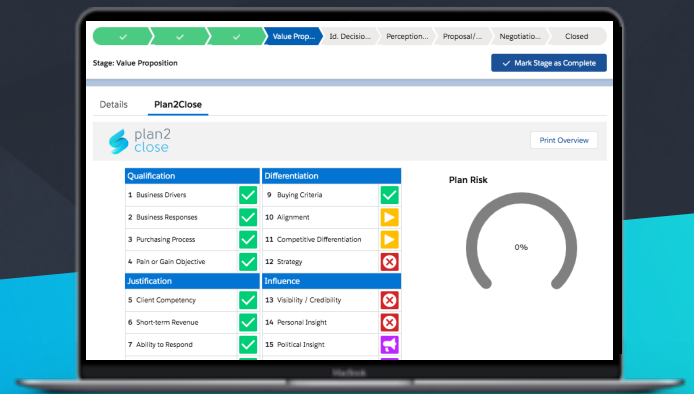




Accelerate opportunity development

Win more sales, faster.

A step change in sales effectiveness – build winning sales strategies in dynamic sales plans for Salesforce.

Drive efficient and successful deal outcomes

Understand

Uncover your customers' key business drivers that help define your unique business value propositions.

Build the winning sales proposition and sales strategy directly into the Opportunity object in Salesforce.

Navigate through a logical plan and prioritise activities that support smarter qualification and faster closure.

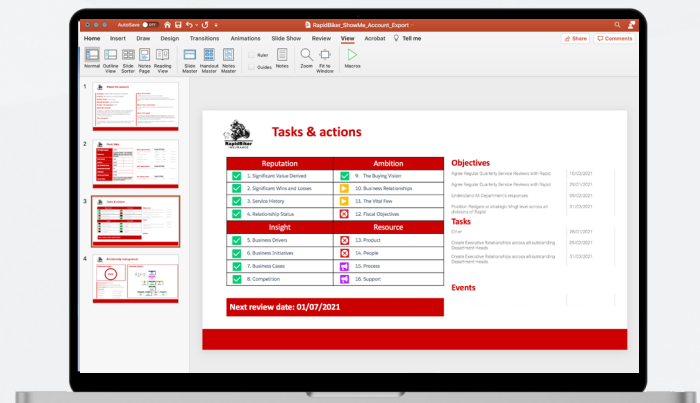
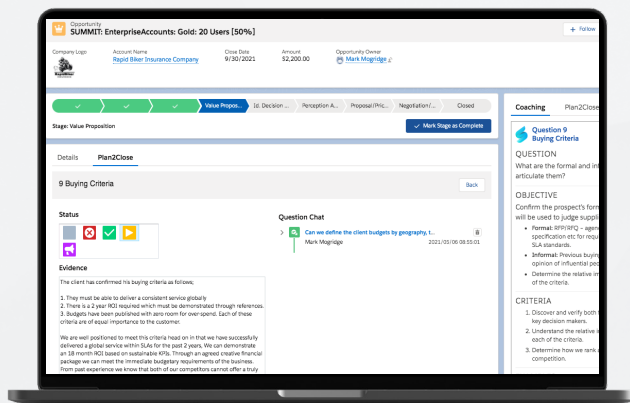
Determine what you need to know and don't waste time on distractions.

Align

Understand customers' buying process to align the buying and selling cycles, creating a synchronized path to mutual success.

Motivate, empower and drive appropriate activities with a platform for sales enablement, supporting your sales team with the tools they need.

Unify all levels within your organisation to understand required and best actions in your sales activities.



Amplify

Embed your deal management process to become more efficient, effective and increase win rates.

Focus time, effort and resource on qualifying the right deals, in the right way enabling you to drive these through to successful closure in record time.

Assess

Management visibility and clear line of sight of relative success of a deal, activity, blockages and progress.

Form accurate and true risk analysis to support resource planning, prioritisation, and forecasting.

Provide a consistent, rigorous sales process and methodology across your business.

Explore key features



Build & Develop

Opportunity win plans within Salesforce underpinned with your sales best practice.

Drive and manage sales activity with visual & customisable progress indicators.

Marry your Salesforce process with your sales methodology by integrating the 'what to do' with the 'how to do it'.



Forecast

Supports progression sales modelling.

Determine risk levels linked to closing plan stages and deal stage velocity.

Match closing stages to risk levels for more accurate forecasting.

Highlight next steps and priorities in sales closing process.



Collaborate

Manager review dialogue and team commentary for actionable feedback and collaboration.

Dynamic in-line coaching to guide users through using your sales methodology.

Designed to fully support team collaboration in remote and hybrid working environments.



Analyse

Match quantitative and qualitative data to optimise forecast accuracy.

Out-of-the-box reports & dashboards for efficient analytics.

Natively export information and reports for wider audience participation.

Trusted by global brands and used daily by thousands of salespeople



Why Choose Plan2Close?



Native to Salesforce

A seamlessly integrated, intuitive Lightning experience, secure and stable, with real-time customer insight. 5* rated on the Salesforce AppExchange.



Flexible & dynamic

Designed to fit your world; effortless customization to fit your sales organisation and processes.



Simple & intuitive

A clean, modern interface to streamline complex practices, designed for efficiency and ease-of-use.



Supports team working

Full activity, review and response tracking, supports entire team contributions in remote working environments.

Discover our sales performance apps on the Salesforce AppExchange

