Agenda

• What is a selling system?
  ‣ Review of well known systems
  ‣ Example of successful cold call
• Startup sales toolkit
  ‣ Examples of software to use
    • Proprietary
    • Open source
Selling systems

1. Miller-Heiman’s Strategic Selling
2. Target Account Selling
3. SPIN Selling
4. The Challenger Sale
5. Value Selling Framework
6. Solution Selling
7. The Sandler Selling System
8. MEDDIE
systems

• Process
• methods
Miller Heiman

- Strategic selling
- Red flags
MEDDIC stands for:

- Metrics
- Economic Buyer
- Decision Criteria
- Decision Process
- Identify Pain
- Champion
Sandler

- Strong on understanding how people buy
- 6 steps process for inside sales
Optimized Calling
Startup toolkit
The old days
### SFDC - High Level Forecast Rollup

**Show**
- All opportunities ▼
  - Opportunity Status ▼
  - Probability ▼

**Run Report** | **Show Details** | **Customize** | **Save** | **Save As** | **Delete** | **Printable View** | **Export Details** | **Subscribe**

Filtered By: Edit
- **Stage** not equal to **Closed Lost Dead Clear**
- **Opportunity Record Type** not equal to **Sourced Opp Clear**
- **Net Unit Price** not equal to **0 Clear**

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© 2013 Copyright – MIT
Sales funnel metrics
# Drill into prospect detail

## Contacts

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<tr>
<th>Action</th>
<th>Contact Name</th>
<th>Title</th>
<th>Phone</th>
<th>Email</th>
<th>Created Date</th>
<th>Last Dial Date</th>
<th>Role</th>
<th>Contact Status</th>
<th>Reports To</th>
<th>Lead Source</th>
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<tr>
<td>Edit</td>
<td>Angelo Ayala</td>
<td>Senior Manager</td>
<td><a href="mailto:angelo.ayala@fmr.com">angelo.ayala@fmr.com</a></td>
<td>6/7/2010</td>
<td></td>
<td></td>
<td>Actively prospecting</td>
<td>RFL: Referral</td>
<td></td>
<td></td>
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<tr>
<td>Edit</td>
<td>Barbara Tressler</td>
<td></td>
<td><a href="mailto:barbara.tressler@fmr.com">barbara.tressler@fmr.com</a></td>
<td>7/13/2012</td>
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<td></td>
<td>Actively prospecting</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>Brian Lempel</td>
<td>Research Analyst</td>
<td>+1.603.791.8142</td>
<td><a href="mailto:brian.lempel@fmr.com">brian.lempel@fmr.com</a></td>
<td>3/5/2012</td>
<td>1/19/2011</td>
<td>Actively prospecting</td>
<td>CCL: Telemarketing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>Christopher Melgren</td>
<td>Principal Capacity Planning Analyst</td>
<td>(617) 563-8729</td>
<td><a href="mailto:christopher.melgren@fmr.com">christopher.melgren@fmr.com</a></td>
<td>6/27/2012</td>
<td></td>
<td>Actively prospecting</td>
<td>CCL: Telemarketing</td>
<td></td>
<td></td>
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<td>Edit</td>
<td>David O'Dwyer</td>
<td>Platform Product Manager</td>
<td>david.o'<a href="mailto:dwyer@fmr.com">dwyer@fmr.com</a></td>
<td>6/7/2010</td>
<td></td>
<td></td>
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<td>RFL: Referral</td>
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<tr>
<td>Edit</td>
<td>George Brady</td>
<td>EVP, Distributed Hosting Services</td>
<td><a href="mailto:george.brady@fmr.com">george.brady@fmr.com</a></td>
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<td>Edit</td>
<td>Kevin Cunningham</td>
<td>Director</td>
<td><a href="mailto:kevin.m.cunningham@fmr.com">kevin.m.cunningham@fmr.com</a></td>
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<td>Actively prospecting</td>
<td>RFL: Referral</td>
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Show 7 more » | Go to list (17) »

## Leads

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<th>Phone</th>
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<td>Edit</td>
<td>Paul Masterson</td>
<td>Director of Desktop Engineering</td>
<td>(617) 563-7000</td>
<td><a href="mailto:pmaster@charter.net">pmaster@charter.net</a></td>
<td>Andrea</td>
<td>6/29/2010</td>
<td>8/3/2011</td>
<td>Not a stakeholder</td>
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<tr>
<td>Edit</td>
<td>William Bulling</td>
<td>Director, Technology Risk</td>
<td>(603) 791-8697</td>
<td><a href="mailto:bill.bulling@fmr.com">bill.bulling@fmr.com</a></td>
<td>Andrea</td>
<td>8/23/2010</td>
<td></td>
<td>No Interest</td>
<td>CCL: Telemarketing</td>
<td></td>
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</table>
Sales Lead Sourcing

These tools allow sales reps to source leads based on criteria as broad as industry and as granular as a specific role at a specific company.

Let’s take a deeper dive into these tools and the features that make them unique.
RainKing is especially good for sourcing tech companies and SMB
<table>
<thead>
<tr>
<th>Contact</th>
<th>Manager</th>
<th>City</th>
<th>State</th>
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</thead>
<tbody>
<tr>
<td>Steve Acord</td>
<td></td>
<td>Issaquah</td>
<td>WA</td>
</tr>
<tr>
<td>Laurie Arpal</td>
<td>Tim Bowersock</td>
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**Company Name**

<table>
<thead>
<tr>
<th>Industry Verticals</th>
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</thead>
<tbody>
<tr>
<td>Banking</td>
</tr>
<tr>
<td>Chemicals</td>
</tr>
<tr>
<td>Consumer Products</td>
</tr>
<tr>
<td>Energy/Utilities</td>
</tr>
<tr>
<td>Federal</td>
</tr>
<tr>
<td>Financial Services</td>
</tr>
<tr>
<td>Health Insurance</td>
</tr>
<tr>
<td>Higher Education</td>
</tr>
<tr>
<td>Hospitals/Health Care</td>
</tr>
<tr>
<td>Insurance</td>
</tr>
<tr>
<td>IT Services</td>
</tr>
</tbody>
</table>

**Technologies**

- Popular Technologies
  - Cisco Routers and Switches
  - Citrix
  - IBM e250
  - Java
  - Microsoft SharePoint
  - Microsoft SharePoint 2013

**Seniority Level**

- Administrator
- Analyst
- Architect
- Assistant Director
- Assistant VP
- Category Manager
- Chief Accounting Officer
- Chief Audit Officer
- Chief Compliance Officer

**Job Functions**

- Accounting
- Advertising
- Analytics/Insights
- Application Development
- Business Intelligence/Data Warehouse
- Business Service Management/ITSM
- Chief Accounting Officer
- Chief Compliance Officer

**More Search Options**

- Geographic searches apply to
  - States
  - Metro Areas
  - Area Codes

**Search by name, email address, or keyword. Add criteria below.**

**Company Name**


**Industry Verticals**

- Banking
- Chemicals
- Consumer Products
- Energy/Utilities
- Federal
- Financial Services
- Health Insurance
- Higher Education
- Hospitals/Health Care
- Insurance
- IT Services

**Technologies**

- Popular Technologies
  - Cisco Routers and Switches
  - Citrix
  - IBM e250
  - Java
  - Microsoft SharePoint
  - Microsoft SharePoint 2013

**Seniority Level**

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- Analyst
- Architect
- Assistant Director
- Assistant VP
- Category Manager
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- Chief Audit Officer
- Chief Compliance Officer

**Job Functions**

- Accounting
- Advertising
- Analytics/Insights
- Application Development
- Business Intelligence/Data Warehouse
- Business Service Management/ITSM
- Chief Accounting Officer
- Chief Compliance Officer

**More Search Options**

- Geographic searches apply to
  - States
  - Metro Areas
  - Area Codes
Data.com looks for duplicate leads, contacts, and accounts within Salesforce in addition to presenting new or updated information for these objects such as address or phone number. This allows for reps to ‘clean’ their data.
Salesloft key feature is the quality of the emails that they provide. Their tool works by pinging the prospects email server to verify it in real time, causing the email button to turn green. If emails cannot be verified, they light up orange, and are subsequently free of charge.
LinkedIn allows reps to connect with their prospects on a different level by leveraging common connections. Additionally, it’s plugin to Salesforce gives reps a quick way to verify new lead data against the prospects LinkedIn profile.
Marketing automation

• Now that the Leads are in Salesforce, what’s next?
### Marketo Activity Log

<table>
<thead>
<tr>
<th>Date/Time (PST)</th>
<th>Activity Type</th>
<th>Detail</th>
<th>Campaign Name</th>
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<tbody>
<tr>
<td>Feb 19, 2009 12:53 PM</td>
<td>Change Score</td>
<td>Changed Lead Score from &quot;1587&quot; to &quot;1560&quot;</td>
<td>(1) Web Visits - Any</td>
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<tr>
<td>Feb 19, 2009 12:53 PM</td>
<td>Add to List</td>
<td>Heavy Web Activity (&gt;8 Pages)</td>
<td>Heavy Recent Web Activity</td>
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<tr>
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<td><a href="http://www.marketo.com/">www.marketo.com/</a></td>
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<td>Repeated Web Visits</td>
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<td>blog.marketo.com/</td>
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<td>Raab Guide vendor analysis full</td>
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<td>Basic Form WP</td>
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**Date: Feb 18, 2009 (3 Items)**

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<td>Feb 18, 2009 10:19 PM</td>
<td>Add to SFDC Campaign</td>
<td>2009Q1 Tippt Wbr</td>
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**Date: Feb 17, 2009 (32 Items)**

1-200 of 4569 items
Cloudingo provides automation for lead clean up on a larger scale.
Sales productivity tools
Analytics

• We have leads, they seem good, we’re calling them all, but how do we tell if we are closing them?
What are our conversion rates for closed opportunities?

61% win rate for opportunities with close dates in the previous 12 months.

<table>
<thead>
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<th>Opportunity Stage</th>
<th>Opportunity Count</th>
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<td>Trial</td>
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<tr>
<td>Proposal</td>
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<tr>
<td>Deal</td>
<td>4379</td>
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</tbody>
</table>
Paying commissions
How happy are your customers?

Black Duck Year To Date

Year To Date
Date: 2015-01-01 to 2015-04-29 | Filter By: Sent date

Summary
Date: 2015-01-01 to 2015-04-29 | Filter By: Sent date

Workflow Summary
Date: 2015-01-01 to 2015-04-29 | Filter By: Sent date

Net Promoter Score: 26
Total Sent: 1330
Responses: 175 (13%)
Detractors: 29 (16%)
Passives: 71 (41%)
Promoters: 75 (43%)
Comments: 58

Graph
Date: 2015-01-01 to 2015-04-29 | Filter By: Sent date
Case Type: Help Request

Primary Areas of Satisfaction as suggested by your customers:
- Customer Support: 52
- Product: 7
Influitive – customer advocacy
Managing services
Open source CRM
vTiger

- India based software company
- 1.5 million downloads of its LAMP/WAMP based product
  - Comes with:
    - SFA- sales force automation
    - marketing automation
    - Customer service
    - Inventory management
    - Calendar and email integration
- Customers get a fully functioning base product with proprietary software add on’s that are geared toward each businesses unique uses of the CRM
- New cloud based version available
- Pricing
  - Sales edition- $12/ user/ mo
  - Support edition - $12/ user/ mo
  - Ultimate edition- $29/ user/ mo
Splendid CRM

• Built on the Microsoft platform
  ‣ SQL Server, Windows Server, IIS, .NET C#, and ASP.NET
  ‣ Atypical of CRM systems- most are Linux-based
• Targets an indirect channel of consultants, VARs( value added resellers), and system integrators
• Provide a competitor to Microsoft Dynamics CRM for companies that want to utilize the customization that open source allows with the underlying Microsoft technology
• Software preloaded with access to developers customizations for a vast array of organizations
• Do not have to give these customizations back to the community, companies can use them as competitive products
• Pricing
  ‣ Community
    • Live- $10/user/mo
    • On premise-Open source
  ‣ Professional
    • Live $25/user/mo
    • On-premise- $300/user
  ‣ Enterprise
    • Live- $40/user/mo
    • On premise- $480/user
xtuple

- Offers free version and enterprise fee-based addition
- Also offers back office ERP and industry versions
  - Designed for distribution, retail, professional services and manufacturing
- Offers customers opportunity to customize the system to their needs
  - Have had customers customize and improve back end
- Various versions of Xtuple built with PostreSQL database and Qt GUI client framework
- Bills itself as an Enterprise Resource Planning software provider
  - CRM is key subset
- Pricing
  - Offer perpetual, annual licenses
    - Annual license
      - Postbooks- $400 / user/yr
      - Distribution- $800 / user/year
      - Manufacturing- $1200 / user/year
      - Enterprise- $1500 / user/year
Founded in 2000
More than a CRM
  - Four modules in ConcourseSuite
    - CRM
    - Web
    - Content
    - Team- collaboration
  - Modules can be deployed individually or as an integrated suite
    - Software as a Service (SaaS) or on premise versions
Originally operated under the Central Public License
Since name change in 2007 now operate under older licenses and licenses approved by Open Source Initiative consortium
Developed with Java/J2EE
Developer community has more than 15,000 registered users
Pricing
  - On demand
    - Small (recommended 250 or less employees)- $99/mo
    - Medium (500 or less)- $199/mo
    - Large (1000 or less)- $399/mo
  - On premise
    - $750 for 25 users
    - $2000 for 200 users
    - 10,000 for unlimited users
Compiere

- Recently acquired by Consona
- Offers combined CRM/ERP suite
  - Community addition - free
  - Standard addition - $300/ year
  - Professional addition $750/ year
  - Enterprise addition $995/ year
- Enterprise-wide business systems
  - Much of applications power likely to go un-used
- Had back and forth with open source community about whether contributions were being considered
- Application written primarily in Java
- Downloaded by over 1.8 million users since its founding in 1999
Opentaps

- Another CRM/ERP package
- Targets small and medium sized business
- Built on Apache Open for Business
- CRM provides basic functionality for
  - Sales
  - Marketing
  - Service
  - Also offers built in business intelligence tools and mobility integration
Civicrm

• Targeted at
  ▶ Organizations with budget constraints and frequent needs for unique software functionality
    • Public sector
    • Non profits
    • Advocacy groups
    • Political campaigns

• Licensed under GNU
  ▶ Integrates with Drupal and Joomla! Content management systems
# Side by Side CRM comparison

<table>
<thead>
<tr>
<th>CRM Comparison</th>
<th>CentricCRM</th>
<th>Compire</th>
<th>Concursive</th>
<th>OpenTaps</th>
<th>SplendidCRM</th>
<th>SugarCRM</th>
<th>vTiger</th>
<th>Xtuple</th>
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### Implementation

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15.387 Entrepreneurial Sales
Spring 2015

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