Sales Process Flow Chart

Developing 'Suspects'

Marketing Prepares Business Development Campaigns:
* Advertising
Press Releases
* Trade Shows
* Direct Communication
* User Conferences

Sales Manager (SM) Makes Status Check Phone Calls
* Quarterly to Selected Customers
* Monthly to Small Distributors
* Weekly to Large Distributors

Significant Items Recorded in Goldmine

Marketing Provides Distributors with
* Mailshot
* Cold Call Materials

Customer Responses:
* Bingo Cards
* Email
* Phone Call
* Business Card

SM Visits to Distributors:
(Quarterly - large distributors; semi-annually – small distributors)
* Review Forecast
* Review Key Prospects
* Joint Customer Visits
* Blue Sheet Review
* Review sales / marcoms needs
* Provide sales training

Significant Items Recorded in Goldmine

SalesAdmin:
Log Info in Goldmine
Advise SM
Respond to Customer:
* Literature
* Email
* Phone call

Application Engineer (AE) Visits to Distributors
(as agreed with SM):
Joint Customer Visits
Provide Technical Training

Customer Interest from:
* Marketing Campaign
* Distributor Contacts
* SE Phone Calls
* Product Support Contacts
* Prior Contact with Company

Developing Prospects

Sales Admin:
Logs Info in Goldmine
Advises SM

SM Qualifies the Prospect
(via direct phone or via distributor)
* Prospect's business
* Buying concept
* Application
* Budget
* Timing
* Buying influences
* Product needs
* Non-standard requirements
(Non-standard requirements & opportunities >£250k referred to Engineering)

Engineering Review
* Possible phone call to or visit with customer
* Provide advice to SM

Info Logged in Goldmine

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┌──────────────┐                          ┌──────────────┐
│ Info Logged  │                          │ Info Logged  │
│ In Goldmine  │                          │ in Goldmine  │
└──────────────┴─────────────────┐        └──────────────┴──────────────────┐
│     AE May Telephone           │        │   SM May Visit Customer          │
│         Customer               │────────│ (if opportunity is large or       │
│ * To discuss technical issues  │        │        strategic)                 │
│ * Resolve open issues          │        │ * To build the Relationship       │
│ * Advise the SM                │        │ * Continue the Qualification      │
│                                │        │        Process                    │
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AE May Telephone Customer
* To discuss technical issues
* Resolve open issues
* Advise the SM

SM May Visit Customer
(if opportunity is large or strategic)
* To build the Relationship
* Continue the Qualification Process

AE May Visit Customer
(as requested by SM to qualify the customer technically):
* Discuss application
* Contact buying influences
* Discuss product performance
* Present Spirent solution
* Differentiate Spirent
* Overcome technical objections

Info Logged In Goldmine

Customer Requests Proposal & Quote

Sales Admin
* Prepares QPA
* Obtains Approvals

SM
* Defines Quote
* Defines Proposal
* Initiates QPA (if applicable)

Filed in Goldmine

Sales Admin Prepares Quote

Engineering Provide Technical Assistance (if req'd)

Filed in Goldmine

AE Prepares Technical Proposal (with Engineering, if req'd)

SM
Reviews Quote & Proposal
Attaches Electronic Signature
Transmits to Customer

Closing the Opportunity

Logged in Goldmine

Follow-up Phone Call(s) or Visit by SM (or via distributor)
* Review Proposal & Quote
* Needs confirmation
* Contact buying influences
* Confirm timing
* Differentiate Spirent
* Overcome objections

AE Customer Contact to Resolve Technical Issues

Customer Requires Formal Contract:
MD involved in Negotiation & Approval

Purchase Order or Signed Contract Received

Sales Admin obtains User Customer details & enters information in HEAT

Begin Contract Review

Sales Order Follow-up

Sales Admin Acknowledges Order

Sales Admin
* Provide soft copy of Welcome Letter to Production. Letter includes statement of thanks, our contact details, website access information, SM electronic signature

All other Orders

Sales Admin
* Provide website login & password to SF Customer Support

SF Orders

Production
* Prints Welcome Letter
* Attaches system-specific information
* Includes Letter & attachment in box with product

Production
Includes system-specific information in the box with the product

Sales Admin
(2 weeks after shipment)
* Email to distributor: 'everything received in good order?'
* Reminder to SM, via Goldmine, to contact customer

Except customers served by W. Sales

SM call to distributor or call/visit with customer
(within 2-3 months of shipment)
* 'Is your equipment operating OK?'
* If 'yes' – 'pleased to be of service!'
* If 'no' – initiate corrective action

Except customers served by W. Sales