

# How to Achieve Predictable, Consistent and Reliable Sales Forecasts

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



**Advance**  
Creators of SCOTSMAN®

Sales Qualification and  
Pipeline Experts

# Foreword

Companies invest in CRM systems and sales training to address the common challenges of predictability, reliability and consistency of sales results, but all too often these investments address symptoms, not root causes.

As a result, the problems continue, and sales management frustrations increase. Our SCOTSMAN® Commitment Manager add-on for CRMs addresses the root causes.

## Our research into root causes showed that:

- Leaders struggle to measure the quality of the sales pipeline
- Sales Leaders measure what the salesperson is doing, not what the customer is doing
- Sales probabilities are frequently inaccurate
- Sales productivity is often less than desired
- Companies invest in CRMs and training but fail to deliver a ROI
- Companies lack a common sale language that addresses fuzzy sales objectives.

## By addressing the root causes to fix the symptoms we can demonstrate:

- Improved forecasting and predictability
- Improved sales productivity, sales velocity and win rates
- How Sales Leaders are in control
- Managers are more effective coaches – using a common sales language
- How to replicate the skills and behaviours of top salespeople.

**SCOTSMAN® is the most powerful qualification tool in the marketplace available for sales teams**

## Why SCOTSMAN® Commitment Manager?

We have identified the root causes and shortfalls of current CRM systems and opportunity management, what is missing, and a solution.

SCOTSMAN® Commitment Manager app enables a forensic understanding of the pipeline. It is the missing link to predictable forecasting.

With SCOTSMAN® Commitment Manager, Sales Leaders will be able to coach more effectively.

Tackling the root causes, best of breed training solutions in product, sector or skills result in competency frameworks achieving a better ROI.

SCOTSMAN® Commitment Manager and our enablement solutions are underpinned by Commitment Based Selling.

Easy to implement, irrespective of current sales processes, CRM systems or existing investments in sales training.

**Our lead product for CRMs, powers a new future for sales qualification and pipeline management by bringing “science to the art of selling.”**

*“You get what you inspect, not what you expect”*

The power has shifted from the seller to the buyer. B2B buyers prefer online facilities to educate themselves, and there is a dramatic reduction in the selling process cycle time. B2B buyers are typically more than 60% through the buying process before the seller gains any significant access.

**As a result, qualification and pipeline management skills are now even more critical for success.**

### **CEOs demand accurate sales forecasts and the predictability of business results**

Common issues that businesses suffer:

- Opportunities slip from month to month
- "Dead cert" deals are lost
- Salespeople don't seem to be skilled enough.
- Valuable time and effort is wasted chasing unwinnable business
- Sales Leaders have to explain why they've missed their numbers...again.

### **Sales Leaders are under pressure to improve win rates and sales productivity**

- They are not satisfied with the predictability, reliability and consistency of business results.
- They are wrestling with the challenge of accurate forecasting
- Sales productivity is a challenge.

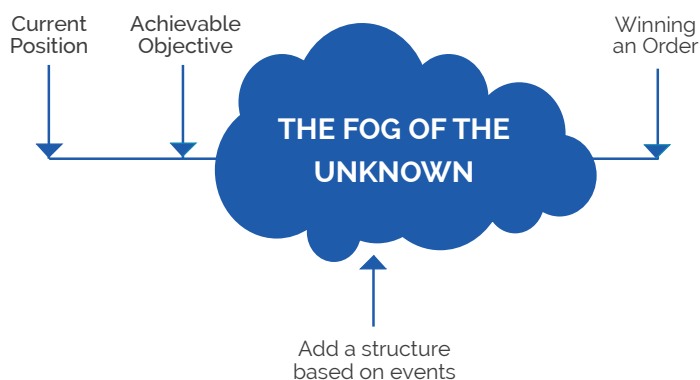
**Many sales professionals spend between 70%-80% of their time losing**

## **The Shortfall of CRMs**

There is an increasing reliance on CRMs in the management of pipelines, and they are often seen as the silver bullet to fix issues. In many cases, they do just the opposite.

### **Why is this?**

Opportunity management in CRMs breaks sales down into stages. Progress is rated by probabilities. But there is a problem. Managers can only measure the salesperson's inputs and activity – the efficiency of the process and the salesperson. There is a 'fog' for sales leaders and salespeople.



- I can't measure the quality of the project – is it worth our time and resources?
- I can't measure how well we are doing against the competition.
- I don't have an understanding of the politics in the sale.
- I can't measure the customer's likelihood to do business with us.

**Advance's solution allows sales leaders to bring structure to the unstructured**

Opportunity management requires more than measuring stages of sale and what work the salesperson is doing. You cannot be sure, objectively, how well sales are progressing and how to manage them because CRMs do not provide sales teams with data to measure the quality of the pipeline. These serious shortfalls lead to false forecasting and inexact sales processes. **The cost to an organisation is high.**

## A typical model

A common example is the use of Inside Sales to feed 'qualified opportunities' to Field Sales. Inside Sales are used to identify and qualify sales with a simple checklist (such as BANT, or equivalent).

Similar questions are asked:

- Is there a big enough budget?
- Do we know, and can we access, the decision process?
- Do they have a need? Will they make a decision?
- Can we meet the timelines etc?

These are good and important questions. **But at this point most CRM systems go wrong.** They turn answers into a metric to 'score' sales so a Bid/No Bid decision can be made.

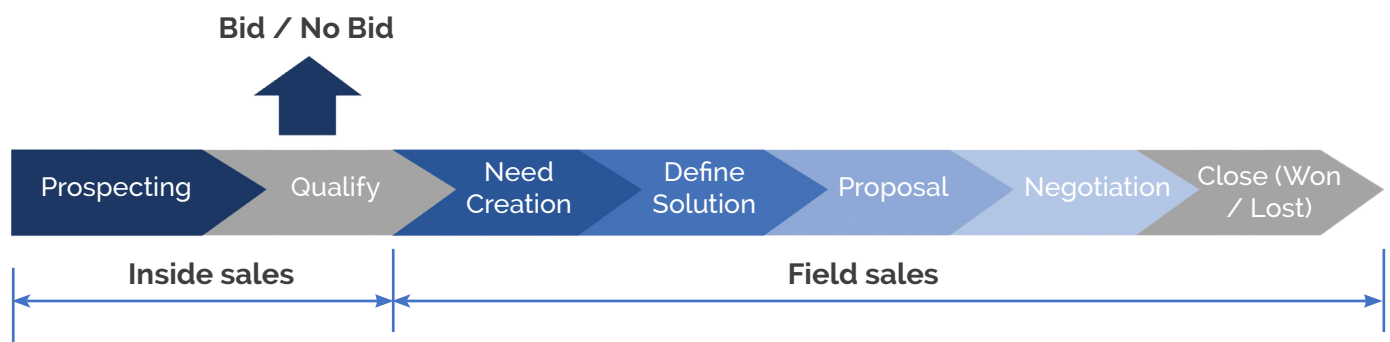
These "qualified" opportunities are then passed to Field Sales to "win" the deal.

Unfortunately, there are many weaknesses to this approach. It often leads to considerable friction between inside and field sales forces and often reflects these critical flaws:

- **Basic Scoring** – Mini-checklists do not show the true quality of opportunities.
- **No Direction** – It does not identify the work needed to progress and win the sale.
- **Planning ahead** – The sale is not viewed as a whole with customer actions needed to win sales.

## Qualification is seen as a one-off event

In CRM systems, Qualification is often a stage of sale. This compounds the "bid / no bid" process.



- **Bid** – time can be wasted on "qualified" opportunities as conditions change through the sale but are not identified. New competition enters, the spec changes, time scales move.
- **No bid** – no effort is made to work out if an opportunity could be won if certain conditions were different and the work needed to make this so.

## As a result of this current model:

- Sales productivity and win rates are poor
- Time is wasted on unwinnable deals
- Potentially winnable deals are ignored
- Metrics are inappropriate to forecast accurately
- Metrics focus on the salesperson and not the customer
- There is no clear plan of actions
- Coaching and intervention is ineffective
- Management drives the wrong behaviours.

### What is missing?

Many people see qualification as a two-way process - do I bid or not bid?

### At Advance we see Qualification as a 3-way process:

- If everything is fine and there are no problems then, of course, you bid.
- If there are too many problems or they are too big then you don't bid. It's obvious.
- In any sale there are always problems. Qualification tells us clearly what meetings we need. Success is measured by customer commitments.

SCOTSMAN® Commitment Manager redefines qualification and pipeline management. Test the temperature and plan the sale by checking the opportunity against 8 criteria of the acronym SCOTSMAN®.

### **Solution, Competition, Originality, Timescales, Size, Money, Authority, and Need.**

Instead of a Yes/No, qualification questions are interpreted with three possible outcomes that score the sale simply and identify work needed:

- **We know the answer and we are happy with it. (Score of 0)** We know their budget and our solution will fall within it. There is no more work to do in that area.
- **We don't yet know the answer. (Score of 1)** We have not yet established how the decision will be made. There is work to do. We need to add this topic into the agenda of future meetings.
- **We know the answer and it is not good. (Score of 10)** We cannot deliver to their timescales. A potential 'showstopper.' If we cannot fix the problem we will definitely lose. We must get customer commitments to allow us to bid. If we succeed we move forward. If not, we might as well quit.

The qualification process directly drives the sales campaign. It identifies meeting agendas and customer commitments needed.

The Bid/No Bid decision is now straightforward. The decision is made by the prospect (and not by the sales team), by refusing to clear a Potential Showstopper. **It is now a real Showstopper. A deal killer.**

Our SCOTSMAN® Commitment Manager supports this way of thinking and tracks these agenda items and the commitments that are needed. This natural evolution compliments stages of sale and enhances opportunity management with massive improvements.

## The missing link to enable B2B companies to achieve Predictable, Consistent and Reliable Sales Forecasts.

### CRM Pipeline Management



#### SCOTSMAN® Checklist

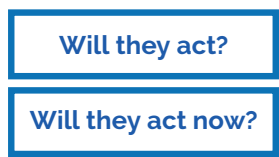
S	0-OK
C	1-Data Missing
O	0-OK
T	10-Problem
S	0-OK
M	10-Problem
A	0-OK
N	1-Data Missing



#### Event Tracker



- Stage of Sale – Best practice sequence of events
- Politics – Who's seeing who, when and why
- Agenda – The work the salesperson is doing
- **Commitments** – The work the customer is doing



**Forensic understanding of the pipeline  
by adding quality measures to existing reports**

- **Comprehensive Quality Check** – Score the opportunity using SCOTSMAN® and track how this changes throughout the sale.
- **Planning Tool** – identify what work we need to do and add these to a plan to win the deal
  - Events that we plan to have with the customer.
  - See the Politics - Who to meet, when to meet them and why?
  - What will be discussed to address gaps in knowledge or problems.
- **Quality Measures** – measurement is a binary process – Yes or No. The prospect either does or does not commit to a series of actions. Winning sales is the accumulation of commitments.

**SCOTSMAN® Commitment Manager now becomes the sales person's most powerful time management tool.** A clear picture of the sale. Qualification is not just some annoying administration task. It is the driving force of the sales process.

## Results of using SCOTSMAN® Commitment Manager are:

- **Sales Leaders in control**
  - Additional dashboards, reports and KPIs
- **Improved forecasting and predictability. Sales Leaders have:**
  - a forensic understanding of the pipeline
  - new quality metrics for discussions with the board
- **Improved sales productivity and win rates**
  - Sales managers can play devil's advocate to help the skills up
  - Salespeople can plan and win, or quit, opportunities more effectively
  - Higher success rates, fewer lost sales and increased sales velocity
- **Managers are more effective coaches**
  - There is a clear roadmap of events and a common sales language
  - Information that drives better sales reviews and deal planning
  - Measuring efficiency and effectiveness
  - Improved morale
- **Salespeople can replicate the skills and behaviours of top salespeople.**

*“You get what you inspect,  
not what you expect.”*

# How to double your selling time

Focused on winning the winnable

## **SCOTSMAN® and Commitment Based Selling**

Will they act? Will they act now?

Will they act with you?

*“Instinct is common sense,  
enough of it is genius”*



If you ask what resource salespeople lack that stops them selling twice as much in a year they will answer: "time." They will claim that this is due to "admin, travel and meetings." In reality, the biggest waste of a salesperson's time is the time they've spent on sales they've lost.

The average B2B sales person wins just 3 out of 10 of their opportunities. Effectively they waste 70% of their time. **Top salespeople win 7 out of 10 opportunities: effectively doubling their selling time.**

## Why?

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

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

Pipeline opportunities continue to be scored with probabilities; influenced by a salesperson's subjective opinions. They are optimistic. In reality they should be pessimistic – this is good for their wallet and their company's wallet.

The stats show that qualification is done badly. It is most used early on in the sale to say, "I will qualify in (or out)."

It is seen as a black or white decision. "Do I bid or not?" This is driven by the "in it to win it" mentality.

Advance turns this on its head. The real purpose of qualification is to identify what work is needed.

The questions are interpreted with 3 possible outcomes:

- **We know the answer and we are happy with it.** No work needed.
- **We don't yet know the answer.** Agenda items needed.
- **We know the answer and it is not good.** Customer commitments needed.

### **If you are going to lose, lose quickly but first see if you can win!**

Most training companies lack the tools and components in their training to have an impact. Accordingly, there is often no real behaviour change, and no resulting improvement in the sales hit rate.

### **If Qualification is one side of the coin ... Commitments is the other side.**

Commitments are at the heart of our solution. The basic qualification questions are good and necessary, but they miss a major issue. If the answers are positive then all we have shown is that there is a real project. The prospect is serious about making a decision. And that is good.

The question that is not answered is "Are they serious about us?" Are we getting a fair chance at winning the business? No simple qualification question can answer the question.

The only way to get a true picture is by looking at the commitments we get from the prospect as the sale progresses.

Positive answers to commitments convince us we have a real chance of winning. If we cannot get these, then we should question why we are bidding. SCOTSMAN® Commitment Manager helps salespeople to identify these commitments then track their progress through the sale.

Advance encourages looking at a **sale as a whole**. There are typically 3 approaches:

### The Next Call Plan

The salesperson can only see the next meeting. They have a blindfold on.

### The Evidence Plan

There is a plan, but the salesperson is doing all the work, gathering evidence and prematurely writing proposals.

### The Commitment Plan

The salesperson plans what they want to achieve, and the customer commitments needed to progress the sale. Looking at the sale as a whole allows them to plan ahead like a series of chess moves.

As a take on the JFK quote:

*"Think not what you are going to do for the customer, but what the customer can do for you!"*

Successful sellers think in terms of customer commitments, not in terms of agenda items and giving evidence.

We help companies to re-align the behaviours of their salespeople to rigorously qualify throughout the sale and operate like the Commitment Plan salesperson – **We call this "bottled common sense."**

By measuring the effectiveness of the outcome (the commitments), managers have:

- Accurate measures resulting in more productive sales reviews and coaching.
- Forensic understanding of pipelines, showing issues and required interventions.
- Improved sales force morale.
- More accurate forecasts and the satisfaction of being in control.
- A higher success rate on sales.
- A common language to plan opportunities.

**SCOTSMAN® tells you they are serious about the project** Will they Act, Will they Act now!  
**Commitments tell you they are serious about you and your solution** Will they Act with me!

**Combined they double the power of Pipeline Qualification**

# Don't just take our word for it...

To give a flavour, here is some feedback from our clients that have experienced our solution.



"Using SCOTSMAN® has revolutionised sales and sales management here at LINKFRESH. It is quick to use and gives far better visibility of every deal we are working. Fundamentally, it changes the sales team's behaviour, making them prepare for meetings, where they have to ask the right questions, listen to the answers and know what commitments they are going to ask for. The result is a shared plan with the prospect that in turn leads to great improvements in our ability to forecast deals."

**Andy Makeham**

"Great program to give salespeople real concrete things to implement instead of just fluffy philosophies." **Tyler Neal**

"The course was great for attaching science to the art of sales." **Ron Espinosa**



"Important step in personal development that has invigorated, motivated and equipped me with the tools to improve conversion rates and business profitability."

**Gavin Slattery**

"I felt 8 years ago that SCOTSMAN® and Commitment Based Selling was the best and most relevant to our Solutions Team. This has been confirmed again this time around."

**Cameron Smith**



**KONICA MINOLTA**



"I have been on other courses, but I feel this was easiest to relate to real life."

**Karl Vieira**

**ESSENTRA**

If you want your sales leaders, managers and teams to enjoy the benefits we've described, and would like to know more:

Email us at:  
[sales@advancetm.com](mailto:sales@advancetm.com)

Call us on:  
0113 823 2877

We look forward to hearing from you.

 **Advanced Selling Skills Academy**

 **@commitmentsales**

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