decision-makers and influencers

For each team member:

Name: Individual identifier

Role: Job title or function

Power Level: Decision-making influence (1-5 scale)

- 1-2: Limited influence
- 3: Moderate influence
- 4-5: High decision-making power

Support Level: Attitude toward your solution (-2 to +2 scale)

- -2: Strongly resistant
- -1: Somewhat resistant
- 0: Neutral
- +1: Somewhat supportive
- +2: Strong advocate

Power Mapping Strategy

High Power + High Support: Champions and key allies **High Power + Low Support:** Critical conversion targets **Low Power + High Support:** Internal advocates and information sources **Low Power + Low Support:** Monitor but don't prioritize

Process Tab

Buying Stage Tracking

Current Stage: Select the buyer's current position

- Awareness: Problem recognition
- Explore: Solution research
- Define: Requirements definition
- Validate: Vendor evaluation
- Commit: Final decision phase

Value Hypothesis

Strategic Positioning: Craft your core value proposition

Template: "For [persona] who [pain], we will [outcome] by [capability], proven by [evidence], measured by [metric/timeframe]."

Procurement Constraints

Process Requirements: Check all active constraints

- Tender/RFP: Formal bidding process required
- Security Review: Information security evaluation
- Legal Review: Contract and compliance review
- Framework Agreement: Existing vendor agreements
- Budget Approved: Funding confirmed and allocated

Risk Assessment

Risk Identification: Document and prioritize potential obstacles

For each risk:

- **Description:** Clear risk statement
- **Severity:** Low, Medium, or High impact assessment

Summary Tab

Automated Intelligence

The Summary tab provides AI-generated insights based on your data inputs.

Strategic Health Metrics

Health Score: Overall partnership viability (0-100%)

- 70-100%: Strong strategic position
- 40-69%: Moderate potential with improvement areas
- 0-39%: High-risk partnership requiring significant support

Component Scores:

- Capability: Average performance across management, sales, marketing
- Capacity: Average resource availability
- Market Share: Calculated percentage
- Strategic Impact: Combined market relevance and scale
- Deal Health: Composite partnership viability

Suggested Plays

Automated Recommendations: System-generated action items based on assessment

Common suggestions include:

- Capability improvement strategies
- Capacity expansion recommendations
- Channel optimization guidance
- Relationship development priorities

Quadrant Interpretations

Strategic Context: Detailed analysis of each quadrant position

For each assessment area:

- **Current State:** Description of quadrant position
- **Meaning:** Strategic interpretation
- **Implication:** Business impact
- **Vendor Response:** Recommended action approach

Notes and Actions

Key Insights: Strategic observations and intelligence

Action Items: Specific next steps and follow-up tasks

Export Features

PDF Export

Professional Reports: Generate comprehensive strategy documents

Content Includes:

- Executive summary with key metrics
- Capability matrix visualization
- Strategic priorities and recommendations
- Account intelligence summary
- Stakeholder analysis
- Risk assessment
- Next steps planning

Usage: Click "Export PDF" to download formatted business report

AI Export

Strategic Analysis: Prepare data for AI-powered insights

Features:

- Anonymized data export (company alias, stakeholder aliases)
- Structured JSON format for AI analysis
- Comprehensive strategic context
- Suggested analysis questions
- Copy-to-clipboard functionality

Usage: Click "Export to AI" to copy anonymized data for AI analysis tools

AI Analysis Questions automatically included:

- Strategic fit assessment
- Capability gap analysis
- Stakeholder influence strategy
- Competitive positioning
- Risk mitigation priorities
- Revenue optimization opportunities

- Process acceleration tactics
 - Relationship development
 - Market dynamics assessment
 - Execution priorities
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Best Practices

Data Quality

Consistent Updates: Refresh BattleCards quarterly or after major developments

Accurate Percentages: Ensure channel mix totals exactly 100%

Realistic Assessments: Use quadrant positioning based on evidence, not wishful thinking

Complete Stakeholder Mapping: Include all decision-makers and influencers

Strategic Usage

Focus on Key Accounts: Prioritize your most strategic opportunities

Cross-functional Input: Gather insights from sales, marketing, and product teams

Regular Reviews: Schedule periodic assessment updates

Action-Oriented: Use insights to drive specific partnership decisions

Security Best Practices

Strong Passwords: Use unique, complex passwords

Regular Logout: Always log out on shared devices

Data Sensitivity: Be mindful of confidential information in notes

Verification: Keep your email address current for security notifications

Troubleshooting

Common Issues

Login Problems:

- Ensure email is verified

- Check password accuracy
- Clear browser cache if needed

Data Not Saving:

- Check internet connection
- Ensure all required fields are completed
- Refresh page and try again

Export Issues:

- Verify channel percentages total 100%
- Ensure all required data is entered
- Try different browser if problems persist

Mobile Usage:

- Use portrait orientation for best experience
- Tap and hold for drag operations in quadrants
- Use pinch-to-zoom if interface appears small

Getting Help

Refresh Strategy: Most issues resolve with a browser refresh

Browser Compatibility: Works best with modern browsers (Chrome, Firefox, Safari, Edge)

Regular Updates: The application updates automatically - refresh to get latest features

Data Backup: Your data is automatically backed up in the cloud

Contact & Support

For technical support or feature requests, please contact your system administrator.

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Application: B2B Sales BattleCards

Provider: Sales3volution

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This guide covers the core functionality of the B2B Sales BattleCards application. Features and interface may be updated regularly to improve user experience and strategic capabilities.