

Opportunity Management made easy!



Sales Opportunity Snapshot®

Sales Opportunity Snapshot (SOS) helps qualify in and set competitive strategy for deals that are worth winning, and qualify out of deals that are not pursuing.

SOS provides a structured, scalable process for qualifying and most importantly, winning strategic sales opportunities where competitors are strong and customer buying protocols are influenced by formal and informal decision criteria.

Ideal for companies utilizing a sales process for the first time, or users of sales methodologies in need of a tune-up, SOS represents the state-of-the-art for taking your regional, national, or global sales teams to the next level.

What Does SOS Do?

SOS helps B2B sales teams win more deals, and increase deal size and margins by exploring 5 Key Areas:

➤ Opportunity Snapshot

Using a *Snapshot* assessment of the 9 key criteria that quickly determines if you should pursue or disengage from any deal.

➤ Alignment with the Political Landscape

Using the simple and insightful *Influence Map* to examine formal and informal power and find the Relevant Executive and all key Stakeholders who affect the buying decision.

➤ Establishing a Competitive Sales Strategy

By examining your relative strengths, weaknesses and positioning compared to competitors, and plotting which of 3 sales strategies will accelerate your deal.

➤ Developing a Value Proposition

To align with the business and political dimensions of the buying process in a way that creates new value for the client.

➤ Planning the Next Steps

Using decision points from each of the previous areas to drive actions towards the next iterative *Snapshot* assessment.

Stand-Alone or Seamless Dynamics 365 Integration

The SOS Tool is available as a stand-alone Excel Workbook and also works seamlessly with D365 for new or existing opportunities you already create and manage. It is extremely visual, insightful, and helps Sales Teams win, and helps Partners with successful D365 implementation. Available now on the AppSource.

Who Needs SOS?

SOS is highly effective when you face:

- Long sales cycles
- Tough competition including “Do Nothing”
- Complex buying process

Sales reps, managers, support professionals and business partners will learn a common language to coordinate the group selling effort. This will help your extended team to:

- Qualify in or out of deals quickly
- Coordinate the sales strategy across departments
- Improve forecast accuracy
- Win more profitable business
- Ramp up new sales team members faster

Practical Field Implementation

A sales methodology is only as good as a team's willingness to use it. SOS is designed to be practical, effective, and easy to use – **SOS helps sales teams sell!**

- Snapshots take minutes to update and are highly visual. Critical sales information can be seen at a glance, so the focus remains on deal closure.
- SOS is a complete turn-key solution for companies installing a sales planning process for the first time.
- SOS can be used to supplement other sales methodologies.
- Simple, time-efficient assessment tools help managers easily apply SOS as a natural part of the sales review and forecasting process
- The hands-on 8-hour workshop ensures sales teams return to customer-facing activities faster than any comparable workshop on the market.

A Methodology and Tool You'll Love to Use

We asked salespeople the Top 3 things they wanted in sales planning software:

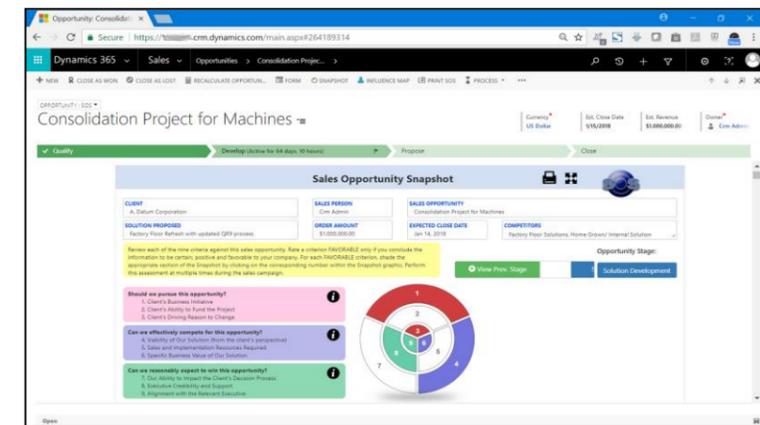
1. Intuitive dashboard interface
2. Easy to use and update
3. A focus on selling, not reporting

So, we created SOS in what may be the world's simplest interface ever.

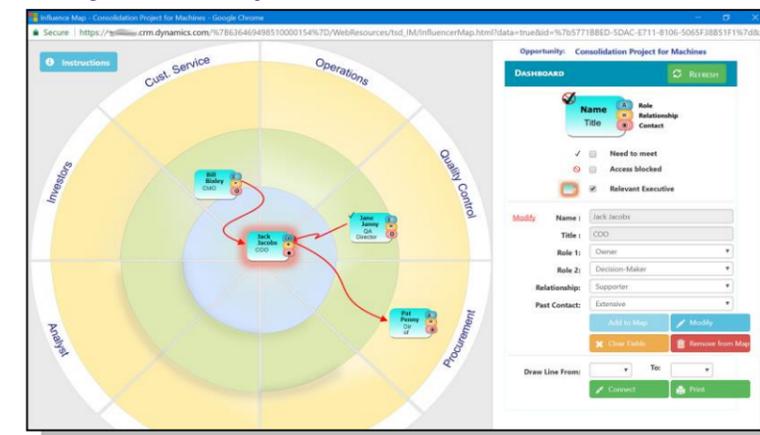
Also available as a D365 App

Take the SOS for D365 test drive today and learn why users of other sales methodologies call it “The most significant evolution in sales planning for more than 10 years.”

Sales Opportunity Snapshot®



Influence Map



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One customer who has been using SOS for over 15 years documented a **22% Increase in Bookings in the first 2 years of use and 16-point average increase in win-rate.**

SOS is extremely visual, easy to use, and clearly depicts various aspects of a sales opportunity, including the **Snapshot Assessment®** of the sales opportunity, based on nine key Qualification Criteria, the **Influence Map**, consisting of an overview of key client executives who influence the sales opportunity, **Competitive Strategy**, **Value Proposition**, and **Action Plan**

Competitive Strategy

Criteria	Our Solution	Factory Floor Solutions	Home Grown/ Internal Solution
Solution	Factory Floor Refresh with updated QES process	Full QES with custom integration for Simple Machines	Internal solution developed early 2010
Strengths	Established process Local expertise	Already has integration based on previous project. Not currently installed.	Custom to their environment
Weaknesses	Integration with some of their systems will require customization	Still going with the "2007" version - not updated yet. Since it is custom they have very	Has not grown with business. Not capable of handling anticipated workload. Will need to be
Our Strategy	Direct	Probable Strategy of Our Competitors	Segment
Our Company will win this deal if...	We work with Jack to convince the committee to move forward.	The Competition will win this deal if...	The system creates excessive management that their solution

Value Proposition and Action Plan

Our Value Proposition

Our Value Proposition: The quality issues can be improved from 1,500 parts rejected to 1/10,000 parts rejected in Phase 1 which will include accommodating the legacy systems. This is estimated to improve customer satisfaction from 8.0 to 8.8, the minimum threshold required, reducing customer churn and cutting rework costs by \$75k/month.

Action Plan

Subject	When will it happen?	Owner	Who will do it?	Start	Close	Status	Status Res.	Date Created
Continue work to influence others	12/6/2017	Pat Jones	---	Yes	No	No	Open	11/9/2017 12:24 PM
Meet with Jack to open out R880	8/30/2017	CM Admin	Kate Kelly	Yes	Yes	No	Open	10/9/2017 10:53 AM
Meet with Jack to discuss contract.	10/5/2017	CM Admin	Kate Kelly	Yes	Yes	No	Open	10/9/2017 10:54 AM
Set up meeting	---	CM Admin	Alii	Yes	No	No	Open	10/10/2017 12:08 PM

In the D365 Environment SOS is fully integrated, providing a unique view into Sales Opportunities such as:

- **Use of existing Contacts** on the Influence Map, or creation of Contacts when new Influencers are added.
- The ability to determine across all Opportunities where, and in what capacity (Role, Relationship, Level of Contact) **where the Influencers (contacts) have appeared on other Opportunities** so those relationships can be leveraged
- The ability to determine **positioning of Competitors across all Opportunities**, what solution they are proposing, strengths, weaknesses and strategy used so that experience can help plan winning strategies
- **SOS Action Items assigned to D365 users appear on their Activity list** and Action Items can be assigned to non-D365 users
- **All Snapshot qualification data is captured at each change of sales stage** so that business analytics can be used to help sales reps and managers uncover patterns in winning deal processes, proactively determine actions to drive deals forward, or determine what is required to accelerate stalled deals.