

Advance
Get Ahead

SCOTSMAN® Commitment Manager for your CRM

Effective qualification can double
your selling time



*CRM systems help you do things right
SCOTSMAN® helps you do the right things*

Part of Advance's Commitment Based Selling Solution Suite

SCOTSMAN® Commitment Manager

Unlock much more value from your CRM system



How satisfied are you with the predictability, reliability and consistency of your business results?

Do you find that you're always wrestling with the challenge of accurate sales forecasting?

Impact

Poor forecasting can have a negative impact that affects every part of the business, leading to a lack of confidence in the sales operation, stress and a feeling of being out of control.

Problem Cause

- *Business and sales leaders often measure the wrong things.*
- *The behaviours, attitude and skill levels of sales people are out of line with what's required.*
- *CRM systems don't always highlight problems early so you can manage your way around them.*

Solution

Sales leaders need to make the most of their resources – people, process and systems:

- *Manage the sales process, ensuring maximum efficiency and effectiveness.*
- *Coach and develop their people and create a professional sales culture.*
- *Ensure that the CRM, in particular, actively engages and supports the winning of business.*

They will enhance their control over the business and engender confidence in the sales operation.



Ask sales people what resource they lack most and they'll tell you it's time.

Ask them what eats up their time, and they'll tell you it's admin, travel, meetings.

It's none of these.



The biggest waste of sales people's time is the deals they lose.

Companies regularly lose 70% of their selling time, winning only 3 out of every 10 sales by not qualifying sales opportunities well enough.

The best sales people win 7 or 8 out of 10.

Why?

- *They use a strict set of criteria to choose which opportunities they want to chase.*
- *They refuse to bid on unwinnable sales.*
- *Then they use the time saved on deals they can't win to spend more time on those they can, and*
- *They devote some of this time to prospecting for new opportunities.*

They double their selling and prospecting time, all devoted to winning the winnable.

They have a clear picture of what they want to do and what they want their prospects to do.

They win the biggest deals, their forecasts are the most accurate and they instil confidence in their management.

They have a high quality pipeline, and enjoy the luxury of choice – they can pick and choose which business they chase.

In reality, there are only two reasons why you lose a sale – either you were outsold, or you shouldn't have been there in the first place.

Concentrating on Pursuing the Winnable Business Opportunities

Commitment Based Selling

A commitment is what the prospect does for you to move the sale forward.

There's a gap in the way that many organisations manage their sales. They focus on what the sales person is doing. They don't focus on measuring and managing what the prospect is doing to progress the sale.



They measure the quantity of activity, but not the quality of activity.

There needs to be a link between the organisation and the prospect. This link is formed by defining a sale as a structure of events measured by the quality of commitments achieved – a roadmap.



The roadmap defines:

- *Events that you plan to have with the prospect*
- *Who will attend from both sides, covering practical and political considerations*
- *Agendas – topics to be discussed*
- *Commitments – what the prospect will do for you at the end of each event.*

This makes sure that the right people are in the right events at the right time.

With a roadmap you won't get lost in the 'fog of the sale! You know how well the sale is progressing, and are not relying on ratios and probabilities.

How do you measure and manage the quality of the sale?

Measurement becomes a binary process, Yes or No. The prospect either did or didn't commit to something you wanted them to do for you. You can start to measure the quality of the sale with a simple, but very powerful quality check. This makes inspection easy. Sales become more science than art.

You need to be able to qualify the sale and then plan what commitments you need.

SCOTSMAN® Commitment Manager Delivers Business Value

SCOTSMAN® in Progress – Dashboard

SCOTSMAN Dashboard

Opportunity Name Alpha Server Cluster Account Name Corp International Inc

[Scotsman Report](#)

Event Tracker

Action	Event Name	Status	Event Date	Agenda Items	Commitments	Action	Review Date	S	C	O	T	S	M	A	N	Score
Edit Del	Kick Off Meeting	Planned	30/09/2015	3	1	Edit Del	15 / 09 / 2015	0	0	0	10	0	1	0	0	11
Edit Del	Demo	Unplanned		0	0											
Edit Del	Time Table Meeting	Unplanned		0	0											

[Add Event](#) [Order Events](#) [Add Review](#)

Open Commitments **Event Name** **Reassign** **Action** **Unidentified Roles** **Attendees From** **Showstoppers** **Unknown Items**

Item	Reason	Status
Time	Customer requires project to be completed in 3 months and will take us 6	Unactioned

[Add Role](#)

Advance now provides **SCOTSMAN®** Commitment Manager, a plug in for Salesforce.com and Microsoft Dynamics CRM systems. The approach has been used by tens of thousands of sales people across the globe to help improve their forecasting accuracy and their productivity.

It comes in three parts:

- *SCOTSMAN® qualification*
- *An event and commitment planner and tracker*
- *Online training – accessible from your CRM – that supports its use and help sales people adopt the appropriate behaviours at different stages throughout the sale.*

SCOTSMAN® Commitment Manager gives you a complete solution – the tools and training (on Qualification and Commitment Based Selling) that develop the requisite behaviours and skills and accelerate individuals and teams towards joining the best of the best.

Qualification is in Two Parts

First, it helps you test the temperature of the sale by checking the opportunity against its eight criteria. Secondly, it helps you work out what meetings and other actions are needed to win the opportunity.

SCOTSMAN® – Qualification in Progress

The screenshot shows a software interface for 'Scotsman Review'. At the top, there are fields for 'Comments' and 'Review Date' (15/09/20). A 'Scotsman Review' section contains a table with columns 'Element' and 'Score'. The table lists five criteria: Solution, Competition, Originality, Time, and Size. Each row has a score dropdown menu and a text input field. A 'Scotsman Help Solution' pop-up window is open, displaying a list of questions: 'Have they told us that they like our solution?', 'Are they happy with any new/leading edge solution?', 'Do we meet their decision criteria? Are we compliant?', 'Does the prospect accept our references in this area?', 'Are they already our customers in this area?', 'Do we have our own company's approval to bid?', and 'Do they accept our contracts? Or do we accept theirs?'. A 'Close' button is at the bottom of the pop-up.

Element	Score
Solution	0 - No Further Work Nt
Competition	0 - No Further Work Nt
Originality	0 - No Further Work Nt
Time	10 - Potential Showstc
Size	0 - No Further Work Nt

SCOTSMAN®'s Qualification Criteria

The eight criteria test the temperature of the sale and help you plan how to win a winnable sale or how to quit if it looks unwinnable. And if you're going to lose, lose quickly!

The criteria are:

1. Solution

Do we have a good solution to their problem?

2. Competition

*How are we positioned competitively? Is it a fair fight?
Are there any biases?*

3. Originality

Do we have any genuine USPs? Have we created the need for any of them?

4. Timescale

Can we meet their timescales? Both for a decision and for implementation?

5. Size

Is the sale big enough, too big? Does it justify the likely resource required? Do we have the resources?

6. Money

Is there a budget? Is it realistic? Can we do it within their budget?

7. Authority

Are we talking to the decision makers? Do we understand the decision making process?

8. Need

Is there a real need? Are they serious? Are they actually going to make a decision?

SCOTSMAN® uses a scoring system that records whether or not you need to do more work, have a potential showstopper that needs to be dealt with or are short of data and need to plug the gaps.

Planning the Way Forward for the Sale

The real purpose of qualification is to identify the sales meetings required to be first out of the race or first past the winning post.

You plan the events and actions you need, to deal with the issues exposed by the criteria check.

SCOTSMAN® – Progress Review

Event Name Kick Off Meeting Account Name Corp International Inc Status Complete

Stage of Sale Qualification Related SF Event [Kick Off Meeting](#) [Delete SF Event](#)

▼ **Agendas and Commitments**

Action	Agenda Item	Type	Action	Commitment	Given
Edit Del	Understand budget	Qualification		Publish date for demo	Yes
Edit Del	Discuss Customer Issues	Need Creation		Publish new timescale	--None--
Edit Del	Show case Studies	Evidence			Yes
Edit Del	Discuss Timescales	Qualification			No
					Open
					No Longer Needed

[New Agenda](#) [Update](#)

SCOTSMAN® tells you if they are serious about the project.

Commitments tell you that they are serious about you and your solution.

SCOTSMAN® Commitment Manager:

- Helps sales people plan and win, or quit, opportunities much more effectively
- Increases adoption of your CRM by ensuring your sales people feel they get full value from it
- Improves the return on your CRM investment
- Informs communication between sales people and sales management, making for better 1:1s, deal plans and reviews.

Sales leaders and managers have the tools to communicate more effectively with the board to explain exactly, with factual support, where the main issues and challenges are, thus improving forecasting and predictability.



SCOTSMAN® Commitment Manager for your CRM

Embed the Power of Commitment Based Selling

Sales leaders, sales managers and sales professionals begin to inspect the right things.

You start to focus on quality prospects, win them in a controlled way, develop more confidence and achieve more targets.

The results:

- *Better forecasting and predictability*
- *Higher productivity*
- *More lead generation*
- *More selling time*
- *Ability to throw out bad or unwinnable opportunities and focus on the good ones*
- *Enhanced sales skills and behaviours*

Most importantly 'best of the best' is no longer based on intuition. It is embedded into the culture and the processes of the organisation with the purpose of replicating top performers who:

- *Win more sales*
- *Win bigger sales*
- *Win more profitable sales*
- *Win them more quickly*

Predictability becomes the norm and forecasts are met more frequently.

The business leaders are in control, so the business is under control.

Qualifying sales is not about intuition.

Selling is a process.

Only if it's not a process is it a problem.

Do you want your sales leaders, managers and teams equipped to emulate, develop and ultimately join the ranks of the best?

[Like to Learn More?](#)

We'd be delighted to explain more about how **SCOTSMAN®** Commitment Manager can enhance the value of your CRM and deliver the business benefits we've described.

Contact Us Now

[We look forward to hearing from you.](#)



0845 125 9098



customerservices@advancetm.com



www.commitmentbasedselling.com



[linkedin.com/company/advanced-selling-skills-academy](https://www.linkedin.com/company/advanced-selling-skills-academy)



twitter.com/SalesEtraining



[facebook.com/MobileEtraining](https://www.facebook.com/MobileEtraining)