

UNIFICIENT

Sales Efficiency

Assessments

Effortless Business Scale



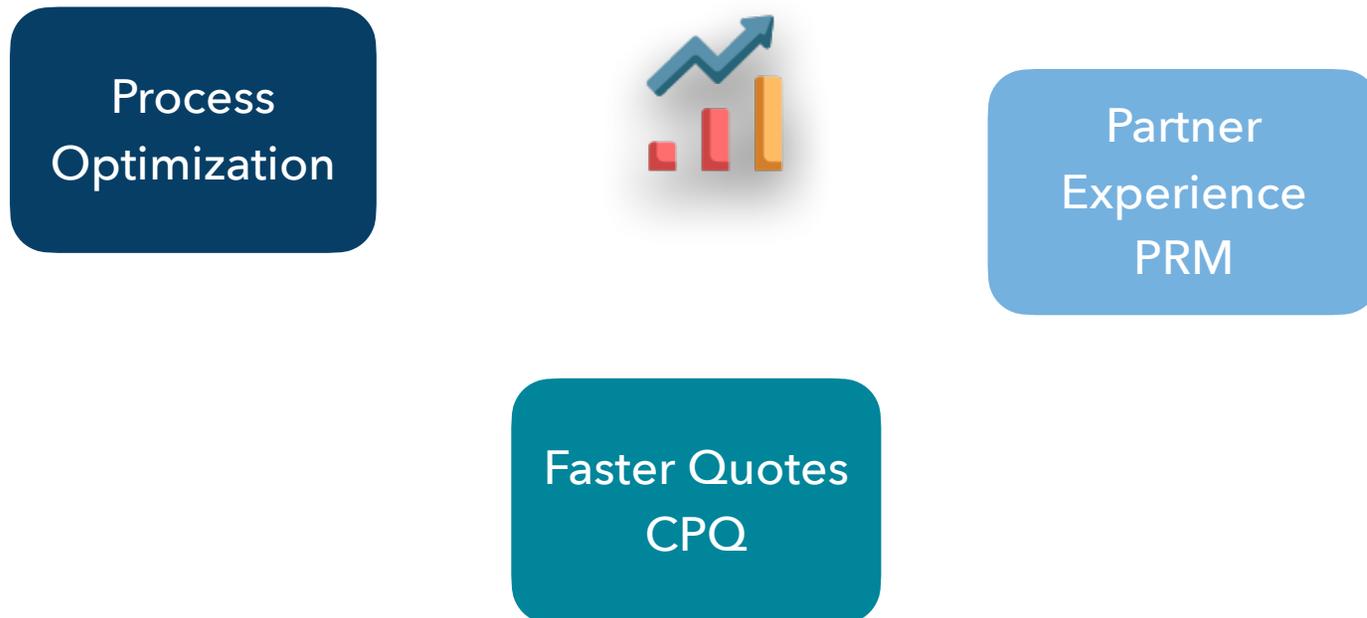
Sales Efficiency

Capabilities and optimizations at each step of your sales cycle.

Empowering you to sell more while boosting productivity and reducing costs.



Our Sales Efficiency



Sales Efficiency

Areas of Focus

For assessment and optimizations

Sales Capabilities

Sales User
Experience



Sales Process

Platform
Dependencies



Sales efficiency Assessments

Value of Assessment

How does assessment fit into your sales efficiency journey

Provides a complete view of the current state of sales and creates a path to help you scale your business.

Your Goals



Identify the problem to solve.
Get agreements on value,
goals and objectives.

Current State



Know the current state of
sales including
challenges, bottlenecks
and experiences.

Road Map



Set future state vision.
Create recommendations
and a roadmap to
execute and reach goals.

Execute



Ideas into action. Scale
for long term benefits.
Track progress at
intervals.

Assessment Process

Business Value and Scoping

A business value map helps align on your business goals , business objectives, business capabilities, and metrics. Narrows down the sales capabilities to assess and optimize.

Sales Goals	Capabilities		
Sales growth	Account Management	Account 360°	Contact management
	Channel strategy	Lead management	
Customer Engagement	Forecasting	Customer Portal	Campaign management
Operational Cost reduction	User experience	Platform efficiencies	

Sample map

Assessment Process

Interviews & Analysis

Peoples experiences, insights and feedback are vital to a complete assessment.

Insights

Gather qualitative insights through stake holder interviews.

Experience

Insights on your user experience and productivity, peoples challenges and their suggestions.

Analysis

Analysis of data multiple data sources and the platform's efficiency and impact on the sales process.



Assessment Process

Readout & Actionable results

Readouts to stake holders enable alignment on recommendations, action items and next steps.

Recommendations

Provide suggestions and best practices based on assessment.

Prioritization

Identify action items from the assessment with highest impact, cost and time to implement.

Guidance

Create a roadmap with prioritized items in an action plan.



Assessment Process

Action & Value

Align

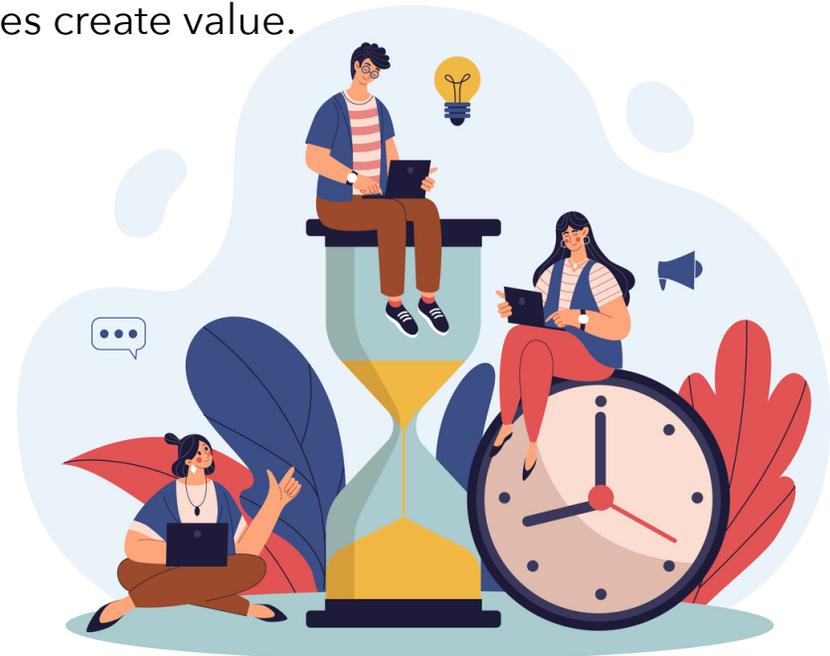
Align with all stake holders on action plan and values

Next Steps

Set a clear path for closing capability gaps.

Value

Create understanding of how the adding capabilities create value.



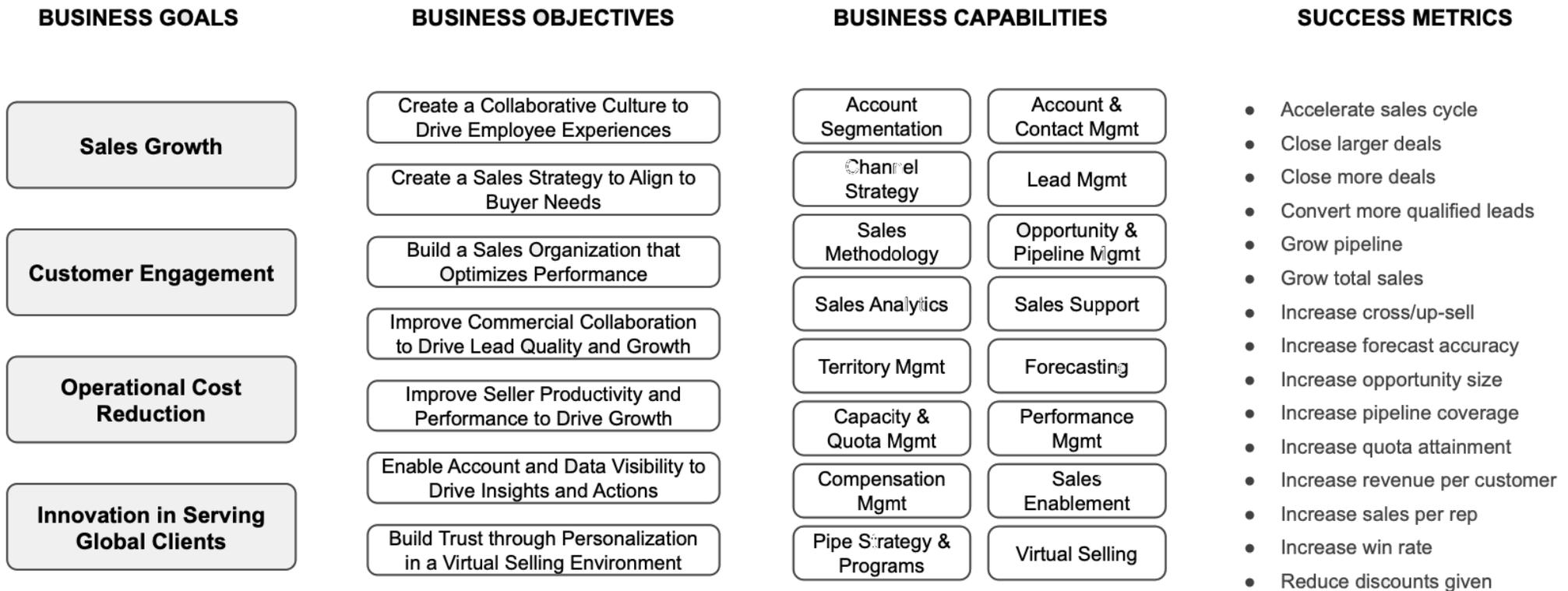


Sales efficiency Assessment Output

Assessment Sample Out

Map goals, objectives and capabilities

A clear view of how your goals map to required capabilities and metrics.



Sample output

Assessment Sample Out

Recommendations

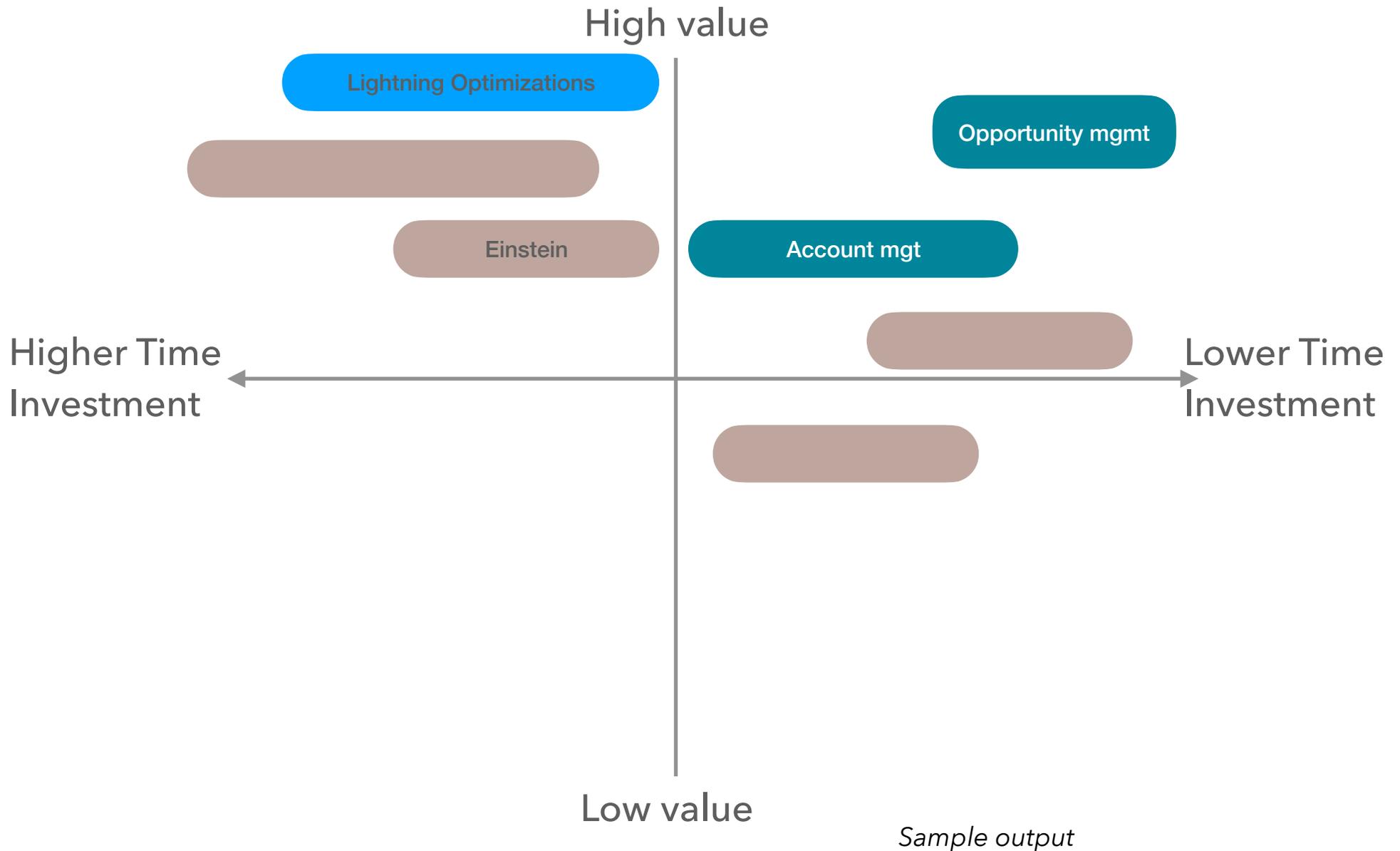
High-level recommendations by sales areas. Followed by detailed recommendations based on assessment findings.

Theme	Findings	Recommendations	Time (months)
Account management	No quick visibility into accounts	Create simple account visibility strategy	1
Lead management	Web to lead processing	Streamline web-to-lead process	1.5

Sample output

Assessment Sample Out

An easy to way to identify priority



Priorities = Recommendations prioritized by key criteria

Assessment Sample Out

Execution timeline and road map



KPI

- Adoption ↑
- Experience ↑
- Win rate ↑
- Opportunity close rate ↑
- Account Territories ↑
- Partner experience ↑

Sample output

About

unifICIENT

Our Mission

Share our learning to empower our customers to provide exceptional experiences to their employees and customers.

Our Goal

Go beyond functionality to deliver exceptional experience, growth, and cost efficiency to our customers.

Our values

Trust is our #1 value. Business with integrity, innovation and the drive for customer success are our core values.

Expertise

Over 15 years working on the Salesforce platform. More than a decade as a Salesforce employee.

1% pledge

We are excited to be part of the 1% pledge and give %1 of our time in serving our community.



Email: scale@unificent.com
anil.jacob@unificent.com

Website

www.unificent.com/s/contactus

LinkedIn

www.linkedin.com/company/unificent/