

Sales Cycle Manager for AppExchange



Abstract

Sales Cycle Manager is a sales opportunity management system using the methodology described in the book "Sales Automation Done Right" by Keith Thompson. It has a unique way of determining the probability and priority for the opportunity, ensuring accuracy and consistency for forecasting across the sales team.

Description

Salespeople generally are charged with the task of handling many open opportunities at a given time, at different points in their sales cycle and with different chances for success. Sales Cycle Manager calculates an intrinsic value for the opportunity based on a few key parameters that are entered by the salesperson. The opportunities can then be worked in an order that guarantees the best use of the salesperson's time. The salesperson's progress in the sale can be tested against the "sales advisor" using fundamental aspects of good selling practices. Valuable for both salespeople and their managers. Provides a consistent view of the progress within the opportunity and a platform on which to build winning strategies.

Highlights

Name	Description	Type
Probability Determination	Looks at "Assurance of Completion" and "Confidence of Winning" as the two determining factors that govern probability of winning the sale.	■ □ ● ◆
Position in Sales Cycle	Tracks the current point in the sales cycle and uses a skill phase model to determine the proper tactical plan the salesperson should be using.	■ □ ● ◆
Priority	Determines priority from considerations of probability of winning and point in sales cycle (skill phase)	■ □ ● ◆
Sales Advisor	Provides tactical advice to the salesperson from user entered data using established and proven factors sales methodology	■ □ ● ◆
Opportunity Dashboard	Summarizes critical parameters of the sales opportunity in a graphical and dynamic interface	■ □ ● ◆
Easy, Intuitive Interface	Easy data entry, real time updating, responsive and interactive, encouraging user adoption.	■ □ ● ◆

■ = Custom Object, □ = Custom Tab, ● = Custom Link, ◆ = Custom S-Control
 ≡ = Plug-In, ✕ = Composite Component

Features & Benefits

- **Probability:** Calculates probability using a 3 x 3 matrix dependent on two variables—the assurance of completion and confidence of winning. Ensures consistency and accuracy across the team.
- **Priority:** Assigns a priority, recognizing that point of time in the sales cycle is an important factor. Assists the salesperson in working a list of opportunities in an optimum way for maximum sales success.
- **Sales Cycle:** Divides the sales cycle into three phases matching the three phases of the buying process. Guides the salesperson to the appropriate emphasis on specific skills for a given point in the sales cycle.
- **Advisor:** Intelligent sales advisor tests salespersons gut feel on the sale through analysis of key issues derived from sound sales methodology. Acts as a sounding board assuring that nothing is being overlooked.
- **Dashboard:** Presents current status of the opportunity in a graphical, easy to understand, dynamic interface. Encourages the salesperson to sense the critical aspects of one opportunity versus another. Shows the Advisor's thinking on the sale versus the salesperson's and suggested tactics going forward

Key Reports & Dashboards

Name	Description
Opportunity Dashboard	Dynamic dashboard showing probability matrix, calculated priority, sales cycle with skill phases, advice from intelligent sales advisor
Sales Cycle Planner	Show opportunities sorted in order of priority with five priority levels: Do it first, Do it second, Do it third, Leave it alone, and Breakthrough needed.
Forecast	Forecast showing forecasted sales by month using the Sales Cycle Manager probability factors in weighted averages.

Requirements

External Service	SalesWays
Salesforce.com Edition	Enterprise

Specifications

Publisher	SalesWays Corporation
Type	Composite
Salesforce.com Certification	None
Pricing	Annual License Fee

Sales Cycle Manager for AppExchange



Screenshot

Sales Cycle Manager

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Bar Scale: Month

Priority: Review Second

SA #	Last Review	Opportunity Name	Amount	WWH	WH	WWGI	Sales Cycle Bar
SA#0011	23/06/2006	United Oil Refinery Generators	\$270,000.00	24/10/2006	Med	High	<div style="width: 100%; height: 15px; background: linear-gradient(to right, blue 33%, green 33% 66%, red 66% 100%);"></div>
SA-0013	23/06/2006	Photo Copier	\$100,000.00	31/07/2006	High	High	<div style="width: 100%; height: 15px; background: linear-gradient(to right, blue 33%, green 33% 66%, red 66% 100%);"></div>
SA-0014	23/06/2006	Grand Hotels Guest Portable Generators	\$20,000.00	31/08/2006	High	High	<div style="width: 100%; height: 15px; background: linear-gradient(to right, blue 33%, green 33% 66%, red 66% 100%);"></div>
SA#0008	26/06/2006	ACME - Industrial Copier	\$8,000.00	24/08/2006	High	High	<div style="width: 100%; height: 15px; background: linear-gradient(to right, blue 33%, green 33% 66%, red 66% 100%);"></div>
SA#0007	26/06/2006	United Oil Plant Standby Generators	\$675,000.00	12/09/2006	Med	Med	<div style="width: 100%; height: 15px; background: linear-gradient(to right, blue 33%, green 33% 66%, red 66% 100%);"></div>

There are 1 Open Opportunities without Advisor

Opportunity Name	Date Close	Amount
Burlington Textiles Weaving Plant Generator	31/08/2006	\$11,000,000.00

Recent Items

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Sales Advisor Mode: Expert ▼

Priority

2
2

Probability

80%
80%

Phase

PROVE

Sales Advisor

You're in a commanding position. Keep the momentum going, eliminate any possible obstacles, and prepare for an early close.

▼ Strategies and Suggestions

Calculating Probability

	High			
Will We Get It?	High	High	High	High
	Med	Med	Med	Med
	Low	Low	Low	Low
	Low	Med	High	
	Will It Happen?			

Sales Cycle: 6 months 3 weeks

Focus

Time
From start 4 months 3 weeks
To close 1 month 4 weeks

Fundamental Selling Skills

At this point in the sales cycle:

- Probing: Roughly 25% of your effort should be probing
- Proving: Roughly 75% of your effort should be proving
- Closing: Getting near to close phase

Sales Advisor ID
SA#0008

Date Qualified

Opportunity Name
ACME - Industrial Copier

Will It Happen?
High ▼

Amount
\$8,000.00

When Will It Happen?

refresh
save

Recycle Bin