

Overview of the SOS Workshop

Sales Methodology Training for the SOS for D365 App



Sales Opportunity Snapshot



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Sales Methodology Training for the SOS for D365 App

Workshop objectives: At the end of the workshop, participants will be able to use the SOS Process and D365 App to:

- Effectively qualify each of their sales opportunities, using the *Opportunity Snapshot* process
- Use concepts of influence and power to leverage a relationship with the relevant executive
- Select a competitive sales strategy that enables them to compete for each opportunity they pursue
- Develop meaningful actions that will enable them to win the deal
- Quickly and effectively communicate the status of each sales opportunity to others in the organization

Pre-Workshop Assignment

- Participants are asked to assemble information about a current sales opportunity they are pursuing and bring that portfolio of information with them to the workshop

SOS Workshop Modules

The workshop is comprised of the following modules:

- Brief Introduction – The Value of Opportunity Management
- Qualify the Sales Opportunity
- Align with the Political Landscape
- Select a Competitive Sales Strategy
- Develop a Value Proposition and Action Plan
- Summary and Close

Introduction Module – The Value of Opportunity Management

The workshop begins with a reinforcement of why salespeople need to have a process in place to systematically evaluate their sales opportunities (increase win-rate, be more consultative, be more strategic, etc.). The overall workshop objectives are disclosed, and the SOS Process is overviewed.

Qualify the Sales Opportunity Module

This module delivers a comprehensive and insightful methodology to quickly assess current sales opportunities. It is accompanied by a visual tool that is easy to use and dramatically displays the status of any sales opportunity, ranging from the simplest transactional sale to one that is multifaceted and complex.

The SOS Opportunity Assessment process is based on nine criteria that lie within three compelling questions. It is suggested that these criteria be assessed at multiple times during a sales campaign.

The three compelling questions are:

- **Is there an opportunity we should pursue?** Is this project or application driven by one of the client's key business initiatives? Is there significant payback associated with that initiative or are there significant consequences to the client if no action is taken? What is the client's driving reason to change and why does the client need to take action?
- **Can we effectively compete for this opportunity?** Do we have a solution that provides specific business value to the client? Does the client think that we have some level of business value that differentiates us from our competitors?
- **Can we reasonably expect to win this opportunity?** Does the most powerful person in the client organization (that impacts or is impacted by this buying decision) want us to win? What has that person done to demonstrate that level of commitment to us?

By the end of this module, participants are able to...

- Qualify their current sales opportunity
- Decide whether to pursue that opportunity or disengage, based on a Snapshot assessment of their sales opportunity
- Begin to develop the most appropriate actions to:
 - **Strengthen** their position
 - **Obtain** missing information
 - **Soften** their weaknesses

Align with the Political Landscape Module

This module focuses on the third compelling question previously described; namely, *Can we reasonably expect to win this opportunity?*

In this module, the concept of the *Relevant Executive* for the sales opportunity is introduced. In the context of the SOS workshop, the **Relevant Executive** is defined as the executive in the client organization who stands to gain the most if the project succeeds and to lose the most if the project fails.

Participants also discover that there are typically two types of decision-making processes (associated with the buying decision) taking place within the client's organization; namely, formal, and informal decision-making processes. They learn which is more important and how to identify people of influence in the client organization.

A unique and groundbreaking *Influence Map*, is introduced in this module. It contains a view of the client's organization not seen in the traditional organization chart. It also contains a significant amount of information about each client executive that has a role in the buying process for the sales opportunity. Activities within this module focus on having each participant create a unique *Influence Map* for their sales opportunity.

By the end of this module, participants are able to...

- Expand their view of the client's organization, by reflecting on the importance of formal and informal power
- Develop the political landscape for their current sales opportunity, including the *Relevant Executive*
- Describe the level of influence for key executives in the client organization
- Create an *Influence Map* for their current sales opportunity, that helps win the deal

Select a Competitive Sales Strategy Module

In this module, participants learn that there are three different competitive sales strategies that can be applied against a sales opportunity. They are also introduced to a step-by-step process for selecting the specific sales strategy that they can employ to increase the chances of winning the sales campaign.

By the end of this module, participants are able to...

- Describe the three competitive sales strategies
- Position the client's business initiative against their sales objective, focusing on the specific business value of their solution
- Select a specific sales strategy that enables them to compete for each opportunity they pursue

Develop a Value Proposition and Action Plan Module

The module begins with the creation of a meaningful value proposition, which client executives revealed is an essential ingredient in developing a lasting relationship with the client's organization.

Participants are given a template and a process for creating an effective value proposition. They immediately practice applying the template and creating a value proposition for their current sales opportunity.

In this module, we further define the Action Planning Process and have participants consolidate their action planning notes into a logical sequence of events they will implement within the next 30-45 days of their sales campaign.

By the end of this module, participants are able to...

- Describe the key components of a value proposition
- Create an effective value proposition for their current sales opportunity focused on the client's business objectives and using their metrics
- Develop a comprehensive set of actions for the next 30-45 days of their sales campaign by consolidating the ACTION PLANNING notes they developed throughout the workshop

Summary and Close Module

In this module, the progress made on the current sales campaigns of the participants is summarized. Key concepts delivered during the day are discussed and reviewed.