SOS (Sales Opportunity Snapshot) for D365 usage Guideline

SOS is a Mindset, Methodology, Process, and Tool, that can be used to the level and depth of need in order to help you qualify the Opportunity, strategize to win, or decide to exit.

Here is a recommended approach as to how and when to use the various aspects of SOS, listed from most basic to more advanced:

- The overall approach and mindset can be used for all opportunities whether an SOS is created or not
- At a minimum the Snapshot (9 Criteria diagram and corresponding text boxes) should be used and tracked as the Opportunity moves through the sales stages. The Snapshot is captured at each change of sales stage for data-mining/analytics purposes, and the Snapshot of the opportunity at the previous sales stage can be viewed for reference.
- At a minimum Actions should be used to identify, assign, and track the Actions required for the SOS to move the deal forward. This allows Actions to be managed with the Opportunity, and these Actions items show up on the associated Action Item owner's Activity List on their D365 home page.
- At a minimum Value Prop should be identified (preferably with full Financial Selling approach, which as shown to increase win-rate).
- It is valuable to create or select existing Contacts on the Influence Map, with the job title and key attributes selected, even if the Influence Map sections and relative influence and connections are not utilized. Each instance in which a given contact is added to the Influence Map is listed on the Contact Influencer page, showing all of the Opportunities on which the Influencer shows up, as well as the job title and attributes designated while the opportunity was still active, allowing the Opportunity owner to better plan Actions involving the Influencer.
- Ideally the full capability of the Influence Map should be used including Department Sections, placement of Icons showing level of relative Influence, and connections between Icons showing the flow of Influence to evaluate and determine how to best "engineer" influence toward closure.
- It is valuable to use the Competitive Strategy not only to plan out your strategy but also to track competitor history. Each competitor's proposed solution, strength, weakness, strategy and "will win if" is saved, so you can see all of the Opportunities in which they've been involved, how they were positioned and what happened with the Opportunity.

The idea is to use SOS to the level and depth helpful – not just filling everything in to be "complete." Use of the Snapshot at the minimum levels recommended is hugely helpful for all.

Guidelines for explicit use of the more "full-blown" SOS (i.e. all of the above) include:

- Certain $ level above which SOS should be used
- Certain customers that have high visibility
- New markets
- New Logos
- Complexity – more complex, more of SOS should be used
- When more than 5 stakeholders are involved
- When strategy is not clear, the deal is stuck, or there is concern that it will be lost