



SPO

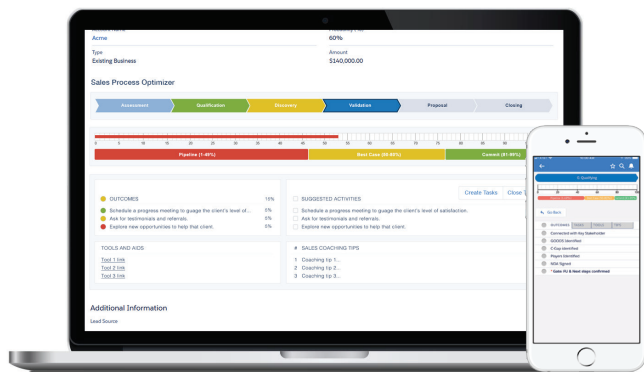
Sales Process Optimizer



Process Playbook

Sales Process Optimizer™ (SPO) is a completely configurable, native Salesforce® app designed as a centralized repository of data, job aids, key activities, strategic planning, coaching and predictability of forecasting.

Enhance the efficiency in the execution of your sales processes to achieve real results.



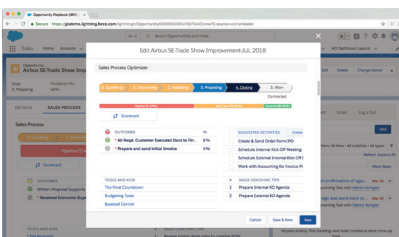
- Define Outcomes, Suggested Activities, Tools, Job Aids and Coaching tips.
- Access playbooks directly on your object page layouts.
- Define criteria to control which process to display.
- Easily configure your company's process outcomes and activities.



This is a fully configurable sales process one-stop shop designed to improve the following core competencies:

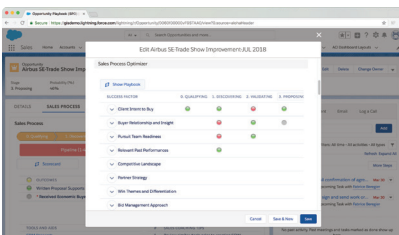
- ⚙ The ability to improve execution of best practices to increase win rates and profit margins.
- ⚙ The ability to understand improved forecasting and predictability based on tangible outcomes.
- ⚙ The ability to have organizational consistency in the execution of defined best practices.
- ⚙ The ability to have flexibility around creating separate guides for different sales processes.
- ⚙ The ability to have a centralized repository of a salesperson's tools and job aids.

Sales Playbook



Develop unique playbooks for all of your deal types to define criteria to control which sales process to display, ensuring your sales reps always have relevant Outcomes, Activities, Coaching Tips and Tools on-hand.

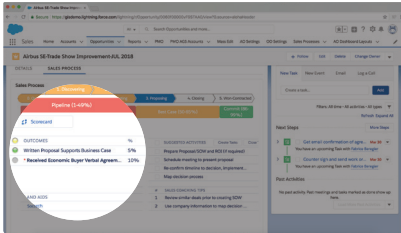
User-Friendly Setup



Configure your company's Outcomes, Suggested Activities, Coaching Tips and Tools & Jobs Aids for each stage of the sales process.

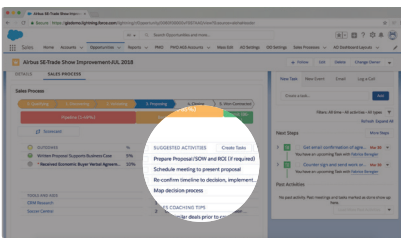


Outcomes



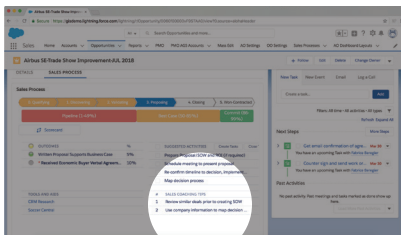
Document the outcomes to keep detailed track of the pipeline. Enabling a categorized outlook based on percentages on the sales process.

Suggested Activities



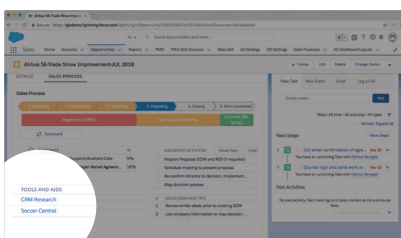
Customize the Suggested Activities tab to use as reminders, guidelines and/or execution plan for the sales processes.

Sales Coaching Tips



Review coaching tips and development for new hires to reduce time to profitability.

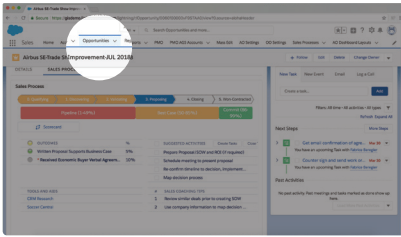
Tools and Aids



Review a resource list for a salesperson with several tools and job aids.



Direct Access



Access SPO directly on the Opportunity tab in Lightning

Ensure you are maximizing the value of every client interaction with the Call Plan Tool inside SPO.

- Plan calls quickly with key questions
- Manage your deals on the go!
- Configurable Call Plan templates!

