

**salestro –  
process  
methodology  
business rules  
deliverables**

**corporate overview**

Mannheim, October 8th, 2008

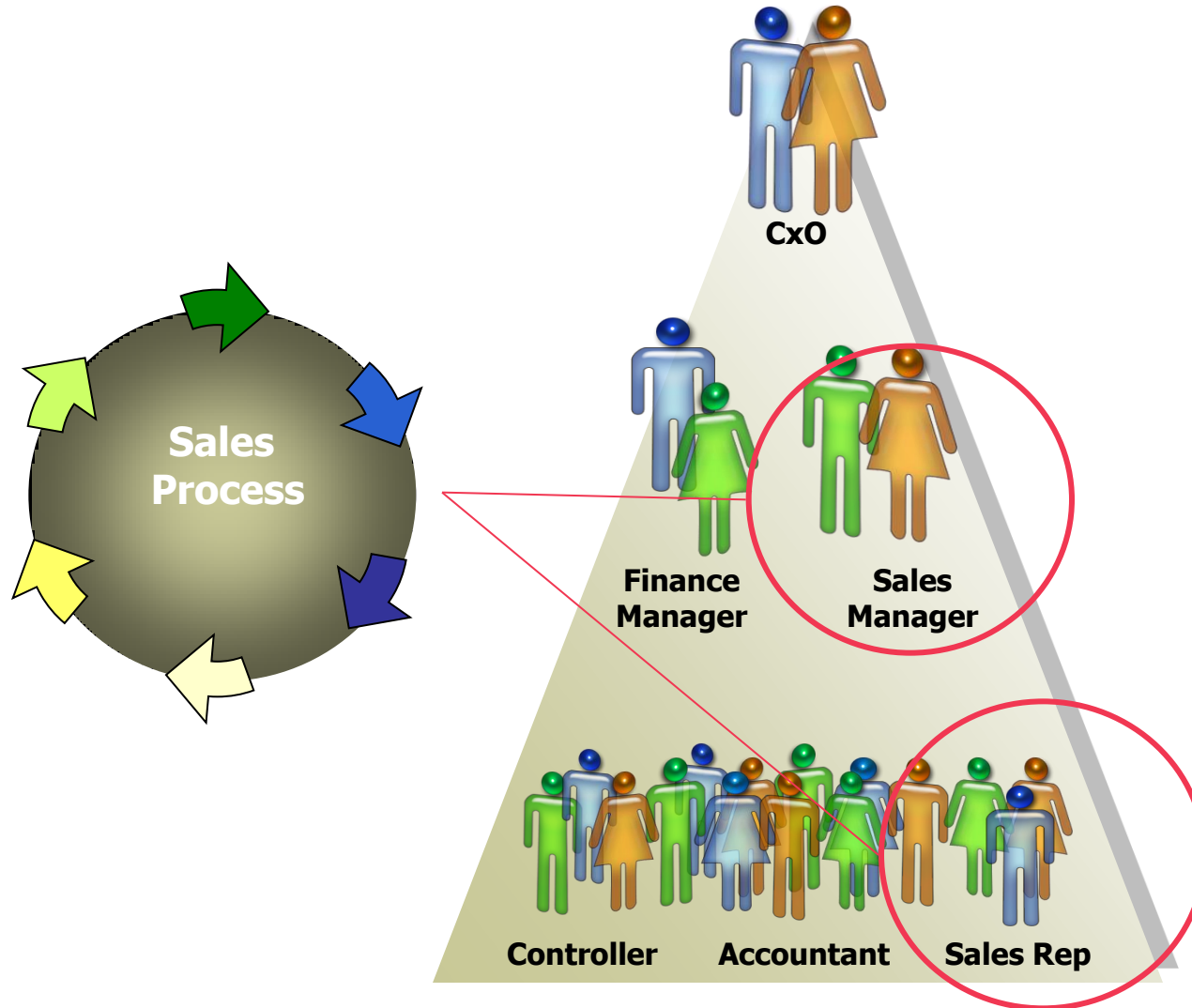
**Jörg Limberg**  
Managing Partner  
Founder

# salestro model

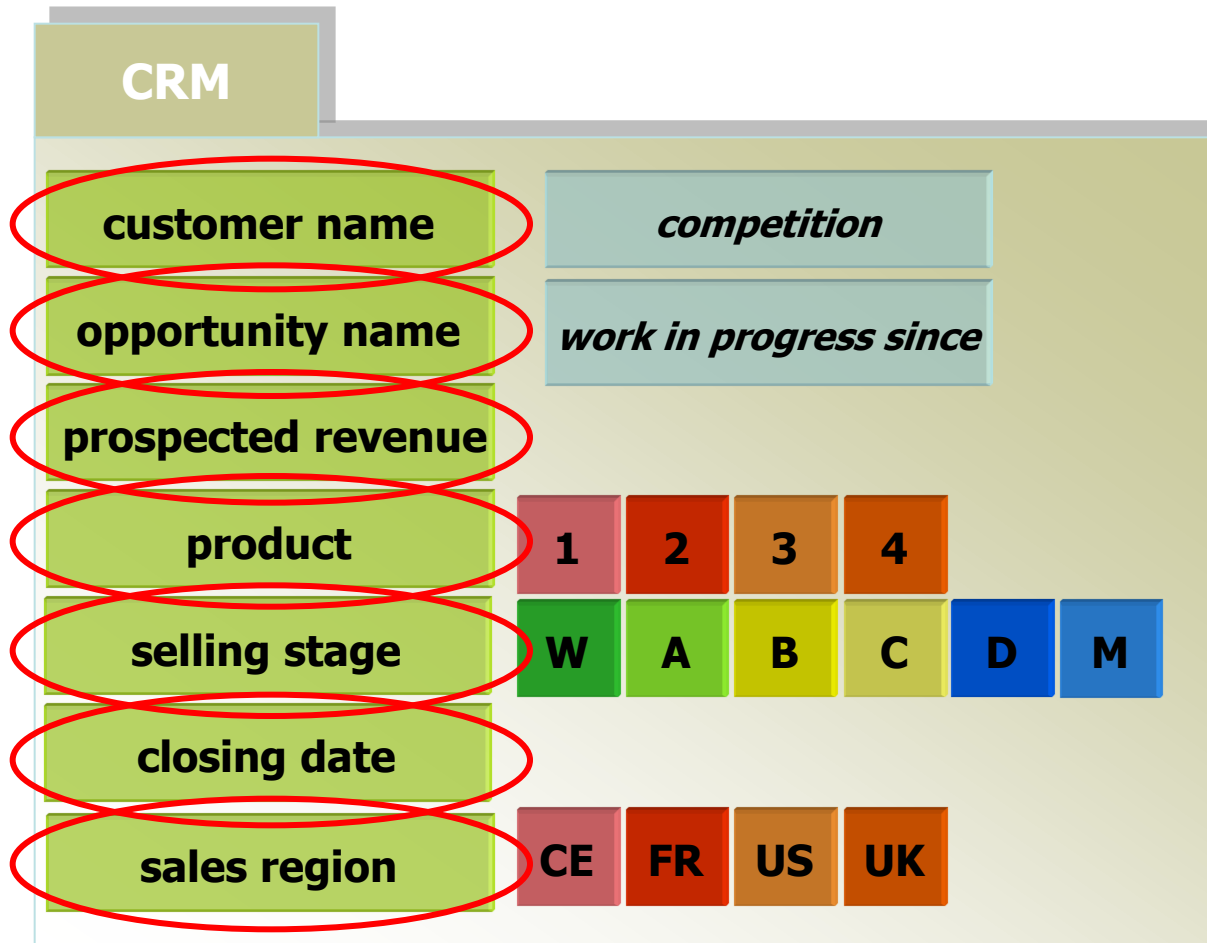


- keep relevant data accurate
- definition of a sales process
- ensure all sales understand and follow that process
- implementation of HCF
- comparison of historical and actual data
- sales pipeline/forecast analysis
- risk assessment
- forecast dashboards
- forward looking business planning

# salestro sales process

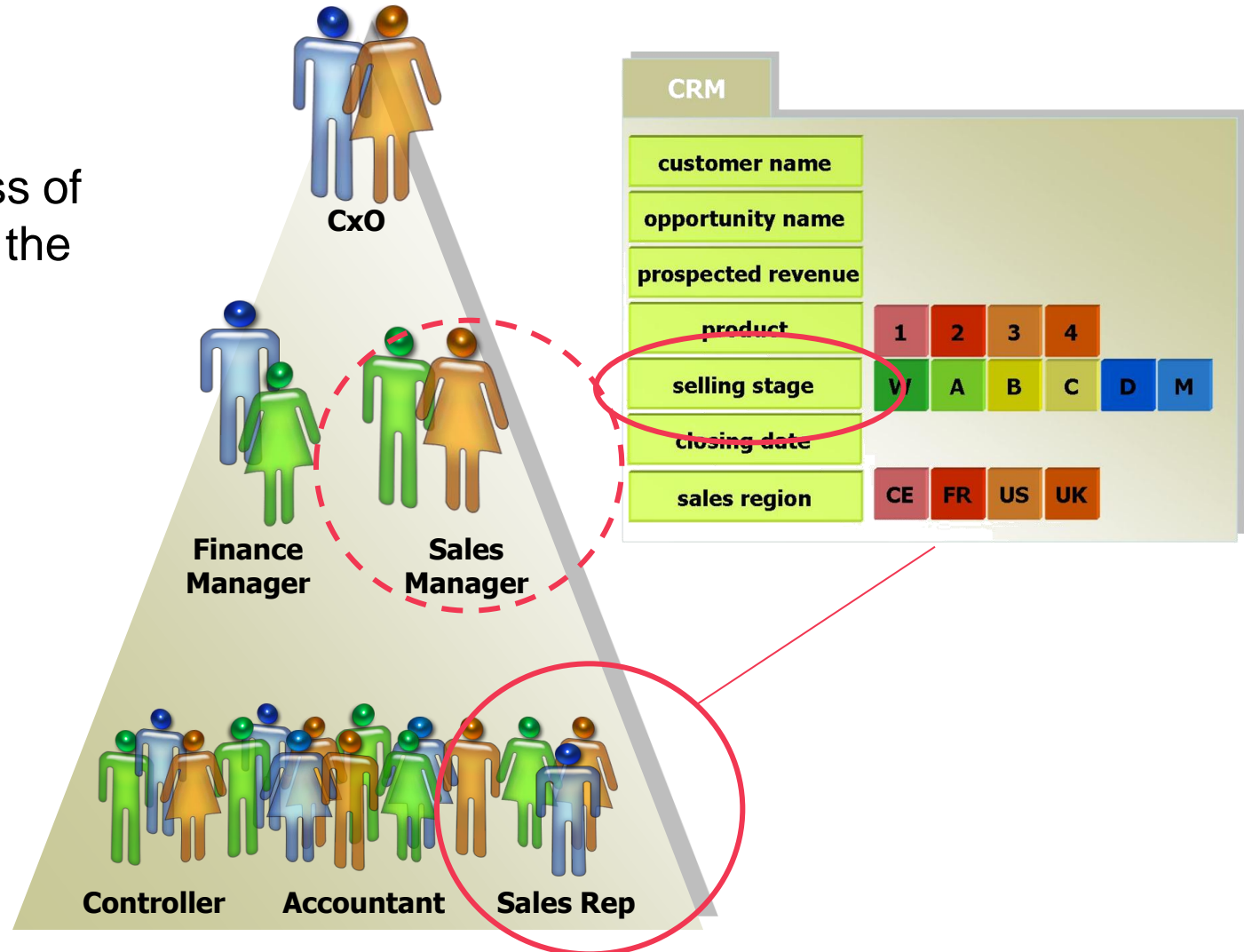


# salestro forecast parameter

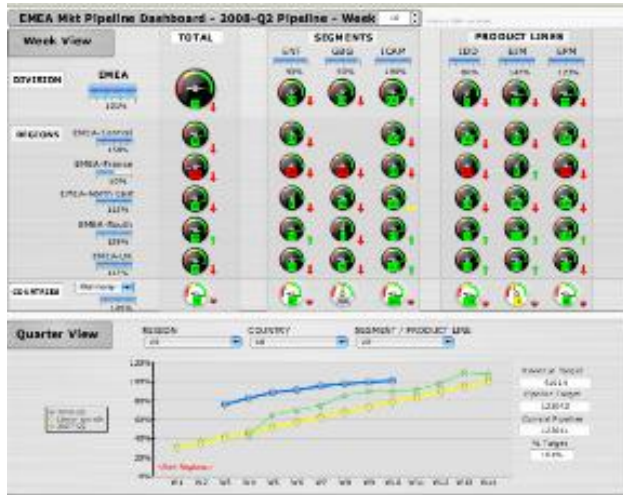


# salestro business rules

in line with the progress of the sales process and the sequence of events the selling stage has to be updated continuously in the (CRM) system



# salestro pipeline analysis

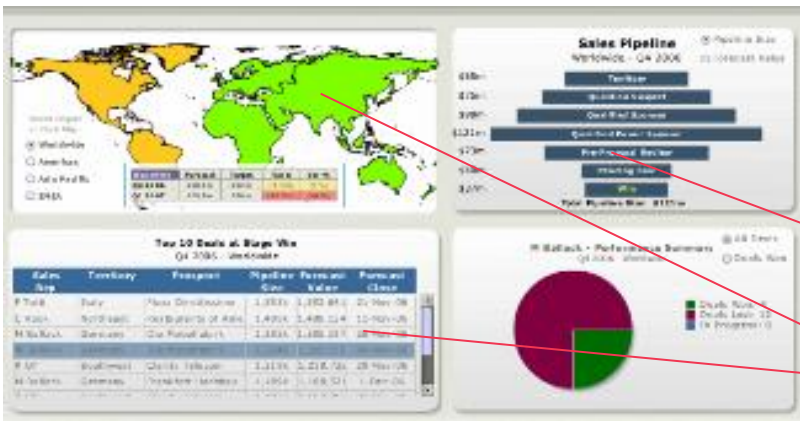


including the HCF

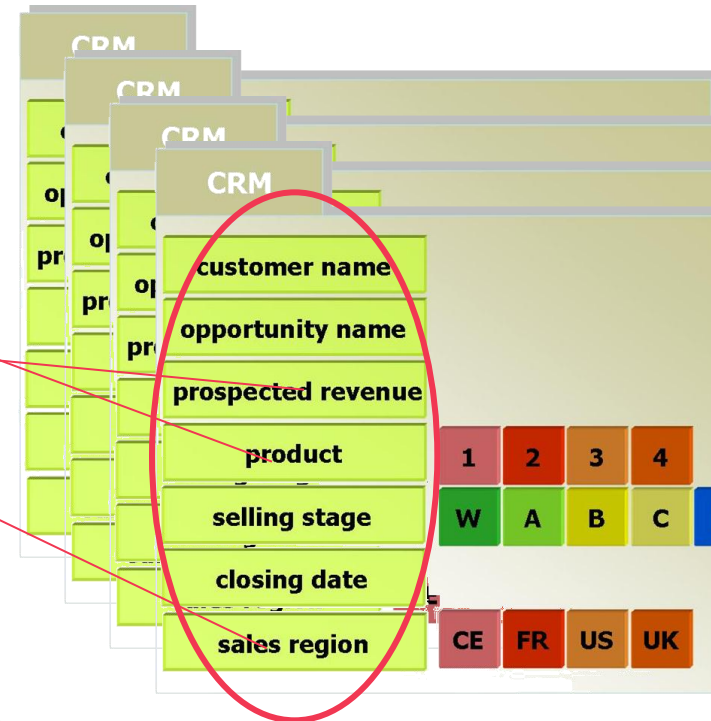
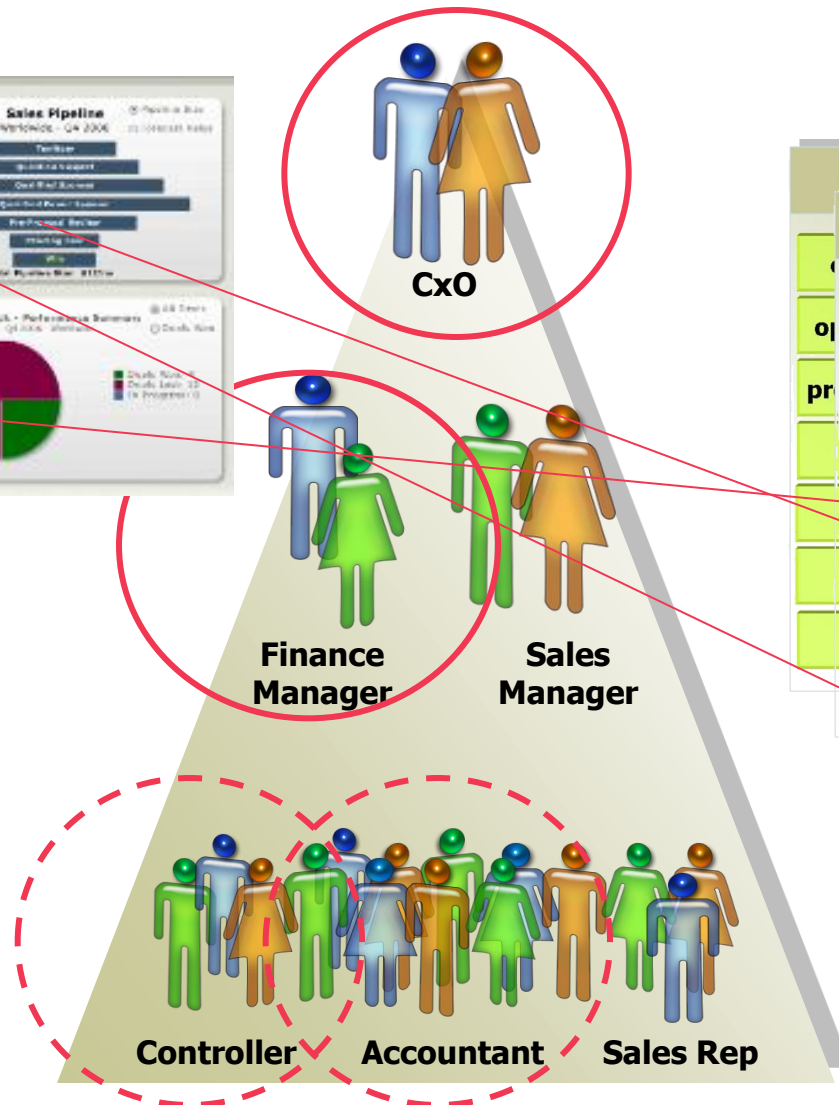


CRM						
CRM						
CRM						
CRM	customer name					
CRM	opportunity name					
CRM	prospected revenue					
CRM	product	1	2	3	4	
CRM	selling stage	W	A	B	C	D
CRM	closing date					
CRM	sales region	CE	FR	US	UK	

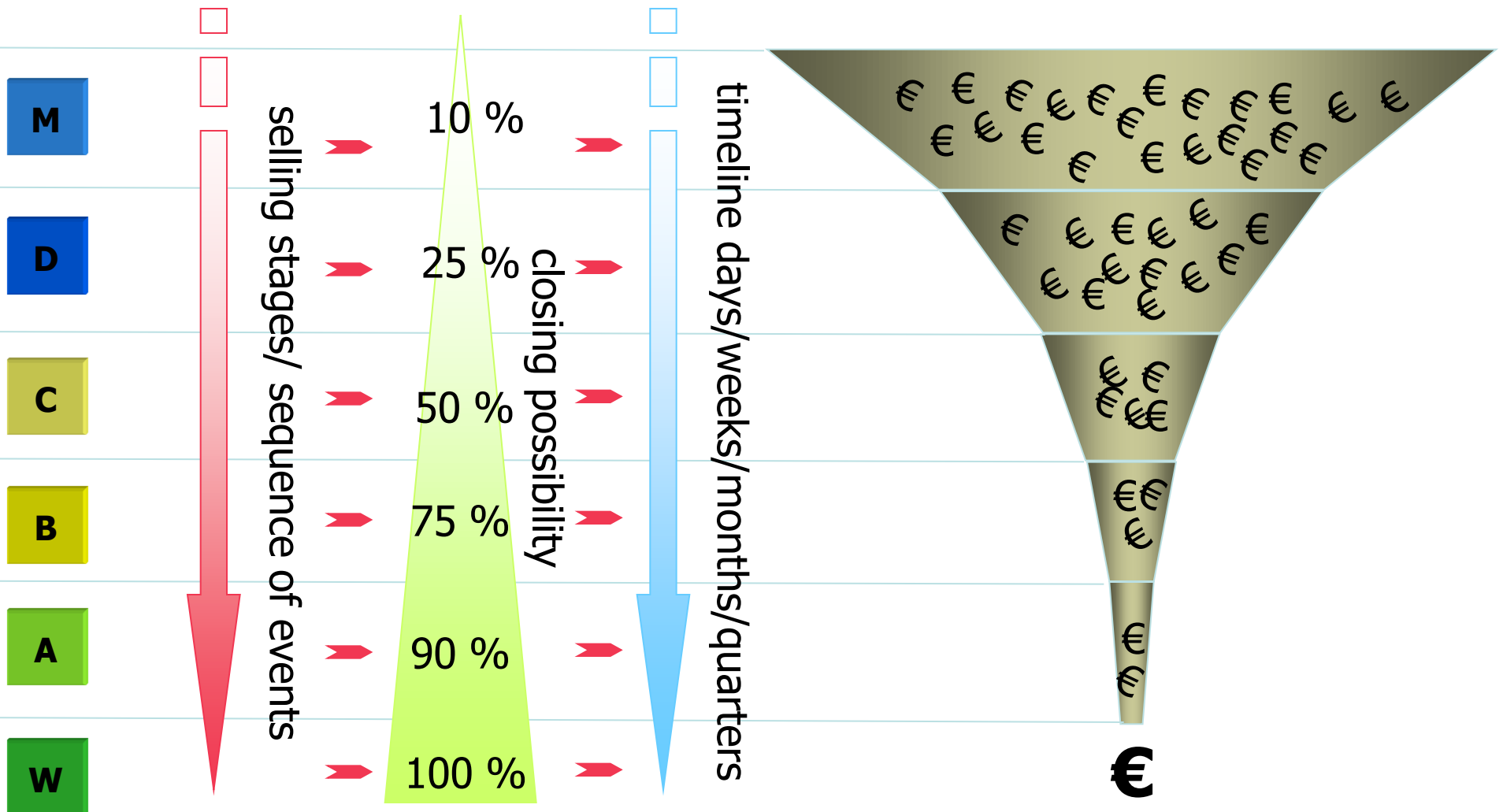
# salestro forecast analysis



- consolidated numbers by
- product line
  - territory/region/country
  - selling stage
  - type of revenue
  - closing date
  - # of deals
  - average deal size
  - etc...



# salestro sales process





# salestro selling stages

**M**

generating customer interest

**D**

validating customer commitment / needs

**C**

qualifying opportunity

**B**

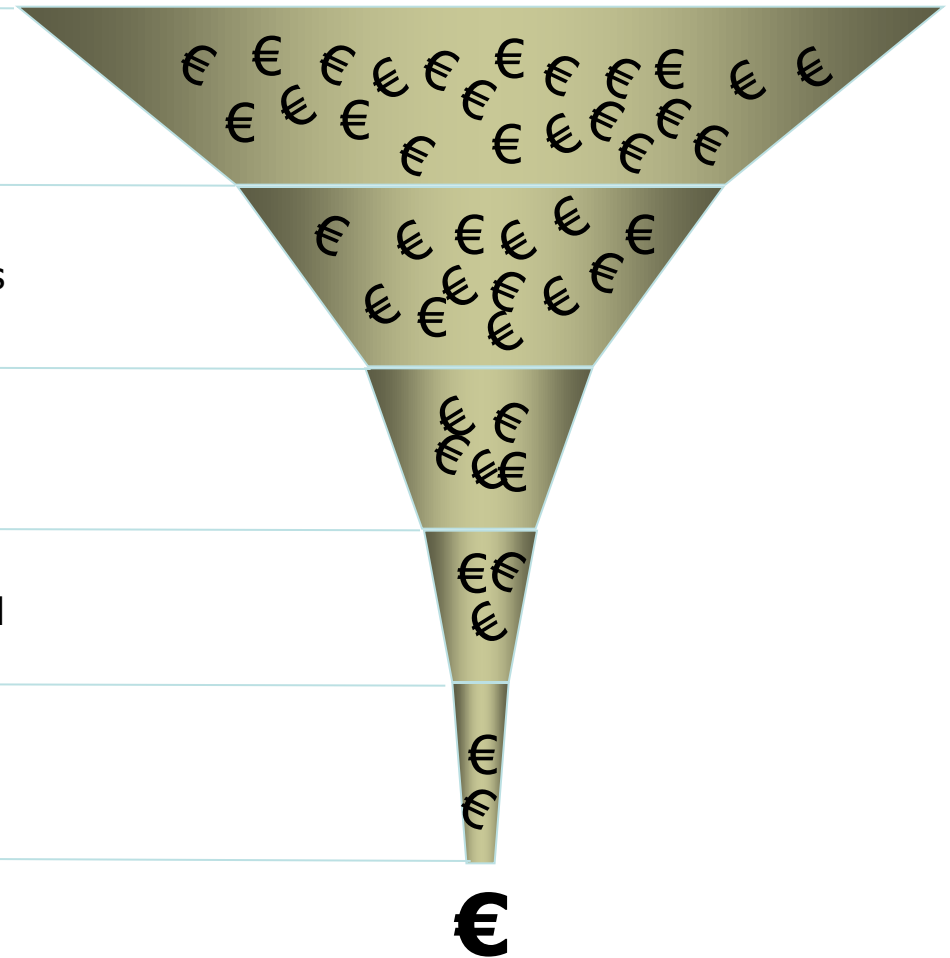
value exceeds cost / generating proposal

**A**

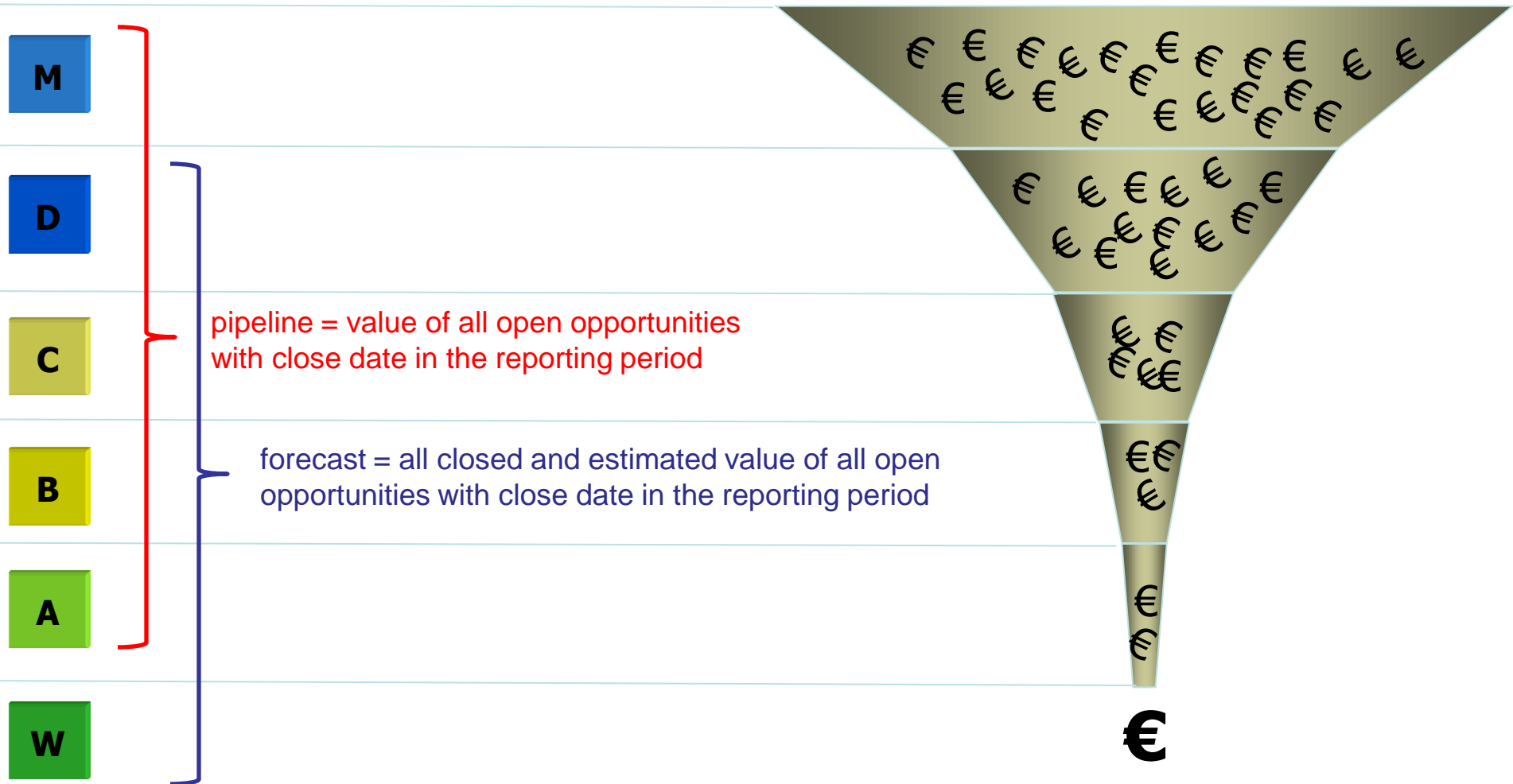
pending sale / contract negotiations

**W**

paperwork signed / order



# salestro pipeline /forecast definition



# salestro sequence of events

- customer is interested in our offering
- account in territory
- ideal customer profile

- sponsor identified and contacted
- pain and value (compelling event) shared with sponsor
- value proposition created and agreed by letter, email
- sponsor agreed to explore value proposition
- access to power sponsor negotiated
- power sponsor contacted

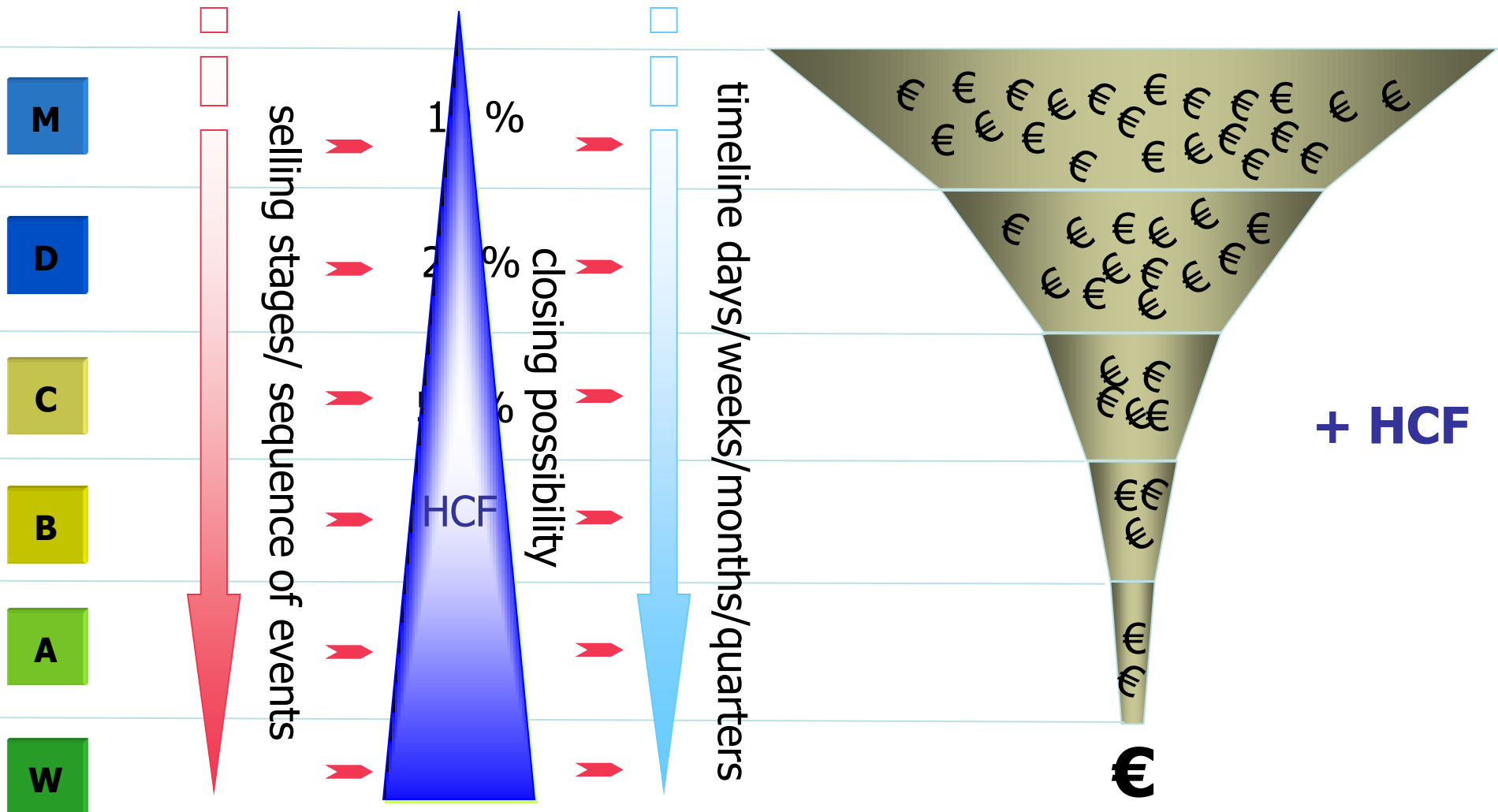
- power sponsor agree value proposition
- power sponsor agree to explore value proposition
- buying and decision making process understood
- proof proposed
- decision criteria agreed and accepted
- timelines and milestones agreed
- proof underway
- agreed in writing

- proof meets decision criteria
- power Sponsor confirms proof meets decision
- verbal commitment that value exceeds cost
- pre-proposal (ROI & business case)
- criteria distribute proof results
- legal review

- final pricing and contract negotiation
- sign off process

- bookable revenues

# salestro sales process performance



# salestro Historical Closing Factor

values of HCF:

- validate revenue targets vs revenue pipeline
- forward looking business analysis
- validation of sales effectiveness
- analyze sales forecasting performance of teams, sales regions, territories, projects etc.
- lead into more sales efficiency
- minimize risk in failing to commitments
- adaptable with existing CRM systems
- independent standard factor



# salestro sales forecast

	EMEA-West/South	EMEA-North	EMEA-Central	Total
<b>Actuals</b>	733	524	218	1.516
<b>Commit</b>	22.251	24.172	5.086	51.550
<b>Growth: Commit vs. Y-1 Actuals</b>	21%	20%	33%	22%
<b>Plan</b>	31.251	34.389	8.578	74.218
<i>Current Quarter Pipe Update</i>				
<b>WS (V•A•B•C•D)</b>	60.970	59.510	18.994	139.570
<b>WS (V•A•B•C)</b>	38.693	44.075	12.008	94.816
<b>WS (V•A•B)</b>	9.843	14.584	3.564	28.033
<b>WWS (V + 90A + 75B + 50C+25D)</b>	27.919	30.214	8.897	67.085
<b>WWS (V + 90A + 75B + 50C)</b>	22.350	26.356	7.151	55.897
<b>WWS (V + 90A + 75B)</b>	7.925	11.610	2.928	22.505
<b>Best Case</b>	66.158	62.125	21.928	150.358
<b>Pipeline</b>	66.648	64.239	21.938	152.97
<b>vs. Commit</b>	3,0	2,7	4,3	3,0
<b>Coverage (Pipeline vs. Plan)</b>	2,1	1,9	2,6	2,1
<i>Milestone Analysis</i>				
<b>V</b>	733	524	218	1.516
<b>A</b>	2.719	3.606	1.339	7.665
<b>B</b>	6.718	10.453	2.007	19.178
<b>C</b>	28.850	29.492	8.444	66.786
<b>D</b>	22.277	15.435	6.985	44.752
<b>M</b>	5.351	4.703	2.935	13.033
<i>Next Quarter</i>				
<b>NQ Pipe Target</b>	69.065	60.181	19.300	148.546
<b>NQ Pipe</b>	14.193	16.498	3.478	34.25
<b>Historical Closing Factor (HCF)</b>	2,21	1,75	2,25	1,86

WS = Working Set

WWS = Weighted Working Set

Best Case = max potential revenue

revenue per milestone

revenue pipeline / pipeline target  
for next quarter based on HCF

# salestro sales forecast accuracy

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<b>WWS (V + 90A + 75B)</b>	7.925	11.610	2.928	22.505
<b>WWS (W + A/1,1+B/1,2 +C/2,5+D/10)</b>	25.127	27.193	8.007	60.327
<b>WWS (W + A/1,1+B/1,2 +C/2,5)</b>	20.450	24.116	7.151	51.717
<b>WWS (W + A/1,1+B/1,2)</b>	9.510	13.932	3.514	26.956
<i>Milestone Analysis</i>				
<b>V</b>	733	524	218	1.516
<b>A</b>	2.719	3.606	1.339	7.665
<b>B</b>	6.718	10.453	2.007	19.179
<b>C</b>	28.850	29.492	8.444	66.785
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WWS = Weighted Working Set

WWS<sub>HCF</sub> = Weighted Working Set  
based on HCF

# salestro business model

phase 1  
analysis

variance analysis

cause & effect  
analysis



recommended course of action

phase 2  
definition

sales process

forecast model

deliverables

system req

sales process

forecast model

deliverables

system req

phase 3  
implementation

training

interpretation

coaching



# salestro partners



***thank you!***

