



# SALES OPERATIONS

- + Are you lacking a Sales Operations team and are you looking for best practices in this area?
- + Are you data blind and uncertain in your decisions and strategy?
- + Do you spend time building reports or drawing analysis based on bad data?

Every decision made by sales leadership has a major impact on an entire organization, and especially the bottom line. The Sales Ops team acts as the eyes and ears for leadership, and the best friend of the VP of Sales.

Without Sales Operations, initiatives are launched into the dark, reporting is futile, campaigns aren't properly tracked, and the results can be costly and detrimental to your business.

SRi provides operational support with our Sales Operations solution, ensuring strategic execution of sales plans, accurate mapping of territories, hiring best practices, transparent sales funnels, training initiatives for new and existing reps, and more, to keep your sales and marketing teams working both hard *and* smart.



## BENEFITS OF SALES OPERATIONS

- An expert, third-party approach on operational priorities, best practices, & areas of improvement
- Data-driven decision making
- A scalable sales operations infrastructure
- Greater sales funnel transparency
- A streamlined sales process
- Sales team enablement with the proper processes, tools & technology
- Recruitment & hiring of top performers
- Faster ramp-up times for new hires
- Improved lead generation strategy
- Adoption & buy-in from sales team on your preferred CRM system
- Strategic initiatives & campaigns that have trackable & measurable goals
- Increased profitability using a sales coverage model & territory planning



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## WHAT'S INCLUDED IN SALES OPERATIONS

### 1. EXECUTIVE SUPPORT

- + Interviews with key management to identify the current and desired state of Sales Operations
- + Identification of top operational priorities, bottlenecks, and hidden revenue blockers
- + Customized Sales Operations action plan
- + Special projects, such as gross margins analysis and white space opportunities
- + Ongoing decision-making support for executives

### 2. SALES TEAM ENABLEMENT

- + Tools and techniques for forecasting, planning and goal-setting
- + Ramp-up and training for new hires
- + Ongoing training and adoption for sales team

### 3. CRM DATA & ANALYTICS

- + **If no CRM:** recommendation of a system to fit the needs of your sales organization
- + **If CRM:** analysis of current system & recommendations for improvement
- + Customized reporting and dashboards to deliver actionable insights, and training for sales management on how to use properly

- + Clearly-defined CRM policies, processes, definitions, and workflows
- + Training for sales team to improve adoption and usage
- + Identification of key metrics and analytics that need to be managed
- + Data collection, analysis and summarization to improve data-driven decision-making

### 5. FUNNEL & FORECASTING

- + Definitions of key characteristics of customer profiles for segmentation
- + Identification of funnel stages, and data that needs to be tracked at each
- + Optimization of sales funnel and sales process
- + Implementation of tools for accurate sales forecasting to drive accuracy and predictability

### 6. SALES COVERAGE MODEL

- + Analysis of current key activities, profitability and margins
- + Development of best key activities, rules of engagement, territory planning, approach strategies, and quotas
- + Sales coverage model visual workflow
- + Compensation plans



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FROM COLD LEADS TO **CLOSED SALES®**