



Sales Manager

Sales Manager contains a full set of components to manage and forecast sales opportunities from Channel Partners, Direct Sales and Hybrid Models

Key Features at a Glance

- Track Opportunities from inception to close
- Manage opportunities and bids across teams
- Create and share sales plans
- Identify vendor support for bid
- Assign tasks to team members and track progress
- Link quotations to main bid
- Monitor bids managed by channel partners
- Forecast opportunities
- Track order take vs forecast

Benefits

- Effective tracking of multiple bids to maximise conversion
- Teams based across multiple locations can easily share information about opportunities
- Single reference point of all bids within a channel for a single opportunity enables more effective overall bid management

Introduction

The effective and profitable management of new business opportunities is a challenge for any organisation. As a business grows, the complexity of the sales and marketing operation increases and with it the risk of costly and unnecessary mistakes as sales cycles are won and lost. Sales Manager helps manage sales cycles ensuring that complexity doesn't limit the organisation's ability to win profitable business.

The Sales Manager toolset comprises of:

- Opportunity Controller
- Opportunity Monitor

In addition, Sales Manager makes use of

other components in the OneOffice software application.

Opportunities come in many different guises. When these come from the channel it can be difficult to identify which channel partners may be raising quotes for the same opportunity. Sales Manager helps you answer questions like:

- Who is bidding for each opportunity?
- Are different partners bidding for different parts of the same opportunity?
- Which bid should be supported?
- Does vendor support exist for the bid?

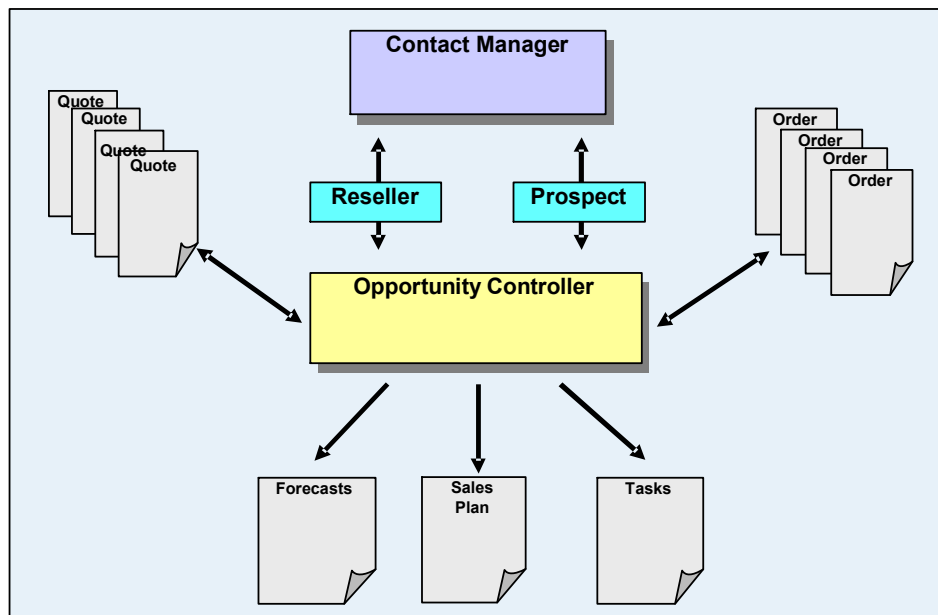


Figure 1. OneOffice Sales Manager enables the co-ordination of multiple opportunities



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- Which services does the business need to provide at each stage during the bid?
 - Is a direct sales team also bidding for the same opportunity?

Sales Manager ensures that businesses can successfully manage these and many other scenarios to increase profitability and reduce channel conflict.

Opportunity Controller

The Opportunity View provides a single dashboard view of each opportunity and includes a set of tools to manage the opportunity lifecycle. Having searched to ensure that there is no opportunity profile set up already, the first step is to define and create the opportunity.

Opportunity Creation

This is the starting point for managing each opportunity as information about it is gathered together. Typically this will include:

- Prospect information entered directly into Sales Manager or linked in from existing information held in the Contact Manager.
- For businesses selling through a reseller channel, details of the reseller partner, again this can either be entered directly or linked from the Contact Manager.
- The Account/Opportunity Team is pulled through for the prospect and/or reseller partner where the Contact Manager is in use, otherwise it can be manually set up.

- Profile of the Opportunity; what form it takes, possible value, level of any vendor support etc.
- This core information ensures that the business now has a level of understanding about the opportunity.

Sales Plan

Building on the core information, a sales plan can now be outlined. This describes the process that the opportunity is expected to follow and a strategy for winning it.

Task Management

As individual tasks need to be undertaken, these can be entered directly into each team member's diary or allocated as workflow tasks to the individual or group responsible.

Quotation Management

Many opportunities will include several elements, for example different types of equipment/hardware, services, training and consultancy. This can be further complicated when selling through a channel where different channel partners may be bidding for the same or different elements of each opportunity.

Unless this complication is carefully managed, margin can easily be eroded as individual reseller partners compete for the same opportunity.

Using the Opportunity Controller, individual quotations are linked to each opportunity or element of an opportunity and can be compared to pre-existing quotations prior release.



Opportunity Forecasting

As each opportunity moves through the sales cycle, the account team can maintain a forecast of the expected value and margin from the opportunity, an anticipated closing date and can factor the deal value/margin into the aggregate forecast.

Winning the Order

As opportunities are converted into sales, each order is logged against the opportunity and the forecast information updated to reflect progress. For many businesses, winning the first order in a larger opportunity leads to a series of follow-on activities and tasks which can then be placed directly into diaries or passed to people as workflow tasks.

Opportunity Monitor

The Opportunity Monitor provides a single view across all campaigns and the ability to drill-down into the Opportunity Controller for each campaign.

This enables the teams managing opportunities to locate each opportunity, update progress and forecast the associated sales value.

This interactive approach to opportunity management is possible because the Opportunity Controller and Opportunity Monitor sit inside the unified architecture of OneOffice. This means that information on contacts, quotations and opportunities are just a click or two away, making the day-to-day maintenance and sharing of information about each opportunity quick and easy.

Winning the Opportunity

Opportunity management is at the heart of customer relationship management. An opportunity is the final measure of success for many sales and marketing activities and is where the organisation needs to be completed joined-up to ensure the highest margin and a successful sale.



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