

## SuperOffice Sales Improvement Plan

In today's competitive environment where organizations compete against aggressive competitors, a successful organization must make the most effective use of its selling resources. Managers of sales teams are constantly faced with many challenges ranging from increasing revenues, improving sales effectiveness, shorten sales cycles to improving productivity.

SuperOffice CRM 5, as a sales supporting solution, helps both sales people as well as sales managers conquer these challenges. SuperOffice CRM 5 standardizes key sales functions by automating important activities such as:

- ✓ Account and opportunity management
- ✓ Sales process tracking
- ✓ Scheduling
- ✓ Forecasting and reporting.

The goal of our Sales Improvement Plan is to analyze your sales process with the goal of increasing sales and providing each sales person with more time for sales activities. During this 2 day workshop, we will cover the following:

### Analysis of your current sales process

Is your sales force currently organized with inside sales, a mobile sales force, or do you sell through a network of partners? According to how you structure your sales process, SuperOffice should be set up accordingly, in order to provide you a maximum return.

### Sales process

#### – prospects/customers:

- ✓ How are leads and prospects handled by your sales team(s)?
- ✓ How do you categorize prospects and customers?
- ✓ Which segments/categories are you using?
- ✓ Which phases are used in your sales process?
- ✓ How do you build your sales pipeline?
- ✓ How do you do your sales forecast planning and reporting?
- ✓ Do you have standardized "customer need analysis" templates?
- ✓ Do you track who you are competing against?
- ✓ Do you track the reasons why prospects and existing customers are deciding to buy from someone else?
- ✓ Do you work within sales territories (protection of accounts..)?
- ✓ How do you develop existing accounts?

Based on information from this analysis, our consultant will assist you in setting SuperOffice CRM 5 up to match your sales process. This includes defining the various stages in your sales process. The importance of creating a sound sales process can not be understated. A normal sales process typically involves four to seven stages from "start to finish". A well-defined sales process not only guides seasoned sales people, but is a valuable tool for new sales people in quickly understanding the stages in a company's sales process and the corresponding activities. This step is followed by defining probability levels matching your sales stages, setting up your sales pipeline and forecasting reports, templates for analyzing customer needs (to be used by your sales force) and finally defining your key competitors and lost prospect/customer codes.

At the end of this workshop, you will have increased visibility into the sales process of each sales person and you can help them supervise their professional growth. With SuperOffice CRM 5 and the Sales Improvement Plan you will be able to find improvement points for your people. For example, if a sales person is selling well, but his or her activity level is low, a sales manager can recommend that he or she work harder and sell even more. On the opposite end, a hard working sales person who is not making budget might need training in selling and closing skills.

In short, the Sales Improvement Plan will provide you with an instantaneous and comprehensive insight into all your prospects, customers, contacts, opportunities and related sales activities.

Duration: Running the Sales Improvement Plan takes a minimum of 2 days. The first step is spent on discussions with sales management and selected key sales people, analyzing your sales process related to how it is supported by your SuperOffice CRM database and getting a complete overview of the sales related topics in your company. As the second step, we prepare a report, documenting and performing the steps you should take in order to optimize your company's use of SuperOffice CRM within sales. The number of days will vary depending on the size of your company and the number of users.

The SuperOffice Sales Improvement Plan is part of the SuperOffice CRM Implementation Method, a framework of services built for securing a professional implementation, use and growth of your SuperOffice CRM solution. This framework includes several business improvement service packages.

If you want to maximize your sales performance and return from your SuperOffice CRM solution, contact SuperOffice, or one of our partners, for more information on the Sales Improvement Plan.

