

SALES ENGAGEMENT MODEL

STRATEGIC

1. Project description
2. Marketing
 - a. Identification of need
 - b. Determination of market opportunity
 - c. Conduct market survey
 - i. Validate need
 - ii. Validate that offering satisfies need
 - d. Purchasing Model
 - e. Related opportunities (cross-selling)
3. Develop market opportunity hypothesis
 - a. What is the approach
 - b. Whom do we know
 - c. How do we penetrate
 - d. What is the sales cycle
 - i. 1st iteration
 - ii. 2nd iteration
 - iii. Early adopters / late adopters
 - e. Who is the competition?
 - i. What is their approach?
 - ii. How do we counter?
 - iii. S.W.O.T. analysis
 - f. Identify targeted niche market
 - i. Greatest dollar value
 - ii. Greatest need / urgency / penalties
 - iii. Least competition
 - g. Assess alignment possibilities
 - i. Channel opportunity
 - ii. Joint marketing with equipment manufacturer
4. Determine business (\$) opportunity; then decide: "GO" / "NO GO"
 - a. Revenue potential
 - b. Costs
 - c. Profit
 - d. Investment
 - e. Timing
 - f. Where? (Location)

SALES ENGAGEMENT MODEL

TACTICAL

1. Sales Plan
 - a. Sales effort distribution selection
 - i. Direct versus channel sales
 - b. Targeted and prioritized accounts
 - c. Functional service knowledge
 - i. Certifications required
 - ii. Training
 - d. Objections and buyer beliefs
 - e. Set account goals
 - f. Identify key decision-makers / influencers / sponsors
 - g. Qualifying
 - i. Referrals

ARTIFACTS

1. Written assessment with recommendations
2. Operating budget ROI
3. Revenue Pipeline
4. Management Presentation
 - a. Market description / context
 - b. Business opportunity
 - c. Revenue / Profit / Break Even / ROI / Payback Analysis
 - d. Decision request