Overview of SOS Sales Methodology & SFDC App

Sales Opportunity Snapshot

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Sales Opportunity Snapshot® (SOS) is a proven Sales Methodology which helps professional sales professionals analyze and manage their sales opportunities quickly and more effectively, increasing win rate, margin, and client satisfaction.

One client using the SOS methodology documented a sixteen-point increase in win rate and increased revenue twenty-two percent in the first two years using SOS.

SOS for SFDC is completely integrated with Salesforce, is extremely visual, easy to use with a graphical interface that depicts all aspects of a sales opportunity, and provides profound insights, going far beyond any other sales methodology. The magic is in the methodology and the method is in the app.

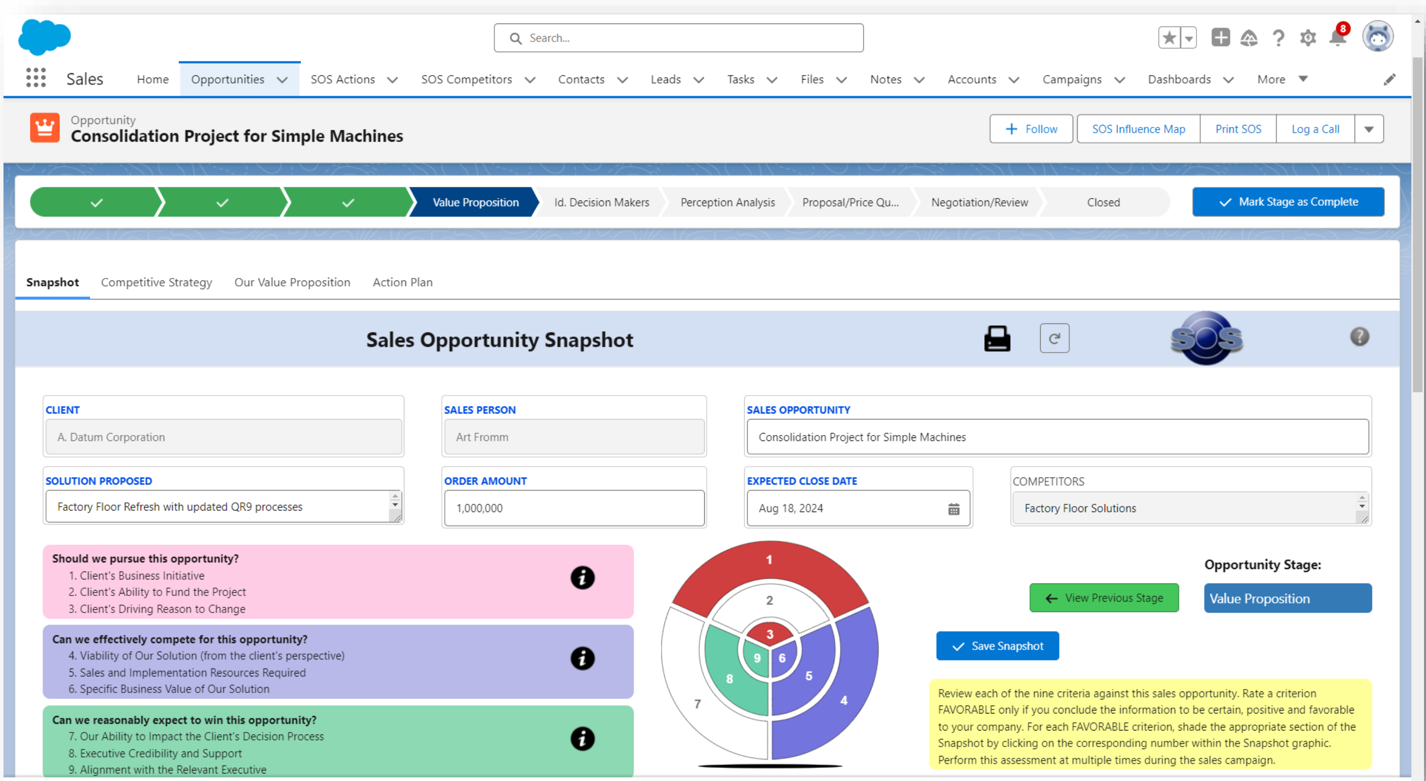
There are 5 main parts of SOS:

- SOS Snapshot Assessment®.
- Influence Map.
- Competitive Strategy.
- Value Proposition.
- Action Plan.

The SOS Snapshot Assessment

The “Snapshot” consists of nine key qualification and discovery criteria for the opportunity covering three main questions (the three sections):

1. Should we pursue the opportunity?
2. Can we effectively compete (and deliver) this opportunity?
3. Can we reasonably expect to win the opportunity?



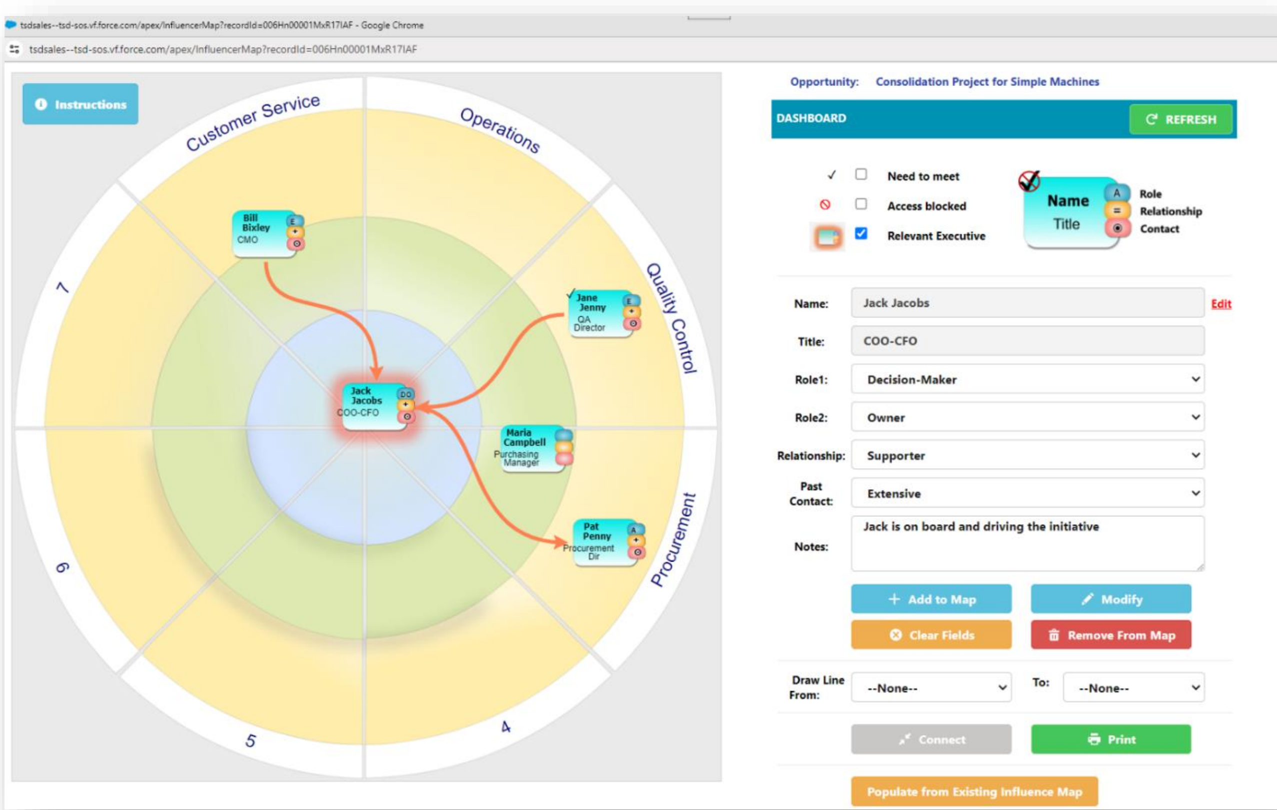
For each of the nine criteria the salesperson can take notes. Once they have confirmed the criteria with a “flawless source” (i.e., not our opinion), and that it is favorable to our company (i.e., aligned with our goals and capabilities) then that slice of the snapshot is filled in. This holds everyone to the same standard and ensures more accurate, up to date information in the CRM, as therefore a cleaner pipeline that delivers more reliable forecasts.

The visual nature of the snapshot, common language, and process, with specific definitions, allows the salesperson, sales team, management, and everyone involved - from “hello” to implementation and client success - to see the state and status of the opportunity as it develops and is deployed for the client.

The Influence Map

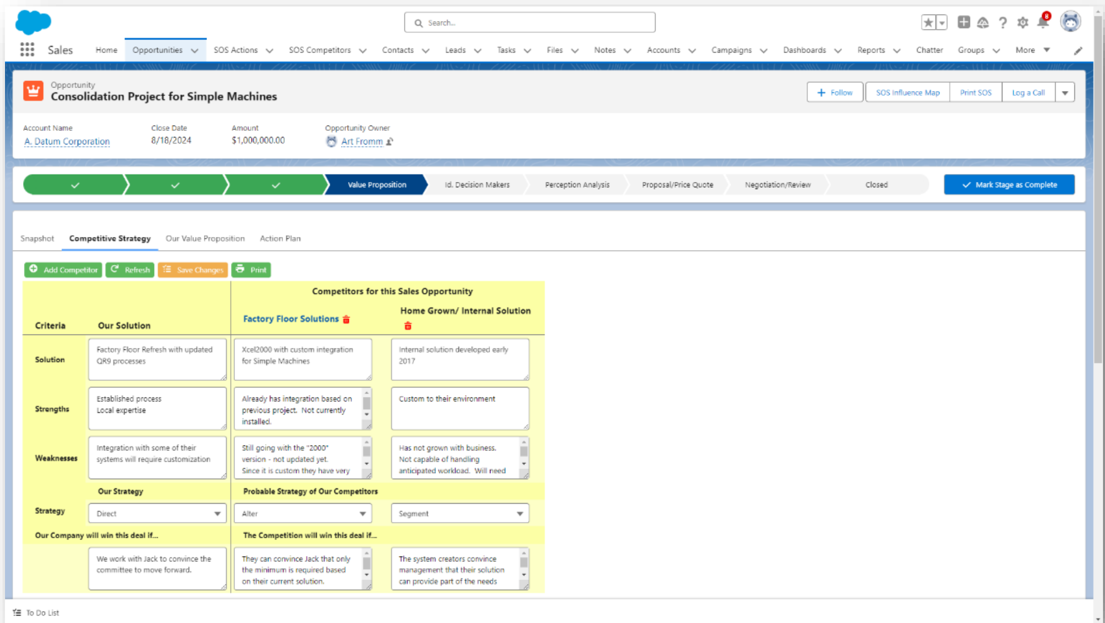
The influence map is a graphical depiction of the decision process for all key client stakeholders. For each stakeholder we record and track **nine key criteria** about each, and the flow of influence for the sales opportunity. For each stakeholder we document:

- **Their job title –** indicating the level of **authority**, or formal power they have.
- **Their role –** indicating the **formal role** in the decision making process such as approver, decision maker, evaluator, or owner.
- **Our relationship** – ranging from sponsor to competitive sponsor.
- **The level of past contact** we’ve had – ranging from none to extensive.
- Whether we **need to meet** with them.
- Whether our **access is blocked**.
- Whether they are the **Relevant Executive –** defined as the person who has the most to gain or to lose as a result of implementing the project.
- Their relative level of **informal influence** (the concentric circles, with highest influence in the middle).
- The **flow of influence** - whom they influence and who influences them.



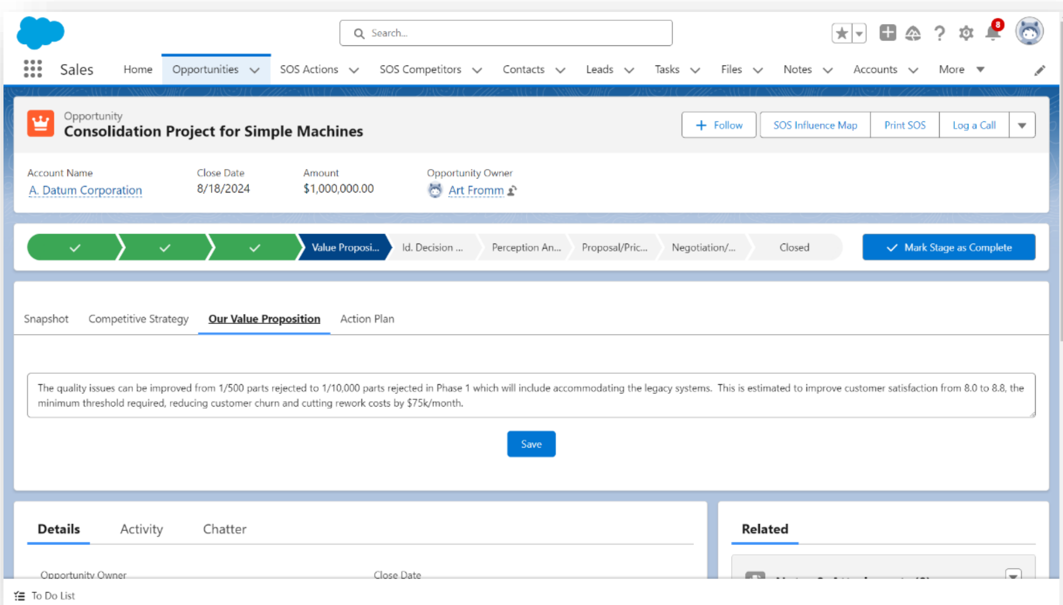
Competitive Strategy

Our solution strengths and weaknesses are analyzed against the alternatives being considered by the client including "do nothing" and "homegrown" solutions. Based on this as well as the likely strategy of the alternatives, the opportunity owner selects the strategy along with an analysis of what it will take for us to win.

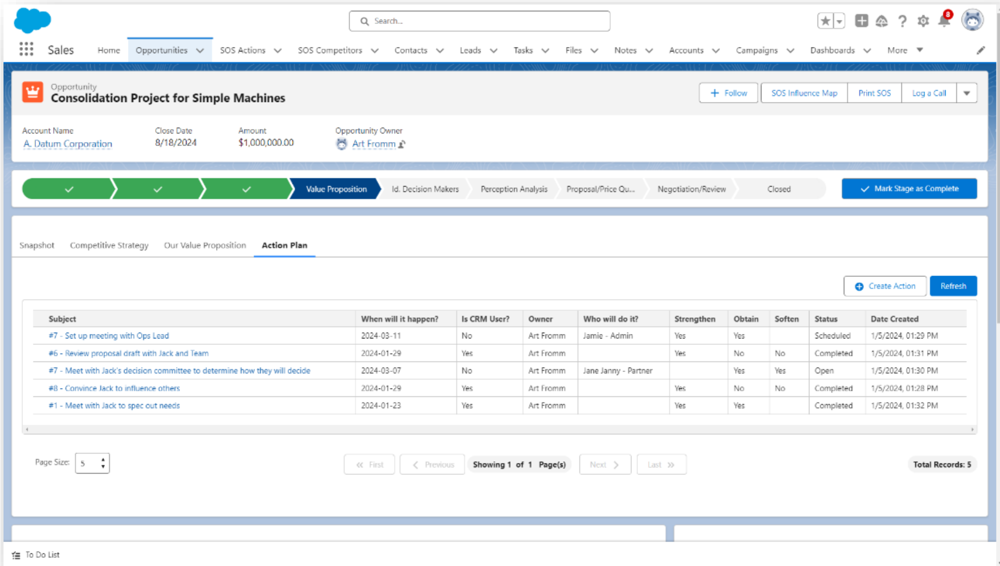


Value Proposition

The unique and specific quantified value proposition of our solution.



Action Planning process



Salesforce integration

The methodology is **fully integrated with the SFDC Environment**:

- Existing Salesforce contacts can be used on the Influence Map, or if a new influencer is added, the Salesforce contact is created.
- The ability to determine across all opportunities where, and in what capacity (Role, Relationship, Level of Contact, etc.) the influencer (contact) has been involved with other opportunities so those relationships and account owners can be leveraged.
- The ability to determine across all opportunities positioning of competitors, what solution they are proposing, and their strengths, weaknesses, and strategies used so that past experience can help plan winning strategies.
- All Snapshot qualification data is captured at each change of the sales stage so that business analytics can be used to help sales professionals and managers discover patterns in winning deals, proactively determine actions to drive deals forward, or determine how to accelerate stalled deals.

Summary

SOS for SFDC should be used by extended members of the sales, implementation, quote, proposal, and customer success teams to ensure that the goals and objectives of key stakeholders are achieved. Sales management can understand the opportunity at a glance to validate forecast probabilities and allocate resources. SOS is also used to prepare and update sales executives who might be asked to call on various executives in the client organization.

SOS is taught in a fast-paced highly interactive two-part eight-hour virtual, or in-person workshop covers the SOS Methodology, the tool, and most importantly, the mindset around Consultative Selling. The participants implement the methods via the SOS App during the workshop by applying the concepts to their own real live opportunities.

Two-part eight-hour Workshop for the SOS Methodology and SFDC App

Workshop objectives

At the end of the workshop, participants will be able to use the SOS Methodology and the SOS for SFDC App to:

- Effectively qualify each of their sales opportunities, using the Sales Opportunity Snapshot Methodology
- Use concepts of influence and power to leverage a relationship with the Relevant Executive
- Select a competitive sales strategy that enables them to compete for each opportunity they pursue
- Develop meaningful actions that will enable them to win the deal
- Quickly and effectively communicate the status of each sales opportunity to others in the organization

Pre-Workshop Assignment

Participants are asked to assemble information about a current sales opportunity they are pursuing and bring that portfolio of information with them to the workshop to apply the concepts and receive feedback on the application.

SOS Workshop Modules

The workshop is comprised of the following modules:

- Brief Introduction – The Value of Opportunity Management
- Qualify the Sales Opportunity
- Align with the Political Landscape
- Select a Competitive Sales Strategy
- Develop a Value Proposition and Action Plan
- Summary and Close

Introduction – The Value of Opportunity Management

The workshop begins with a reinforcement of why sales professionals need to have a process in place to systematically evaluate their sales opportunities (increase win rate, be more consultative, be more strategic, etc.). The overall workshop objectives are reviewed, and the SOS Methodology is overviewed.

Qualify the Sales Opportunity

This module delivers a comprehensive and insightful methodology to quickly assess current sales opportunities. It is accompanied by the visual SOS tool that is easy to use and dramatically displays the status of any sales opportunity, ranging from the simplest transactional sale to one that is multifaceted and complex. The SOS Opportunity Assessment Methodology is based on nine criteria that focus on three compelling questions. It is suggested that these criteria be assessed multiple times during a sales campaign.

The three compelling questions are:

- **Is there an opportunity we should pursue?** Is this project or application driven by one of the client's key business initiatives? Is there significant payback associated with that initiative or are there significant consequences to the client if no action is taken? What is the client's driving reason to change and why does the client need to take action?
- **Can we effectively compete for this opportunity?** Do we have a solution that provides specific business value to the client? Does the client think that we have some level of business value that differentiates us from our competitors?
- **Can we reasonably expect to win this opportunity?** Does the most powerful person in the client organization (that impacts or is impacted by this buying decision) want us to win? What has that person done to demonstrate that level of commitment to us?

By the end of this module, participants can…

- Qualify their current sales opportunity
- Decide whether to pursue that opportunity or disengage, based on a Snapshot assessment of their sales opportunity
- Begin to develop the most appropriate actions to:
  - Strengthen their position
  - Obtain missing information
  - Soften their weaknesses

Align with the Political Landscape

This module focuses on the third compelling question previously described: *Can we reasonably expect to win this opportunity?*

In this module, the concept of the *Relevant Executive* for the sales opportunity is introduced. In the context of the SOS workshop, the ***Relevant** Executive* is defined as the executive in the client organization who stands to gain the most if the project succeeds and to lose the most if the project fails.

Participants also discover that there are typically two types of decision-making processes (associated with the buying decision) taking place within the client's organization: formal, and informal decision-making processes. They learn the importance of each and how to identify people of influence in the client organization.

The unique and groundbreaking visual *Influence Map* is introduced in this module. It contains a view of the client's organization not seen in the traditional organization chart. It also contains a significant amount of information about each client executive that has a role in the buying process for the sales opportunity. Activities within this module focus on having each participant create a unique *Influence Map* for their sales opportunity.

By the end of this module, participants can…

- Expand their view of the client's organization, by reflecting on the importance of formal and informal power
- Develop the political landscape for their current sales opportunity, including the *Relevant Executive*
- Describe the level of influence for key executives in the client organization
- Create an *Influence Map* for their current sales opportunity, which is essential to win the deal

Select a Competitive Sales Strategy

In this module, participants learn that there are three different competitive sales strategies that can be applied for a sales opportunity. They are also introduced to a step-by-step process for selecting the specific sales strategy that they can employ to increase the chances of winning the sales campaign.

By the end of this module, participants can…

- Describe the three competitive sales strategies
- Position the client's business initiative against their sales objective, focusing on the specific business value of their solution
- Select a specific sales strategy that enables them to compete for each opportunity they pursue

Develop a Value Proposition and Action Plan

The module begins with the creation of a meaningful value proposition, which client executives revealed is an essential ingredient in developing a lasting relationship with the client's organization.

Participants are given a template and a process for creating an effective value proposition. They immediately practice applying the template and creating a value proposition for their current sales opportunity.

In this module, we further define the Action Planning Process and have participants consolidate their action planning notes into a logical sequence of events they will implement within the next 30-45 days of their sales campaign.

By the end of this module, participants can…

- Describe the key components of a value proposition
- Create an effective value proposition for their current sales opportunity focused on the client's business objectives and using their metrics
- Develop a comprehensive set of actions for the next 30-45 days of their sales campaign by consolidating the ACTION PLANNING notes they developed throughout the workshop

Summary and Close Module

In this module, the progress made on the current sales campaigns of the participants is summarized. Key concepts delivered during the day are discussed and reviewed.