

# Opportunity Management Made Easy!



## Sales Opportunity Snapshot®

**The Sales Opportunity Snapshot (SOS) helps qualify in and set a competitive strategy for deals worth winning, and qualify out of deals 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.**

**Sales Opportunity Snapshot is ideal for companies wanting to utilize a sales process for the first time, or frustrated 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.**



<https://bit.ly/SOSbyTSD>

### 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 methodology is supported by a robust, easy-to-use App, available as a standalone Excel Workbook or fully and seamlessly integrated with Salesforce (also available in Microsoft D365), to create and manage new or existing opportunities. It is highly visual and insightful, helping sales teams win and 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 is visible at a glance, keeping the focus 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 an opportunity management tool:**

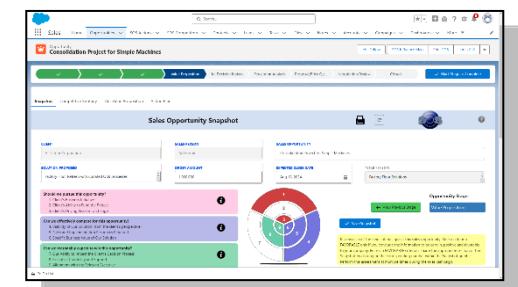
1. **Intuitive dashboard interface.**
2. **Easy to use and update.**
3. **A focus on selling, not reporting.**

**We created SOS with what may be the world's simplest interface ever.**

**Available 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," and the App "The missing link of CRM."

### Sales Opportunity Snapshot®



### Influence Map

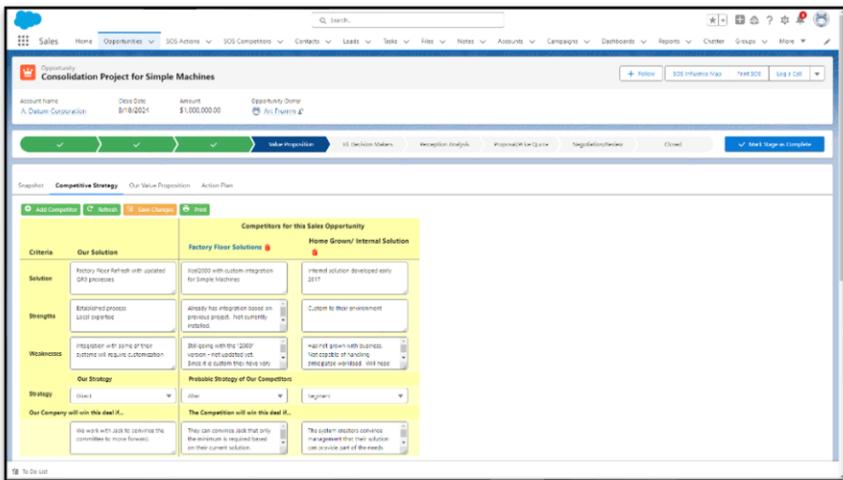


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*One client who has been using the SOS methodology for over 20 years and using the app in production on their CRM system, documented a 16-point average increase in win-rate.*

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**.

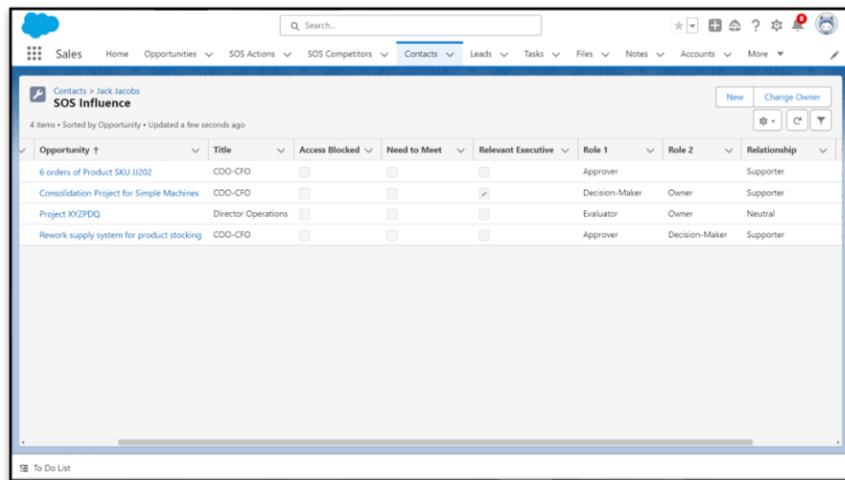
## Competitive Strategy



The screenshot shows a detailed comparison of a company's solution against competitors. It includes sections for Strengths, Weaknesses, and Strategy, with specific details for each competitor's proposal.

| Competitor   | Strengths                   | Weaknesses                | Strategy                     |
|--------------|-----------------------------|---------------------------|------------------------------|
| Competitor A | Efficient process, Low cost | High price, Poor support  | Focus on cost reduction      |
| Competitor B | Customizable, High quality  | High price, Poor support  | Focus on quality and support |
| Competitor C | Low cost, Quick delivery    | Low quality, Poor support | Focus on cost and delivery   |

## Action Plan



The screenshot displays a list of contacts and their influence on various opportunities. It includes 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 |
|---|---------------------|----------------|--------------|--------------------|----------------|----------------|--------------|
| Order XYZ123                              | COO-CFO             | Yes            | No           | John Doe           | Approver       | Supporter      | Neutral      |
| Consolidation Project for Simple Machines | COO-CFO             | Yes            | Yes          | John Doe           | Decision-Maker | Owner          | Supporter    |
| Project ABC123                            | Director Operations | Yes            | No           | John Doe           | Evaluator      | Owner          | Neutral      |
| Rework supply system for product stocking | COO-CFO             | Yes            | No           | John Doe           | Approver       | Decision-Maker | Supporter    |

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

- **Use of existing Salesforce contacts** for 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 the **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.