

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. MEDDIC



systems

- Process
- methods



Miller Heiman

- Strategic selling
- Red flags



MEDDIC

MEDDIC stands for:

- **M**etrics
- **E**conomic Buyer
- **D**ecision Criteria
- **D**ecision Process
- **I**dentify Pain
- **C**hampion



Sandler

- Strong on understanding how people buy
- 6 steps process for inside sales



Optimized Calling

MIT
Entrepreneurship
CENTER



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Startup toolkit

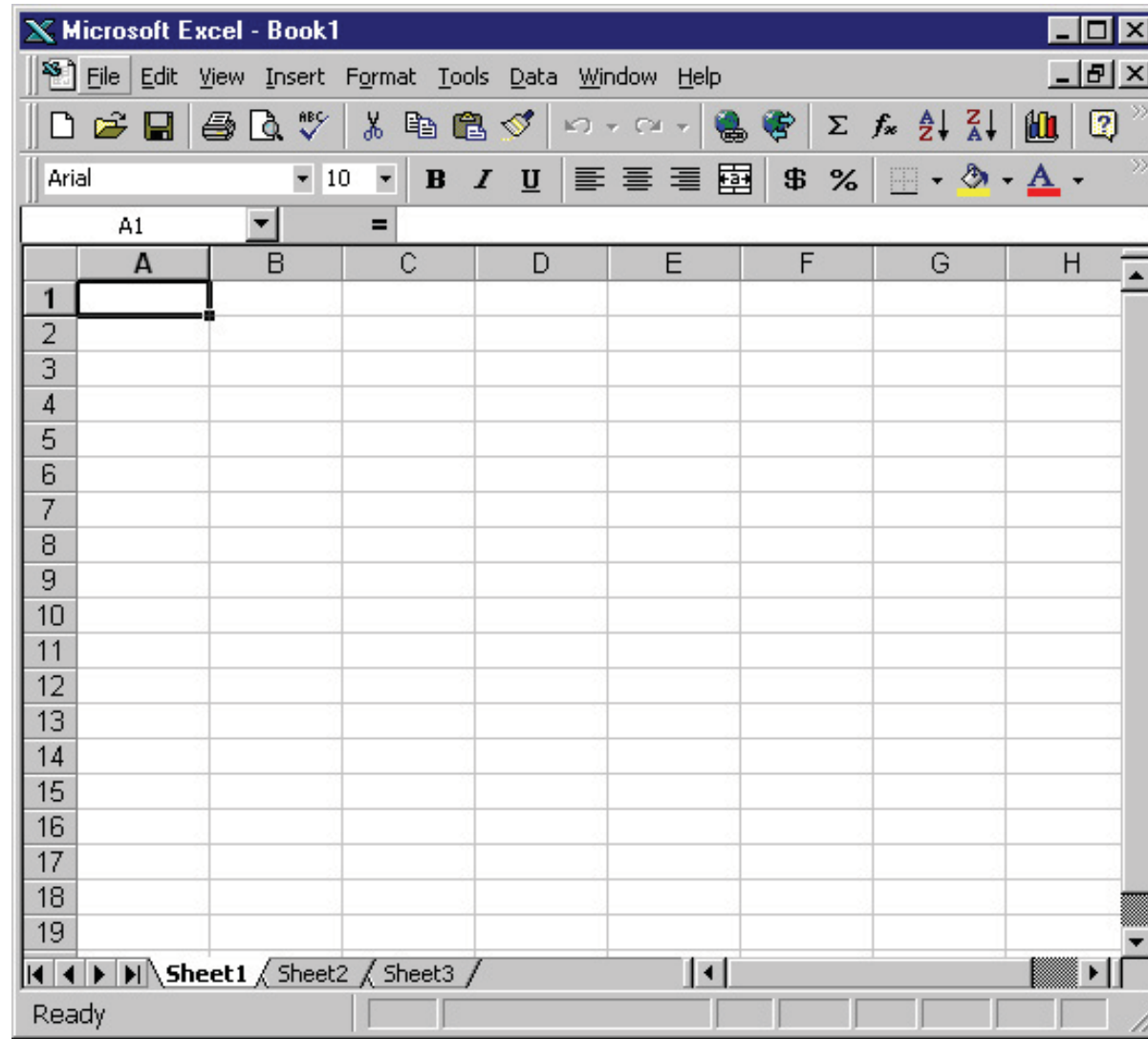
MIT
Entrepreneurship
CENTER

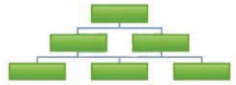


MIT Sloan
MANAGEMENT

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The old days





SFDC- High Level Forecast Rollup

Show Opportunity Status Probability

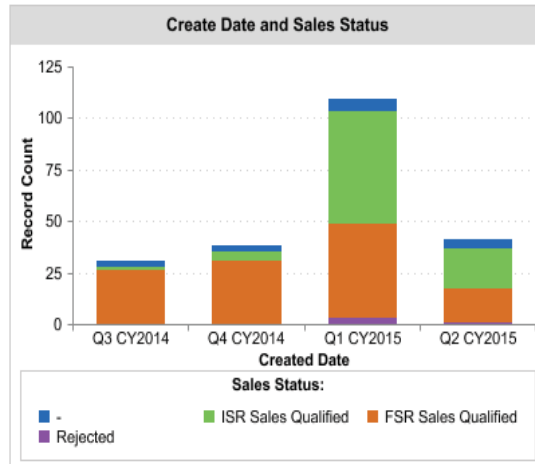
Filtered By: [Edit](#)
 Stage not equal to Closed Lost,Dead [Clear](#)
 AND Opportunity Record Type not equal to Sourced Opp [Clear](#)
 AND Net Unit Price not equal to 0 [Clear](#)

Opportunity Record Type	Reports To Region		Forecast					Grand Total
			Pipeline	Forecast	Commit	Is Closing	Closed	
<input type="checkbox"/> License	Americas	Sum of ACV Extended Price Record Count	\$2,700,133 75	\$2,492,084 31	\$9,734 2	\$0 0	\$180,300 4	\$5,382,251 112
	EMEA	Sum of ACV Extended Price Record Count	\$2,170,121 39	\$400,020 7	\$0 0	\$0 0	\$0 0	\$2,570,141 46
	APAC	Sum of ACV Extended Price Record Count	\$618,697 34	\$389,609 10	\$237,089 10	\$108,000 2	\$13,900 2	\$1,367,295 58
	Subtotal	Sum of ACV Extended Price Record Count	\$5,488,951 148	\$3,281,713 48	\$246,823 12	\$108,000 2	\$194,200 6	\$9,319,687 216
<input type="checkbox"/> Audit	EMEA	Sum of ACV Extended Price Record Count	\$1,000 1	\$2,000 1	\$0 1	\$0 0	\$0 0	\$3,000 3
	APAC	Sum of ACV Extended Price Record Count	\$0 1	\$0 0	\$8,850 1	\$0 0	\$9,900 1	\$18,750 3
	Audit	Sum of ACV Extended Price Record Count	\$647,698 65	\$1,762,520 31	\$0 0	\$176,000 11	\$1,645,125 68	\$4,231,343 175
	Subtotal	Sum of ACV Extended Price Record Count	\$648,698 67	\$1,764,520 32	\$8,850 2	\$176,000 11	\$1,655,025 69	\$4,253,093 181
Grand Total		Sum of ACV Extended Price Record Count	\$6,137,649 215	\$5,046,233 80	\$255,673 14	\$284,000 13	\$1,849,225 75	\$13,572,780 397

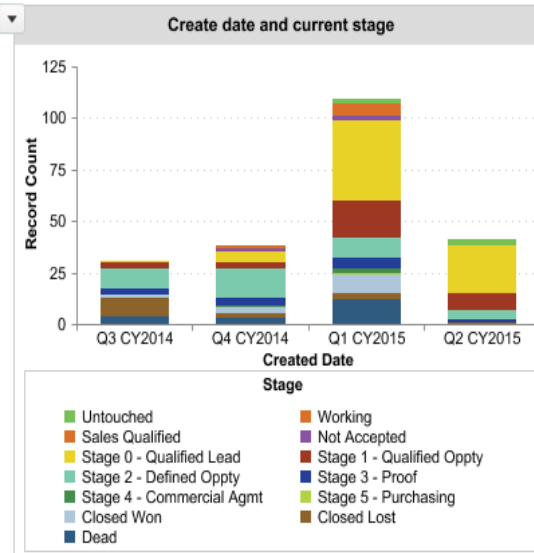


Sales funnel metrics

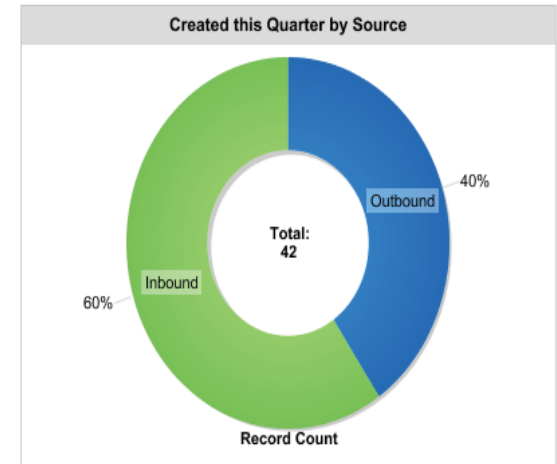
Inside Sales Opportunity Creation - Trend



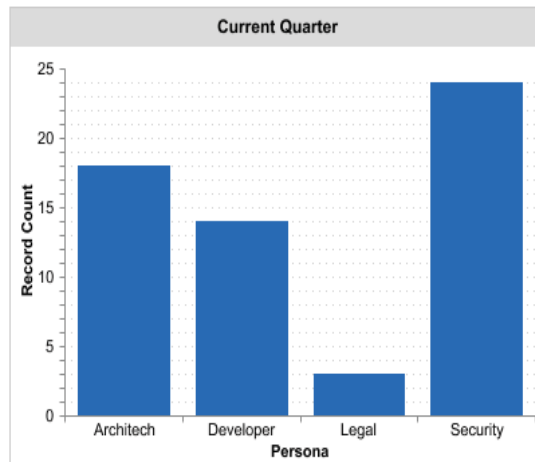
Inside Sales Opportunity Creation - Trend



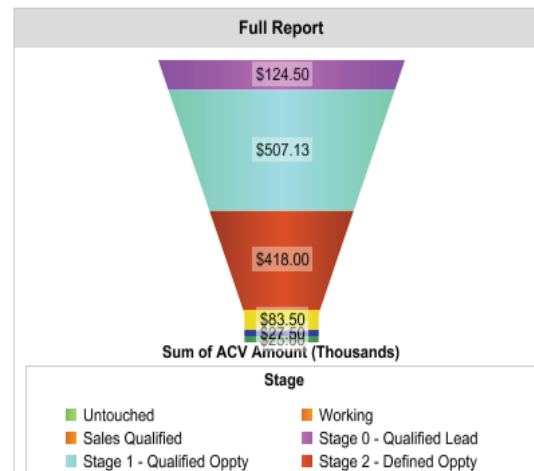
Inside Sales Opportunity Creation - Snapshot



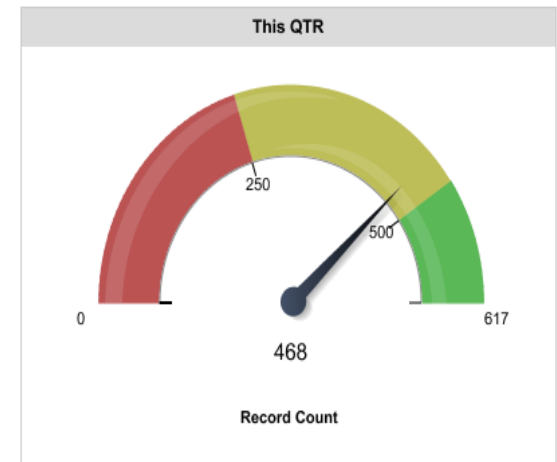
Engagement by Persona



ISR Pipeline (Current)



MQL Attainment - North America



Last 30 Days

Last 30 Days



Drill into prospect detail

[Edit](#) [Delete](#) [Sharing](#) [Hoover's Account Tools](#)

Contacts [New Contact](#) [Merge Contacts](#) [Contacts Help](#)

Action	Contact Name	Title	Phone	Email	Created Date	Last Dial Date	Role	Contact Status	Reports To	Lead Source
Edit Del	Angelo Ayala	Senior Manager		angelo.ayala@fmr.com	6/7/2010			Actively prospecting		RFL: Referral
Edit Del	Barbara Tressler		(972) 584-5505	barbara.tressler@fmr.com	7/13/2012			Actively prospecting		
Edit Del	Brian Lempel	Research Analyst	+1.603.791.8142	brian.lempel@fmr.com	3/5/2012	1/19/2011		Actively prospecting		CCL: Telemarketing
Edit Del	Christopher Mellgren	Principal Capacity Planning Analyst	(617) 563-6729	christopher.mellgren@fmr.com	6/27/2012			Actively prospecting		CCL: Telemarketing
Edit Del	David O'Dwyer	Platform Product Manager		david.o'dwyer@fmr.com	6/7/2010			Actively prospecting		
Edit Del	Ed Karjala	Director Platform Engineering - Tools, Automation, and Data	(617) 563-7000	ed.karjala@fmr.com	5/3/2011			Actively prospecting		RFL: Referral
Edit Del	George Brady	EVP, Distributed Hosting Services		george.brady@fmr.com	6/7/2010	11/17/2009		Actively prospecting		RFL: Referral
Edit Del	Joe Mckenna	VP of Distributed Hosting Architecture & Engineering	+1 (919) 458-3548	joe.mckenna@fmr.com	5/3/2011	6/20/2011		Actively prospecting		
Edit Del	Keith Shinn	VP - Data Center Strategy	(214) 224-8355	keith.shinn@fmr.com	3/9/2010	6/8/2010		Actively prospecting		Bain
Edit Del	Kevin Cunningham	Director		kevin.m.cunningham@fmr.com	6/7/2010			Actively prospecting		RFL: Referral

Show 7 more » | [Go to list \(17\)](#) »

Leads [New Lead](#) [Leads Help](#)

Action	Name	Title	Phone	Email	Created By	Alias	Created Date	Last Dial Date	Lead Status	Reports To	Lead Source
Edit Del	Paul Masterson	Director of Desktop Engineering	(617) 563-7000	pmaster@charter.net	Andrea		6/29/2010	8/3/2011	Not a stakeholder		CCL: LinkedIn
Edit Del	Eric Carco	Infrastructure Capacity Planning Analyst	(617) 563-7000	eric.carco@fmr.com	Yotam		7/21/2010	3/28/2011	Not a stakeholder		CCL: LinkedIn
Edit Del	William Bulling	Director, Technology Risk	(603) 791-8697	bill.bulling@fmr.com	Andrea		8/23/2010		No Interest		CCL: Telemarketing



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

The screenshot displays the RainKing application interface. At the top, there's a navigation bar with tabs for 'My RainKing', 'Marketing Center', 'Prediction Engine Manager', and 'Settings'. Below this is a search bar and a table of search results. A tooltip is visible over one of the results.

Rank	Name / Title	Company	Email	Phone	Updated		
1,062	1	Mans Anand	Manager	IBM	MAnand@us.ibm.com	(914) 499-1900	04/03/2014
1,062	1	Karen Beale	Manager	IBM	KBeale@us.ibm.com	(914) 499-1900	04/03/2014
1,062	1	Ed Turkel	Manager, Sr	Hewlett-Packard Co	Ed.Turkel@hp.com	(800) 857-1801	04/03/2014
1,248	2	Yaelie Hesse	Director	Hewlett-Packard Co	Yaelie@hp.com	(800) 857-1801	04/03/2014
2,179	2	Devin Chan	Technical	Computer Sciences	Devin.Chan@cs.com	(816) 645-3000	04/02/2014
2,483	3*	Alex Powers	Chief Te	Computer Sciences	Alex.Powers@cs.com	(816) 645-3000	04/02/2014
3,858	2	Anne Hoopes	Execum	JPMorgan Chase & Co	anne.hoopes@jpmchase.com	(212) 272-2000	04/02/2014
6,252	3*	Larry Gao	Vice Presid	JPMorgan Chase & Co	Larry.Gao@jpmchase.com	(212) 272-2000	04/03/2014
8,220	3*	Jeffrey					
8,581	1	Rene					
10,848	1	Rene					
12,140	1	Rene					

Tooltip for Larry Gao:
 Larry Gao has responsibilities over application support, application development, cloud-based solutions, IT service management, network infrastructure, middleware and data integration solutions, and systems support.
 JPMorgan Chase & Co
 Larry Gao@jpmchase.com
 (212) 272-2000



Contact	Manager	City	State	
Steve Acord Information Security Analyst 425-313-2842 Direct Dial SA/acord@westco.com	Franklin Donahoe	Issaquah	WA	
Laurie Acpal Executive Assistant, Tim Bowersock 425-313-8771 Direct Dial	Tim Bowersock			

MS Dynamics

Lead **Contact**

DISCOVERORG

Search Real Time Triggers

Active Criteria

- Verticals: Banking
- Seniority Level: Analyst
- State: AL, USA
- Job Function: Accounting

Recent Searches

- Contact Search: 3318 records - 10/17/2014 1:45 PM
- Contact Search: 4776 records - 10/17/2014 1:38 PM
- Contact Search: 7 records - 10/17/2014 1:29 PM
- Contact Search: 7 records - 10/17/2014 1:20 PM
- Contact Search: 37 records - 10/17/2014 1:18 PM
- Contact Search: 16 records - 10/17/2014 1:27 PM

Saved Searches

- 3M Accounting 10/17/2014 1:39 PM
- Frangul/Williams in Baton Rouge 10/17/2014 1:35 PM
- CPG in AL 10/17/2014 1:31 PM

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

Company Name: **Go**

Industry Verticals:

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

Technologies:

- Cisco Routers and Switches
- Citrix
- IBM i/OS
- 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 Financial Officer

More Search Options

Geographic searches apply to: Physical Address Headquarters Address

States: USA Canada Eur

Metro Areas: All USA Abilene TX Aguadilla-Isabela PR

Area Codes: +27 +30

Paste 'n Go:



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.

Select a match from Data.com

5 records from Data.com may match this Account. Please choose one.

	Account	Data.com
Account name	Acme Laboratories	Acme Laboratories
D-U-N-S number		606037232
Tradestyle		Acme Labs
Phone	+1.510.528.2100	+1.510.528.2100
Website	http://www.acme.com	http://www.acme.com
Address	1000 Acme Avenue Albany, CA 94706-1000 United States	1000 Acme Avenue Albany, CA 94706-1000 United States
Industry	Pharmaceuticals	Pharmaceutical Preparations
Ownership	Public	Public
Employees	120,000	135,200
Revenue	\$6,500,000,000	\$7,529,312,113

Acme Laboratories Albany, CA

Acme Nutrition Albany, CA

Acme Machinery Albany, CA

DUNSRight™
Match Information
Confidence code: 10
D&B MatchGrade:
A A A A A B F
Phone
Values do not match More Info

Select and Proceed to Clean No Records Match Cancel





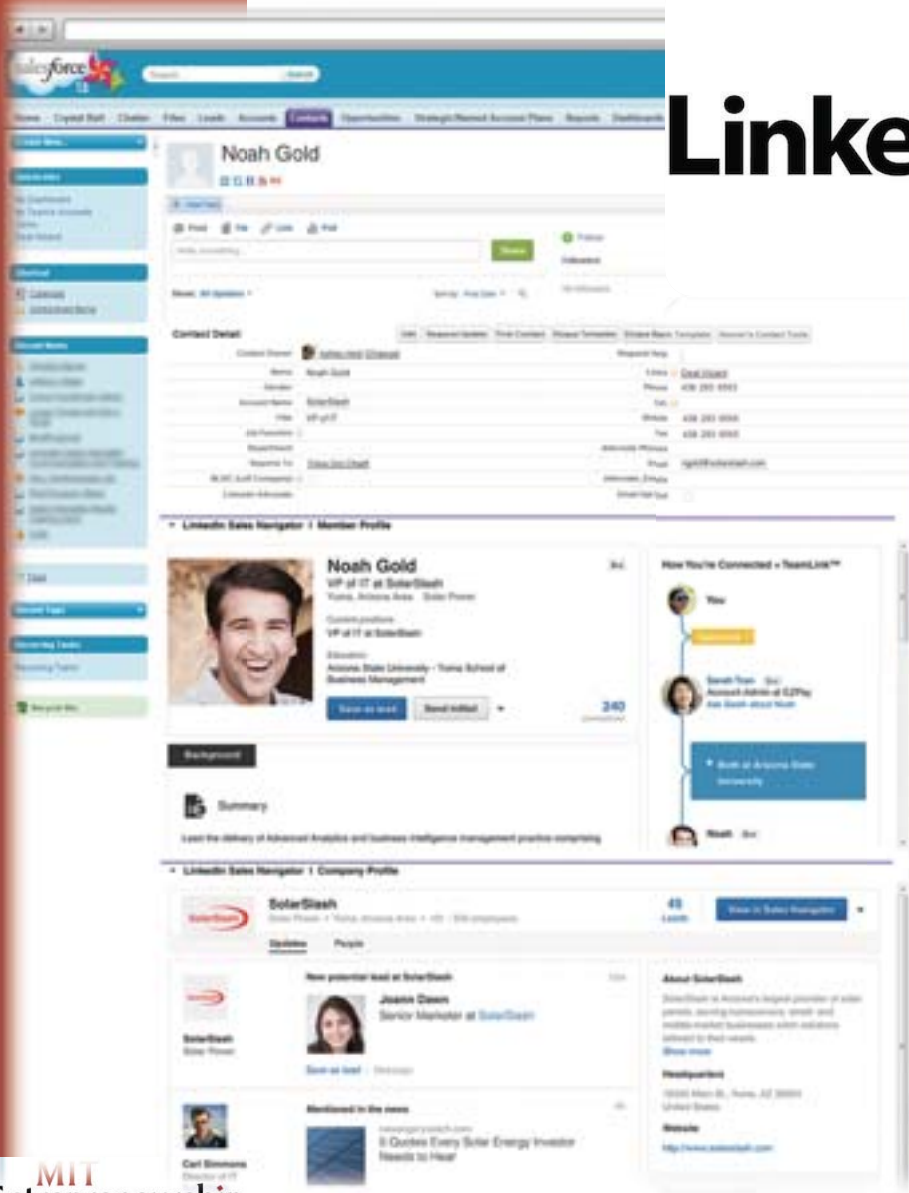
Salesloft key feature is the quality of the emails that they provide. Their tool works by pinging the prospects email server to verify it in real time, causing the email button to turn green. If emails cannot be verified, they light up orange, and are subsequently free of charge.

The screenshot displays the SalesLoft interface for a list of prospects. The top navigation bar includes the SalesLoft logo, tabs for 'Prospects' and 'Companies', and a user profile for 'Kyle Porter'. Below the navigation is a search bar and buttons for 'Credit Usage', 'Get More', and 'Free Credits'. The main content area shows a list of prospects under the heading 'VP SaaS Sales Boston' with 344 prospects. The list includes columns for prospect names, company names, and email addresses. Each row has a 'profile' button and a 'verify' button. The 'verify' buttons are either green (indicating successful verification) or orange (indicating failed verification). For example, Chris Williams and Peter Caputa have green verify buttons, while Mike Perozek has an orange one. The interface also includes action buttons like 'Move to list', 'Copy to list', 'Reload selected', and 'Delete Selected'.

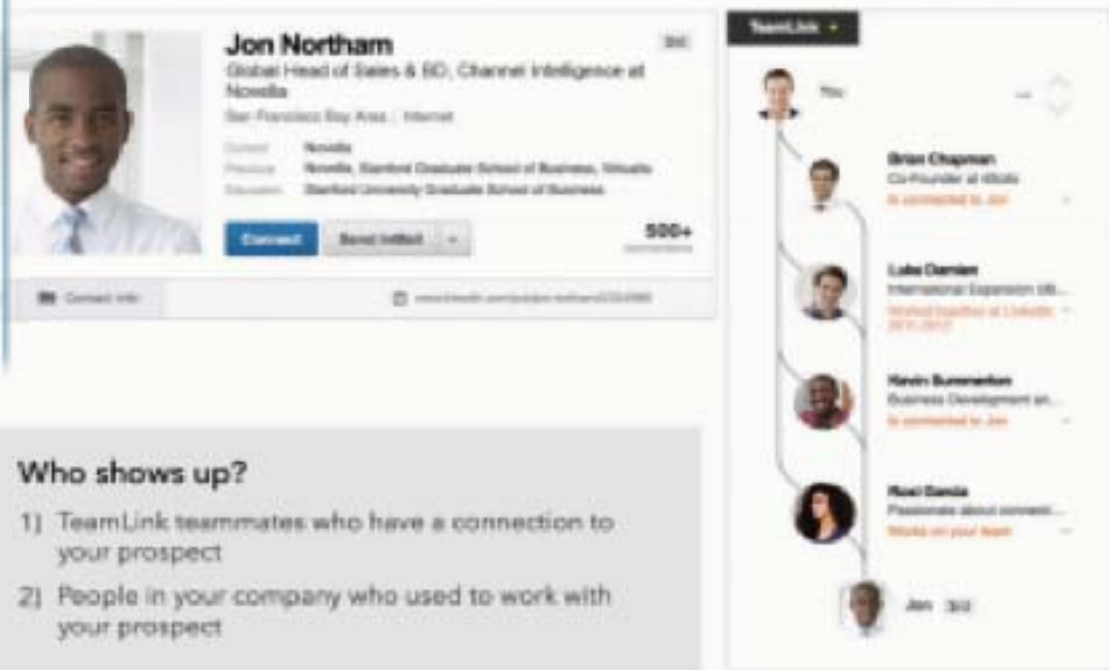
Name	Company	Email	Verify Status
Chris Williams / Advisor	Lagoo	chriswilliams@lagoo.com	Green
Peter Caputa / VP Sales	HubSpot	peter.caputa@hubspot.com	Green
Dave Sherman / Enterprise Sales Director	Apperian, Inc.	dsherman@apperian.com	Green
Chris Edgren / VP of Sales & Marketing	Wrightsoft Corporation	chris.edgren@wrightsoft.com	Green
Nick Baran / VP Sales	Adroit Software Inc.	nick.baran@adroitgroup.com	Green
Mike Perozek / VP of Sales, North America	Bullhorn	mperozek@bullhorn.com	Orange
Tom Lyons / VP of Sales	Saylent Technologies, Inc.	tylons@saylent.com	Green
Andrew Berman / VP Sales, North America	bigtincan	andrew.berman@bigtincan.com	Green
Tom Colby / VP of Sales Eastern/Retail	Epsilon	scotby@epsilon.com	Green
Andrew Custard / VP of Sales, Americas	SOASTA, Inc.	acustard@soasta.com	Green

LinkedIn™

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.



LinkedIn Sales Navigator TeamLink



Who shows up?

- 1) TeamLink teammates who have a connection to your prospect
- 2) People in your company who used to work with your prospect

Marketing automation

- Now that the Leads are in Salesforce, what's next?



Filter Results Filter Options

ID	Date/Time (PST)	Activity Type	Detail	Campaign Name
7776486	Feb 19, 2009 12:53 PM	Change Score	Changed Lead Score from "1507" to "1503"	(1) Web Visits - Any
7776485	Feb 19, 2009 12:53 PM	Add to List	Heavy Web Activity (>8 Pages)	Heavy Recent Web Activity
7776481	Feb 19, 2009 12:53 PM	Change Score	Changed Lead Score from "1580" to "1587"	Heavy Recent Web Activity
7776471	Feb 19, 2009 12:53 PM	Click Link	www.marketo.com/	
7776064	Feb 19, 2009 12:28 PM	Change Score	Changed Lead Score from "1579" to "1560"	(1) Web Visits - Any
7776057	Feb 19, 2009 12:28 PM	Click Link	www.marketo.com/about/news/marketo-wins-demand-genera...	
7774714	Feb 19, 2009 11:47 AM	Change Score	Changed Lead Score from "1578" to "1579"	(1) Web Visits - Any
7774178	Feb 19, 2009 11:30 AM	Change Score	Changed Lead Score from "1577" to "1578"	(1) Web Visits - Any
7774175	Feb 19, 2009 11:30 AM	Click Link	www.marketo.com/customers/	
7774068	Feb 19, 2009 11:20 AM	Add to List	Multiple Web Visits in Last Week	Repeated Web Visits
7774065	Feb 19, 2009 11:20 AM	Change Score	Changed Lead Score from "1576" to "1577"	(1) Web Visits - Any
7774063	Feb 19, 2009 11:20 AM	Change Score	Changed Lead Score from "1568" to "1578"	Repeated Web Visits
7774060	Feb 19, 2009 11:20 AM	Click Link	blog.marketo.com/	
7774059	Feb 19, 2009 11:20 AM	Change Score	Changed Lead Score from "1567" to "1568"	(1) Web Visits - Any
7774056	Feb 19, 2009 11:20 AM	Add to List	Downloaded Marketo Vendor Analysis - Raab Guide	Raab Guide vendor analysis full
7774054	Feb 19, 2009 11:20 AM	Fill Out Form	Basic Form WP	
7772494	Feb 19, 2009 10:19 AM	Add to List	Visited Site in Last 7 Days	First Web Visit
Date: Feb 18, 2009 (3 Items)				
7792637	Feb 18, 2009 11:05 PM	Change Score	Changed Lead Score from "1566" to "1567"	(1) Web Visits - Any
7792968	Feb 18, 2009 10:19 PM	Change Score	Changed Lead Score from "1565" to "1566"	(1) Web Visits - Any
2696725	Feb 18, 2009 12:13 PM	Add to SFDC Campaign	2009Q1 Tippit Wbr	Run Action Add to SFDC Campaign 2009-02-18 12:13:09
Date: Feb 17, 2009 (32 Items)				



TM

Cloudingo provides automation for lead clean up on a larger scale.

cloudingo DASHBOARD ACCOUNT SUPPORT

Notifications Your Plan: Professional | Need More? Upgrade

Logged in as: Stephen Harding (Logout) Get Started

FREE TRIAL MODE - You're FREE TRIAL! expires in 135 days - Why not... [cancel my account](#) and get a jump on things

Salesforce Account - Marketing Org

8 total filters created Cloudingo uses filters to find similar and/or duplicate data. You can edit the standard filters below or create your own custom filters [what are filters?](#)

Run All Filters Merge/Contact History

13demo Status: Active Added: 02-27-12

24demo Status: Active Added: 02-29-12

Marketing Org Status: Active Added: 03-01-12

Connect to Salesforce

The Cloudingo dashboard lists all of the duplicates in your Salesforce org. Easily manage and merge duplicates from the filter menus.

Filter ID	Source Object	Target Object	Fields	Last Run	Groups	Matches
#1	Single Table - Lead	Lead	Email Last Name	0 minutes ago	99	378
#2	Single Table - Lead	Lead	Email Last Name Phone Website Industry	0 minutes ago	12	168
#3	Multi Table - Lead to Con...	Contact	Email Last Name Phone	0 minutes ago	531	1193
#4	Multi Table - Lead to Acc...	Account	Company Industry Employees State/Province	0 minutes ago	4	160
#5	Single Table - Account	Account	Account Name Billing City	0 minutes ago	5	11
#6	Single Table - Account	Account	Account Name Billing State/Province Account Phone	0 minutes ago	4	8
#7	Single Table - Contact	Contact	Email Last Name	0 minutes ago	1391	2874

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En
MANAGEMENT

Sales productivity tools

insidesales.com™

salesforce

Search... Search

Logged in as Sarah Torbin (storb@blackducksoftware.com)

Sales

Home Chatter Campaigns **Leads** Accounts Contacts Opportunities Incent Reports Dashboards Documents Cases Travel Approvals Online Training +

BLACKDUCK Leads Home Tell me more! | Help for this Page ?

View: My MQL's this week Go! Clone | Create New View

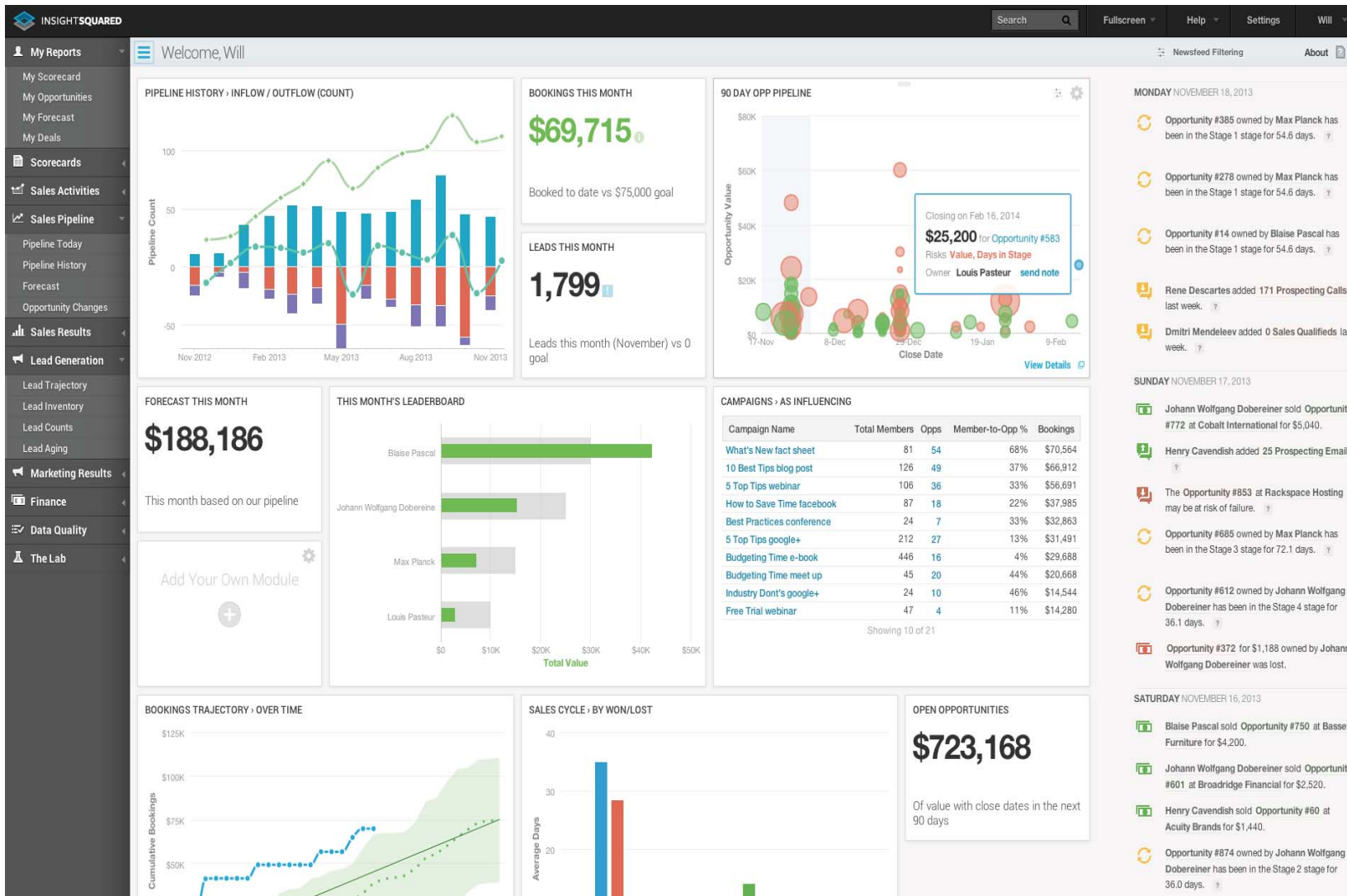
Recent Leads New My Unread Leads

Name	Company	Phone	Lead Source	Lead Status	Email	Created Date	Territory
Klunder, James	AHEAD	248-398-6988	SalesLoft	Suspect	james.klunder@thinkahead.com	5/4/2015	Unknown
Reder, Scott	AHEAD	312-329-7880	SalesLoft	Suspect	scott.reder@thinkahead.com	5/4/2015	Unknown
Barcinas, Glenn	AHEAD	312-329-7880	SalesLoft	Suspect	glenn.barcinas@thinkahead.com	5/4/2015	Unknown
Kaplan, Eric	AHEAD	312-329-7880	SalesLoft	Suspect	kaplan@thinkaheadit.com	5/4/2015	Unknown
Darcy, Richard	Cision	866-639-5087	SalesLoft	Suspect	richard.darcy@cision.com	5/4/2015	Unknown
Rueda, Amanda	Cision	866-639-5087	SalesLoft	Suspect	amanda.rueda@cision.com	5/4/2015	Unknown
Oakley, John	Clubessential	513-321-2780	SalesLoft	Suspect	joakley@clubessential.com	5/4/2015	Unknown
Lundstrom, David	Cision	866-639-5087	SalesLoft	Suspect	david.lundstrom@cision.com	5/4/2015	Unknown
Gattiker, Matt	Clubessential	800-448-1475	SalesLoft	Suspect	mgattiker@clubessential.com	5/4/2015	Unknown
Bolton, Steve	Election Systems & Software	877-377-8683	SalesLoft	Suspect	sbolton@essvote.com	5/4/2015	Unknown
Weber, Gary	Election Systems & Software	815-397-8144	SalesLoft	Suspect	gweber@essvote.com	5/4/2015	Unknown
Miller, Carol	Election Systems & Software	877-377-8683	SalesLoft	Suspect	cmiller@essvote.com	5/4/2015	Unknown
Wall, Eric	Election Systems & Software	402-593-0101	SalesLoft	Suspect	ewall@essvote.com	5/4/2015	Unknown
Sylla, Mamoudou	Unemployed	2017375152	Web	Rejected	moudsylla@gmail.com	5/2/2015	Unknown
Huang, George	Nationwide	6143743224	Tradeshaw	MQL	huangg@nationwide.com	4/27/2015	Unknown
Husain, Aliasghar	1 Jump Financial	3122058770	Tradeshaw	MQL	ahusain@jumptrading.com	4/27/2015	Unknown
Katz, Mike	MeS	6504894366	Tradeshaw	MQL	mkatz@merchante-solutions.com	4/27/2015	Unknown
King, James	Adobe Systems Incorporated	4085365219	Tradeshaw	MQL	jamking@adobe.com	4/27/2015	Unknown
Kotha, Anil Kumar Kotha	CipherCloud	4089145928	Tradeshaw	MQL	anilkumar.kotha@gmail.com	4/27/2015	Unknown
Lacher, Leo	Seagate Technology	4053297956	Tradeshaw	MQL	leo.d.lacher@seagate.com	4/27/2015	Unknown
Leidecker, Jack	Digital Realty	415-738-6500	Tradeshaw	MQL	jleidecker@digitalrealty.com	4/27/2015	Unknown

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Analytics

- We have leads, they seem good, we're calling them all, but how do we tell if we are closing them?





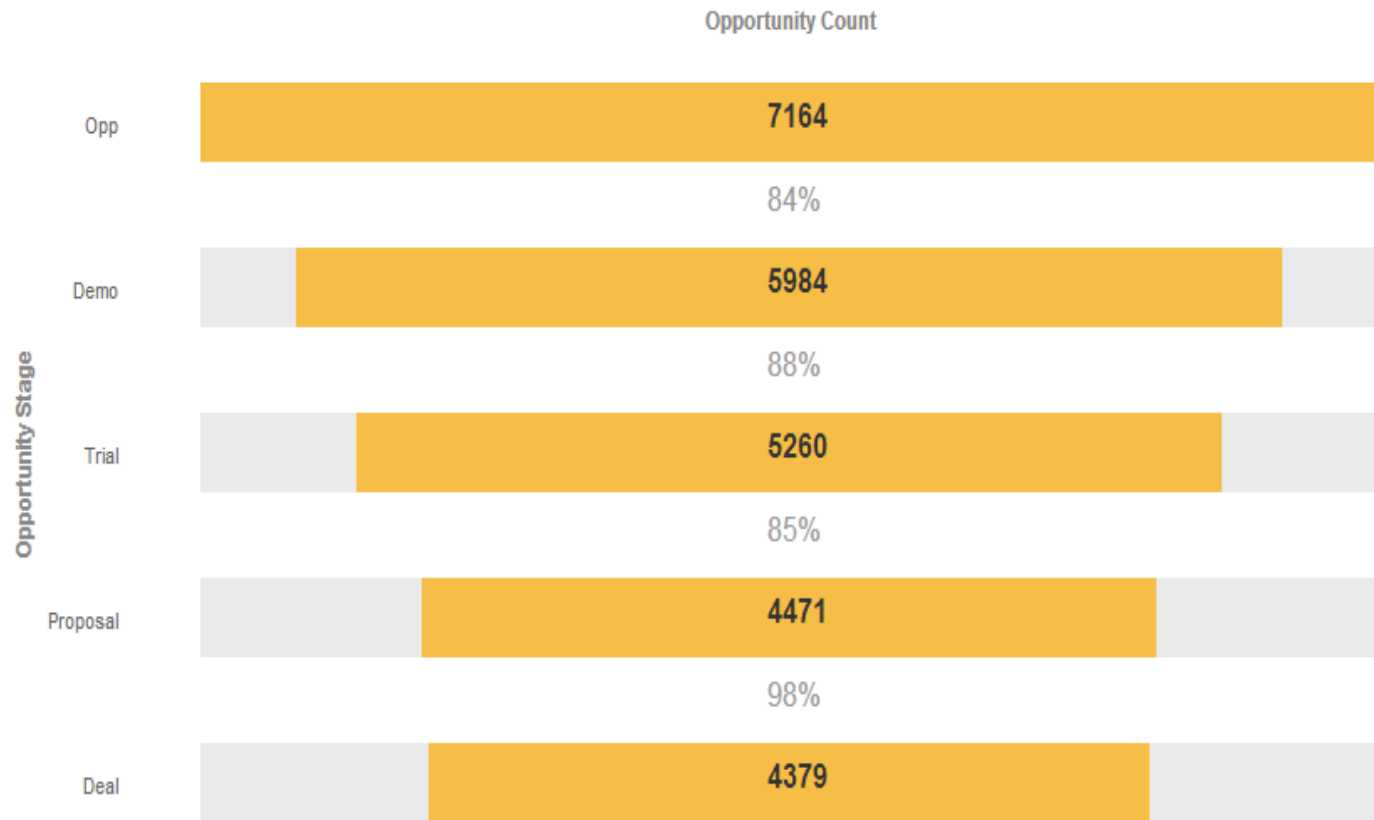
INSIGHTSQUARED™

What are our conversion rates for closed opportunities?

Custom Last This To Date **Trailing**

7D 30D 90D **12M**

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



Paying commissions

xactly™

xactly express March 2011 Date Levy Help xactly Express

DocuSign

March 2011

Sales Manager

Commission	
ARR	3,962.50
Customers	5,000.00
Training	320.00
Total Payment	9,282.50
YTD Payment	14,712.50

Balance Information

Hold Balance	0.00
Liability Balance	0.00

Resources

- Summary Commission Statement
- Detailed Commission Statement

Dashboard My Payments My Deals My Plan New Pod +

ARR

Annual Quota Result

March Credit 198,125.00

January to December

Credit 451,625.00

Quota 2,000,000.00

23%

Training

Annual Quota Result

March Credit 16,000.00

January to December

Credit 34,000.00

Quota 60,000.00

57%

Customers

Annual Quota Result

March Credit 4.00

January to December

Credit 8.00

Quota 20.00

40%

ARR

Monthly Total Payout

March Payout 3,962.50

March

MTD Payout 3,962.50

Month	Payout
Jan	~1,500
Feb	~2,500
Mar	3,962.50

Training

Monthly Total Payout

March Payout 320.00

March

MTD Payout 320.00

Month	Payout
Jan	~100
Feb	~150
Mar	320.00

Customers

Monthly Total Payout

March Payout 5,000.00

March

MTD Payout 5,000.00

Month	Payout
Jan	~1,000
Feb	~1,500
Mar	5,000.00



How happy are your customers?

CustomerGauge

BLACKDUCK Ishipley@blackducksoftware.com

search

logout

- [Dashboard](#)
- [Customer](#)
- [Email & Surveys](#)
- [Reports](#)
- [Fire Fighting](#)
- [Admin](#)
- [My Profile](#)

Black Duck Year To Date

Unsubscribe

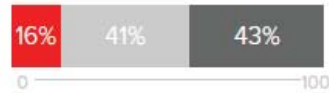
Year To Date

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



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

Workflow Summary

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

Status OPEN	6
Status PROGRESS	1
Status CLOSE	14

L1L2

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

Primary Areas of Satisfaction as suggested by your customers are

Customer Support	52
Product	7

Graph

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

NPS based on Industry ordered by NPS in descending order (limited to 10).



Influitive – customer advocacy

MIT
Entrepreneurship
CENTER



MIT Sloan
MANAGEMENT

Managing services



NETSUITE | OpenAir

Home Expenses Invoices Projects Purchases Resources Timesheets Reports Workspaces Administration

Honeycomb SERVICES

Bookings - Projects - Tasks - Action items - Alerts - Assignments

Marc Collins - Administrator

Femhill Solutions

Financial integration

Action items Phases/Tasks - Personnel - Financials - Reports - Properties | 56%

Phases/Tasks: Outline

show all hide all clear sort

Phase/Task	ID	Assigned To	HOURS				% Complete	Start	Finish
			Planned	Worked	Approved	Estimated			
System integration	1		6,000	8,728	8,568	7,708	56%	11/07/11	12/08/13
Plan	2		2,040	3,840	3,840	2,040	94%	11/07/11	07/09/13
Review SOW	3	Ellis, Ed (120 hrs)	120	120	120	120	100%	11/07/11	11/25/11
Discuss integration points	4	Foster, Tim (360 hrs) Garcia, Juan (360 hrs) Ellis, Ed (120 hrs)	840	840	840	840	100%	11/28/11	02/01/12
Finalize integration plan	5	Foster, Tim (480 hrs) Garcia, Juan (480 hrs)	960	960	960	960	100%	02/02/12	04/27/12
Define training plan	18	Ellis, Ed (120 hrs)	120			120	0%	06/18/13	07/09/13
Configure	12		2,760	4,888	4,728	4,468	53%	04/30/12	06/17/13
Configure integrations	13	Foster, Tim (1800 hrs) Garcia, Juan (480 hrs)	2,280	2,280	2,280	3,988	57%	04/30/12	03/21/13
Document configurations	14	Foster, Tim (480 hrs)	480	164	84	480	18%	03/22/13	06/17/13
Test & train	19		1,200			1,200	0%	06/18/13	12/08/13
Conduct integration tests	20	Foster, Tim (240 hrs) Garcia, Juan (240 hrs)	480			480	0%	06/18/13	07/30/13
1 row (13 sub-rows)			6,000	8,728	8,568	7,708			

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Open source CRM

The screenshot displays the SUGARCRM web application interface. At the top, there's a navigation bar with 'Home', 'Sales', 'Marketing', 'Support', 'Activities', 'Collaboration', 'Tools', and 'Reports'. Below this is a 'My Sugar' section with 'My Charts' and '+ Add Page' options.

My Top Open Opportunities table:

Opportunity Name	Amount	Expected Close Date
White Cross Co 536796 - 1000 units	\$50,000.00	10/02/2007
MTM Investment Bank F S B 999464 - 1000 units	\$50,000.00	10/12/2007
Doggie Diner Co Ltd 610209 - 1000 units	\$25,000.00	10/22/2007
NW Bridge Construction 994636 - 1000 units	\$50,000.00	11/02/2007
JAB Funds Ltd 494196 - 1000 units	\$10,000.00	11/12/2007

My Pipeline shows a funnel chart with a red funnel shape.

My Calls table:

Close	Subject	Duration	Start Date	Accept?
X	Bad time, will call back	0h30m	07/30/2008 15:00	✓
X	Bad time, will call back	0h30m	11/09/2007 08:00	✓
X	Bad time, will call back	0h30m	03/09/2008 16:15	✓
X	Get More information on the proposed deal	0h30m	12/18/2007 15:30	✓
X	Get More information on the proposed deal	0h30m	09/26/2007 16:30	✓

My Meetings table:

Close	Subject	Duration	Start Date	Accept?
X	Discuss pricing	0h30m	07/16/2008 08:00	Accepted
X	Demo	2h15m	04/18/2008 08:45	Accepted
X	Introduce all players	2h00m	07/01/2008 16:30	Accepted
X	Follow-up on proposal	2h30m	12/28/2007 08:00	Accepted
X	Review needs	0h15m	11/28/2007 19:00	Accepted

My Accounts table:

Account Name	Phone	Date Entered

The interface also features several charts and graphs, including a line chart for 'OSEEX', a bar chart for 'Mile Sales', a gauge chart for 'Mile Sales', and a pie chart for 'Opportunities by Lead Source'. A calendar view is also visible at the bottom right.



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 PostgreSQL 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

Concursive

- 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

CivCRM

- 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

Y=Yes
N=No
P=partially developed/ available through 3rd party

CRM Comparison	CentricCRM	Compiere	Concursive	OpenTaps	SplendidCRM	SugarCRM	vTiger	Xtuple
<i>SFA</i>	Y	Y	Y	Y	Y	Y	Y	Y
<i>dashboards</i>	N	Y	Y	Y	Y	Y	Y	Y
<i>Quota management</i>	N	N	Y	N	Y	N	P	N
<i>Custom Report Writer</i>	N	Y	Y	Y	Y	Y	Y	Y
<i>Workflow designer tool</i>	N	P	P	N	P	P	P	P
<i>Account de-duplication</i>	N	Y	Y	N	Y	Y	Y	Y
<i>Marketing</i>	Y	Y	Y	P	Y	Y	Y	Y
Implementation								
<i>On Premise</i>	Y	Y	Y	Y	Y	Y	Y	N
<i>SaaS</i>	Y	Y	Y	Y	Y	Y	Y	Y
<i>Implementation services</i>	N	Y	Y	Y	Y	Y	Y	Y

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