Sales Process Flow Chart

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

**Marketing Provides Distributors with:**
- * Mailshot
- * Cold Call Materials

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

**Sales Admin:**
- Logs Info in Goldmine
- Advises SM
- Respond to Customer:
  - * Literature
  - * Email
  - * Phone call

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

**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)

**Info Logged in Goldmine**

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

**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**

**Developing ‘Suspects’**

**Developing Prospects**

**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**

**Engineering Review**
- * Possible phone call to or visit with customer
- * Provide advice to SM
SM May Visit Customer (if opportunity is large or strategic)
* To build the Relationship
* Continue the Qualification Process

AE May Telephone Customer
* To discuss technical issues
* Resolve open issues
* Advise the SM

Info Logged In Goldmine

Info Logged In Goldmine

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

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

SALES ADMIN
* Prepares QPA
* Obtains Approvals

Sales Admin Prepares QPA

SALES ADMIN Prepares Quote Filed in Goldmine

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

AE Prepares Technical Assistance (if req’d)

AE Customer Contact to Resolve Technical Issues

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

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

SM Reviews Quote & Proposal
Attaches Electronic Signature
Transmits to Customer

SM*

Sales Admin obtains User Customer details & enters information in HEAT

Customer Requires Formal Contract: MD involved in Negotiation & Approval

MD involved in Negotiation & Approval

Purchase Order or Signed Contract Received

Customer Require
s Formal Contract: MD involved in Negotiation & Approval

Closing the Opportunity
Begin Contract Review

Sales Order Follow-up

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

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

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

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

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

SF Orders

All other Orders

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

Except customers served by W. Sales