

Overview of SOS Sales Methodology & D365 App



Sales Opportunity Snapshot



Technical Sales Development Inc.

www.technicalsalesdevelopment.com

For more information please contact:

Art Fromm

art@technicalsalesdevelopment.com

(716) 688-4351

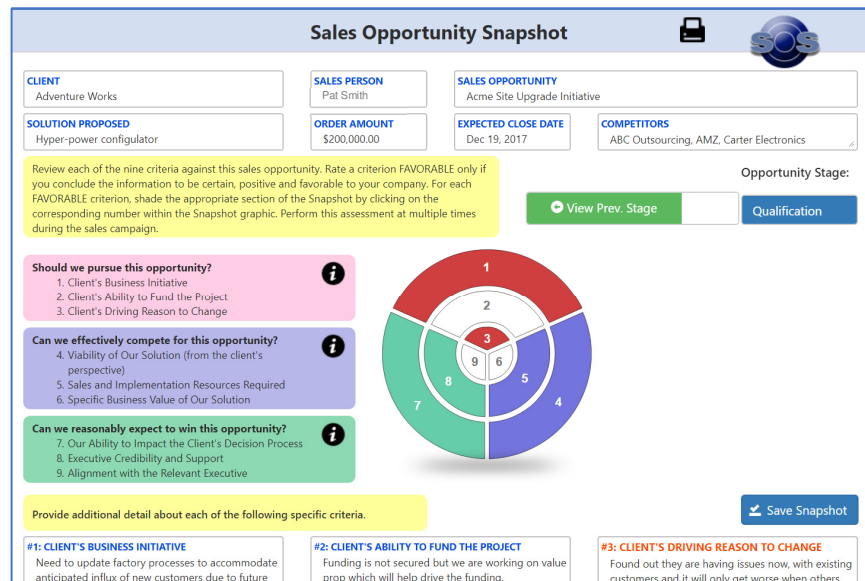
Sales Opportunity Snapshot™ (SOS) for D365

Sales Opportunity Snapshot (SOS) is a proven Sales Methodology, which is **now available as a D365 Managed Solution** and soon to be available on the AppSource.

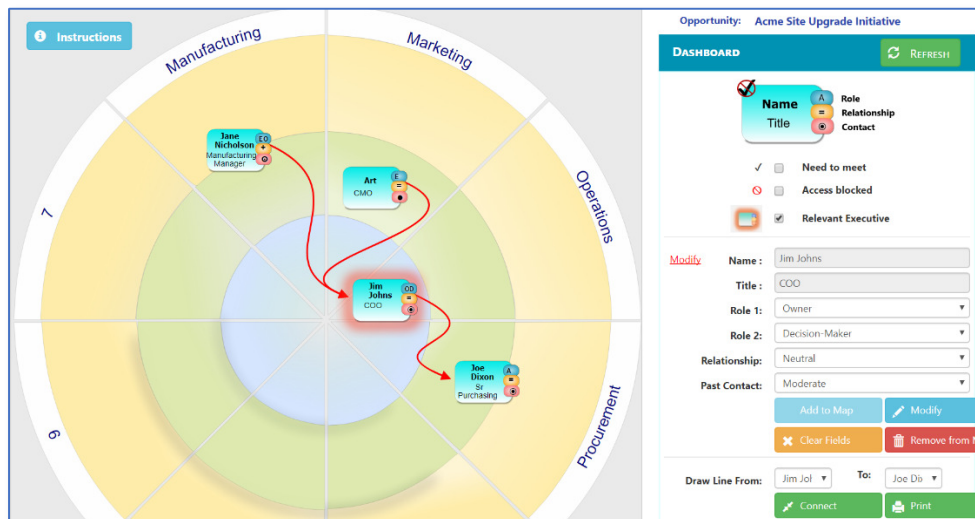
SOS focuses on helping professional salespeople analyze and manage their sales opportunities quickly and more effectively, increasing win-rate, margin, and customer satisfaction.

One customer who has been using the methodology for over 10 years, documented a 16-point average increase in win-rate using SOS.

SOS for D365 is extremely visual, easy to use, and dramatically depicts various aspects of a sales opportunity, including the *Snapshot Assessment*® of the sales opportunity, based on nine key qualification criteria...



... and the *Influence Map*, consisting of an overview of key client executives who influence the sales opportunity:



In addition, SOS provides:

1. A structured, scalable Methodology for qualifying and winning strategic sales opportunities where competitors (including “do nothing”) are strong, and customer buying protocols are influenced by formal and informal decision criteria.
2. A methodology to select a sales strategy for the opportunity, including an assessment of the strengths and weaknesses of major alternatives
3. Action Planning process
4. Unique and specific value proposition created for the sales opportunity

The methodology is **fully integrated with the D365 Environment**, providing a unique view into Sales Opportunities such as:

- Use of existing Contacts on the Influence Map, or creation of Contacts when new Influencers are added.
- The ability to determine across all Opportunities where, and in what capacity (Role, Relationship, Level of Contact) the Influencers (contacts) have appeared on other Opportunities so those relationships can be leveraged
- The ability to determine across all Opportunities positioning of competitors, what solution they are proposing, strengths, weaknesses and strategy used so that past experience can help plan winning strategies
- SOS Action Items assigned to D365 users appear on their Activity list and Action Items can be assigned to non-D365 users
- All Snapshot qualification data is captured at each change of sales stage so that business analytics can be used to help sales reps and managers uncover patterns in winning deal processes, proactively determine actions to drive deals forward, or determine what is required to accelerate stalled deals

SOS D365 is available to extended members of the sales team and can also be used by sales management to validate forecast probabilities and allocate resources. It can also be used to prepare and update sales executives who might be asked to call on various executives in the client organization.

SOS is accompanied by a fast-paced interactive 2-part vILT workshop which teaches the SOS Methodology, the tool, and most importantly, the mind-set around Consultative Selling.