Sales Force Training for Target Pipeline

As of January 2021

We have spent the last year using our new sales tool, Target Pipeline and have made many changes along the way to make the using of this tool as easy as possible for our sales force. As we move into the new year, we would like to get everyone using this valuable tool in order to increase efficiency and sales.

Benefits of using Target Pipeline:

1. Order info
2. HIPAA compliant Rolodex
3. Efficient communication
4. Customer updates
5. Claims
6. Monitor sales pipeline
7. Manage sales process
8. Accountability

Definitions

Target Pipeline defines various terms in a certain way that is applicable specifically to the software. Here are some terms from within the program and what they mean:

1. Pipeline: This is a sales tool that allows reps to view their own sales territory, see all open or closed orders and forecast future sales based on data that has been entered.
2. Accounts: These are defined as Hospitals or Facilities, SLP's or any other location where the patient came from for the purposes of purchasing an Eyegaze Edge®. These can be looked up from existing lists or added manually by a rep.
3. Opportunities: These are the patients who will use the Eyegaze Edge®.
4. Contacts: This is the 'rolodex' section of the database and can be used to store a reps' own contacts in the industry.
5. Tasks: In the case of this program, a task is something associated with a particular opportunity and can be used to schedule a follow up with a patient. These can also be re-assigned to any other user in the database. Any scheduled tasks will be seen on the main page of the program along with any assigned due date.
6. Activity: This screen summarizes all activity for a particular sales rep for a specified date range. It provides a summary listing of any notes added to an opportunity for the given time period.
7. Lead: This is the first 'stage' for an opportunity. Any contact from a potential user or family member can be added as a lead to track contact and follow up.
8. Evaluation: Once a lead has completed a demonstration, they are in the evaluation stage until they decide.
9. Device Trial: This is used to represent an extended trial of the Eyegaze Edge® for a patient.

10. Funding: Once an opportunity decides to move forward, they are put into the Funding stage. This includes gathering of paperwork, verifying insurance benefits and calculating any patient responsibility for the purchase of our system.
11. Production: Sending a contract to a patient, building and shipping their system is included in this stage.
12. Set-up & Training: Once the system is received and training and set-up coordinated, this is also where we track receiving all shipment paperwork back.
13. Claims: As soon as we have a delivery date for the system and the mounting package, we move the patient into the claims stage. This includes filing of all claims and collection of money due for the purchase of a system.
14. Complete/No Sale: Includes everything from a patient choosing a different company to a patient passed away before we could complete our process to a patient wasn't a good fit for our system.
15. Complete/Sale: This is the very end of our process and means that all steps have been completed for the purchase of an Eyegaze Edge® and all money has been collected for the sale.
16. On Hold: This is used to indicate that a patient isn't moving forward with a purchase yet. They could have had a demonstration of our system, but hasn't seen other systems yet or wants to purchase our system but their insurance doesn't cover it and they are going to change insurance providers or other scenarios like this.
17. CPUC: This is very specific to CA patients with certain funding options.

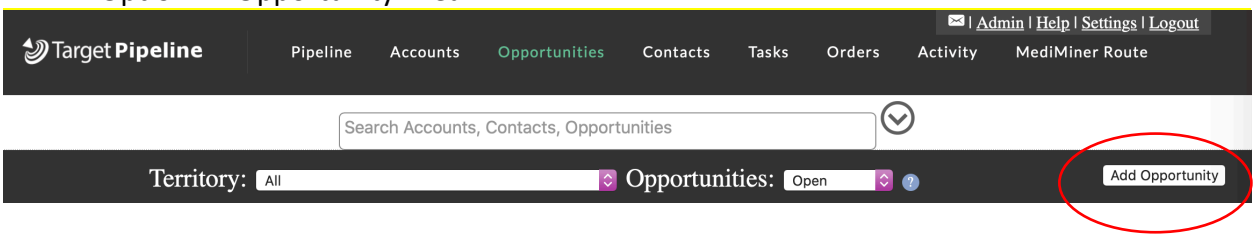
Log In Options

Target Pipeline is a cloud-based application that can be run on a browser from a PC or Tablet or you can download the Target Pipeline app from your app store on your phone. Taking advantage of the phone app puts valuable tools in the palm of your hand. Anything you do in the phone app is automatically updated to the cloud for later access on a PC or vice versa. If you need your login credentials sent, please let us know.

Adding an Opportunity

There are two different ways to add a new opportunity to Target Pipeline, through the 'Opportunities' area or through the 'Accounts' area.

Option 1: Opportunity Area



Click on the 'Opportunities' menu at the top of the screen, then click the 'Add Opportunity' button on the right side of the screen.

Target Pipeline | Pipeline | Accounts | Opportunities | Contacts | Tasks | Orders | Activity | Medi

Search Accounts, Contacts, Opportunities

Enter Patient Name:

Account Name:

Select Territory Permissions: Select Territory

All fields on this screen are required. The 'Patient Name' field should be input as Patient First Name followed by Patient Last Name. The 'Account Name' field allows you to enter the name of the facility or hospital associated with the patient, after you enter the name of the account, the database will try to find the account through a look up. If the account name you entered does not come up as a look up, then it will have to be added. The final field on this page is for the rep to assign this new opportunity to their own sales territory.

Search Accounts, Contacts, Opportunities

Account Name:
Address:
Zip Code:
City:
State: Select State
Country: United States
Phone:
Add Account

Add as much or as little as you know when setting up a new account.

There is also an area to enter the SLP contact information for the patient when adding the opportunity:

| Admin | Help | Settings | Logout

Target Pipeline | Pipeline | Accounts | Opportunities | Contacts | Tasks | Orders | Activity | MediMiner Route

Search Accounts, Contacts, Opportunities

Enter Patient Name: Test Patient

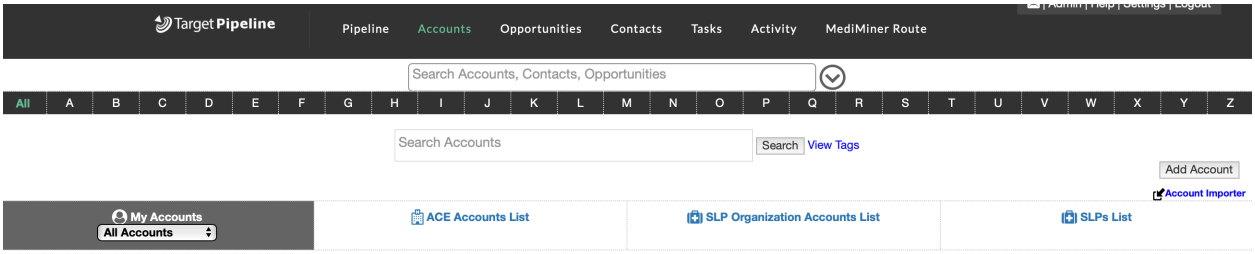
Account Name: **Alabama Neurology Associates**
3105 Independence Drive, Ste 105
Birmingham, AL 35209

Enter SLP Contact:
Name: **Kathleen Smith**
Title: SLP
Phone: (205) 803-2210
Email:

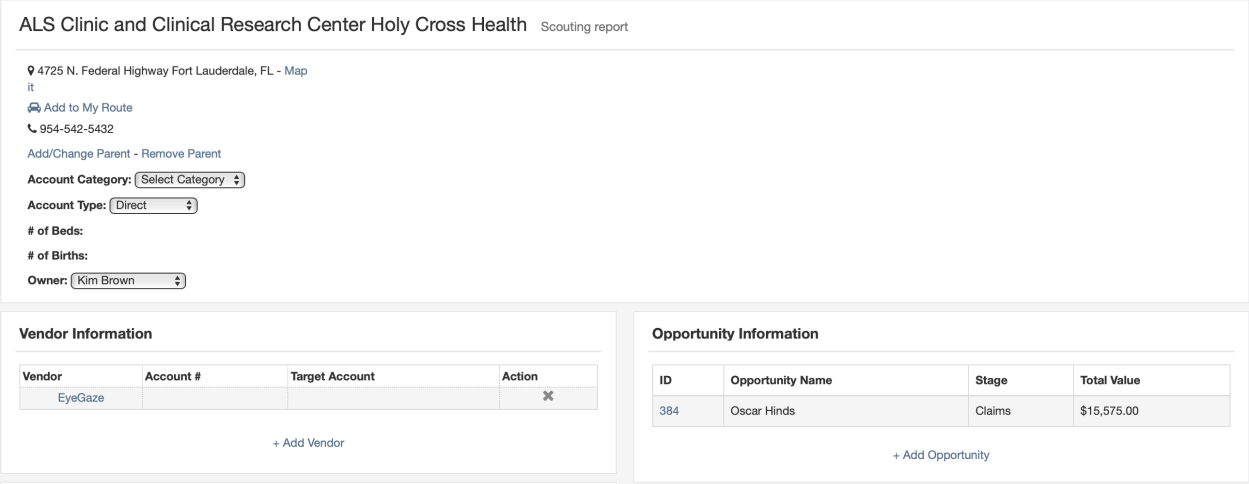
Select Territory Permissions: - Carol Pinto

Create Opportunity

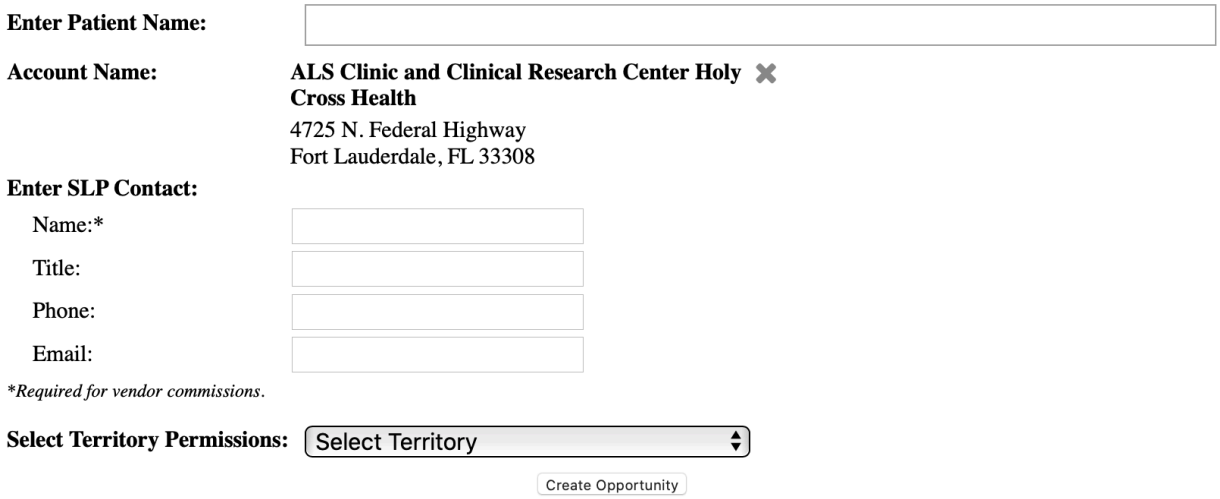
Option 2: Accounts Area



Click on the 'Accounts' link at the top of the screen to get to the Account area. From here, you can use the 'A through Z' letters near the top to find the Hospital or Facility where the opportunity came from. When you find the account you want, click on the name of the account to access the full record.



In the lower right corner, you can click the 'Add Opportunity' link to add your patient



Add the SLP information and assign the opportunity to your territory.

Once you click the 'Create Opportunity' button at the bottom, then your patient becomes a 'Lead' within the database.

Patient Name: Test Patient

Address:
Email:
Phone:
Mobile:
DOB:
Diagnosis:
Primary Funding:
Secondary Funding:

Key Contact:
Key Contact Email:
Key Contact Phone:
Key Contact Mobile:

Make & Model of wheelchair:
Tilter or quick release?
Include base coupler? No
Include quick pack? No
Eye condition(s):
Positioning:
Other:

Territory Permissions:
Adaptive Tech P

Expected Close Date:
07/21/2020

Click on the pencil icon under the patient name field and enter the address (the street, city, state and zip all on one line), Email, Phone, Mobile, DOB (if known) and Diagnosis (if known). You also have to ability to add Key Contact information for the caregiver or the patients' representative if they are unable to speak. You can use this section to capture the wheelchair specifics, any special eye conditions or positioning requirements. The 'Expected Close Date' defaults to a date three months in the future, but can be changed to be specific to your case. Be sure to click the 'Update' button at the bottom of this section to save the information.

Pre-Order:

In the Pre-Order area just below the patient information you will mark different checkboxes depending on the stage of your patient. You can use the 'Patient Undecided' checkbox to put your patient 'On Hold' or use the 'Patient Move Forward' box to enter a date and then send a notification to the Funding Department. This date box also changes the stage of your Patient from Lead to Funding. Using the 'Complete/No Sale' checkbox changes the stage to the same thing for your patient and then you can use the notes area at the bottom of the record to indicate why the sale was lost.

Pre-Order:

Demo Completed	Patient Undecided	Complete/No Sale	10/23/2020 Patient Move Forward Send Notification Send

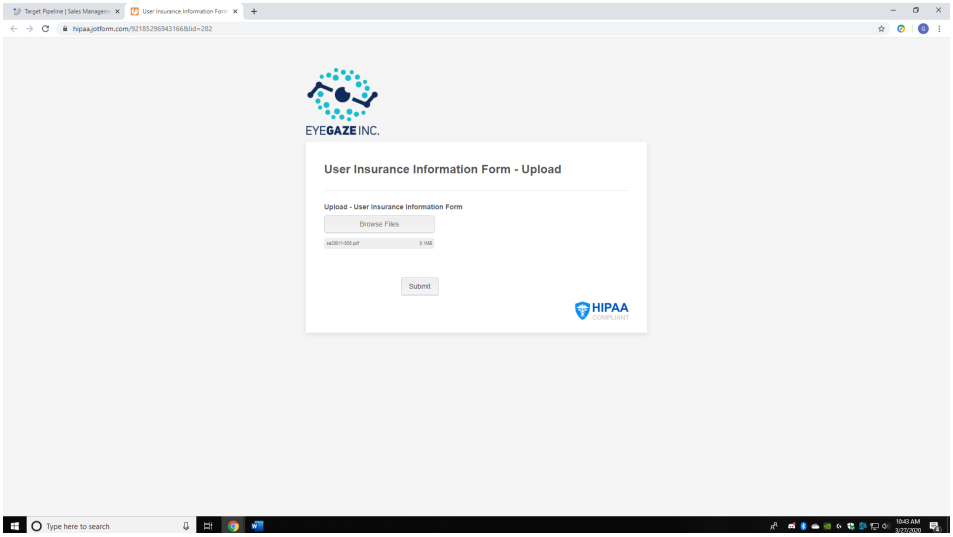
Funding Packet:

Now that the patient has been set up with as much information as you have, you can email the funding packet forms directly to the patient (or caregiver with PHI clearance) for completion electronically.

Funding Packet: Email Funding Packet | Email SLP Packet | Email Physician's Packet

Authorization for Release of Information **Status: Completed** ***Date Completed: 2020-06-11 09:45:01*** **View Submission** **Remove Submission** Form - Upload Form	**Eyegaze Privacy Policy** **Status: Completed** ***Date Completed: 2020-06-11 09:47:47*** **View Submission** **Remove Submission** Form - Upload Form	**Financial Responsibility Form** **Status: Completed** ***Date Completed: 2020-06-11 09:49:50*** **View Submission** **Remove Submission** Form - Upload Form	**User Insurance Information Form** **Status: Completed** ***Date Completed: 2020-06-11 10:10:54*** **View Submission** **Remove Submission** Form - Upload Form	**HIPPA-PHI Form** **Status: Completed** ***Date Completed: 2020-06-11 10:19:09*** **View Submission** **Remove Submission** Form - Upload Form
Copy of all insurance cards **Status: Completed** ***Date Completed: 2020-06-11 10:21:39*** **View Submission** **Remove Submission** Form - Upload Form	**Medicare Supplier Standards** **Status: Awaiting Response** Form - Upload Form	**SLP Report template and instruction sheet** **Status: Awaiting Response** Form - Upload Form	**Physician's Prescription Form and instruction sheet** **Status: Awaiting Response** Form - Upload Form	**Copy of Physician's Face to Face Notes** **Status: Awaiting Response** Upload Form

In the section header for 'Funding Packet' you will see three different links to click for different packets: **Email Funding Packet** is for the patient or caregiver, **Email SLP Packet** has our SLP report template along with notes to help the SLP complete their report and then the **Email Physician Packet** which contains a blank RX to complete and sign, and information regarding face to face notes required for insurance claim filing. When you review the individual boxes for each form, if the status indicates 'Complete' then we have received this form, if the status is 'Awaiting Response' then we have requested the form but have not yet received it. You can also upload PDF versions of completed forms in this area by clicking the link 'Form Upload Form' in the box specific to the form you want to upload.



Browse to the form you wish to upload and then click 'Submit'.

Insurance:

In this section you can track the progress of the Funding Department for your patient. These dates are filled in as various tasks are completed. Once the 'Funding Process Complete' field is filled in, the stage changes to 'Production' and is now ready for a contract.

Insurance:

09/28/2020 **Funding Packet Complete**	10/22/2020 **Start Insurance Verification**	10/22/2020 **Contact User** Call	10/23/2020 **Insurance Verification Process Complete**	10/27/2020 **Funding Process Complete**

Production:

Once the case is ready for contract, you will see when the contract was sent to your patient, when it was signed and received, the serial number for the system once it is built and ready and then when that system ships from the Eyegaze Inc. office.

Production:

10/29/2020	10/30/2020	3705-3926	11/02/2020
Contract Sent	Signed Contract Received, Building Order	Serial #	Order Ships

Set-Up/Training:

When the system has been delivered along with the mount to your patient, then you can provide any set-up and training necessary for your patient and record the date that you complete that task. We also track when the required delivery paperwork has been received from your patient.

Set-Up/Training:

11/12/2020	11/20/2020
Set-Up & Training Date	Signed Paperwork Received

Final Funding and Claim Details:

These areas are used to track the progress of claims that have been filed and any payments associated with those claims. This data is primary for accounting purposes, but will give you an idea of how different insurance providers process and pay claims.

Final Funding:

11/04/2020	11/05/2020		
Date of Service	Primary Insurance Claim Filed +Add Note	Secondary Insurance Claim Filed +Add Note	Complete

Claim Details:

	Billed	Allowed	Ded/Coinsurance	Sequestation	Collected
e2510	$ 7862	$	$	$	$
e2512	$ 3075	$	$	$	$
e2599	$ 4638	$	$	$	$
				Primary Total Collected	$ 0
				Secondary Total Collected	$
				Write Off	$
				Insurance Copay/Coinsurance Collected	$
				Add-on: - Paid Options	$
				Patient Responsibility	$ 0.00
				Team Gleason	$
				Total Collected	$ 0.00
				% Paid	0.00%

Account Information:

While you work with a patient, you may identify additional contacts at the account this patient came from. In this section, you can add additional contacts 'on the fly'. You can also edit existing contact information if you get an email for that contact after the fact or maybe get a better phone number to contact them.

Account Information

ALS Clinic and Clinical Research Center Holy Cross Health

4725 N. Federal Highway
Fort Lauderdale, FL 33308

Parent:

Category:

Lauren Tabor - ***Primary Contact***
PhD, CCC-SLP
Phone: (443) 536-1234
Email:

+Add Account Contact

Order Form:
Product selection is listed here and can be accessed through the '+Add Product' link. If you make an incorrect selection, you can click the 'X' button in the 'Action' column. If you need assistance with product selection, you can contact our Production Department.

Order Form

Product	Qty	Unit Price	Total Price	Action
420 - Eyegaze Edge Talker (select camera separately)	1	$7,862.00	$7,862.00	✖
401 - Eyegaze Edge Talker Camera Assembly (Encore)	1	$4,638.00	$4,638.00	✖
MT123 - Wheelchair Mount + FS-VarioFloat mount	1	$3,075.00	$3,075.00	✖
Opportunity Total			$15,575.00	

+Add Product

Notes:
To help you keep track of all of the activity associated with your patient, you can take advantage of the Notes area for free form notes or file attachments or pictures. You can also use this area to send a secure email to any other Target Pipeline user by typing the note and then use the 'Send Email to:' area to select who you would like the message to in the drop-down list. You can organize your notes based on the 'Type' field through the drop-down list.

Add a Note

Send Email to: Select User - **Add Attachment** - Type: Select Type

Date of Sales Note: 02/02/2021 Add Note

- ✓ Select Type
- FTF Meeting
- Phone
- Email
- Tradeshow
- OM Meeting
- Office
- Vacation
- Other

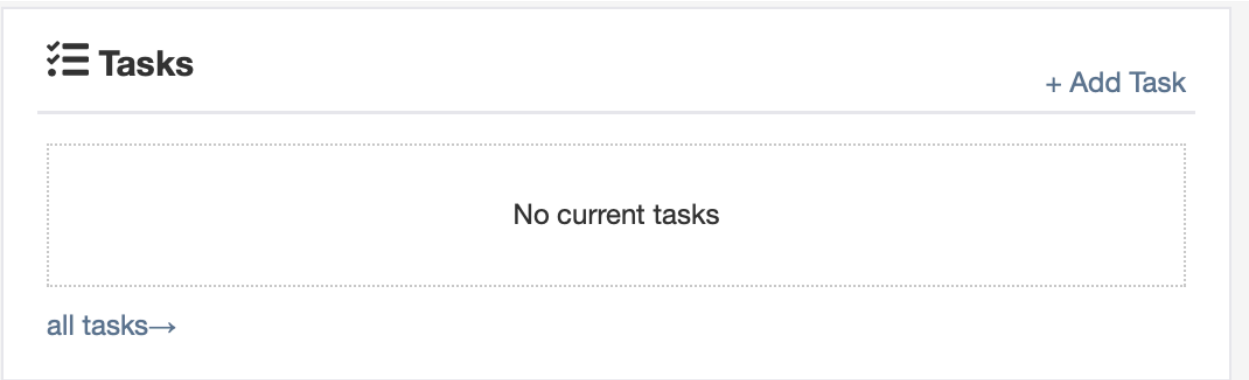
In the Notes area, you can click on the word 'Tasks' to get you into an area to setup various tasks for your patient and then set a due date. When you set a task, it will display on the main page of Target Pipeline on the left side including the due date.

Notes | Tasks | Quote Center

Task:

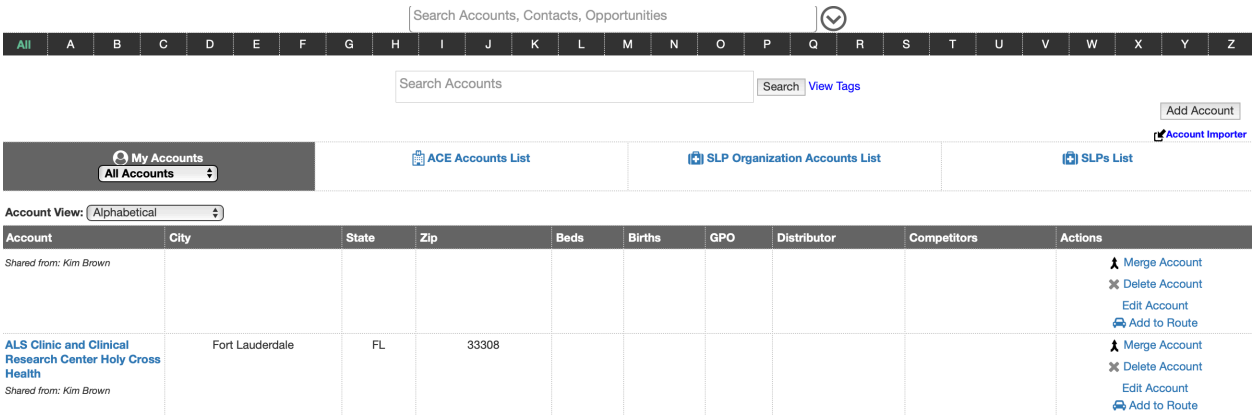
Due Date:

Add Task

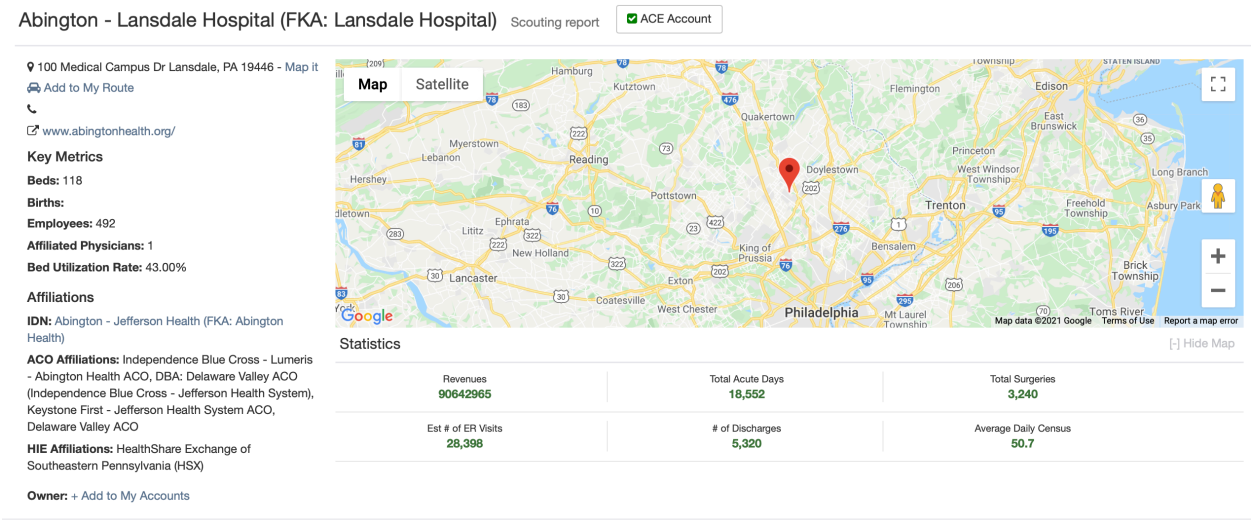


Working with Accounts and Contacts

Accounts:
This is where you will want to list any facility/association/hospital you work with to develop relationships that could lead to referrals. To see if the account is already included in Target Pipeline, you can just search in the 'Search Accounts' box or try using the 'A – Z' letters at the top of the screen to get to accounts with just that letter at the beginning of the name. If the account is not available, you can click on any of the following links 'ACE Accounts List', 'SLP Organization Accounts List' or 'SLPs List' to see if you can find the account on one of those lists.



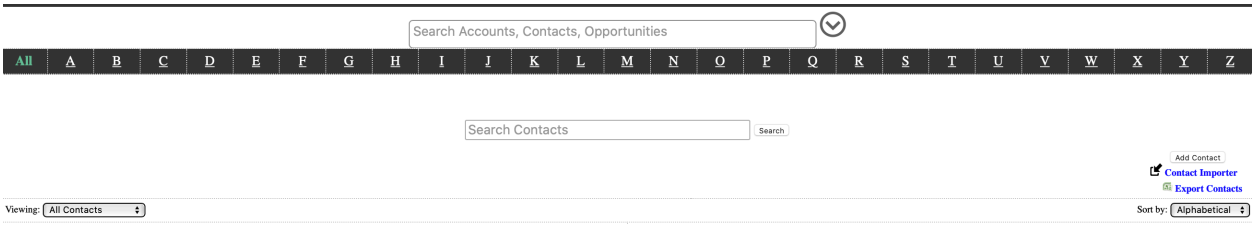
Once you find the account you are looking for, click on the account name link and then you have access to important details about the account. To add it to your account list, click on the '+Add to My Accounts' link next to 'Owner:'.



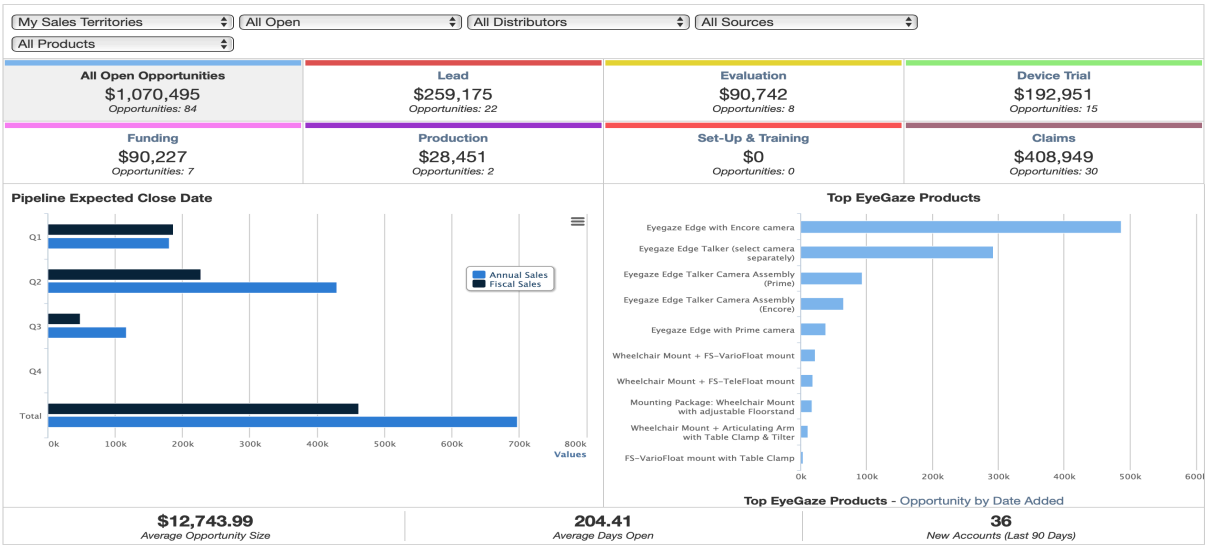
In the record view, you will be able to track all of the opportunities that have come from this account and check for other contacts at the account that could be developed.

If you can't locate the account you are looking for through one of the pre-populated lists, then you can manually add an account by clicking the 'Add Account' button on the far right side of the screen.

Contacts:
This is the online 'rolodex' feature where you can add other contacts not associated with a main account. To add a new contact, click the 'Add Contact' button on the right side of the screen.



Reporting
Tracking your success through reporting is easy in the Pipeline area of the database. Just click the 'Pipeline' link at the top of the screen.



This is the top part of the screen and will default to your own sales territory showing just the open cases. Each box with a colored line above it has a link on the title that will allow you to filter your open cases by the different stages of the sale.

The bottom section of the screen gives you the listing of the opportunities. You can decide which columns you want to see by clicking on the 'Select Columns' link on right side of the screen. If you want to view the actual opportunity, click on the ID # listed next to the opportunity name.

You can also view all of your closed opportunities by clicking the drop-down box next to your name at the top and select 'All Closed' or view all of your opportunities by selecting 'Open and Closed'.

Another way to look at reporting is by clicking on the 'Opportunities' link at the top of the page. Change the territory to yourself (if it is not already set to that) and then you can view all of your open opportunities by account. You can also click on the drop down box next to 'Opportunities:' next to your territory name and select from any option on that drop down list to see the opportunities associated with each stage.