

# 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 five key areas:

### ➤ Opportunity Snapshot

Using a *Snapshot* assessment of the nine 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 three 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 Salesforce Integration

The SOS Tool is available as a stand-alone Excel Workbook and also works seamlessly with Salesforce for new or existing opportunities you already create and manage, except it is extremely visual, insightful, and helps sales teams win, and helps partners with successful Salesforce implementation.

## 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 eight-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 three things they wanted in sales planning tool:

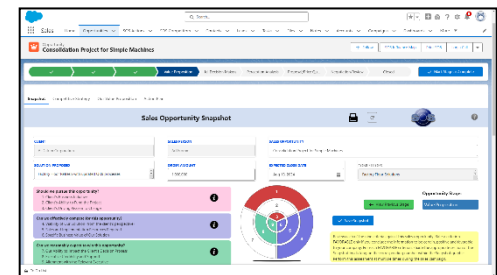
1. Intuitive dashboard interface
2. Easy to use and update
3. A focus on selling, not reporting

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

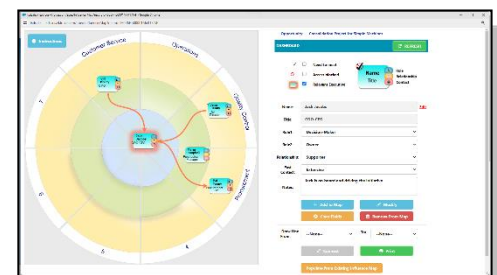
Available NOW as a [SFDC App](#)  
30-Day FREE Trial

Users of other sales methodologies call SOS “The most significant evolution in sales planning for more than 10 years.”

## Sales Opportunity Snapshot®



## Influence Map



<https://bit.ly/SOSbyTSD>



# Opportunity Management Made Easy!

One client who has been using the methodology for over 15 years and is now using the app in production on their CRM system, documented a **16-point average increase in win-rate using SOS.**

SOS for Salesforce 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

The screenshot displays the 'Competitive Strategy' section within the SOS interface. It features a navigation bar with 'Snapshot', 'Competitive Strategy', 'Our Value Proposition', and 'Action Plan'. Below this, there are buttons for 'Add Competitor', 'Add', 'View Changes', and 'Filter'. The main content area is titled 'Competitors for this Sales Opportunity' and is divided into three columns: 'Our Solution', 'Factory Floor Solutions', and 'Home Ground Internal Solution'. Each column contains a table with rows for 'Solution', 'Strengths', 'Weaknesses', 'Our Strategy', and 'Our Company will win this deal if...'. The 'Our Solution' column includes details like 'Factory floor refresh with updated QM processes' and 'Enhanced process local logistics'. The 'Factory Floor Solutions' column mentions 'IaaS/2000 with custom integration for Simple Machines' and 'already has integration based on previous project, not currently installed'. The 'Home Ground Internal Solution' column notes 'internal solution developed early 2017' and 'Custom to their environment'. A 'To Do List' is visible at the bottom left.

## Action Plan

The screenshot displays the 'SOS Influence' section within the SOS interface. It shows a list of 4 items, sorted by Opportunity, updated a few seconds ago. The table below lists the items with columns for Opportunity, Title, Access Blocked, Need to Meet, Relevant Executive, Role 1, Role 2, and Relationship.

Opportunity	Title	Access Blocked	Need to Meet	Relevant Executive	Role 1	Role 2	Relationship
6 orders of Product SKU J1202	COO-CFO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Approver		Supporter
Consolidation Project for Simple Machines	COO-CFO	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Decision-Maker	Owner	Supporter
Project XYZPQ	Director Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Evaluator	Owner	Neutral
Rework supply system for product stocking	COO-CFO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Approver	Decision-Maker	Supporter

A 'To Do List' is visible at the bottom left.

The SOS methodology is **fully integrated with the Salesforce Environment**, providing a unique view into Sales Opportunities such as:

- **Use of existing Contacts** on the Influence Map, or creation of Salesforce contacts when new Influencers are added.
- The ability to determine across all Opportunities where, and in what capacity (Role, Relationship, Level of Contact) **the Influencers (contacts) have appeared on other Opportunities** so those relationships can be leveraged.
- The ability to determine **involvement of Competitors across all Opportunities**, what solution they are proposing, strengths, weaknesses and strategy used so that experience can help plan winning strategies.
- **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.