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Impact Opportunity Plan

User Guide

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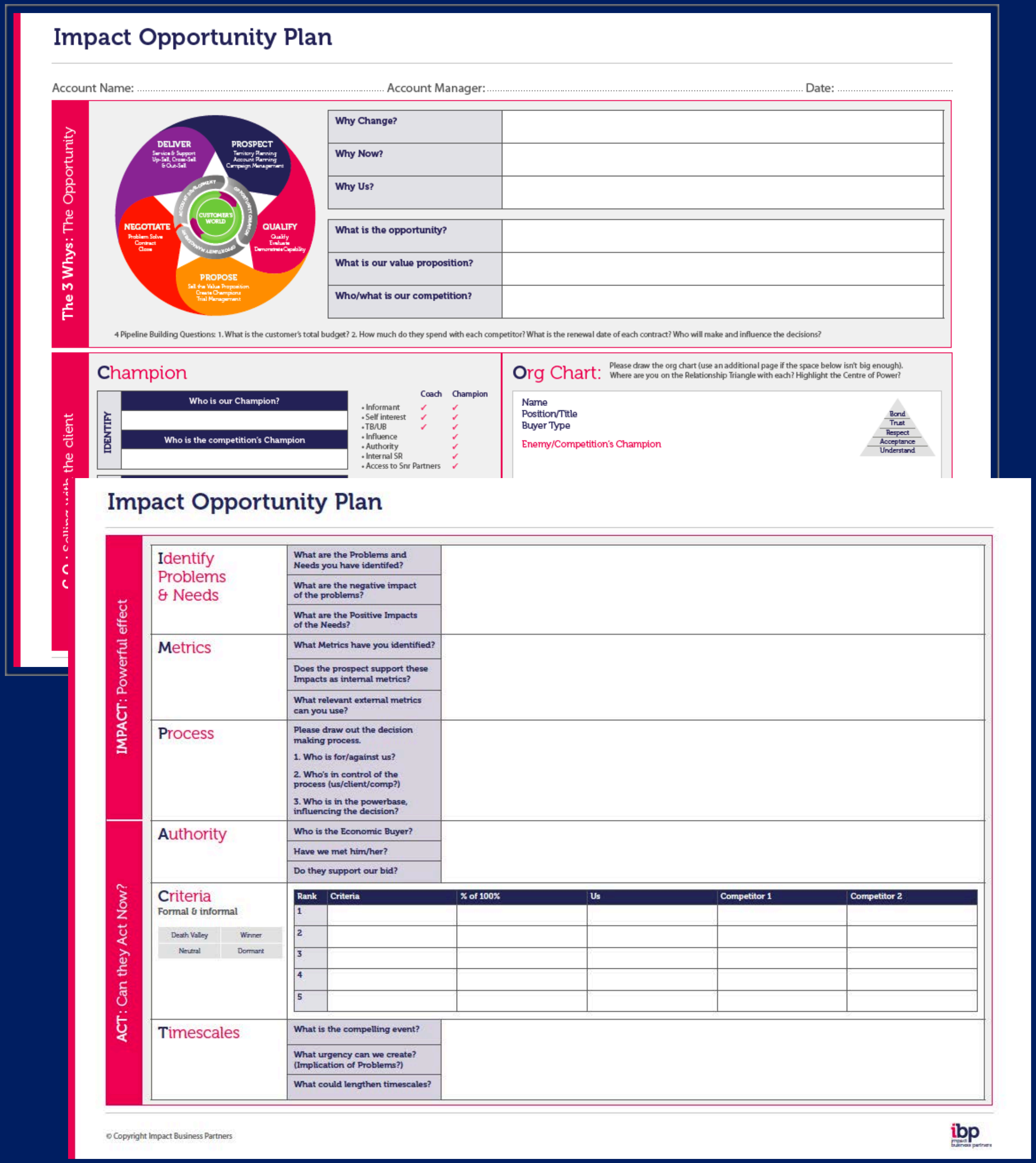
Welcome

Selling solutions and major sales is highly rewarding, especially as with bigger sales comes bigger earnings.

A key challenges of making larger sales is more people becoming involved in the decision making process and keeping multiple stakeholders on track. The larger the decision, the bigger the risk and therefore the expert sales professional needs to have the right mindset, sales strategy and plans ,to keep closer to the deal and manage it through the pipeline to the successful outcome.

The Impact Opportunity Planner is an ideal tool for managing an opportunity through the sales process and analysing how much information the sales person has on the account. It helps qualify the potential of the deal and is used before and after each customer engagement to create a sales strategy and action plan.

Impact is an acronym, a mindset, and a sales optimisation tool to ensure you are working on the right opportunities and leading your customers to say YES!


Impact Opportunity Plan

Account Name: ... Account Manager: ... Date: ...

The 3 Whys: The Opportunity

Why Change?
Why Now?
Why Us?
What is the opportunity?
What is our value proposition?
Who/what is our competition?

Champion

Who is our Champion?
Who is the competition's Champion?

Org Chart:

Name
Position/Title
Buyer Type
Enemy/Competition's Champion

Impact Opportunity Plan

IMPACT: Powerful effect

Identify Problems & Needs
What are the Problems and Needs you have identified?
What are the negative impact of the problems?
What are the Positive Impacts of the Needs?

Metrics
What Metrics have you identified?
Does the prospect support these Impacts as internal metrics?
What relevant external metrics can you use?

Process
Please draw out the decision making process.
1. Who is for/against us?
2. Who's in control of the process (us/client/comp?)
3. Who is in the powerbase, influencing the decision?

ACT: Can they Act Now?

Authority
Who is the Economic Buyer?
Have we met him/her?
Do they support our bid?

Criteria
Formal & informal

Rank	Criteria	% of 100%	Us	Competitor 1	Competitor 2
1					
2					
3					
4					
5					

Timescales
What is the compelling event?
What urgency can we create? (Implication of Problems?)
What could lengthen timescales?

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The Art and Science of sales

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What is the IMPACT Opportunity Plan?

The IMPACT Opportunity Plan is designed to help you to get closer to the deal, qualify where you are in the process and help you strategise and plan for your next call.

The planner is not about filling in forms or creating more reports, it is really to act as a mindset. The form is just there to help you capture the information and many people use it for deal reviews and to aid in the assessment of how much knowledge they have on the account.

The form is divided into 4 key areas across 2 pages:

- **The Opportunity - What is the value proposition**
- **CO - Selling— Who are you selling to / through**
- **IMPACT - What is the impact of the solution**
- **ACT - What do you know that will enable the customer to make and take a decision**

This quick user guide will provide you an overview of the planner and how to use it, for further skills and capability on how to uncover a lot of the data and information you might want to consider completing some of our programmes which are available online or via our classroom session. For more information on these please visit salecology.com.

The 3 Whys: The Opportunity

Why Change?	
Why Now?	
Why Us?	

What is the opportunity?	
What is our value proposition?	
Who/what is our competition?	

4 Pipeline Building Questions: 1. What is the customer's total budget? 2. How much do they spend with each competitor? What is the renewal date of each contract? Who will make and influence the decisions?

The 3 Whys

The answers to these three questions provide essential top line qualification on every deal in your pipeline. If you are unable to answer these three questions with certainty, the chances are it is not a good deal to be forecasting. Hence, the three Whys give you wisdom of what to and what not to put in your forecast.

Why Change?

This relates to Changes the customer is experiencing. What change has happened that has stimulated a buying cycle? What pain have you identified the customer is experiencing or will be experiencing in the future? How big are, or will, the pains be? What impact is it having on the business and the individuals inside? What metrics do we have associated to the pain? Is the change industry-wide or just localised to your customer?

Why Now?

This relates to the customers awareness of need phase in the buying cycle. Having assessed how big the pain is, what is the win for the customer if they are solved? What metrics can we produce? What is the likely return on investment they will gain by addressing them now? What impact will they avoid and is it sufficiently compelling to act now?

Why Us?

This relates to the 'buyer's options' phase of the buying cycle. Why will the customer want to use us as opposed to 1. Solving the problem internally 2. Choosing another supplier 3. Stay with the incumbent/do nothing? What differentiates our proposition? How do we meet the customer's decision making criteria? Do we have a stronger Champion than the competition?

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Co Selling

Co-Selling aspect of the Planner is about identifying champions and navigating the Organisation chart to ensure we know who could be for and against us.

With major sales you need someone on the inside who is championing you to win. This person who have both influence and power to make things happen.

Do you have a Champion?

A Champion is someone inside the organisation who has influence and power, and wants you to win the deal because they have some personal win attached to it. Ideally they would also have authority.

The Champion part of the planner is designed to assist you in 3 areas:

- ✓ **Identifying Champions** - Do you have / have you identified one
- ✓ **Building them to be your champion -** Have you uncovered personal issues and needs
- ✓ **Testing and coaching -** Are you sure they are your champion, what have you dome to test them and coach them how to sell on your behalf.

How well do you know the Org Chart?

The Organisation chart is a very powerful tool to help you understand more about the organisation, where the centre of power sits and who has both the influence but also who could scupper your plans.

Mapping the Org Chart out will help you identify people you need to get to or blind spots in your account knowledge.

C O : Selling with the client

Champion

IDENTIFY

Who is our Champion?

Who is the competition's Champion

BUILD

What is / are their personal challenges?

What is / are their explicit personal need?

TEST & COACH

How have you tested them?

How have you coached them to sell on our behalf?

	Coach	Champion
• Informant	✓	✓
• Self interest	✓	✓
• TB/UB	✓	✓
• Influence		✓
• Authority		✓
• Internal SR		✓
• Access to Snr Partners		✓

Org Chart:

Please draw the org chart (use an additional page if the space below isn't big enough). Where are you on the Relationship Triangle with each? Highlight the Centre of Power?

Name
Position/Title
Buyer Type

Enemy/Competition's Champion

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Impact Opportunity Plan

IMPACT: Powerful effect

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ACT: Can they Act Now?

Authority	Who is the Economic Buyer?	
	Have we met him/her?	
	Do they support our bid?	

Criteria

Formal & informal

Death Valley	Winner
Neutral	Dormant

Rank	Criteria	% of 100%	Us	Competitor 1	Competitor 2
1					
2					
3					
4					
5					

Timescales	What is the compelling event?	
	What urgency can we create? (Implication of Problems?)	
	What could lengthen timescales?	

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IMPACTful Sales

Not just an Acronym

The IMPACT page of the planner is designed to help guide and shape your conversations to uncover more about the 3 Whys and assess how well you know this deal.

The IMPACT Acronym is designed to act as a memory aid as well as checker to test your knowledge, it is definitely not a process or flow diagram.

Note to self:
Depending on the size of the opportunity, as well as the perceived risk on the account, it is unlikely that you will gather alll this information in one meeting. Some of the data is about process, whilst the other is about the personal and business needs. Use the model to reflect back on you sales conversation, capture what you have uncovered and consider what you need to ascertain on the next call.

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I

Identify Problems and Needs

What problems, dissatisfaction and difficulties have you uncovered, what is the Pain and Gain of solving them. Have you extended those beyond the person you are talking to, i.e. have you used IMPACT questions to build why change.

M

Metrics

What metrics have you uncovered and who within the customers organisation supports them? Use external metrics early on in the sales process but as quickly as possible uncover real tangible metrics within the client. This will support the Why Change and the Why Now!

P

Process

Understanding the buying process will enable you to accurate forecast when the deal could close. It also prepares you for who else will be involved in the decision making. Knowing early on if it ends up at procurement will forewarn you in terms of negotiation.

A

Authority

Knowing who has authority to say yes, or who has the power of Veto is also important. It is important to establish who would sign it off, but also who would want to review the deal before it is signed. This will help you pitch the Value Proposition to the right people.

C

Criteria

There is always a formal and informal decision criteria that people wil use to determine if the deals looks and feels right. Formal criteria will be explicit in terms of what the solution must provide, whereas informal criteria is based on personal wins and risks.

T

Timescale

Timescales are based on the customer and will very rarely be influenced by special offers from the seller. What compelling events or urgency can you identify which will help drive the decision.

TESTIMONIALS

"Salecology's ability to really understand the key business challenges we face, together with their engaging learning style, have made an enormous positive impact with real tangible results in sales growth."

Hillary Harris
Chief Talent Officer
Reed Business Information

"Working with Salecology was a breath of fresh air. They took time to understand our business and our needs and developed a custom-designed training programme which we rolled out across the business with great success"

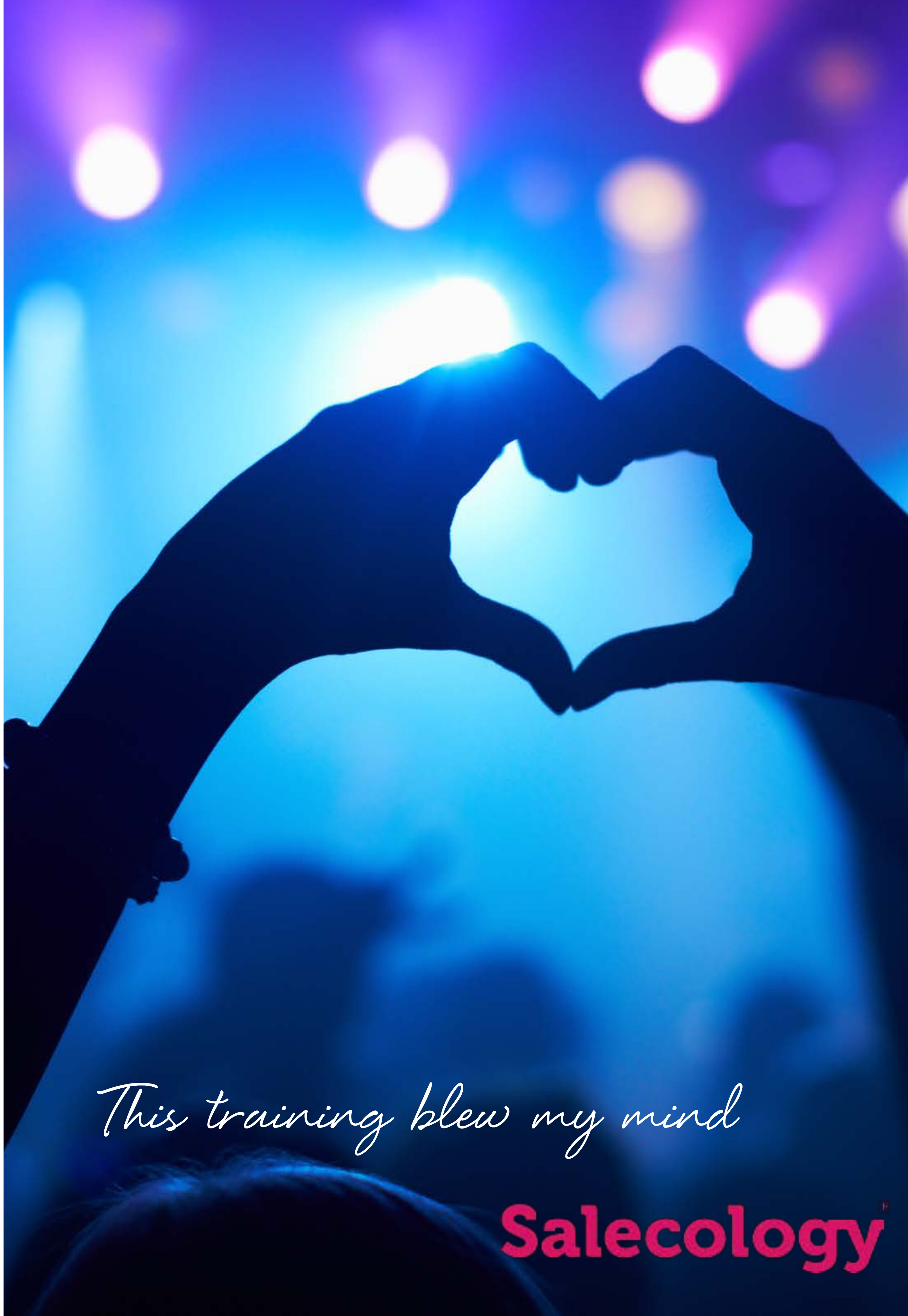
Gavin Cummy,
Director of Sales Operations & Customer Service
LexisNexis

"Through deploying the Salecology programme, we successfully transformed our core New Business inside sales team by providing them with additional capabilities to engage with their prospects at greater levels. As a result our New Business performance, within this team alone, has increased by 277%."

Steve Nicholson
Group Sales Director
XpertHR

"Salecology know how to turn good sales people into great sales people… resulting in a deeper understanding of customer needs."

Dan Barnard,
Global Vice President of Sales
ICIS



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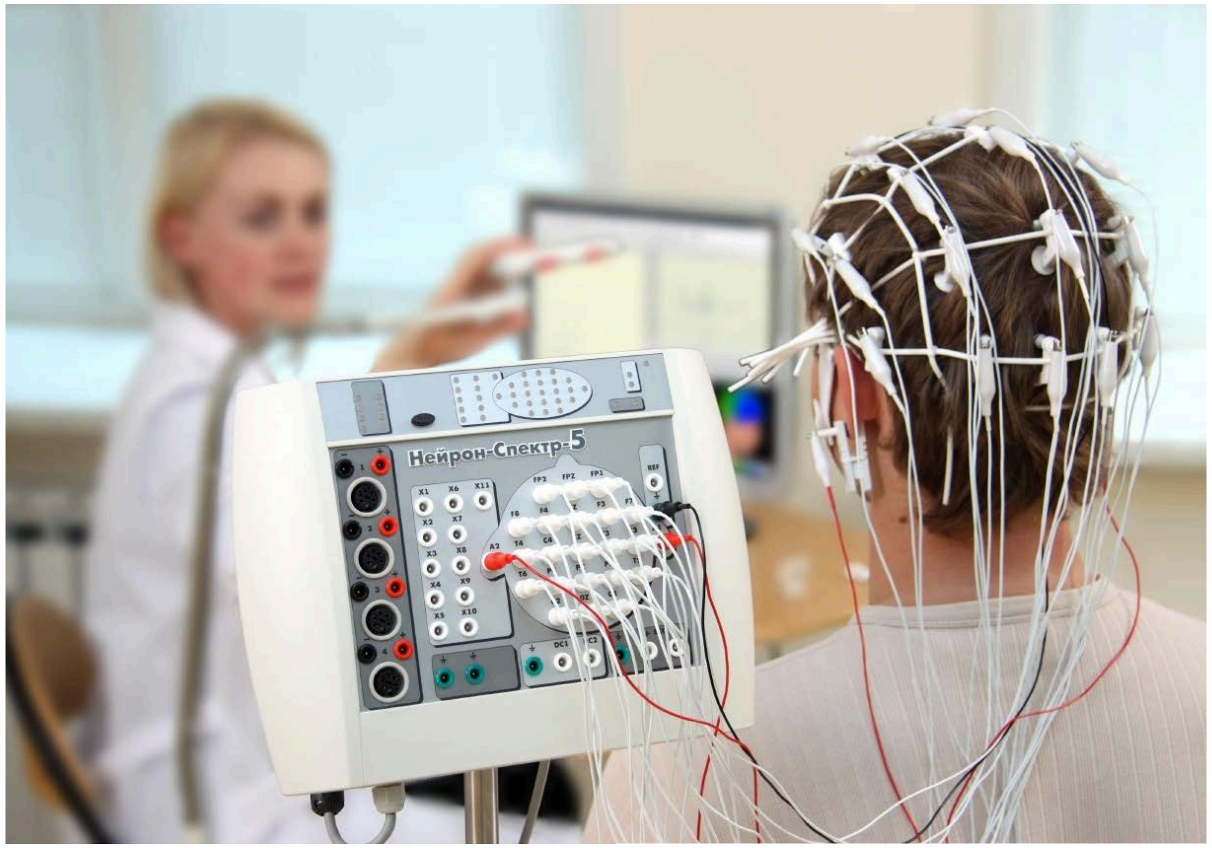

STORY SO FAR:

195,354	Individuals trained
82,194	Sales Call Analysed
37,783	Coaching hours
13,247	Psychometric Assessments
228	"What Great Looks Like" created
33	Countries
16	Languages

Salecology Group has delivered over £ 1bn in client value

'New product sales increased by 250%
Hugo Mahoney
Sales Director, LexisNexis

'Salecology turned good people into Great sales people
Dan Barnard
VP Sales, ICIS

'Sales Conversion jumped 28%
Andy Morrison. Managing Director, Travis Perkins

Why Salecology?

Salecology are the world's leading sales behaviour psychologists. We transform your team from the inside out. The Salecology methodology is the brain and applied behavioural science of building connections with your customers and influencing them to say YES, resulting in more sales.

At Salecology we offer a range of high impact services to help you and your company move from good to great. We have specialist expertise to help enhance and develop your organisation from individual sales improvement solutions to complete sales transformation. Our goal is to drive significant, sustainable impact that will accelerate your business and deliver top line revenue growth. We have an unbeaten track record in giving companies the edge they need to succeed.

Our clients rely on the Salecology to keep their sales forces at the peak of their game, and we've helped them to achieve double-digit growth throughout one of the toughest trading periods in history. No organisation can afford to stand still in today's constantly evolving business environment. So we don't. At Salecology we make it our business to keep up with the world's most innovative and successful approaches to selling – and to translate them into solutions that deliver direct top-line growth for your business.

The Science behind Salecology

Neuroscience shows us that when two people are interacting their brains are unconsciously connected…

Unlike any other training in the world, Salecology brings together the latest thinking from the world of Science into the world of Sales.

For example recent findings from Neuroscience has shown that whatever I think or feel about something, that message is transmitted to the person I am communicating with through what is known as the Social Brain.

Bringing this into your organisation– we will assist you to develop highly emotionally intelligent sales leaders and business development managers that will be able to connect and build trust and rapport at an unprecedented level.

We don't teach so much the theory of the actual science, we are not trying to make them Neuroscientists (that's our job), but all of our training and programmes are designed to change the unconscious and conscious mind through the utilisation of the left and right brain. This will help to connect with customers on a deeper more meaningful level, building instant trust and rapport.

We help customer facing teams change their communication styles to match the customer, help them consider how different customers will think, feel and behave, and coach on how to influence the decision and get to a Yes!

To learn more about our science see our Salecology brochure

People Buy from People they Trust!

Salecology®

accelerate your sales today

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