

What is the difference between our **NATIVE** Salesforce® App & the other Apps that are **INTEGRATED** to Salesforce®?



Opportunity Optimizer Opportunity Management Methodology

APP BY  sales
optimizer
DEVELOPING ELITE PERFORMANCE



INCREASE WIN RATES. IMPROVE FORECASTING. DEVELOP ELITE PERFORMANCE SALES TEAMS.

Optimizer - beyond selling basics

Strategic thinking and planning separates the best from the rest.

*The Opportunity Management Optimizer (OMO) program incorporates the best of strategy, tools and skills to enhance execution of the complex sales cycle to **increase win rates.***

The Optimizer is an easy to use visual tool built as a native application in Salesforce designed to simplify the complex and enhance the value and user adoption of Salesforce®.

NATIVE means the entire App and all data resides natively in Salesforce® and is built with Salesforce® programming language. This ensures total security of your data which resides in Salesforce®, no consequences or impact when Salesforce® upgrades and faster speeds.

Sales Optimizer, LLC is an innovative sales **Performance Optimization** consulting firm. We offer a Hybrid methodology that provides the power of integrating Salesforce® with sales and management training to increase **Sales Productivity**.

Our approach is based on 3 principles:

1. ***Time spaced learning***
2. ***Multi-touch approach***
3. ***Learn by doing.***

We start with workshops (live or web) followed by web coaching sessions to ensure application and reinforcement of the skills and competencies in a real world environment.

This approach produces much better results for our clients and costs less because of the reduced cost of travel expenses and time out of the selling environment.

www.SalesOptimizer.com

OPPORTUNITY MANAGEMENT OPTIMIZER™

What Is Opportunity *Optimizer*?

Opportunity Optimizer is a program and a tool built on the Salesforce® platform designed to be a structured, repeatable opportunity management methodology that enables sales driven organizations to:

- Improve win rates, margins, forecast accuracy and sales productivity
- Increase utilization and user adoption of Salesforce®
- Develop strong compelling gaps and differentiated business value
- Reduce cost of sales and new hire time to profitability
- Improve teamwork and team selling
- Reduce inter-departmental communication issues with a common language

Who Needs *Optimizer*?

- Optimizer is effective in organizations with some of the following selling environments:
- Transition from product to solution sales
- Price and margin erosion due to product commoditization
- Intense competition from multiple fronts
- Customer buying decisions with high financial, strategic or organizational impact
- Multiple levels of power and influence in decision making process
- Realization by companies that what got them to this point won't get them to the next level

What differentiates *Optimizer*?

- Native sales methodology application
- Training done via web vs. live workshops
- Reinforces user adoption of Salesforce®
- Enhances the value of Salesforce®

How is the Opportunity Optimizer class delivered?

- Traditionally Strategic Opportunity Management methodology classes are delivered as 2-3 day workshops
- Our methodology is to deliver as a live 1-day workshop followed by 12 virtual Team based web sessions



- This is approximately the same amount of total delivery time, but spread out over a longer period allowing for a coaching and implementation engagement that focuses on the lifecycle of real opportunities and the application of the methodology at every stage of the sales process.
- The traditional approach is more convenient for the training company, but our approach is more effective for you

What Happens in an Opportunity *Optimizer* workshop?

#1 - Assessment	#2 - Player Chart	#3 - Comp.Anal.	4. Biz-Insight	#5 - Biz-Value	#6 - Plan-2-Win
<ul style="list-style-type: none">• Is it real?• Can we win?• Key gaps?• Next steps?	<ul style="list-style-type: none">• Power/influence• Alignment• Access• Roles	<ul style="list-style-type: none">• Comp. Analysis• Intelligence• Compelling Gap• Sponsorship• Business Value	<ul style="list-style-type: none">• Goals• Objectives• Obstacles• Desires• Success	<ul style="list-style-type: none">• Key drivers• Differentiators• Tangible impact• Intangible impact	<ul style="list-style-type: none">• Goals• Objectives• Strategy• Tactics

Step #1 – Opportunity Assessment...

This is a Quick assessment to qualify and determine the likelihood of winning while identifying key initial gaps in the opportunity. The assessment criteria are configurable to each individual client and sales process to ensure relevancy to your business.

▼ Opportunity Assessment

Is It Real?	Description	Can We Win?	Description
<input checked="" type="checkbox"/>	Need	<input type="checkbox"/>	Incumbent
<input checked="" type="checkbox"/>	Budget	<input checked="" type="checkbox"/>	GOODS
<input checked="" type="checkbox"/>	Credit	<input type="checkbox"/>	Sponsor
<input checked="" type="checkbox"/>	Solution	<input type="checkbox"/>	Access
<input type="checkbox"/>	C-Gap	<input type="checkbox"/>	Value

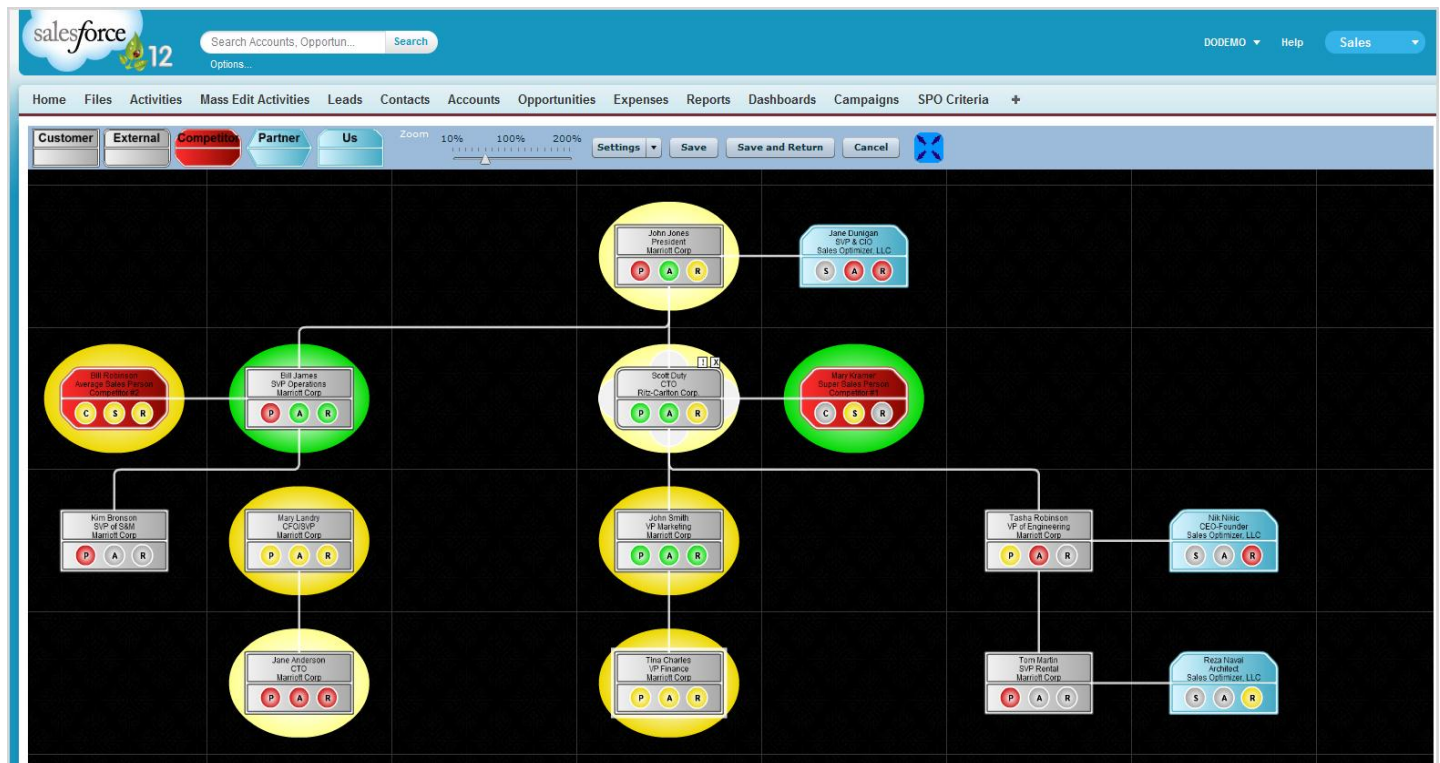
We know the customers need for this initiative
 Client has confirmed they have a budget
 Client credit approval has been done
 We verified our solution meets requirement
 There is a compelling reason to buy

We are currently doing business with this client
 We know the goal, objectives, obstacles, desires, successes
 We have someone who will help us win
 We have access to all the key stakeholders
 Customer confirmed we have the best business value

Legend: ■ Is It Real? ■ Can We Win?

Step #2 – Identify the key Players...

Identify all the players in the decision making process including customer contacts, external influencers, partners, competitors and your company's sales team. This decision making structure will graphically depict things like things like power, influence, access and decision role for anyone who has anything to do with this opportunity.



Note:

The player analysis is a critical component of a strategic opportunity management process as it drives the strategy and all other related components of the plan. If we don't know or if we have no access to the key players, we can't effectively execute the plan.

Step #3 – Competitive Analysis...

Based on the critical decision making criteria, where do you stand at any moment in time and what must you do to impact the outcome in your favor? Unlike a traditional assessment that is done in a vacuum, this probability analysis takes into consideration, the top 2 competitors, the possibility of a NO DEAL and the impact of the power structure on the driving criteria. The strategic analysis also incorporates a coaching wizard based on known factors and historical data.

Probability
Save Save & Return Cancel
Probability Coach Tutorial Video ?

Criteria	Sales Optimizer, LLC	Competitor #1	Competitor #2	No-Deal
Intelligence	4	4	4	0
Compelling Gap	1	1	1	4
Sponsor	4	1	2	0
Access	1	3	1	0
Relationship	2	3	1	0
Business Value	3	3	1	0
Totals	15	15	10	16

SPONSOR = someone who wants YOU to WIN. This person is in some way involved in the decision making process on this opportunity. They will do whatever they can within reason to help you win because they believe working with you is best for their company.

Sales Optimizer, LLC, 30%
Competitor #2, 7%
Competitor #1, 30%
No Deal, 32%

Pts.	Level	Sales Optimizer, LLC	Competitor #1	Competitor #2	No-Deal
1	NO-SPONSOR - someone who is not a sponsor but will provide neutral type of information as they would any other competitor.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	LOW SPONSOR – a user/evaluator with some influence has told you they want you to win and will help you.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
3	INFLUENTIAL SPONSOR – a recommender with high influence has told you they want you to win and will help you.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	POWER SPONSOR - someone with power and decision making authority has told you they want you to win and will help you.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Save & Return Cancel

Probability Coach

Coaching Tips

It seems Competitor #1 has demonstrated significant business value to someone with influence. This is a risky situation and could be an obstacle to winning.

While you may have some good relationships, political alignment can only be achieved by getting access to all the key players and directly securing their support. Be careful not to fall into the trap of being too narrowly aligned.

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Step #4 – Business Insight

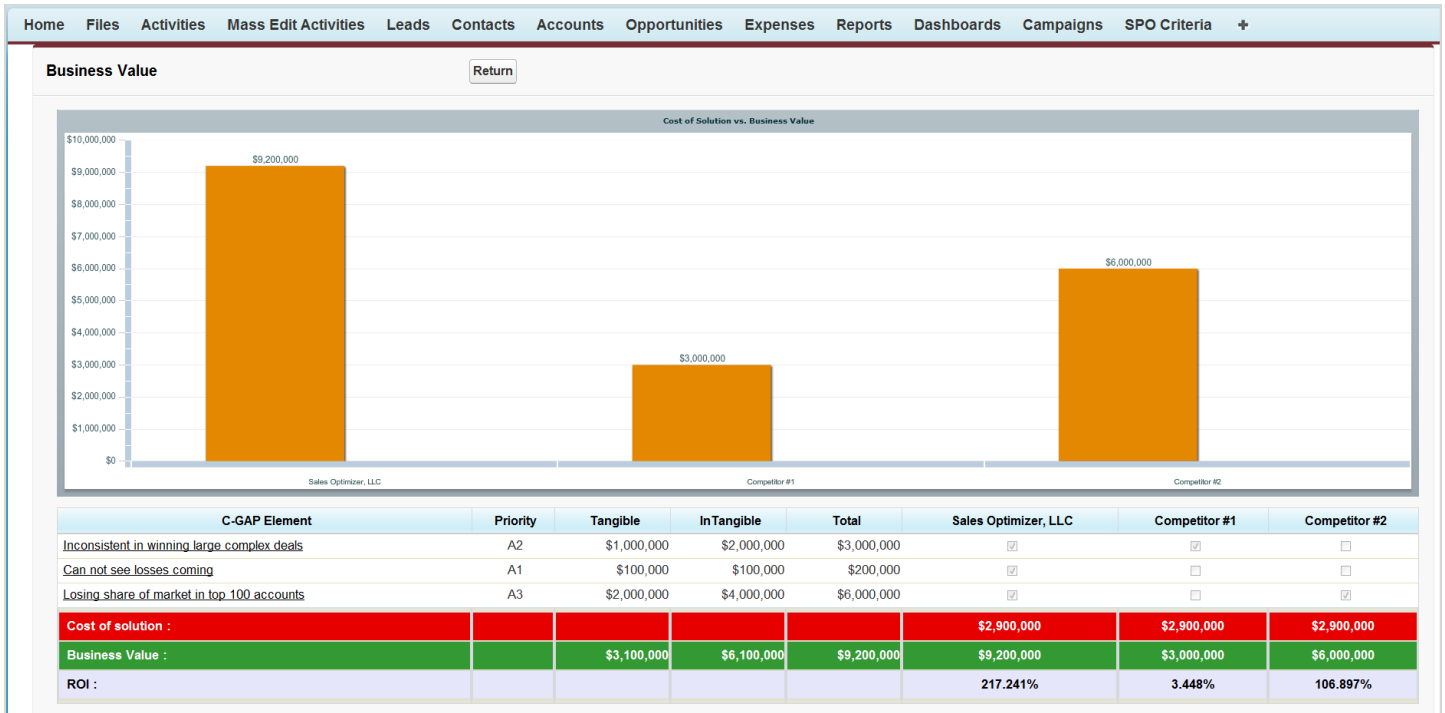
Identify the things that matter most to the customer that will drive the decision making process including their **Goals, Objectives, Obstacles, Desires** and **Success** metrics. Great strategy and execution comes from great insight. This module focuses on identifying, documenting and analyzing that insight to drive towards a value based solution that differentiates you from the competition.

The Goods

- Goal: Increase Revenue by 15% in 2012 in Direct Channel
 - Stakeholders
 - Nik Nikic
 - Open Activities
 - Objectives
 - Develop a strategic accountteam for top 100 accounts
 - Restructure Sales team into hunters & farmers by Q1
 - Implement a CRM by Apr-2012
 - Train Sales team on Optimizer Sales Methodlogy
 - Obstacles
 - Sales team has too many generalists & not enough specialists - especially around selling complex solutions
 - Poor visibility to the pipeline & activity
 - Team selling is critical but non-existent in our new environment
 - Desires
 - Develop a common sales methodlogy and CRM tool for visibility, collaboration and teamwork
 - Success
 - Full and accurate visibility to open pipeline by 4/15/12
 - Increase in deal size by 20% by 8/30/12
 - Comprehensive Account Plans in CRM by 5/15/12 for top 100 Accounts
 - Increase in WIN rates by 25% by 10/30/12
 - Clear strategic opportunity plans for all deals >\$100K in CRM by 6/15/12
 - Increase in total # of \$100K deals in pepeline by 30% by 7/30/12

Step #5 – Quantify the drivers, i.e. The Compelling Gap...The C-Gap Drivers and the Business Value

This module is about understanding and/or creating a compelling business case to close the deal. Understanding the compelling drivers, ensures you can develop a solution that will uniquely address those drivers to create a unique and differentiated business value that will provide you the competitive edge to win. The tool makes it easy to identify each of the core drivers and compare your ability to address them vs. your key competitors and in the process creating an ROI analysis clearly showing your unique and differentiated business value. This takes value creation from the soft and intangible to the concrete and tangible.



Step #6 – Develop & Execute the Plan to WIN...

Set your goals, objectives, strategy and plan of action focused on doing the right things, with the right people at the right time to help you WIN.

The Plan

- Goal: Become marriotts #1 training partner
 - Objectives
 - Close Pilot with Optimizer
 - Leverage success at Ritz
- Goal: Take over all methodology programs for all channels by 2013
 - Objectives
 - Win the Sales Process initiative
 - Win the Opportunity planning initiative for global accounts

Buttons: Open All, Close All, New Goal, Return

Name

- Become marriotts #1 training partner
- Take over all methodology programs for all channels by 2013

Open Activity View All New Task New Event

Action	Subject	Name	Related To	Task	Due Date	Status	Priority	Assigned To
Edit CIs	Need to get access to the decision makers		Marriott Corp-Opportunity Optimizer Demo-Mar-2012	Yes	11/21/2011	Open	C2	DODEMO
Edit CIs	Identify an influential person who we can develop into a sponsor.		Marriott Corp-Opportunity Optimizer Demo-Mar-2012	Yes	11/21/2011	Open	C1	DODEMO
Edit CIs	Need to get access to the decision makers		Marriott Corp-Opportunity Optimizer Demo-Mar-2012	Yes	11/21/2011	Open	High	DODEMO
Edit CIs	Leverage sponsor to get a meeting with executives		Marriott Corp-Opportunity Optimizer Demo-Mar-2012	Yes	11/21/2011	Not Started	High	DODEMO
Edit CIs	Need to get access to the decision makers		Marriott Corp-Opportunity Optimizer Demo-Mar-2012	Yes	11/21/2011	Open	C1	DODEMO
Edit CIs	Identify an influential person who we can develop into a sponsor.		Marriott Corp-Opportunity Optimizer Demo-Mar-2012	Yes	11/21/2011	Open	C1	DODEMO

WHO IS DOING BUSINESS WITH SALES OPTIMIZER?

