

# Sales Portfolio Management

Tool for systematic qualification, planning, and managing progress to target the most valuable sales opportunities

Freedom2Act Sales Portfolio Management™ provides Sales Management with updated and comprehensive data to support the right sales strategies in any Company with a larger portfolio of Customer and Sales Opportunities.

The Unique Buying Points™ are:

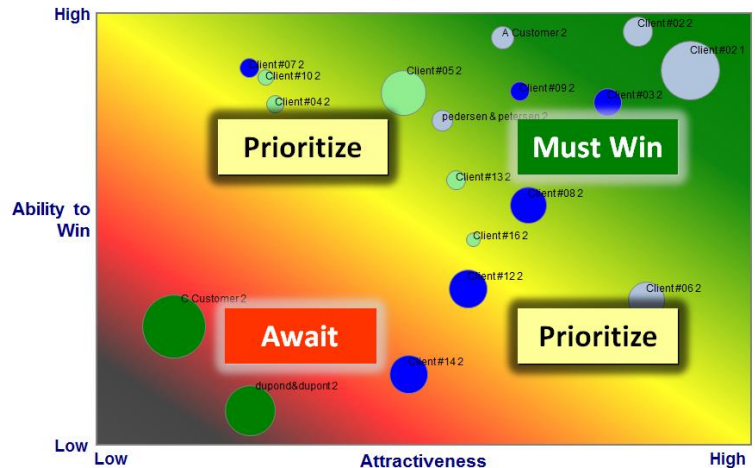
- Presentation of the collective knowledge and assessment of sales teams in a comprehensive and simplified way;
- Provision of Sales Management with a new and unique tool for reporting sales status for Management;
- Improved forecasting using objective criteria;
- Increasing efficiency of the sales resource through:
  - identification and focusing on the most valuable sales opportunities,
  - identification and lowering the priority of less valuable sales opportunities,
  - awaiting how low value sales opportunities develop;
- Increasing the ability of the organization to deliver by highlighting sales opportunities by project and customer over time.

Freedom2Act Sales Portfolio Management™ is provided a cloud-based “Software as a Service”.

In summary the Freedom2Act Sales Portfolio Management™ addresses the growing need for quickly and efficiently to be able to provide an updated, comprehensive overview of sales opportunities and addressed market segments.

Freedom2Act Sales Opportunity Chart  
... How to select the best sales opportunities

MEUR 4



Each circle represents a Sales Opportunity.

The size of the circle represents the Total Contract Value.

The color of the circle represents which sales person

## Testimonials

*“We increased the efficiency of our sales force by 50 pct. by systematically identifying the most interesting sales opportunities in terms of value and profitability. Applying the dynamic and “easy-to-use” sales tool we were able to quickly select the best 30 targets from a list of 150 potential sales opportunities.”*

*“Results in focused sales efforts”*

*“Clear and easily comprehensible conclusions”*

*“Structured knowledge on existing/new customers”*

*“Easy identification of attractive opportunities”*

*“Clear identification of the low hanging fruits”*

*“Quick hatching out in leads that do not really lead to anything”*

*“Focus on where efforts are required”*

*“Quick hatching out in leads that do not result in anything”*

*“Easy to use – immediate results”*

*“A relevant product for any sales person. It gives an immediate and comprehensive overview of customers after answering few but relevant sales qualification questions”*

# Sales Portfolio Management

*Target the most valuable sales opportunities*

## The Importance of Sales Qualification

Sales qualification is the key to improving results. A lot of companies struggle with identifying and prioritizing the best opportunities amongst the prospects and deals they're working on. Best in class companies do a great job at opportunity management by spending regular time systematically analyzing their pipeline, analyzing each opportunity, and prioritizing the allocation of resources to make sure that the focus are on the most valuable opportunities and converting these into contracts.

## Why Is Sales Qualification so Hard

Every sales person wants more clients to work with. But finding new clients is hard work. The temptation is to keep working with a bad opportunity. Time and efforts invested in an opportunity over time creates inertia for the sales person to keep going, regardless of red flags.

## Focus on the Valuable Opportunities

A quick way to get organized is to have a top ten opportunity list for each of your sales persons, to bring that list to every sales meeting, and to get a regular update on what's being done to advance each of the sales on those top ten accounts. Many companies fail to do this, but it's a very easy tactic that can be used in order to bring greater visibility to the key accounts that are going to drive your business, and make sure that your sales persons are focusing their top attention on them.

Have your sales persons focus on those ten accounts every week and make sure that each week you're holding them accountable for showing some advancement on each of those accounts, and also planning what the next steps are to continue to advance the sales at those companies. By maintaining a top ten list for each of your sales persons, you'll show them that it's important for you to get visibility on the accounts that they're working on that are going to drive revenue and help them to achieve their sales quotas.

It will also get them into the mindset that they need to be focusing their time and energy on the most valuable opportunities, as opposed to just turning out the sales activity. Lots of sales persons get overwhelmed by the volume of activity that

they need to generate in order to do their jobs effectively. They get lost in activity and start to equate activity with productivity. Being productive in sales means being able to quickly qualify your most valuable opportunities and focus your time and attention on moving those opportunities forward.

By putting in place an opportunity management system will enable any sales manager to quickly make sure that the sales persons are giving primary focus to what's going to produce the sales that the company needs in order to accelerate its revenue growth.

## A Proven Method

Using a system that is updated once a week by your sales persons and discussed at the sales meeting is one way for the sales manager to do a top ten account review. All users should have access to the same information from anywhere and anytime.

The most important qualification issues are:

- Do we want to win this contract?
- Can we win this contract?

Questions should systematically combine the sales persons' knowledge on the customer's behavior, strategic fit with the business, the business opportunity at hand with the ability to win. The best rating system is achieved by the user selecting from multiple choice answers rather than a simple 0-10 scoring system where it's unlikely that assessments from different users are made in a consistent way.

## Freedom2Act's Solution

*Freedom2Act's cloud based Sales Portfolio Management helps companies accelerate their sales. It brings relevant sales information to the attention of sales staff. Furthermore, it includes pipeline management support and objective forecasting tools.*

*The system enables the sales persons to keep information up-to-date with a minimum of effort. Qualification is based on an assessment of each opportunity derived from answers to 12 to 38 multiple-choice questions. Easy to understand charts and reports clearly indicates where to focus and where to defocus. Growth potentials at existing clients are clearly indicated, whether more of the same or from cross-sales of other products.*