

Complex B2B sales

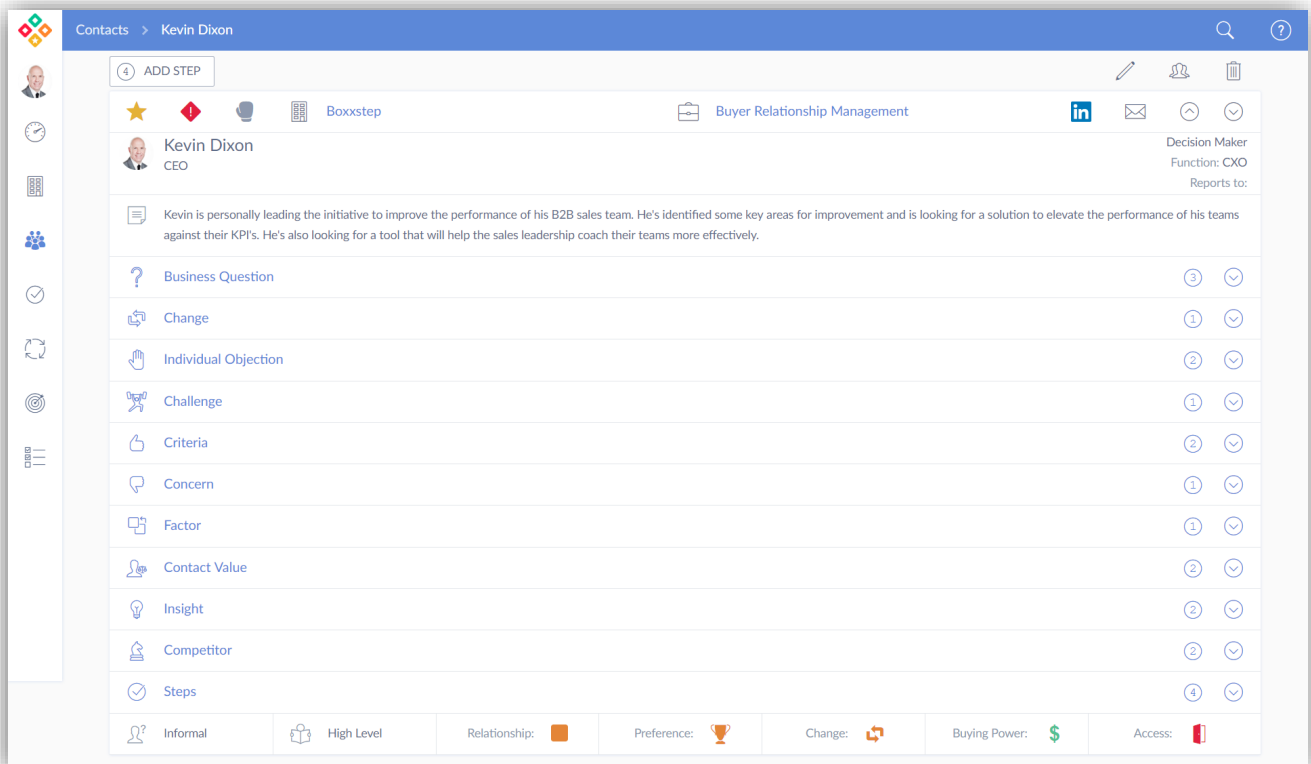
According to Gartner there are now typically 11 people involved in the prospects decision / buying process, but sometimes there are many more who contribute their opinions and influence. The number may sound high for you but remember there are active as well as occasional members of the buyer committee who you may not be aware of and have the power of veto. This is what makes B2B sales so complex today.

You not only need to identify who's involved but what's important to each of them. Selling is now like building a jigsaw puzzle, you need to have all of the right pieces in the right place to complete them.

The best way to manage this complexity is to build buyer team profiles for each contact and visualise them in a way that helps you to navigate the opportunity and work out what you need to do and with whom.

Boxxstep BRM

Boxxstep's standard version of its Buyer Relationship Management platform adds value to the capabilities within your CRM by enabling you to create buyer team organigrams and to capture and manage what's important to each contact in the team.



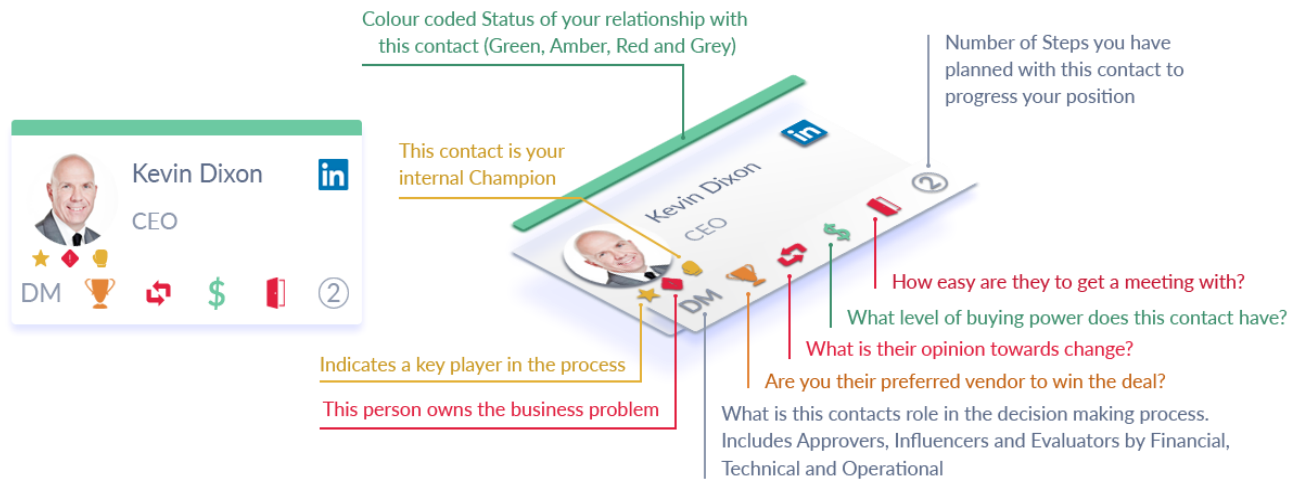
Build profiles on each member of the prospect buyer team:

- ⇒ Plan the business questions you will ask them and capture the answers you receive
- ⇒ The Gain or Pain that the change will lead to for each contact
- ⇒ The objections they raise and answers you provide

- ⇒ Their challenges, criteria, concerns and priorities
- ⇒ The Insights you have provided to help them
- ⇒ The Steps you have planned (or assigned) to advance your position and relationship with each contact.

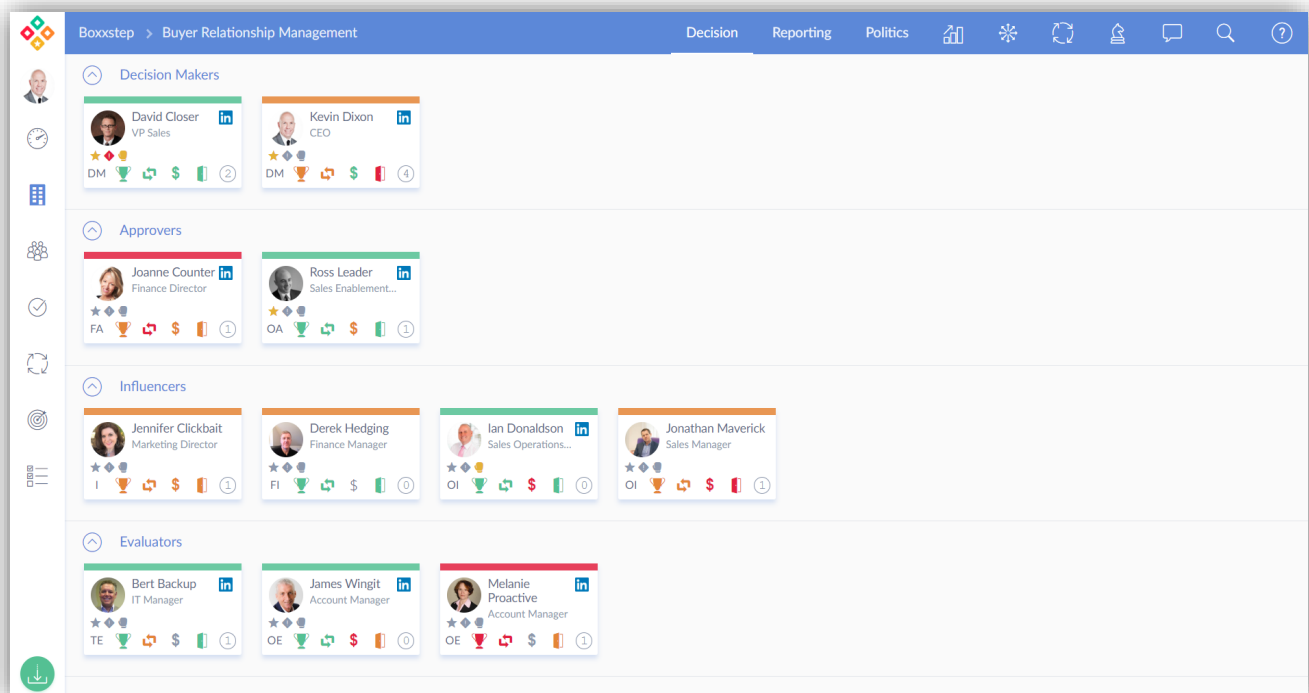
Contact Cards

As you build contact profiles Boxxstep creates them as contact cards that are displayed within our organigrams.



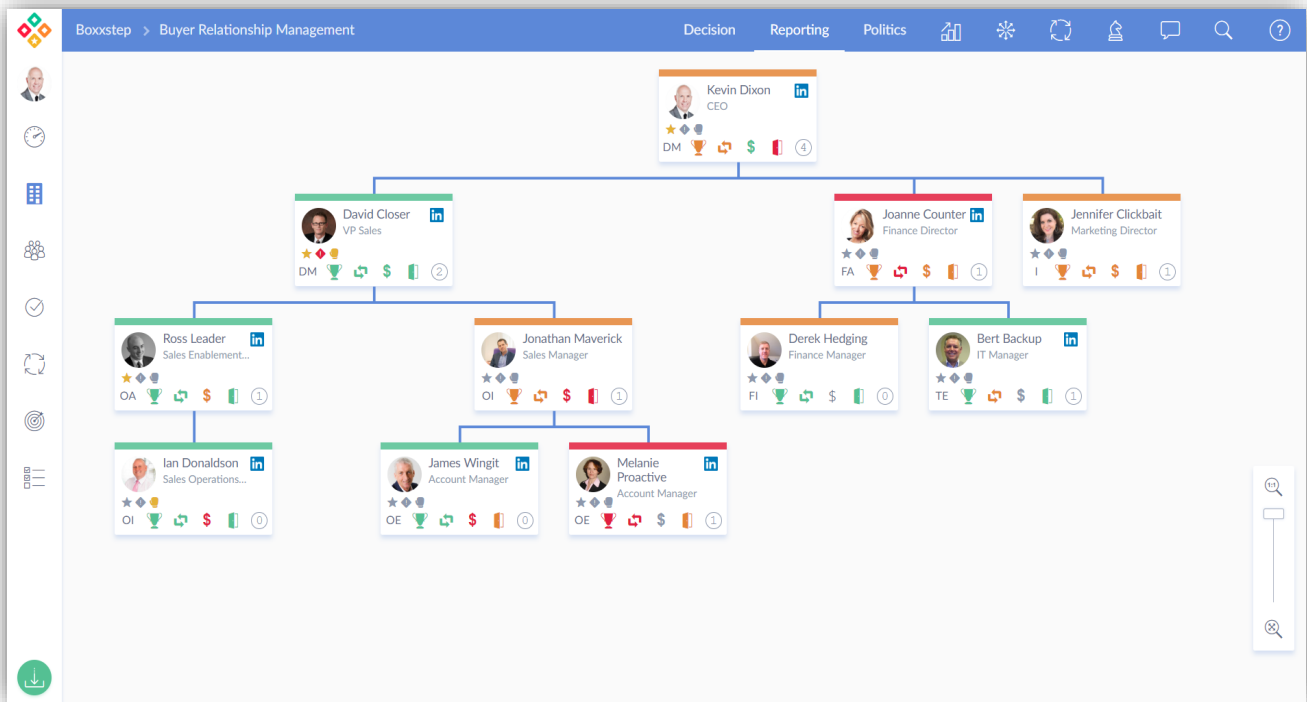
Decision Roles

View the buyer team by their roles—Decision Makers, Approvers, Influencers or Evaluators. Sub categorise them by Technical, Financial or Operational.



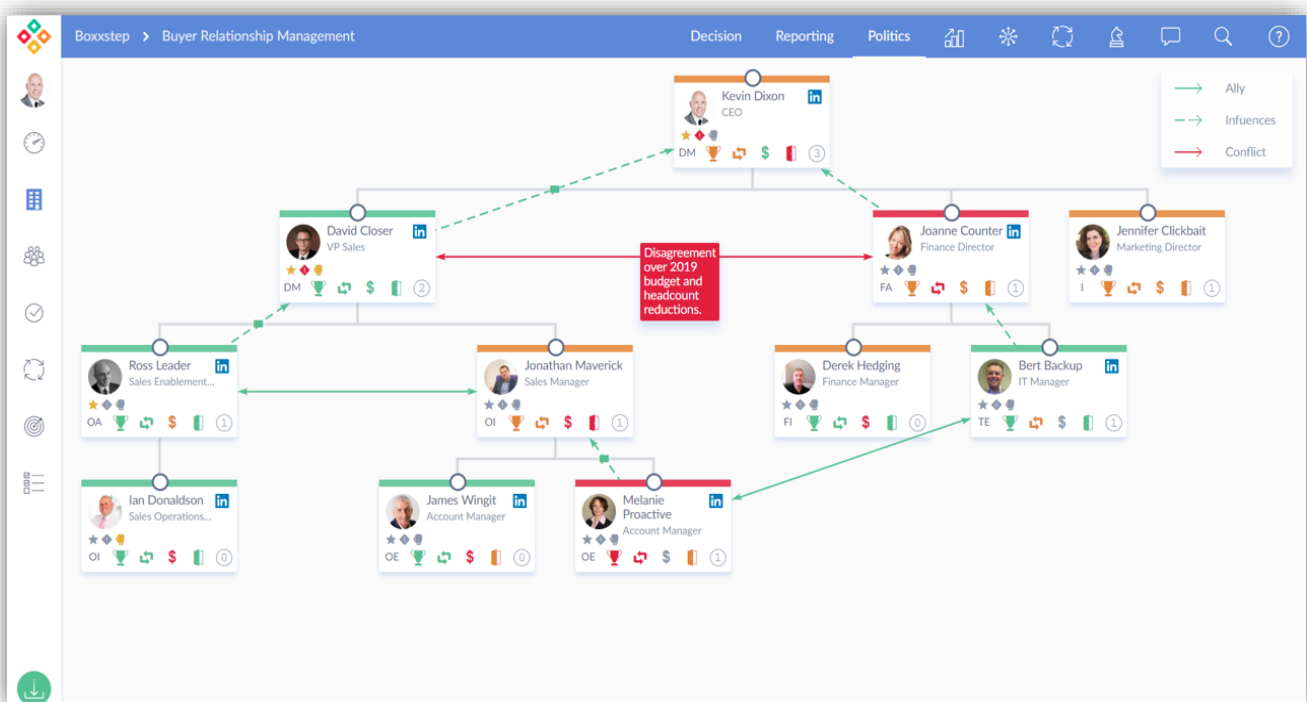
Reporting Lines

The buyer teams will be displayed by reporting line so you can visualise your route to achieve your goals.



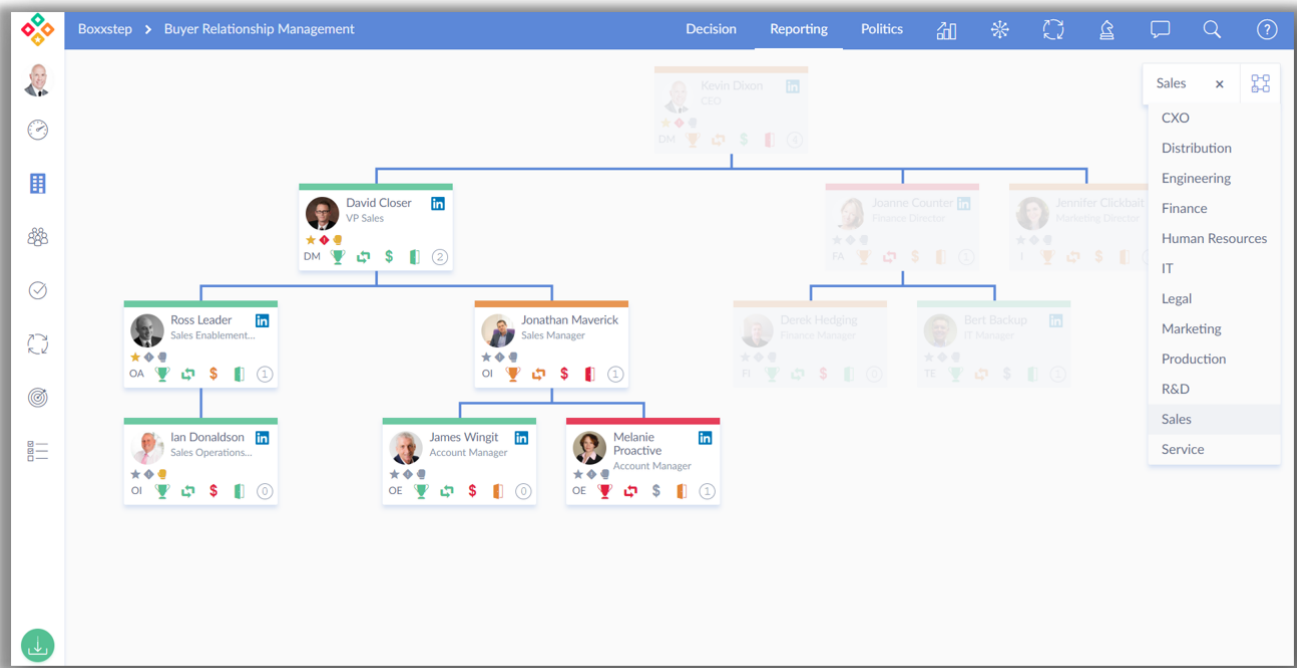
Internal Politics

Internal politics contributes to around 25% of opportunities resulting in a 'no decision' outcome because the buyer team isn't aligned and doesn't reach consensus. As you gather information about the team dynamics add it to Boxstep to provide you with the clarity on what you need to do and with whom to minimise the risks. Add notes on each dynamic to show the reason.



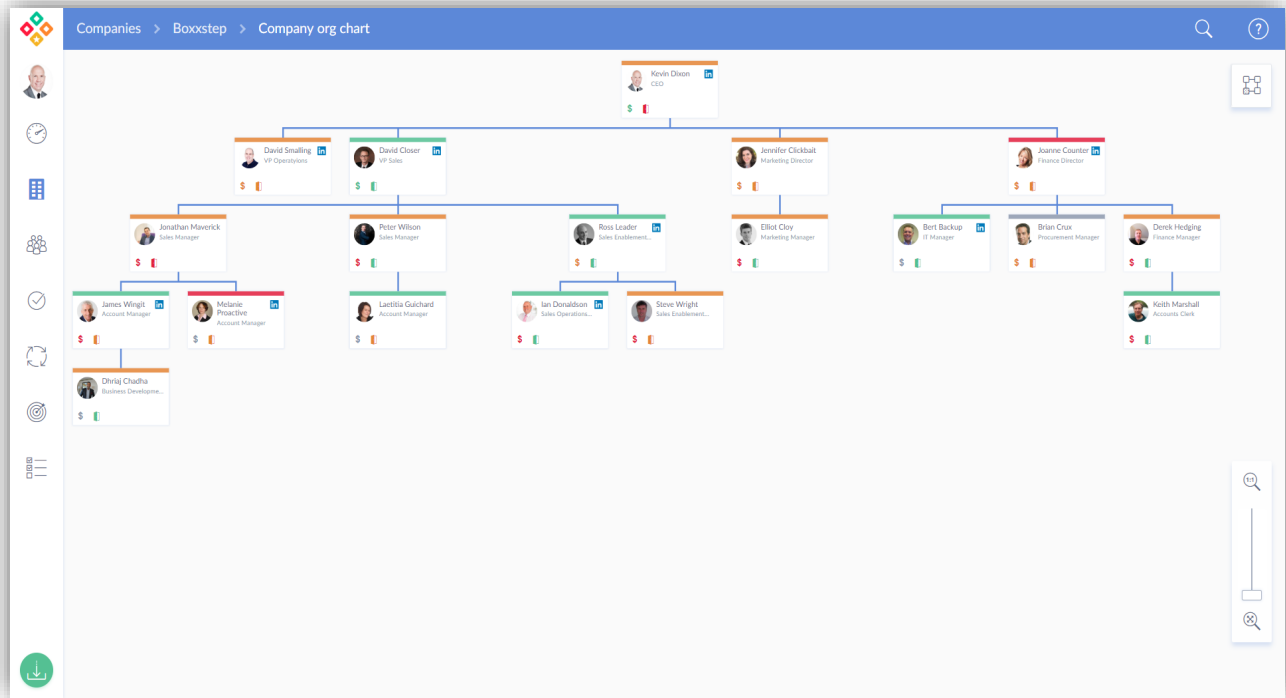
Buyer team by function

If you're working with large buyer teams you can visualise contacts by their functional role



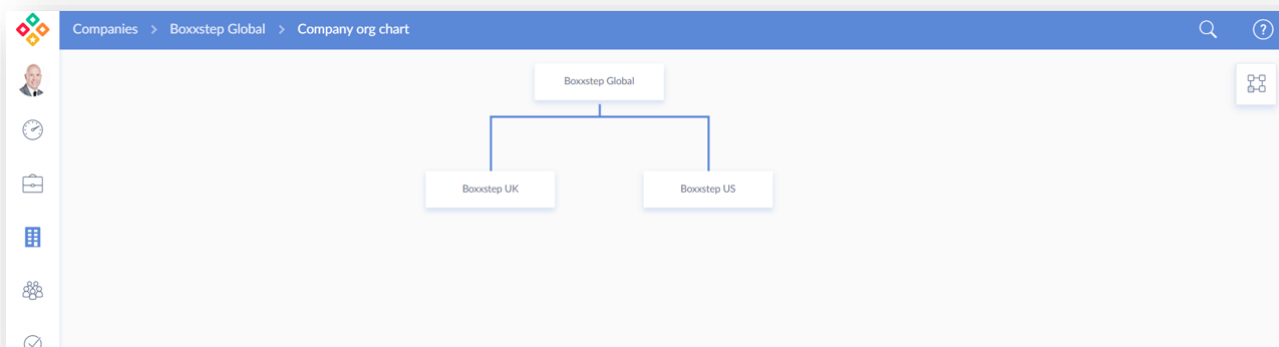
Company view

You can view all contacts across all opportunities with a prospect in a single view.

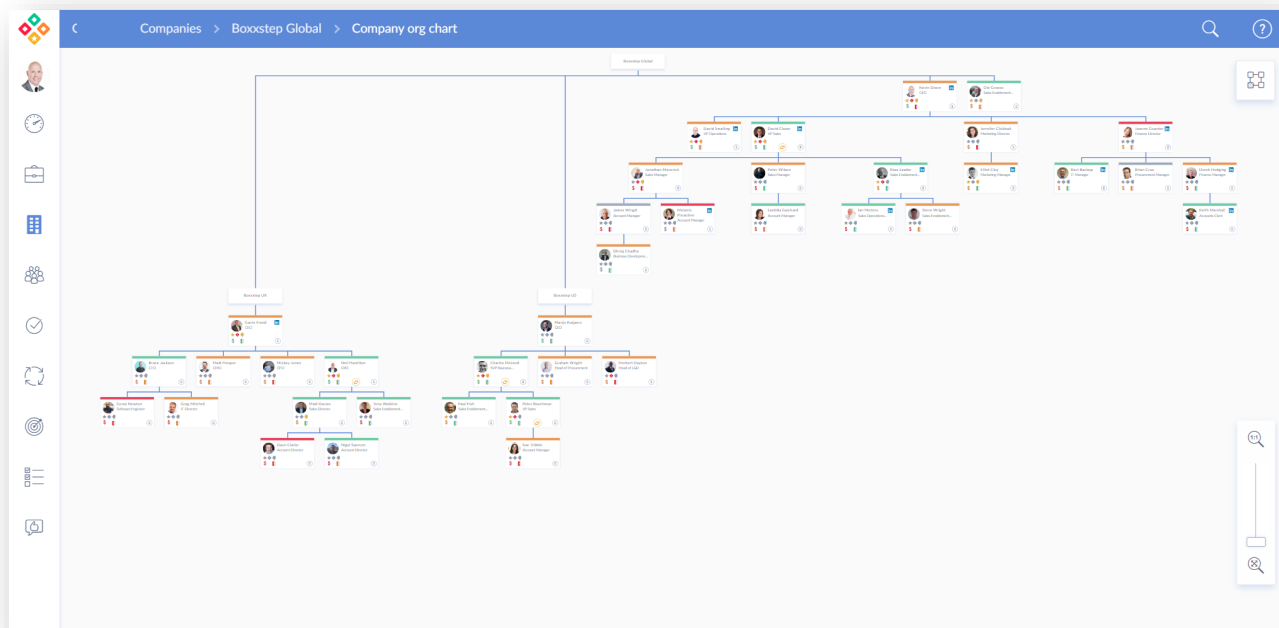


Global Accounts

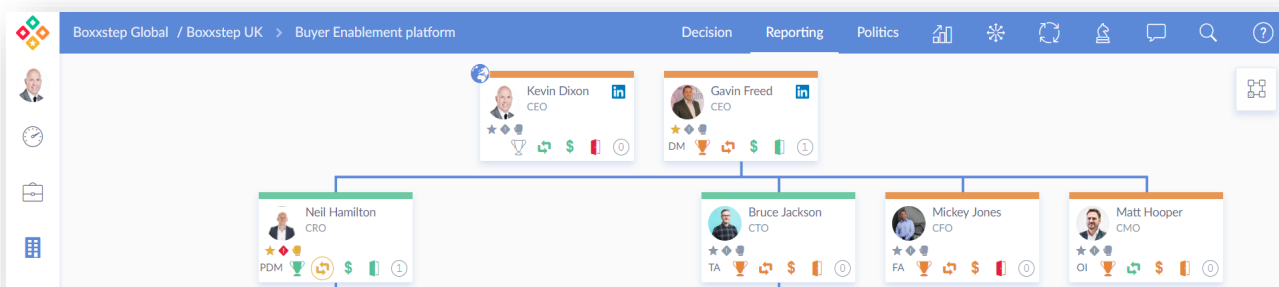
If you manage global or major accounts with complex business unit structures or groups of companies you can use the Parent company capabilities within Boxxstep to visualise the individual accounts and contacts in a single organigram.



You can view all contacts across all opportunities with a prospect in a single view. Click individual or all companies to display the contacts you wish to view.

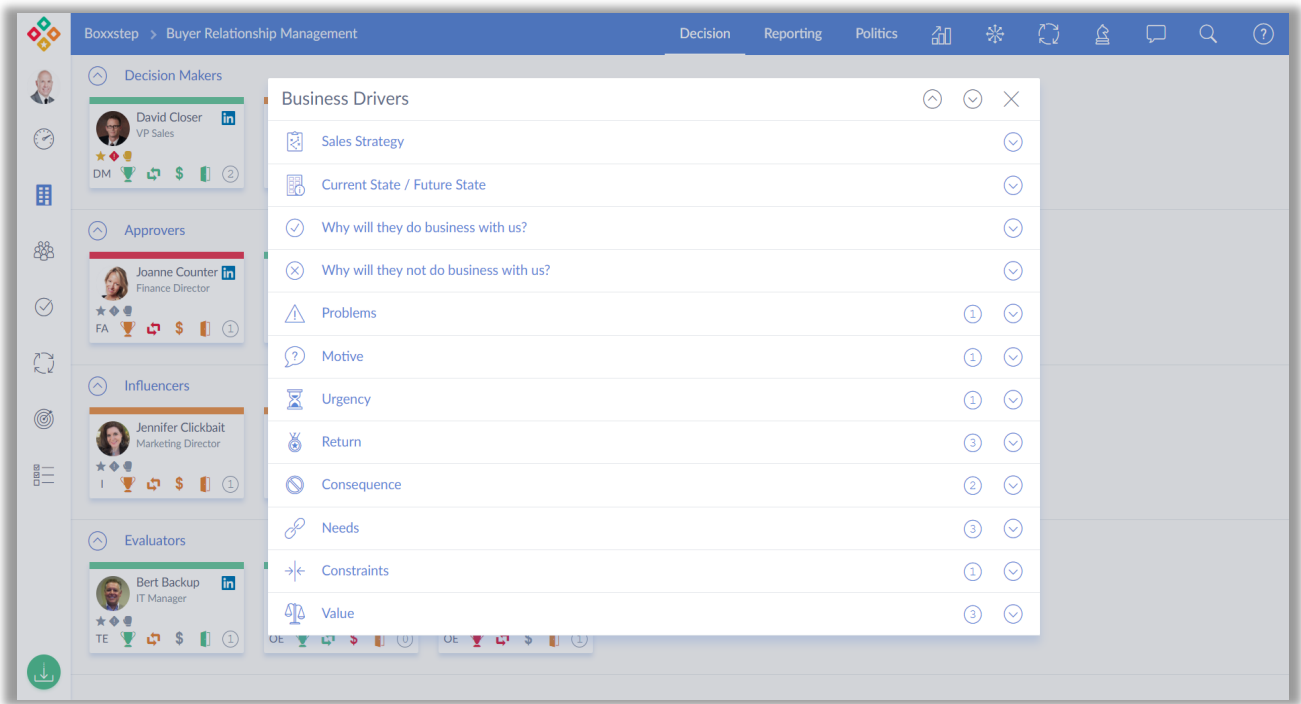


Global contacts are often involved in local company opportunities, you can add them to the opportunity organigrams and they'll be identified with a Global icon in the top left corner.



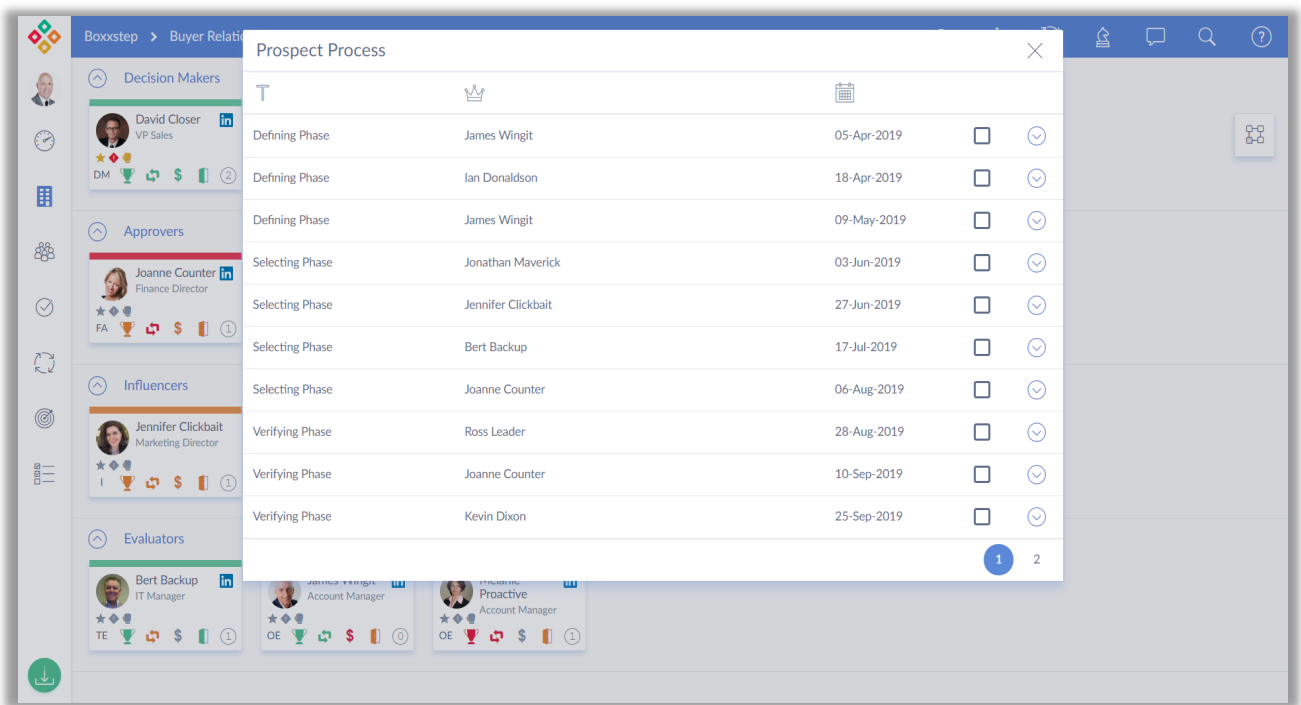
Business drivers

Capture and manage the real business issues that matter for the prospect such as the business problems they’re looking to solve, including the symptoms, who’s affected, the impact and the root cause. It’s vital to understand this level of information and to capture it in-house.



Buying process

The instinct of most salespeople is to focus on the decision date, it’s what they need to forecast the opportunity internally. However, most opportunities fail during the process because the buyer team isn't aligned and doesn't reach consensus. Members of the buyer team rely on the advice and help of sellers to navigate this process with the right insights at the right time. Capture and manage the prospects process as it develops.



SWOT/RAID forms

For major opportunities you can create SWOT or RAID forms to assess your position within the account.

SWOT - Strengths, Weakness, Opportunities and Threats

RAID - Risks, Assumptions, Issues and Dependencies

The screenshot shows the Boxxstep SWOT form interface. The top navigation bar includes 'Boxxstep > Buyer Relationship Management > SWOT'. The left sidebar contains various icons for navigation. The main content area is divided into four sections: Strengths, Weaknesses, Opportunities, and Threats. Each section has a list of text boxes for input. The Strengths section includes: 'Buyer centric approach to opportunities will improve results', 'Improve sales qualifications and forecasting', 'Retains vital buyer team information in-house', 'Improves internal deal reviews and QBR's', and 'Low cost, low risk'. The Weaknesses section includes: 'They have a CRM that we don't currently integrate with', 'They aren't very disciplined in capturing prospect information', and 'Uncertain if the sales leadership will reinforce buyer focused process'. The Opportunities section includes: 'To integrate with their existing CRM solution', 'To widen usage of the solution beyond sales team members for opportunity collaboration', and 'To add buyer team Win/Loss feedback analysis'. The Threats section includes: 'They may not recognise the growing issue of no decision outcomes', 'They may see this as admin rather than being buyer centric', and 'They believe that they can achieve this with custom fields in their CRM'. At the bottom right, there are 'CANCEL' and 'DONE' buttons.

Opportunity Qualification

Boxxstep has an inbuilt qualification tool that will show how well qualified the opportunity is based on the prospect information that has been added to the platform.

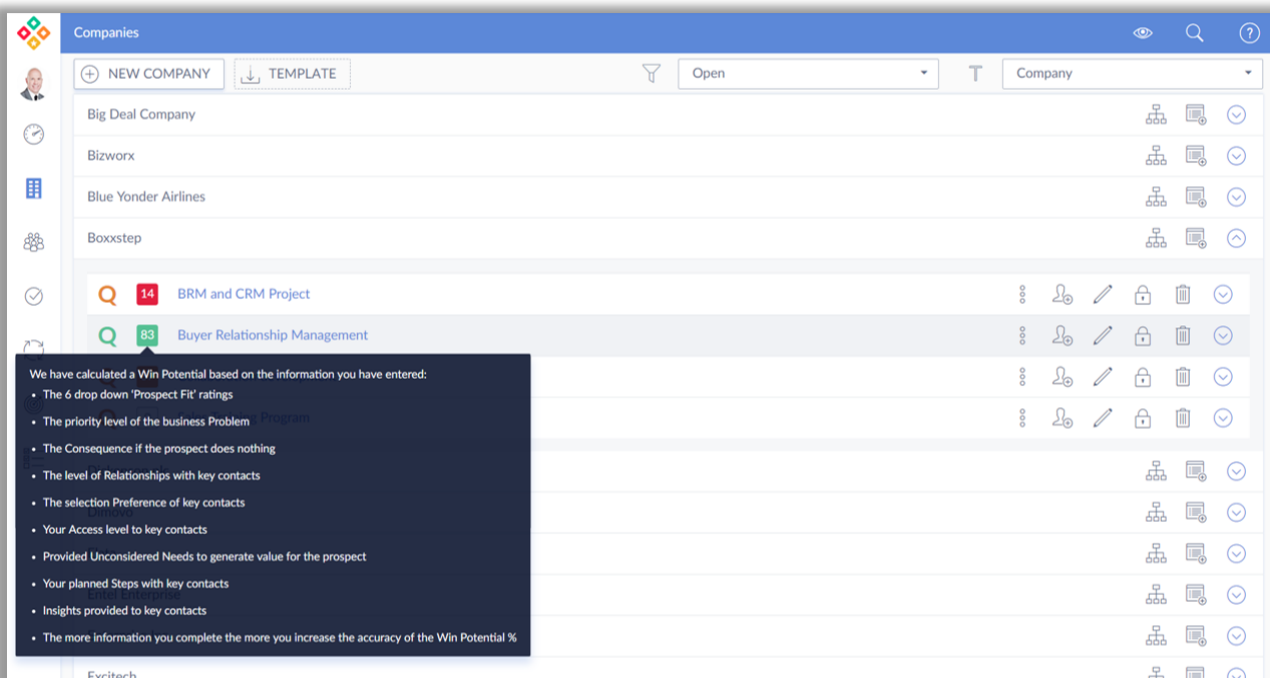
The screenshot shows the Boxxstep Companies list interface. The top navigation bar includes 'Companies'. The left sidebar contains various icons for navigation. The main content area displays a list of companies: 'Big Deal Company', 'Bizworx', 'Blue Yonder Airlines', and 'Boxxstep'. Below the company list, there are two project entries: 'BRM and CRM Project' (14 items) and 'Buyer Relationship Management' (83 items). A tooltip is displayed over the 'Buyer Relationship Management' project, listing the following qualification criteria:

- Your proposition fit with their business, technical and financial needs
- Your position to be able to do business with this prospect
- Identifying a medium or high priority problem
- Understanding the business impact of this problem
- If the opportunity is medium or high urgency
- If the consequences of doing nothing have medium or high impact
- Identification of the return or outcomes that the prospect wants to achieve
- Understanding their buying process and entering a minimum of 5 buying stages
- Identifying and engaging with a Key Player where you have a neutral or good relationship

The bottom of the list shows 'Enterprise Inc.' and 'Excitech'.

Opportunity Win Potential

Your CRM will determine a probability % of winning the opportunity based on the sales stage within your sales process. To add further insight Boxxstep has an inbuilt win potential tool that will estimate a win potential % from the buyers perspective. The more information about the prospect the more accurate the calculation.

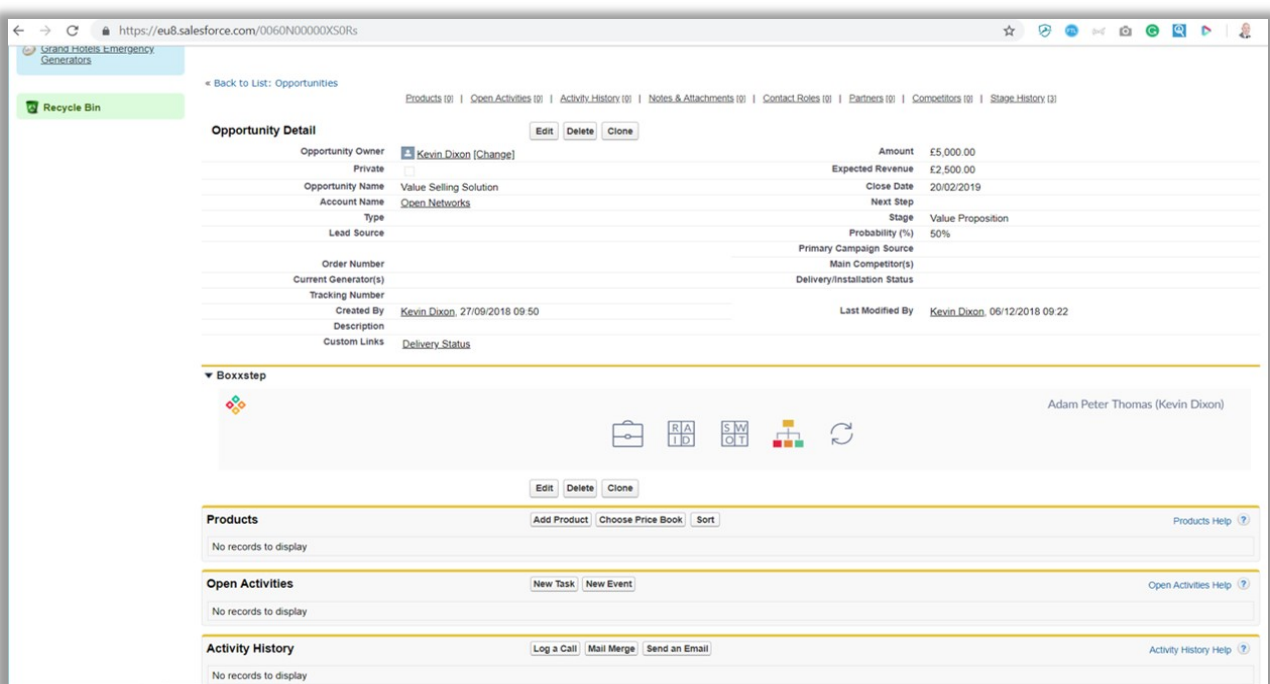


The screenshot shows the Boxxstep 'Companies' interface. At the top, there are buttons for 'NEW COMPANY' and 'TEMPLATE', and a search bar. Below this is a list of companies: Big Deal Company, Bizworx, Blue Yonder Airlines, and Boxxstep. The 'Buyer Relationship Management' project is highlighted, showing a score of 83. A pop-up window provides a detailed breakdown of the Win Potential calculation:

- We have calculated a Win Potential based on the information you have entered:
- The 6 drop down 'Prospect Fit' ratings
- The priority level of the business Problem Program
- The Consequence if the prospect does nothing
- The level of Relationships with key contacts
- The selection Preference of key contacts
- Your Access level to key contacts
- Provided Unconsidered Needs to generate value for the prospect
- Your planned Steps with key contacts
- Insights provided to key contacts
- The more information you complete the more you increase the accuracy of the Win Potential %

CRM Integration

Integrate Boxxstep with your CRM and access Boxxstep information from within the opportunities



The screenshot shows the Salesforce CRM interface for the 'Grand Hotels Emergency Generators' opportunity. The 'Opportunity Detail' section includes fields for Opportunity Owner (Kevin Dixon), Amount (£5,000.00), Expected Revenue (£2,500.00), Close Date (20/02/2019), and various other details. Below the details are sections for Boxxstep, Products, Open Activities, and Activity History.

Opportunity Detail

Field	Value
Opportunity Owner	Kevin Dixon [Change]
Amount	£5,000.00
Expected Revenue	£2,500.00
Close Date	20/02/2019
Next Step	Value Proposition
Stage	50%
Probability (%)	50%
Primary Campaign Source	
Main Competitor(s)	
Delivery/Installation Status	
Order Number	
Current Generator(s)	
Tracking Number	
Created By	Kevin Dixon, 27/09/2018 09:50
Description	
Custom Links	Delivery Status
Last Modified By	Kevin Dixon, 06/12/2018 09:22

Boxxstep

Adam Peter Thomas (Kevin Dixon)

Products

No records to display

Open Activities

No records to display

Activity History

No records to display


Win-Loss Analysis

One of the best ways to improve as a sales organisation is to understand what your prospects think about your sales performance, the only perspective that truly matters is the buyers.

Win, lose or no-decision getting feedback is an opportunity to show that you're an organisation driving a buyer-centric approach and that their opinions matter.

Companies make consensus and committee based decisions so why not get consensus based feedback. Ask question to different buyer personas and functions, the more you ask and the wider you ask the greater the perspectives you gather.

The feedback below is a standard sales performance review that is sent to the selected buyer committee contacts via a digital link. They can grade individual aspects of the sales engagement with you and also show how important it was to them.



Feedback for Buyer Relationship Management at Boxxstep

N/A

Poor

Average

Good

Excellent

How important was this for you?

Problems

How well did our team understand or identify your business problems?

Comment

Needs

How well do you think our sales team understood your business needs?

Comment

Outcomes

How well did our sales team understand the business outcomes you were trying to achieve?

Comment

Engage

How well did our sales team engage across everyone involved in the process for Boxxstep UK?

Comment

Criteria

How well did our team address and meet your stated criteria during the process?

Comment

Process

How well do you think our sales team understood and helped during your process?

Comment

Factors

How well do you think our sales team understood what was important to you individually as part of the process?

Comment

Subject Matter

How would you rate the subject matter expertise of our sales representative?

Comment

Insights

What level of useful business insights did our sales team provide that helped you during the process?

Comment

Value

What level of business value did our sales team provide during the process?

Comment

Meetings

How would you rate the quality of the meetings with our sales team?

Comment

Presentations

How would you rate the quality and content of our presentations or demonstrations?

Comment

Proposals

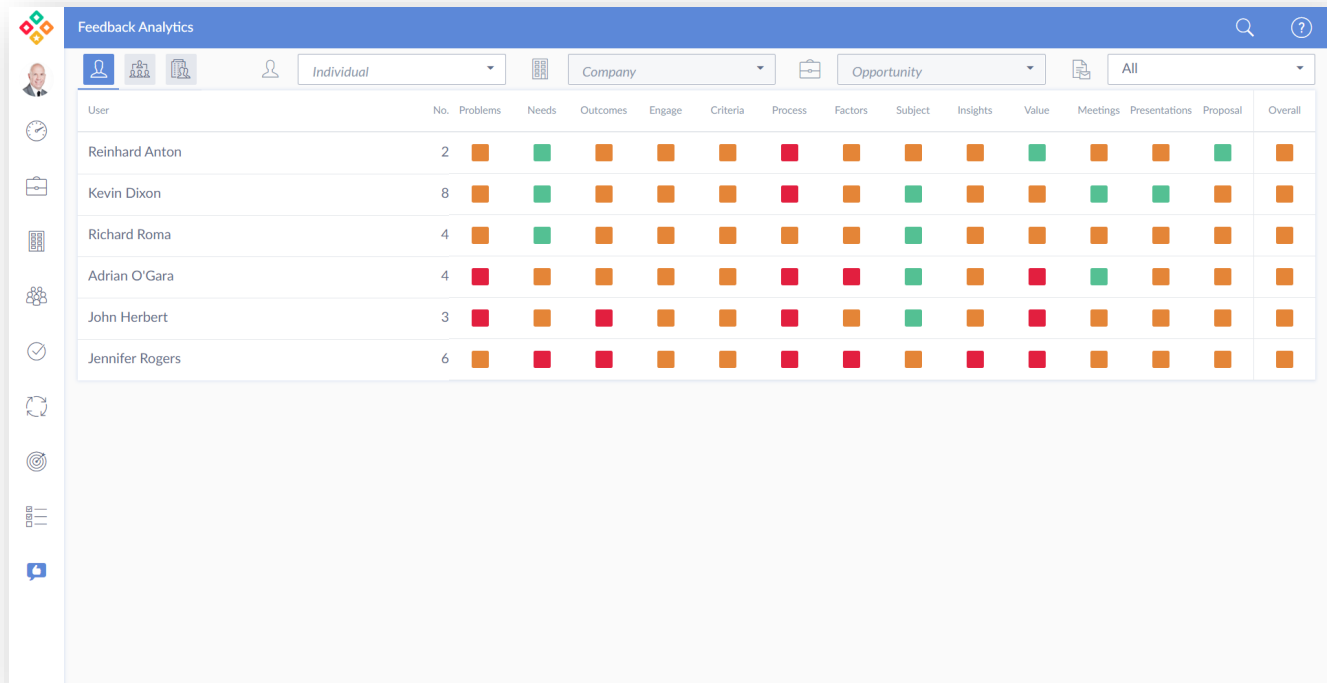
How would you rate the quality and content of our proposal and supporting information?

Comment

SUBMIT

The more feedback responses you receive the more useful the data is to enable you to focus on individual coaching and training plans rather than a one size fits all approach. Looking at this from the buyers perspective enables you to evolve your sales team into buyer-centric sales professionals , a prerequisite for sales growth in todays buyer driven B2B markets.

All of the feedback is displayed for each person, team or company wide based on the average score across all of the buyer-centric questions within the feedback form.



The screenshot shows a 'Feedback Analytics' dashboard. It features a sidebar with navigation icons and a main table. The table has columns for 'User', 'No.', 'Problems', 'Needs', 'Outcomes', 'Engage', 'Criteria', 'Process', 'Factors', 'Subject', 'Insights', 'Value', 'Meetings', 'Presentations', 'Proposal', and 'Overall'. Each cell in the table contains a colored square representing a score or status.

User	No.	Problems	Needs	Outcomes	Engage	Criteria	Process	Factors	Subject	Insights	Value	Meetings	Presentations	Proposal	Overall
Reinhard Anton	2	Orange	Green	Orange	Orange	Orange	Red	Orange	Orange	Orange	Green	Orange	Orange	Green	Orange
Kevin Dixon	8	Orange	Green	Orange	Orange	Orange	Red	Orange	Green	Orange	Orange	Green	Green	Orange	Orange
Richard Roma	4	Orange	Green	Orange	Orange	Orange	Orange	Orange	Green	Orange	Orange	Orange	Orange	Orange	Orange
Adrian O'Gara	4	Red	Orange	Orange	Orange	Orange	Red	Red	Green	Orange	Red	Green	Orange	Orange	Orange
John Herbert	3	Red	Orange	Red	Orange	Orange	Red	Orange	Green	Orange	Red	Orange	Orange	Orange	Orange
Jennifer Rogers	6	Orange	Red	Red	Orange	Orange	Red	Red	Orange	Red	Red	Orange	Orange	Orange	Orange

Our buyer review capabilities will continue to evolve and we'll be adding the ability for users to customise the questionnaires to their specific needs. Feedback requests can also be created on general company performance, one example could be after a successful win decision where you gather responses from the relevant contacts to understand how successful the project was and did you deliver against expectations and needs?

We'll also be adding more analytics to understand how your teams sales performance varies across a period of time to see if their averages vary, hopefully positively!



Contact us – sales@boxxstep.com



Book a demo - bookme.name/boxxstep