



MASTERING SALES SERIES

The Tactical Opportunity Management

Skills Workshop



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Focus on the right opportunities and forecast accurately

The ultimate result being the ability to take action to head off a potential revenue shortfall if necessary. The ongoing benefit is a process, which when implemented, will produce a dependable forecast of revenue.

The Caponi Performance Group's Tactical Opportunity Management (TOM) workshop is part of the Mastering Sales series of necessary sales skills. This one-day workshop introduces a process to enable sales managers to turn the negative atmosphere of most forecast meetings into powerful and productive strategy meetings that sales representatives actually look forward to. For the sales manager, TOM provides a framework to strategize prospect advancement with their sales team; effectively run a sales meeting; diagnose individual representative strengths and weaknesses; provide more accurate sales forecasts and the progression of prospects toward closure; and better focus and prioritize the sales team's activities on the 'right' prospects and activities.

For the sales representative, TOM provides a framework to quickly identify their best prospects, develop and implement strategies to shorten the buying cycle for each prospect, properly balance their selling and prospecting activities, objectively determine which prospects are most likely to close, and better plan and manage their time. It replaces 'Hopium' as the strategy of most buying cycles with a proven process.

Executive management gains an accurate base-line forecast by going through the current pipeline deal by deal and putting each in its proper category, with the ultimate result being the ability to take action to head off a potential revenue shortfall if necessary. The ongoing benefit is a process, which when implemented, will produce a dependable forecast of revenue.

An option to the TOM workshop is the introduction of automation to handle opportunity management. There are two versions; a web-based tool, complete with a configurable executive dashboard, and an Excel spreadsheet version.



Key Elements:

1. Caponi Group Sales Fundamentals

- ▶ The 'A x E = \$' formula of success in selling
- ▶ The Key Performance Indicators (KPI) of Sales
 - Setting the proper activity levels necessary to attain your goals
 - The five ways to impact your effectiveness
- ▶ The urgency and importance of time in the buying cycle
- ▶ Why hearing 'NO' can be a good thing
- ▶ Why looking only for 'Need' will miss opportunities for sales
- ▶ The importance of knowing your number one competitor
- ▶ Leveraging the way people behave in sales situations

2. Introduction to Tactical Opportunity Management Skills

- ▶ The Tactical Opportunity Management (TOM) model
- ▶ The six step 'Objective Based Selling Process'
- ▶ Time and activity allocation
- ▶ The concepts of continual prospecting to replenish the prospect base
- ▶ The true definition of prospect
- ▶ Introduce a common language for account reviews and forecasting

3. Demonstrating and Practicing TOM

- ▶ Apply TOM process to case studies (designed by CPG and sales management)
- ▶ Placing case studies in their proper position on the pipeline
- ▶ Develop sales strategies for the case studies

4. Application of TOM to Current Deals

- ▶ Apply TOM process to actual prospects
- ▶ Evaluate overall pipeline of each sales representative
- ▶ Identify potential quota shortfalls and discuss remedies
- ▶ Strategize individual deals (time permitting)

5. Post Workshop Follow-through

- ▶ Assigned 'homework' to reinforce concepts
- ▶ Scheduled conference call phone sessions to:
 - ▶ Track success
 - ▶ Trouble shoot
 - ▶ Skill transfer to sales management

