

2016

DYNAMISM SYSTEMS AND PROCESSES

A guide for sales representatives

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► PROGRAM GOALS

Our goal for this office is to create an environment where you use your mind to solve problems, build valuable skills, and do work that you are proud of. We expect you to take this job seriously and put forth your best effort every day. Sales is not an easy field to succeed in, and we are more than willing to help you as long as you are helping yourself, too.

You should never feel like you have nothing to work on. Between generating leads and maintaining your pipeline, there is always work to do. If you find yourself struggling to fill your time, we urge you to talk to your manager. Below are guidelines for weekly activity:

► OUTREACH

It is important to note that achieving these goals is, and will always be, secondary to sales. Hitting these numbers without making sales is still bad, and making sales without hitting these numbers is still good. These activities have been proven to drive business and we think that they are a valuable use of your time, but if you have a sales strategy that works, please use it.

COLD EMAILS

1500 lead emails per week. Each of you has a lead bank that contains thousands of leads, and we expect you to add your own leads to it as well. Choose a subset of the list that hasn't been reached out to in a while, or perhaps that meets specific criteria. You can reach out to 750 emails per day using the tools we have in place, and it is worthwhile to cast a wide net.

Once you make it to the end of the lead bank, start over from the beginning, make changes to your message, and try again. The majority of leads need to be reached out to multiple times before they respond. Refine your message so that the calls to action are extremely clear.

LEAD GENERATION

300 leads per week. Schools will continue to be an extremely important part of our outreach, but we would also like to pursue other industries that could benefit from 3D printing. Refer to the “Market Segments” document that is in the shared folder if you need inspiration.

COLD CALLS

50 calls per week. Being comfortable discussing our products on the phone is a very important part of this job. Although it can be very challenging to connect with the person you need to talk to, it isn't impossible. Even if you can't speak with the decision-maker, ask questions and gather information for future outreach.

► DEVELOPMENT

There is always room for improvement in our department. Customers and prospects routinely ask us for various marketing materials, and we should be able to give it to them. I strongly encourage you to spearhead pet projects and build them into valuable assets that we can use to enhance this program.

► TRACKING THE SALES PROCESS

Salesforce uses four main “objects” to track the sales process: Accounts, Contacts, Leads, and Opportunities. Here is how these objects are defined:

Lead Anyone who we are attempting to market to. These are strictly “cold” in that we have had no back and forth correspondence.

Contact A person related to an account. Leads who respond to us are “converted” to Contacts

Account Any organization that we do (or attempt to do) business with and we have corresponded with.

Opportunity A potential deal. Opportunities are also related to accounts.

There are other Salesforce objects, but these are the ones you will be interacting with on a daily basis. Having a solid understanding of these objects is crucial to being able to use Salesforce effectively.

Our sales process can be broken down into three main stages: Lead Generation, Contact Correspondence, and Solution. The following table shows these stages and the common activities associated with them:

Lead Generation	Contact Corr.	Solution
LinkedIn search	Email	purchase order
Identify directories	Telephone call	shipment
Monitor Forums	Quote	post-sales

The majority of work is in the “Contact Correspondence” stage. That said, access to fresh leads is always a priority, so if you discover a new lead, follow up immediately. But make sure that you log it in Salesforce.

Remember: If it isn't in Salesforce, it didn't happen.