

AUSTRALIA SALES PROCESS MAP

PHASE 1: SEARCHING FOR OPPORTUNITIES

DEFINITION: Research and identify opportunities that can result in an approach to a prospect who sees value in meeting with XX Australia.

CUSTOMER EXPECTATIONS

- Be conversant with product you are selling
- Have a basic understanding of my business
- Have a preliminary idea of what will interest me
- Respect my time - - first contact should be a quality contact

KEY ACTIVITIES

1.1 **IDENTIFY PROSPECTS**

- To maximise resources and improve success rate, prepare profiles of the ideal customers and markets by reviewing media, finance and industry information.
- Review existing databases using electronic systems to identify new and expansion opportunities.
- Review responses to any XX A direct mail or advertising.
- Obtain referrals via networks, 3rd party introductions etc to identify further opportunities.
- Collate the information gathered to establish a list of best-matched prospects.
- Review and update list monthly.

1.2 **PRE-QUALIFY PROSPECTS**

- Research the selected potential customer using media information, journals, Who's Who, industry information, networks etc in order to understand the core business and potential needs.
- Talk to relevant internal people to gain a further perspective on the potential customer.
- Request preliminary credit assessment if credit may be an issue.

1.3 **PREPARE TO APPROACH THE PROSPECT**

- To enhance the likelihood of a positive response, identify best product opportunities by analysing research material, and construct an interesting idea.
- In order to project a professional image, prepare for the initial contact by developing a contact strategy plan.
- Begin the relationship by arranging the first appointment, whether by phone, 3rd party introduction or other method.

PERFORMANCE MEASURES

INTERNAL:

- Are the pre-qualifying guidelines providing enough opportunities?
- Number of "best-matched" prospects on the current list (ratio of "qualified" clients)
- Specific preliminary idea identified for every new prospect meeting.

EXTERNAL:

- Number of 1st appointment (intro) achieved monthly.
- Number of new clients added to Tracker.
Percentage of first contacts that lead to an appointment.

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PHASE 2: APPROACHING WITH REASON

DEFINITION: Conduct meetings which establish credibility and a relationship based on an exchange of information resulting in the prospects agreement to a needs assessment.

CUSTOMER EXPECTATIONS

- Listen and show a willingness to learn more about me
- Show your personal and professional values
- Establish your credentials
- Explain briefly how your capabilities will benefit my organisation
- Be able to answer questions
- Cause me to be confident to share information on my needs

KEY ACTIVITIES

2.1 **PREPARE FOR THE MEETING**

- Rely on information prepared in Phase I.
- Construct a list of suitable questions to gain relevant information utilising XX A standard forms. Confirm the appointment, attendees and arrangements.

2.2 **ESTABLISH CREDENTIALS AND START PERSONAL RELATIONSHIP**

- Introduce XX to set the scene by tabling an agenda which includes a positioning statement, capabilities and differentiation.
- Introduce yourself to establish a relationship by relating personal and professional experiences - - "socialise" a little.
- Highlight range of services to establish the total solution capability of XX by demonstrating experiences, customers and solutions.

2.3 **SHARING INFORMATION**

- Exchange of information to demonstrate interest, establish decision making process and key stakeholders, profile likely needs.
- determine current position by questioning and listening on background, urgency, business plan direction, structure of organisation, personal experiences and existing fleet arrangements/suppliers.
- Obtain agreement for a needs assessment to progress the customers commitment by proposing to conduct next steps.
- Detail why no further contact is required (if applicable)

PERFORMANCE MEASURES

INTERNAL:

- Do I understand the client's business?
- Completion of meeting preparation checklist.
- Have Ii built a rapport with the potential customer to discuss issues other than immediate business?

EXTERNAL:

- Did I obtain another appointment?
- Number of Needs Assessment Agreements obtained.
- Likely specific best opportunity identified.

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PHASE 3: IDENTIFYING AND ESTABLISHING NEEDS

DEFINITION: Review and understand customers' objectives, by interviewing key people and exchanging quality data, resulting in a documented, mutually agreed needs assessment.

CUSTOMER EXPECTATIONS

- Know precisely what information is required to determine a solution
- Lead me to understand all the main issues
- Use efficiently my time, resources and processes
- Listen and show empathy to my point of view and circumstances

KEY ACTIVITIES

3.1 IDENTIFY STAKEHOLDERS

- Identify key people, decision makers and influencers so as to determine their needs, by asking the primary contact person.

3.2 DISCOVER CLIENT NEEDS

- Use a standard questionnaire to ensure we obtain all relevant information
- Interview key people to identify objectives, needs, priorities, barriers / roadblocks, timing and supporters.
- Explore cross-functional issues to ensure that the best solution can be found, by reviewing interview results and drawing conclusions.

3.3 DOCUMENT AND CONFIRM NEEDS

- Summarise the identified needs and objectives as found from the interviews, to allow us to confirm our understanding.
- Confirm and finalise the summarised needs analysis with the customer's key people.

PERFORMANCE MEASURES

INTERNAL:

- Number of interviews conducted per client.
- Has sales consultant prioritised needs on a company wide basis?
- Have I identified the decision makers within the potential customer's business?

EXTERNAL:

- Percentage of contacts resulting in a factual, quantifiable needs analysis for the client?
- Did stakeholders have confidence in our final needs analysis? Are we OK to find the solution?
- Percentage of needs analysis leading to customer agreement to receive a proposed solution.

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PHASE 4: TAILORING SOLUTIONS

DEFINITION: In consultation with the client, develop the optimum product and pricing to meet client needs, using team expertise and input, so that real added value can be demonstrated to the client.

CUSTOMER EXPECTATIONS

- Bring a broad base of knowledge to the solution
- Be open and honest
- Tailor solutions and best options from the needs analysis
- Have consulted with all relevant groups within my company
- Have a clear prioritisation of my objectives/needs

KEY ACTIVITIES

4.1 PLAN THE APPROACH

- To determine whether or not to proceed, match the customer's needs to our capabilities.
- Develop a product and pricing strategy with a plan to: ensure that the right direction is set, the right internal expertise is brought in, and the proposal will be delivered on time.

4.2 DRAFT THE SOLUTION

- Draft solution with reference to our standard proposal, adjust to the specific customer needs, to focus on key issues and benefits, providing reference to past experience.

4.3 CONFIRM THE SOLUTION

- Confirm submission internally through appropriate management sign-off (especially for systems/operational changes) to gain acceptance and support of solution.
- Consult with customer's stakeholders to validate that the solution addresses all requirements and deals with any possible objections through consultation and feedback

PERFORMANCE MEASURES

INTERNAL:

- Measure the percent of best fit of proposal to client needs.
- % standard product solutions (no special systems or pricing?)
- All non-standard proposals have prior MIS or Nat Ops sign-off.

EXTERNAL:

- Has the client asked XX Australia to revisit or refine the needs analysis?
- Have the time frames been met?
- Percentage of proposals that are presented to the key decision makers.
- How often did we find we could not meet client needs and said no?

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PHASE 5: SELLING THE SOLUTION

DEFINITION: Presentation of solutions that are accepted by all customer stakeholders.

CUSTOMER EXPECTATIONS

- Demonstrate and convince me that your solutions will achieve my objectives and those of my organisation
- Convince me of your capability to deliver
- Demonstrate that the solution is researched and on target

KEY ACTIVITIES

5.1 **PREPARING THE PRESENTATION**

- Invite customer to visit XX A facility to demonstrate internal capabilities
- Prepare and rehearse a simple presentation to demonstrate a professional outlook, delivered as a team using all available technology.
- Organise an appointment with all stakeholders (internal/external) to present and sell solution.

5.2 **DELIVERING THE PRESENTATION**

- Brief introduction to reaffirm customer objectives, encourage early feedback and customer involvement
- Using visual aids, team approach (introduce customer services) and inviting customer interaction to deliver our solution, including quantification of benefits and draft implementation plan.
- Confidently reinforce how our solution meets the customers objectives

5.3 **FOLLOW-UP THE PRESENTATION**

- Write to customer to thank them for time and input and respond to any additional requirements
- Maintain customer contact and resolve any ongoing issues to meet the customer's objectives.

PERFORMANCE MEASURES

INTERNAL:

- Measure attendance of stakeholders at presentation.
- Number of times specialist staff are called on to assist in presentation.
- Regular meetings per month presenting solutions.

EXTERNAL:

- Number of rejected solutions.
- Number of client visits to our premises.
- Customer responds with questions 75% of the time.

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PHASE 6: GAINING COMMITMENT

DEFINITION: Asking for the customers acceptance of the solutions presented, resulting in a commitment to proceed.

CUSTOMER EXPECTATIONS

- Are ready and prepared to implement
- That you ask for the order
- Have clear and concise documentation to comply with our understanding and agreement
- Restate your commitment and provide reassurance

KEY ACTIVITIES

6.1 **ASKING FOR THE COMMITMENT**

- Contact customer to arrange meeting to finalise
- In the meeting ask We believe our solution meets your requirements fully. May we have your agreement to the proposal?

6.2 **DOCUMENTING THE ARRANGEMENTS**

- Prepare all relevant contracts/documentation to confirm the arrangements.
- Explain documents so customer has clear understanding of mutual obligations.
- Tabling and signing by both parties.

6.3 **PREPARING CUSTOMER PROFILE**

- Introduce Account Manager to commence familiarisation with customer.
- Jointly create customer profile to facilitate implementation and assist disseminate information throughout XX A - using proforma documents.

PERFORMANCE MEASURES

INTERNAL:

- Number of times the Customer Services Managers are introduced into the sales process.
- Ensure at least one per month is coming up - program this (how?)
- 100% Customer profiles prepared and distributed on time.

EXTERNAL:

- Percentage of presented proposals leading to signed agreements.
- Number of formal agreements executed by clients.
- One customer approval per month per sales person minimum.

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PHASE 7: IMPLEMENTING THE SOLUTION

DEFINITION: Delivery and implementation of those solutions agreed to which match precisely the needs assessment and meets customer expectations.

CUSTOMER EXPECTATIONS

- Ensure the implementation is smooth
- Meet my expectations - - honour all stated commitments
- Action the agreed implementation plan
- Achieve the agreed benchmarks

KEY ACTIVITIES

7.1 COMMUNICATION OF COMMITMENT

- Distribute to all internal XX Australia suppliers the customer profile and details of any non-standard customer requirements, both for implementation and ongoing customer service.
- Inform all appropriate customer personnel of commitment to service delivery during customer briefing session

7.2 PREPARATION FOR IMPLEMENTATION

- Prepare the implementation plan to ensure the transition to XX A is smooth - - referring to the final agreement with the customer.
- Prepare all product support material to enable delivery of all services by supplying the appropriate data to our internal suppliers.

7.3 COMMENCE PARTNERSHIP

- Deliver the agreed services by activating the contract.

PERFORMANCE MEASURES

INTERNAL:

- Are all internal players aware of details (client profile, product) and implementation plan/time line?
- Do I have a comprehensive implementation plan?
- NOLS loading 100% accurate.

EXTERNAL:

- Record and review any non-conformance to implementation plan.
- Did the implementation meet the established criteria and benchmarks?
- Results of Post Implementation Review Survey.

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PHASE 8: DEVELOP THE PARTNERSHIP

DEFINITION: Provide ongoing and proactive solutions that will improve customer satisfaction, increase growth and result in a long-term, mutually beneficial partnership.

CUSTOMER EXPECTATIONS

- Preserve original relationship
- Be flexible, accessible and responsive
- Maintain market edge through continually improving your services
- Be proactive in the management of assets and the provision of industry and product information

KEY ACTIVITIES

8.1 **MANAGING AND MEASURING THE PARTNERSHIP**

- Deliver the service to meet our commitment under the arrangement through ongoing account relationship management.
- Measuring our performance to benchmark for continuous improvement by conducting P.I.R.'s, annual reviews and customer satisfaction surveys.

8.2 **COMMUNICATING WITH THE CUSTOMER**

- Communicate concise, relevant fleet information to the customer to enable informed decisions to be made.
- Advise of new products, services and industry trends to keep the customer up to date through regular communication.
- Listen to customer feedback to meet their changing needs through regular communication.
- Be aware of competitor involvement to preserve XX A's partnership by gathering market intelligence (asking questions, market place, customer feedback).

8.3 **EXPANDING THE PARTNERSHIP**

- Determine a growth path to optimise the partnership benefits by developing a business plan.
- Identify opportunities for expansion to optimise partnership benefits through observations and asking effective questions.
- Jointly with customer services, approach with reason (new plan, preparation etc).

PERFORMANCE MEASURES:

INTERNAL:

- What benchmarks are in place to monitor ongoing business developments and CSI targets?
- Turnaround times for quotes, orders, deliveries etc.
- Control over fleet- size of km variances, buffer levels and settlement amounts.

EXTERNAL:

- Percent of penetration into client fleet against objectives.
- Are we achieving the set benchmarks?
- Results of PIR and Annual Review programs.
- Number of client referrals.