

Customer Success Story – Team Sales Development – SOS (Sales Opportunity Snapshot) Salesforce App

US-based Team Sales Development (TSD) partnered with CloudFronts for the development of its TSD SOS (Sales Opportunity Snapshot) Salesforce App.

About Team Sales Development:

Team Sales Development (TSD) is a leading US-based company that offers Sales Transformation, Training, and Services to improve companies' sales effectiveness, revenue, and customer satisfaction. TSD offers Seamless Sales® processes, tools, and a consultative mindset for Sales Engineers (SE) and Account Managers (AM) to manage and optimize their sales opportunities. TSD has been in business since 2004 and has worked with Fortune 100 high-tech organizations, IT firms, telecoms, manufacturers, and software companies. The company's consultative sales methodology (now known as SOS – Sales Opportunity Snapshot) has increased sales for a key client by over \$1 billion in the first two years, and TSD continues to provide sales training to this day. Learn More about them at <https://teamsalesdevelopment.com/>

Business Challenges:

1. Snapshot Field Updates

Salespersons face restrictions in updating certain fields on the Snapshot screen, such as Client, Solution Proposed, Expected Close Date, and Order Amount, which can limit their flexibility.

2. Save Functionality

Ensuring that salespersons can save the Snapshot by clicking the Save button is crucial for maintaining up-to-date information.

3. Navigation Between Stages

The ability to navigate between stages is essential, but there are challenges:

- For the first Snapshot, users can click "View Prev. Stage."
- For subsequent Snapshots, users can also click "View Prev. Stage."
- An error message will appear if the Snapshot was not used at the previous stage.

4. Snapshot Read-Only Status

Previous Snapshots are visible in read-only format and cannot be edited, which may hinder the ability to make necessary adjustments to past data.

5. Active Snapshot Per Stage

Each Opportunity stage will only have one active Snapshot based on the current stage, which can create challenges in managing multiple Snapshots for different stages.

6. SOS Form Initialization

The SOS form needs to load with pre-filled information, and the first blank SOS should be created in the current stage, ensuring data consistency.

7. Print Functionality

The Print SOS function must print all screens, including SOS, Influencer Map, Competitive Strategy, Value Proposition, and Action Plan, to provide a comprehensive report.

8. Information Button

The “I” info button must be enabled with a pop-up or another method to display sub-questions, ensuring users have access to detailed information.

9. Layout Considerations

There is a need for a better layout, such as positioning notes about when to color in a segment on the side of the Snapshot instead of at the top, to avoid taking up valuable screen space.

Solution:

1. Sales Opportunity Snapshot Configuration

Configure organization details, customer profiles, SOS fields, and security roles after the SOS solution is installed in Dynamics CRM.

Steps include navigating to Settings -> Solutions -> TSD SOS and completing the configuration form with two main sections: Organization and Customer Profile and Configure SOS fields.

2. Workflow Setup

Update the email parameters in the workflow named “Update Current Opportunity Snapshot Record” to ensure proper notifications on the creation of the first Snapshot.

3. Security Role Assignment

Assign relevant security roles to SOS users to ensure access to appropriate sections and features. There are two types of users with specific roles: Core CRM Role and TSD Sales Person Role.

4. Success Metrics

Ensure all users with the Core CRM Role can access SOS functionalities.

Users with the TSD Sales Person Role should navigate to Sales -> Opportunities -> Opportunity Snapshots, Influencers, and Actions.

Users with the TSD View Only Role can read SOS forms and functionalities but cannot make changes.

5. Influencer Map and Sales Strategy

Easily create and manage Influencer Maps and sales strategies with minimal effort. The SOS form provides a structured methodology for selecting a sales strategy, assessing strengths and weaknesses, and planning actions.

6. Snapshot Creation and Management

Create opportunity snapshots for each stage, accessible via the SOS form. The first snapshot triggers an email notification, and snapshots for previous stages can be viewed but not edited.

Users can print snapshots, view them in full screen, and quickly update new values without needing to save manually.

7. Competitive Strategy Management

Add, edit, and delete competitor information easily. The quick-create form allows for efficient input, and a print screen option is available for the strategy plan.

8. Creating Influencers

Label key departments, create or modify influencers, and draw lines to illustrate informal influence. Newly created contacts are automatically added to the customer profile.

Key Technologies:

1. Salesforce App

Post Go-live:

1. After the Go-live, Products is ready to user for Salesforce Client who are willing to improve their Sales Process and increase their Lead to Opportunities Win Ratio.

In conclusion, implementing the SOS solution effectively addresses key business challenges related to sales opportunity management. The configuration of snapshots, workflows, and security roles ensures accurate data management and user access. The streamlined creation of influencer maps and strategic plans enhances decision-making and sales efficiency. By providing tools for competitive strategy and

opportunity analysis, the SOS solution helps sales teams improve resource utilization and achieve better business outcomes, ultimately boosting win rates and customer satisfaction.