

Efforts put into competitive research, marketing and PR create opportunities, but without an effective sales process in place, these opportunities can slip away. Open-i Advisors examines current sales cycles and identifies ways to optimize them. Sales cycle engagements include developing strategies for lead communications, CRM workflows, staffing and organizational structure. We can perform a full analysis of the metrics used to measure the success of a sales team, and introduce new methods for tracking activity against existing goals.

Lead Generation

Having an effective strategy for sourcing new sales leads is an important example of sales cycle management. During this stage, we will examine where new customer acquisition strategies take place. We begin by taking a look at how the upgrade cycle is handled, which is an exercise we will return to at the end of the engagement, in order to ensure that a good sales cycle strategy weaves properly into an effective customer lifecycle management process.

Initial Contact

How do you engage potential customers? Do they come to you or do you actively search for opportunities? If you search for them, what methods do you use to engage and are they optimal? We use easy exercises to help give you the metrics that determine answers to these important questions. You can use those tools as your products and services evolve, to ensure that you are always approaching new potential customers with the sharpest, most effective messaging possible.

Identification of Needs

How well are you listening to your customers? Are your products or services matching their needs? Are you maximizing your usefulness? Are you maximizing the revenue potential that the potential customer can bring? In this step, we work to ensure that the way you engage a customer who responds positively to your initial queries is properly handled.

Presentation of Offer

Sometimes this happens online, and the whole process is almost instantaneous. Even then, you need to know that you're effective in demonstrating your value and driving conversion. We help you build metrics to test and ensure you are.

Closing a Sale

How easy is it for people to spend money with you? Test it and see. A poor closing experience can set a bad tone for the rest of the customer engagement. Moreover, you have the potential to lose otherwise converted customers at the last minute. We can assist you in avoiding these pitfalls.

Maximizing the Value of Ongoing Business

A good sales cycle plan evolves into an effective customer lifecycle management plan; both plans should have firm, established metrics for success. A properly onboarded customer has the potential to grow and be a source of new referrals. We can help you explore ways to both increase those odds and track the effectiveness of those efforts.