Resultist Sales Funnel

Suspect/Target

SUSPECT/TARGET IDENTIFICATION
Prospect fits targeted profile: Vertical Niche, LOB, etc.
Scores 16+ on Sales Qualification Matrix
Long-term projects (>12 mos.) tracked through CRM

Marketing

Generate marketplace awareness of Company Brand thru Marketing Plan on ongoing basis (0 to 100%)

Enter Potential Prospect in CRM

Prospect
25%

IDENTIFIED OPPORTUNITY
≤ 12 Months Out

MEETS US, WE DETERMINE:
Project Stage & Budget
Decision Making Process
Buyers – Econ, Tech, Users, Coaches
Win-Results & Service Needs

Ongoing funnel progression goal: Develop relationships to achieve Trusted Advisor Status

Develop initial strategic plan

Update CRM

Forecast in CRM with 0% Probability of Close

Qualified Prospect
50%

COLLABORATE ON SOLUTION
Meetings w/Buyer Groups
Confirm solution development in writing
Submit RFP response or Pricing/Budgetary proposal
Believes in our value proposition
Sees us as superior to competitors

Ongoing Strategic Plan Refinement

Update CRM & Forecast

Solid Prospect
75%

ONGOING SOLUTION DEVELOPMENT
ID Internal Champion & Solicit advice
Red Flags resolved
Develop exact solution to meet needs
Develop an alternative, based on price
Short List / Final Proposal

Ongoing Strategic Planning

Presentations

Update CRM & Forecast

Committed Prospect
95%

VERBAL COMMITMENT
Notice of Award
Client Approval of Final Proposal

Ongoing Follow-Up

Update CRM & Forecast

New Business
100%

SIGNED COMMITMENT
Receive PO; Signed Proposal; Deposit $

Booked Sale!