

Opportunity Description

Customer / Prospect: IT Service Company

Opportunity Manager:

Peter French

Opportunity History:

CLIENT: Major shareholder is an existing Infoteam client; the company is establishing a sales organsiation to enhance their traditional delivery focused structure; at the same time difficult market conditions putting pressure on their daily rates. INFOTEAM: Initial contact with sales director at an industry fair in November leading to a first small assignment for a key-note speech at their quarterly sales meeting; maintained contact regarding their progress in building the sales organisation; early contact used to influence their request for proposal for sales training services; proposal submitted in March; strong support for our solution but tremendous pressure to reduce price based on comparison to competitor's solution.



Customer / Prospect Goals:

Win new customers; maintain their daily rates through value selling; expand business with existing accounts; improve team -work through a common sales methodology; fast ROI and sustained impact



Sales Objective / Solution Offering:

Sales objective: Become the sole provider for a comprehensive sales improvement program



Solution offering: A combination of methodology, individual skills training and implementation coaching and support

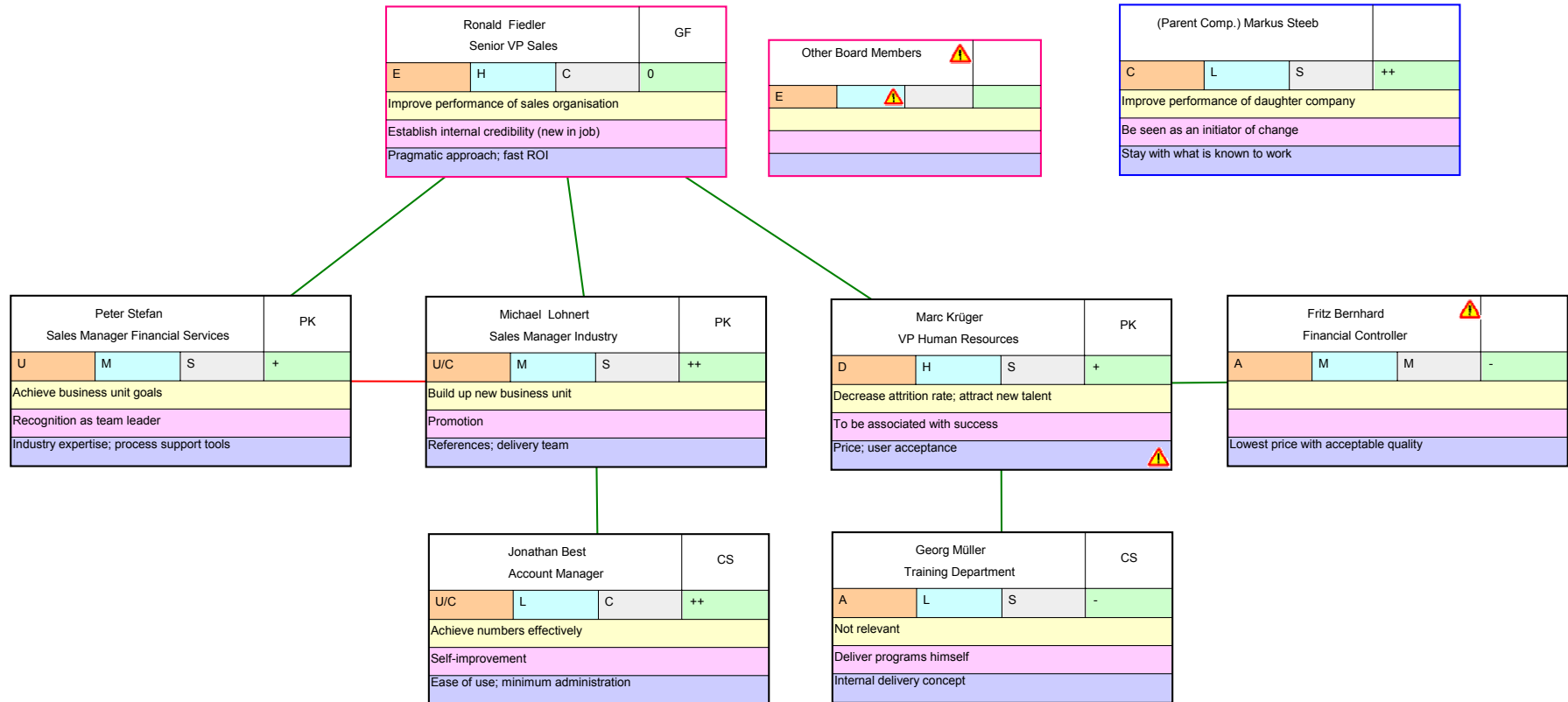
Opportunity Team: Chris Stoller (CS)
George Fisher (GF)
Peter French (RPF)
Phil Kreindler (PK)

Initial Sales Volume: R360 K
Probability of Winning: 70%
Customer Budget: R400 K -> R200 K
Resource Investment: 15 days / 3 days
Potential Growth: R80 K per year
Expected Close Date: End Quarter 2
Current Phase in Sales Process: Proposal




Match to Project Qualification Profile

Mandatory Criteria	Fulfilled	Discretionary Criteria	Fulfilled
1 Customer Needs - business, personal goals, decision criteria well understood		1 Sales Process - we can implement our ideal sales process	
2 Solution Fit - our solution matches customer's technical and commercial requirements		2 Potential - there is potential for future business with the customer beyond the first sale	
3 Buying Center - all the key roles identified and access is possible		3 Coach - we have a strong coach who can provide guidance and information	
4 Budget - funding is available for our sales objective		4 Value Proposition - we have a strong value proposition that differentiates us from competitors	
5 Urgency - the project has a high priority from the Endorser's perspective			
6 Competition - we understand the competition and their customer relationships			
7 Resources - we have appropriate resources for the sales process and solution delivery			
8 Timing - we understand where the customer's is in their buying process			
9 Profitability - the size of the opportunity justifies the investment required to pursue it			

Roles		Influence		Urgency		Opinion		Customer Needs
Assessor	A/C	High	Low	Compelling	Minor	Enthusiastic (++)	Negative (-)	Business Goals
Decider	D/C	Medium		Significant	None	Supportive (+)	Hostile (--)	Personal Goals
Endorser	E/C					Neutral (0)		Decision Criteria
User	U/C							
Coach								



	For Ronald Fiedler	For Marc Krüger	For Peter Stefan
Synthesis of Business Goals	From our conversations, we understand that you wish to improve performance of your sales organisation by increasing the percentage of sales people that achieve their target from 50% to 80% within the next 12 months.	From our conversations, we understand that you wish to reduce the attrition rate of sales people to less than 10% within 1 year and create a success culture that attracts top-level sales talent.	In our recent meeting, you said your goals are to establish the viability of your business unit by winning 6 new opportunities in the financial services sector with an average deal size of €600.000 in the next 12 months.
Decision Criteria	The solution you choose must be pragmatic and easily applicable to the types of opportunities your sales people encounter. Furthermore, it must help you to achieve a 100% return on the training investment within 6 months.	Moving forwards, you place particular emphasis on solutions that fit within the budget available and are well accepted by sales people and management.	In particular, you are looking for a vendor who can provide easy-to-use tools that are well integrated into the sales process and that has extensive experience using them in the financial services sector.
Solution Description	The solution we have designed to meet your requirements is comprised of integrated modules to improve lead generation, opportunity management and account development, supported by an ongoing program of sales management coaching.	Our solution is comprised of a 2-day skills and a 2-day methodology program, each preceded by individual participant preparation and followed by a reinforcement workshop 3 months after the initial program. Also included is a coaching program for sales managers to support the implementation process.	Our approach is to focus workshop time on helping your sales people target and win new customers in your business area. Furthermore, we will support you in coaching must-win deals to ensure that your ideal sales process is being executed.
Benefits of Solution	Based on our experience in your industry, our solution will help your salespeople focus on the right opportunities and position your company's unique capabilities to win more deals at higher daily rates. Your sales managers estimate that this would yield a revenue increase of 5-10% within	The expected results of our program are higher sales motivation and job satisfaction levels that come from winning more opportunities - leading to better staff retention as well as lower recruitment and training costs. Moreover, a successful sales organisation makes it easier to recruit the best candidates.	Clear action plans for the most important deals in your first year of business to create active references and gain a foothold in this market. The tools will enable you to gain sales process transparency which in turn improves forecast accuracy.
Differentiators	The strengths of our solution are based on our philosophy of keeping things simple, tools that scale to the type of opportunity being pursued and a cohesive approach integrating skills and methodology training .	The strengths of our solution are based on familiarity of many people in the sales organisation with our concepts from previous employers and maximising the effective use of available budget to provide both skills and methodology training from one vendor.	The strengths of our solution are based on the measureable impact of our programs from the sales person's point of view as well as the pragmatic approach to sales tool design that reduces administration.

Competitor	Do nothing	Holden	Skills Training Company
Our Advantages Against Them	Doing nothing would significantly impact their ability to grow in an increasingly competitive market	Tailored solution Price/performance Relationships Less complex/easier to implement	Complete offering Customer know-how 
Their Advantages Over Us	No expense	Market image/branding References	 Much lower pricing
Competitors Strategy	Not applicable	Not known	 Emphasis on personal skills not methodology Aggressive pricing
Our Strategy To Beat Them	Illustrate the impact of not making or delaying a decision	Focus on user acceptance and lower cost	Illustrate high ROI of our comprehensive solution combining skills, methodology and coaching Quantify our value proposition to reduce importance of price

Summary of our Position Today

Strengths	Rating (+1 to +5)	Areas of Concern	Rating (-1 to -5)
Customer knowledge	+4	Budget	-5
Comprehensive solution	+5	Business conditions	-3
References in parent company	+2	Access to top management	-2
Successful key-note speeches	+3	Price pressure	-4
Reliable coaches	+3	Important step in sales process omitted - value calculation prior to proposal	-5

Action Plan

What must be done	By whom	By when	Completed	Result of action
Review Roadmap with Lohnert	PK	2005/04/15		
Get Steeb to recommend us at board level	GF	2005/05/25		
Communicate results to Fiedler and Krüger	GF	2005/04/15		
Review pricing	PK	2005/05/26		
Define negotiation and closing strategy	GF,PK	2005/05/18		
Support Fiedler in preparing presentation to board	GF	2005/05/18		
Quantify benefits of our solution with the help of sales managers (value calculation)	GF	2005/04/13		
Monitor competitive activities	GF,PK	2005/04/14		
Obtain order and sign contracts	PK	2005/06/01		
Present complete delivery team	PK	2005/05/31		

