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IMN Sales Process

In establishing a formal sales process it is important to ***require*** the same verbiage and steps for managing sales activity, sales leads, and identified opportunities. As with any team, you can't execute unless everyone is using the same play book and knows the plays.

Lead Creation (Marketing)

A. Segment
B. Target
C. Customize Message
D. Deliver Message

Lead Management (Sales)

1. Register Prospect
2. Initial Meeting (Phone or in person)
3. Needs Analysis (May occur during Initial Meeting)
4. Pre-Sales Resource Request

Opportunity Management (Sales / Sales Operations)

5. Design Solution (Use Portal Quote Tool)
6. Present / Demo Solution (2nd Appointment)
7. Negotiate
8. Contract

Implementation Management (PSG / CCG)

9. Project Management Hand-Off

Customer Relationship Management (Sales)

10. Assure Satisfaction

Segment = Logically group existing Customer Base or Prospects by employee size, revenue, # locations, vertical market, etc.

Target = Research Customers or Prospects and determine who to call on, when to call on them, and for what purpose.

Customize Message = Create a story that is relevant to targeted customers or prospects.

Register Prospect = Enter Customers or Prospects as leads to be contacted and do pre-call research on organization, contact, etc.

Phone Interview = Initial phone call to determine whether customer is willing to explore ways communication solutions can improve productivity, reduce costs, or improve sales and set appointment. This is where we manage leads and begin the customer profile.

Needs Analysis Meeting = Appointment to uncover specific Business Issues that communication solutions can address, and the cost of status quo or forfeited benefit if issues are not resolved. This is where we start the customer profile. May involve multiple site visits, etc.

Pre-Sales Resource Request = Rep requests resource and reviews opportunity with manager, allowing manage to provide direction and help secure and schedule resources from sales engineers for design or presentation assistance.

Design Solution = Meeting with Subject Matter Experts / Engineering resources. May or may not include customer. Communicate business issues solution needs to resolve. Create Statement of Work (SOW). Configure and price solution. Create presentation.

Present / Demo Solution = Appointment to share solution benefits, estimated ROI, investment, implementation plan (including phases if applicable), design, and statement of work.

Negotiate = Trade Value to reach agreement, modify SOW & contract. May be done in person or over phone depending on issues, value, size, etc.

Contract = Sign SOW, contract, secure down-payment

Project Management Hand-Off = Transfer ownership and responsibility for delivery of customer expectations to Operations. CCG / PSG will complete programming, installation, repair, training, etc. per SOW and contract terms. May or may not involve introducing customer to operations.

Assure Satisfaction = Follow-up, ask for referral / cross-sell by leveraging

Note:

Step 1 (Register Prospect) starts the process of lead management. Making sure reps contact identified leads, determining whether leads are valuable, measuring return on investment for leads, etc. will all be accomplished through this process. It isn't so much a step in the sales process as it is the point where the process kicks off. Leads may be entered by rep, loaded by IT, or through some other method like a web form. The default for all leads will be Initial Lead and they must be validated by sales rep calling the contact, making an assessment during the phone interview, and changing status.

Step 2 (Initial Meeting) is where we would expect to see lead / prospect classification / status initially change to either "Bad Lead" or "Prospect".

Step 5 (Design Solution) is where we would expect to see a new opportunity entered and start tracking / forecasting opportunity for pipeline management.