

Here's an example of TOP in action:

A software supplier introduced TOP as an added value lead generation program to its platform vendor partners. A TOP guide was introduced to kick-off the campaign and administer the program. This program distinguished the software supplier from the competition and captured the attention of platform vendors' sales / distribution channel. During the campaign period, this program generated \$50 million hardware and \$7 million software sales and put the software supplier in the driver's seat.

This is the actual kick-off and implementation overview that was contained in the guide and provided to the platform vendors' field sales organizations.

Dear Sales Manager,

This is your personal administrative guide for the Target Opportunity Program (TOP™). As indicated in the announcement sent to you earlier, this guide will assist you in implementing the TOP Program. This package contains:

- Prospect Control List
- Pre-Qualified Leads / Account Profiles
- Implementation Overview

A brief summary of each of the above is in order:

Prospect Control List – Lists all prospective account leads provided to your branch for this distribution. This can be used as a master control list to track and monitor account activity.

Pre-Qualified Leads / Account Profiles – These easy-to-use forms outline specific sales opportunities, and provide comprehensive profiles for each target account. These forms are given to your salespeople for account follow-up, and are used during the sales cycle to record results of customer contact calls.

Implementation Overview – This section lists helpful steps to initiate the TOP program within your branch. It provides forms to determine resource needs and trigger lead replenishment. We hope you will review the package today and begin letting TOP work for you.

Good Luck!

Vice President / Marketing

Implementation Overview

To initiate the TOP program in your branch, we recommend the following:

Brief the Troops

- Gather your salespeople and introduce TOP on a regular basis.
- Explain the program to accentuate the benefits. Your endorsement and sponsorship are critical to the success of the program.
- Include a brief overview of role, commitment to the program, product expertise, services, etc.
- Distribute target leads to your sales people and encourage immediate follow-up.

Make Customer Contact

Direct contact should be made with names listed on the account lead forms. The intent is to set up a meeting to discuss the customer's needs and requirements. Reference can be made that the account lead was obtained from an independent market research source. After the initial customer meeting is completed, ask your salespeople to determine the resources and support needed from Software Int'l to cultivate the sale. Representatives can be contacted directly by your salespeople when needed, to provide product presentations, demonstrations, training, sales and technical literature, etc., for prospective TOP opportunities.

Tell Us How You're Doing

We ask that you submit a Lead Generation Form (see Sample "A") to us for each active target account situation. This will allow us to manage our resources effectively in support of your sales efforts. In addition, the Lead Generation Forms serve as a mechanism to trigger LEAD REPLENISHMENT.

Telemarketing Approach / Methodology

PMG has developed a variety of survey approaches / techniques for the telemarketing environment that are backed by the proven experience of many client installations, including Harris Corporation, Henco Software, Data International, Hadco / Sanmina, Videotel, DCA / Software Institute and Inforex, just to name a few.

PMG telemarketing specialists are trained to assimilate scripts / questionnaires into their own style, which promotes credibility and encourages prospect interaction.

PMG survey techniques puts the prospect in a “non-threatening” position, which allows us to obtain key insights into the selling & buying dynamics.

Your company is viewed by the prospect as a professional problem solver. This is accomplished without diluting our primary objectives – to identify legitimate buyers and weed out unproductive prospects.

PMG’s approach creates a positive selling atmosphere and conveniently builds a bridge to the prospect account for your direct sales team or dealer / distributor partner. This allows easy access to the account and gives you the competitive edge. Time is spent closing business rather than prospecting, due to “pre-qualified leads”.

Elements of Telemarketing Program

TOP provides the following:

Survey / Analysis – conducted informally to build a “knowledge” base, which will be useful to structure questionnaires, develop qualifying scenarios, etc. This assures program integrity and continuity. Includes market / business, product and competitive aspects.

Questionnaire Development – surveys are developed to pre-qualify inquiries from advertising, PR, media sources, trade shows, etc. which will be used by telemarketing specialists. Questionnaires will be structured to fit your business needs exclusively. PMG’s unique survey techniques and introductory scripts are incorporated for maximum effectiveness. Surveys can also be developed to create new sales opportunities, recruit 3rd party distributors / OEM’s, promote new products, etc.

Telemarketing Resources – telemarketing services are provided by PMG’s staff. These services are available on a fixed cost project or retainer basis. Alternatively, PMG can provide a complete training program for those clients seeking to “fine-tune” their existing telemarketing function or assist in setting up a telemarketing operation for the first time user.

Pre-Qualified Leads – tangible leads representing “real” business opportunities are submitted to you for immediate sales follow-ups. Details for non-buyers are made available to allow proper account handling and disposition.

Implementation Support – lead follow-up scripts are developed for your sales force to coordinate activities between telemarketing staff and sales. This will assure that the “sales” atmosphere created by the telemarketing staff is perpetuated, resulting in easy access to the prospective account.

Telemarketing Procedures

The following summarizes the process steps involved to generate pre-qualified leads:

Prioritizing Accounts – lead inquiries or account targets are prioritized according to pre-defined criteria. Accounts are ranked from “best to limited” fit opportunities and segmented geographically. Telemarketing efforts are focused on accounts with the greatest potential first.

Initial Telemarketing Contact – telemarketing specialists reach the key contact professionally and efficiently. Techniques are used to overcome any obstacle, within the account that stands between telemarketer and the key contact. We refer to these individuals as “SARGE” in our training program. Typically they are receptionists, secretaries and administrators. Telemarketers explain the purpose of their call to the key contact and use informal scripts to introduce the survey questionnaire. Prospect agreement is sought at each decision point prior to proceeding to the next step. The questionnaire is administered with a high degree of prospect interaction. Prospect sessions can be fully automated and computerized. For qualified prospects, arrangements are made to involve your direct sales rep or dealer / distributor. Non-buyers and suspects are categorized and set aside for subsequent processing. Many of these become “future” buyers.

Analysis / Interpretation – all contact call questionnaires are reviewed to assure accuracy. Value judgments are often required. In some cases a “suspect” may be worth a sales follow-up due to specific survey responses. These situations are flagged.

Translating Survey Input – questionnaire inputs are edited and condensed into meaningful sales information prior to lead preparation. Prospect “hot buttons & sensitivities” are identified to assure lead effectiveness.

Lead Generation – pre-qualified leads are produced and readied for distribution.

Transfer of Leads – leads are batched and submitted to the sales team or 3rd party partners, as determined by the client company. Typically this is done on a bi-weekly basis. Leads requiring immediate attention receive same day service for quick turnaround. Copies of questionnaires, informal notes or comments that were captured during the telemarketing session are forwarded to round out the data provided to the sales team or 3rd party dealer / distributor prior to follow up.

Sales Follow-up – your sales reps simply follow-up on the “pre-qualified” leads. Sales follow-up scripts correspond with survey approaches / techniques used by telemarketing specialists to assure continuity.

Review and Evaluation – progress / results are discussed periodically with the Client. Necessary refinements and adjustments are made to improve overall program effectiveness.