

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 worth 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 or not fully utilized, 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 determine 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 the alternatives, 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 quantified business value for the client.
- **Planning the Next Steps**
Using decision points from each of the previous areas to drive actions toward the next iterative *Snapshot* assessment.

Seamless SFDC Integration

The SOS Tool works seamlessly with SFDC for new or existing opportunities you already create and manage, except it is extremely visual, insightful. The SOS for SFDC App helps sales teams win, and helps partners with successful SFDC 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.

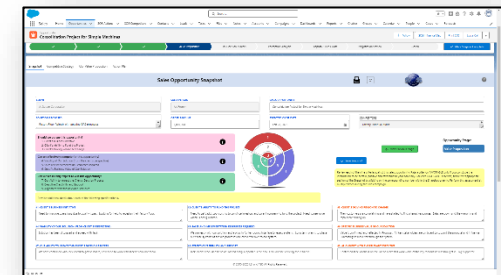
A Methodology and Tool You'll Love to Use

We asked salespeople the top three things they wanted in sales planning tool:

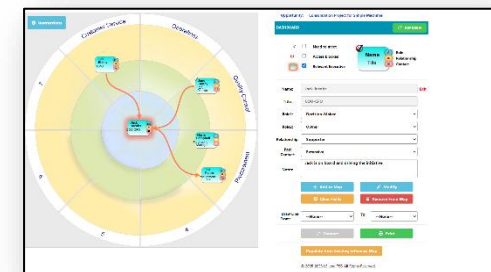
1. Intuitive dashboard interface
 2. Easy to use and update
 3. A focus on selling, not reporting
- So, we created SOS in what may be the world's simplest interface ever.

[SFDC App Available Here](#)

Users of other sales methodologies call SOS “The most significant evolution in opportunity management in more than 10 years.”
Sales Opportunity Snapshot®



Influence Map



[Also available as a Dynamics 365 App!](#)

bit.ly/SOSbyTSD

Opportunity Management Made Easy!

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

SOS for SFDC 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	Inverse Kinoworks/ Internal Solution
Solution	Factory floor robot with updated QMS processes	QMS with custom integration for Simple Machines	Internal solution developed early 2017
Strengths	Established process, local expertise	AR/VR integration based on previous project, not currently enabled	Custom to their environment
Weaknesses	Integration with some of their systems will require a consultation	Still going with the 2017 version - not updated yet, price is higher than this unit	Has no proven skill, business, full support or handling, proprietary version - VR used
Strategy	Direct	Partnership Strategy of Our Competitors	Segment

Action Plan

Subject	When will it happen?	Is CRM User?	Owner	Who will do it?	Strengths	Obstin	Soften	Status	Date Created
#1 - Set up meeting with Doug Lead	2024-03-11	No	Act Fromm	James - Admin	Yes	Yes	No	Scheduled	15/02/24, 09:49 AM
#6 - Review proposal draft with Jack and team	2024-01-29	Yes	Act Fromm		Yes	No	No	Completed	15/02/24, 09:21 AM
#8 - Connective link to influence others	2024-01-29	Yes	Act Fromm		Yes	No	No	Completed	15/02/24, 09:28 AM
#1 - Meet with Jack to open our needs	2024-01-29	Yes	Act Fromm		Yes	Yes	No	Completed	15/02/24, 09:32 AM
#2 - Meet with Jack's decision committee to determine how they will decide	2024-03-07	No	Act Fromm	Jane Jarmy - Partner	Yes	Yes	Yes	Open	15/02/24, 09:32 AM

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

- **Use of existing Contacts** on the Influence Map, or creation of SFDC 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.
- **SOS Action Items can be assigned to SFDC users** or noted for action by non-SFDC 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.