



Sales Process Management

A Data Driven Approach

March 2020



Overview of Growthorn Reporting Services

Focus on Sales Process Integration



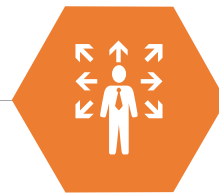
Sales Process Integration

- Use Reports to compliment the different stages within the sales process
- Help drive sales to new prospects
- Help grow sales to existing clients



Strategic & Tactical Insights

- Validate strategic decisions with research
- Use trade data to identify strategic opportunities
- Use historic data to hypothesize and forecast future strategic outcomes
- Use trade data to take corrective or accelerated actions
- Manage risks and potential disruptions to the trade environment



Customer Insights

- Understand the trade activity and behaviour of an existing client
- Use the trade data to understand their market share and relative size
- Identify their relative performance in the market (growth or decline)
- Pricing analysis to identify opportunities and threats
- Monitor their legislative landscape



Trade Route Insights

- Identify trade routes that are the most optimal
- Identify opportunities where trade route optimisation can be used to improve pricing offers or margins
- Pricing analysis across different trade routes



Country View Insights

- View the imports and exports relating to a specific country of interest
- Understand the trader and clearing agent activity
- View ports of entry and exit from a South African perspective

Content

- Our Purpose
- Existing Client Approach
 - Growth Drivers
 - The Offer
- Generic Sales Process to Existing Clients
- New Client Approach



Our Purpose

Build Purpose Driven Sales Outcomes

- The purpose of this report is to identify an approach to integrate trade data into the sales process to achieve 3 main objectives:
 - Better new sales conversion
 - Better client wallet share percentages
 - Better margins
- The trade data is seen as one of the potential tools to be used within the sales processes to fulfill the above objectives
- This approach focuses on both sales approaches i.e.:
 - The Sales Process to Existing Clients
 - The Sales Process to New Clients





Existing Clients

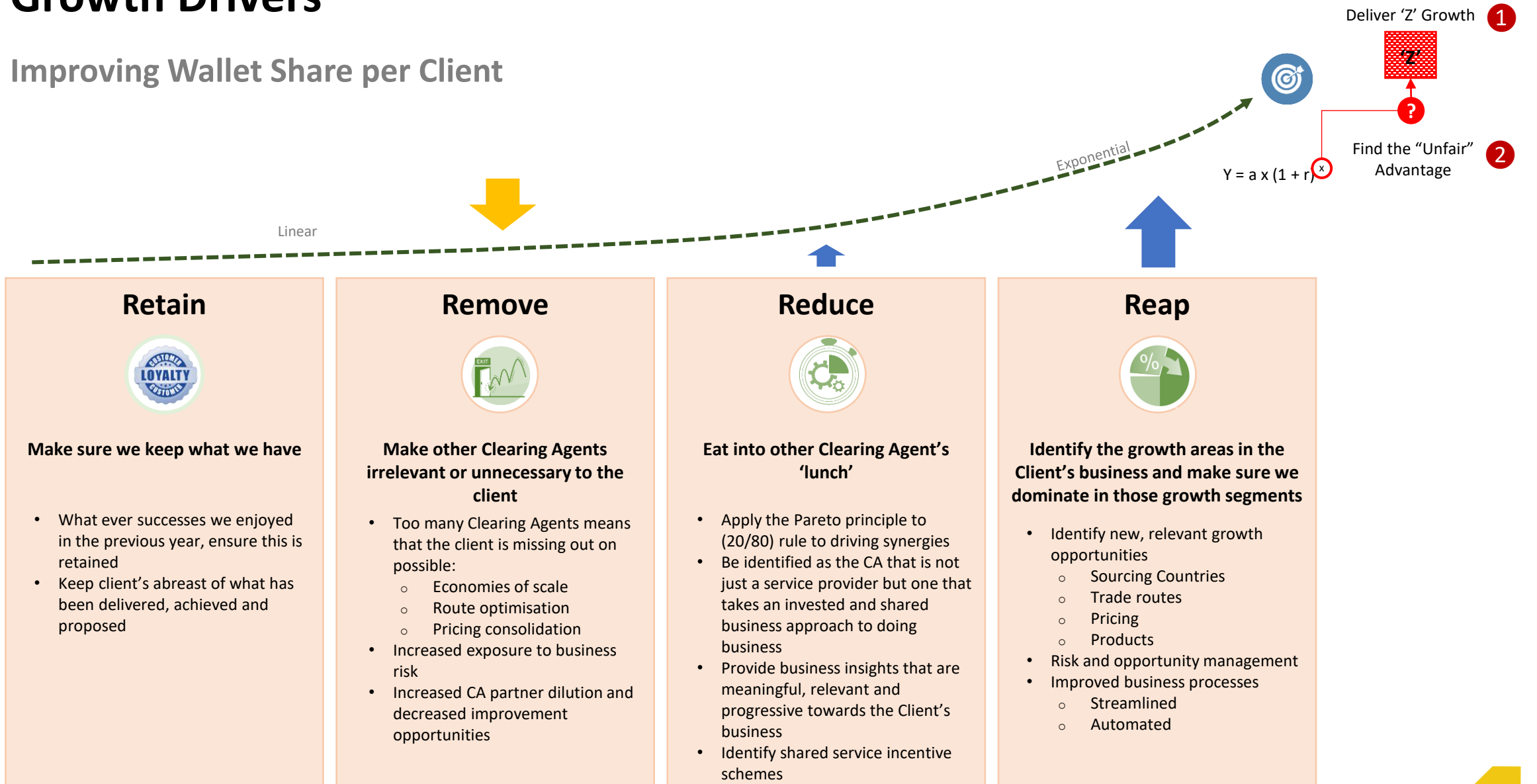


Existing Client Sales Process Management

Using trade data to grow existing client sales

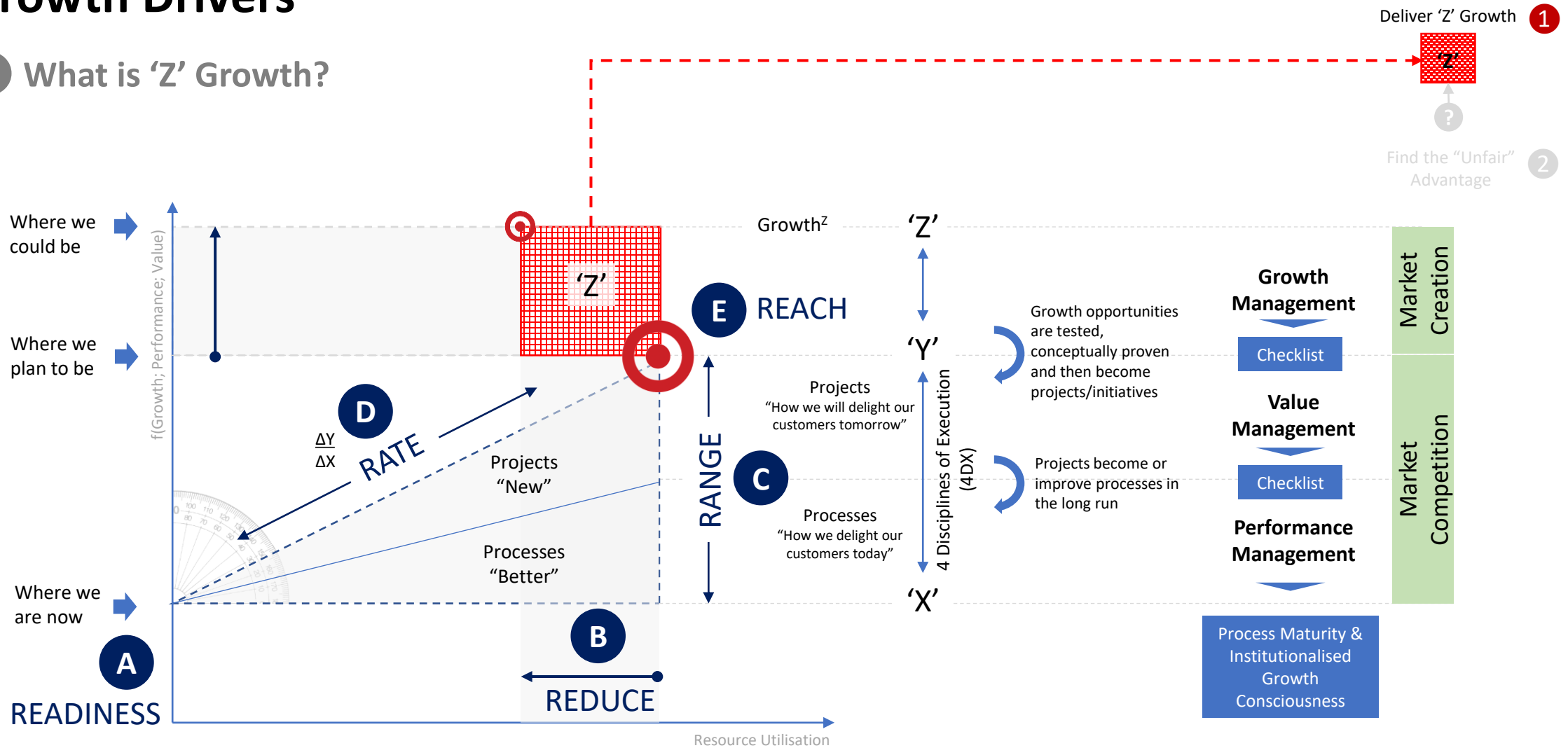
Growth Drivers

Improving Wallet Share per Client



Growth Drivers

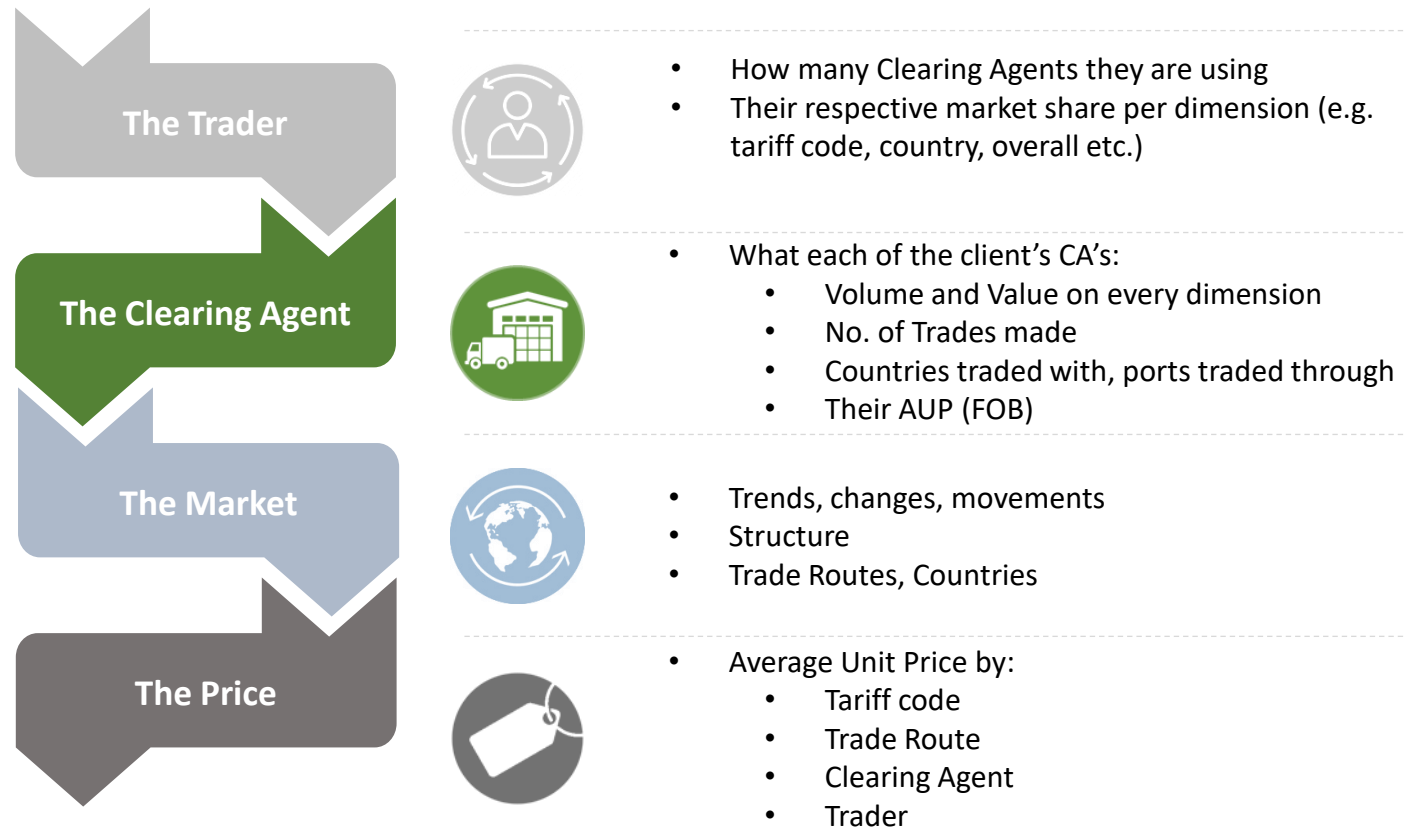
1 What is 'Z' Growth?



Growth Drivers

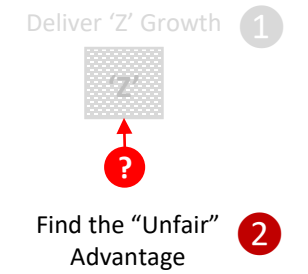
2 The “Unfair” Advantage

What we know about the market (that others probably don’t!):



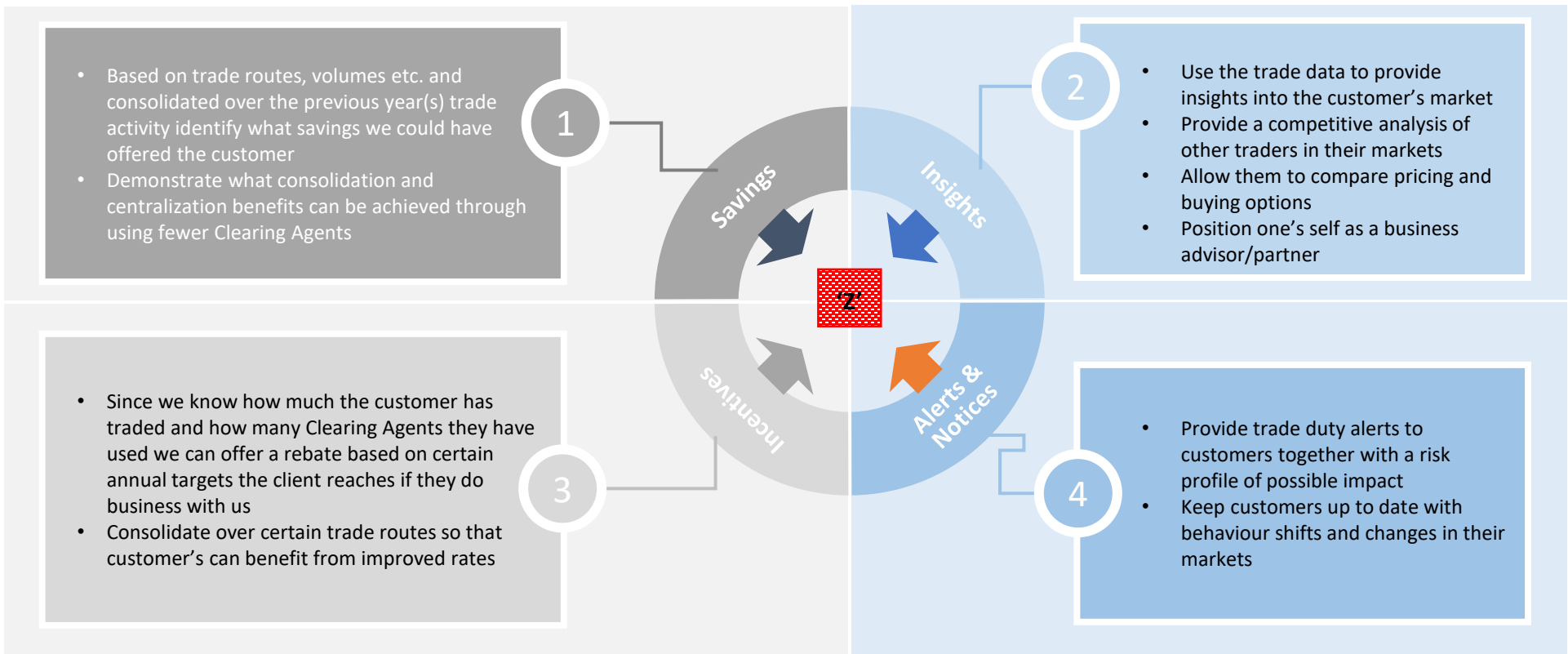
The Offer

Value Propositions to Customers (4 Key Categories)



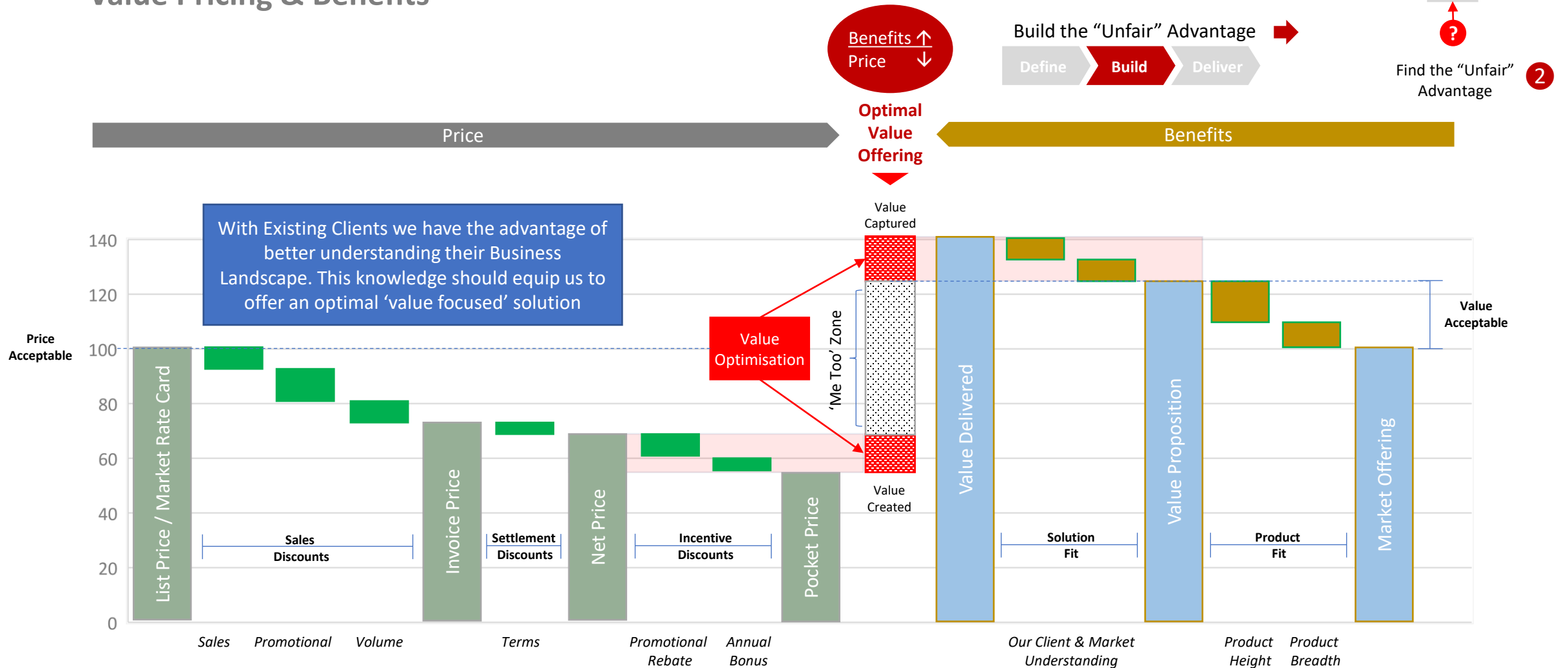
Price

Benefits



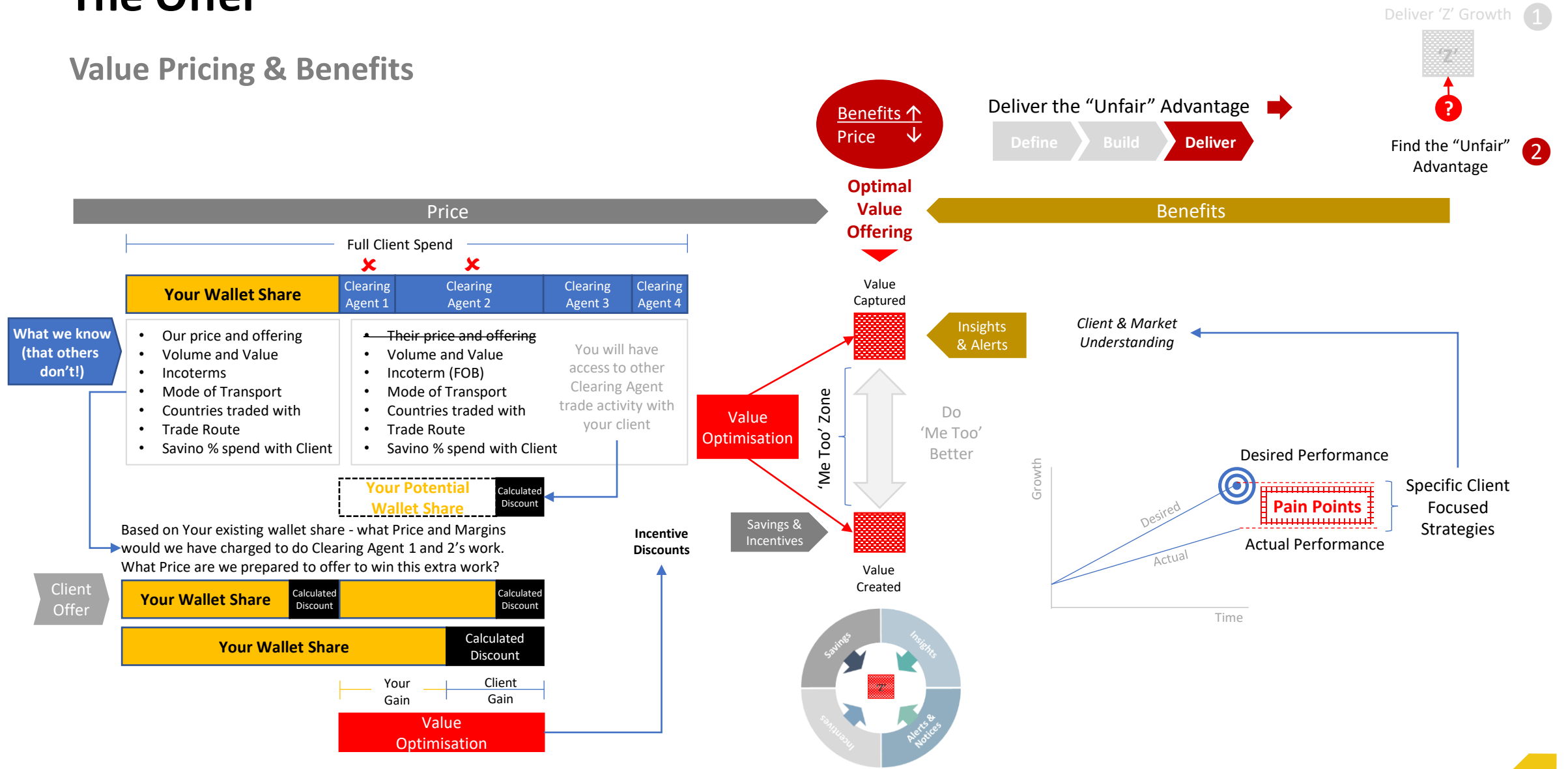
The Offer

Value Pricing & Benefits

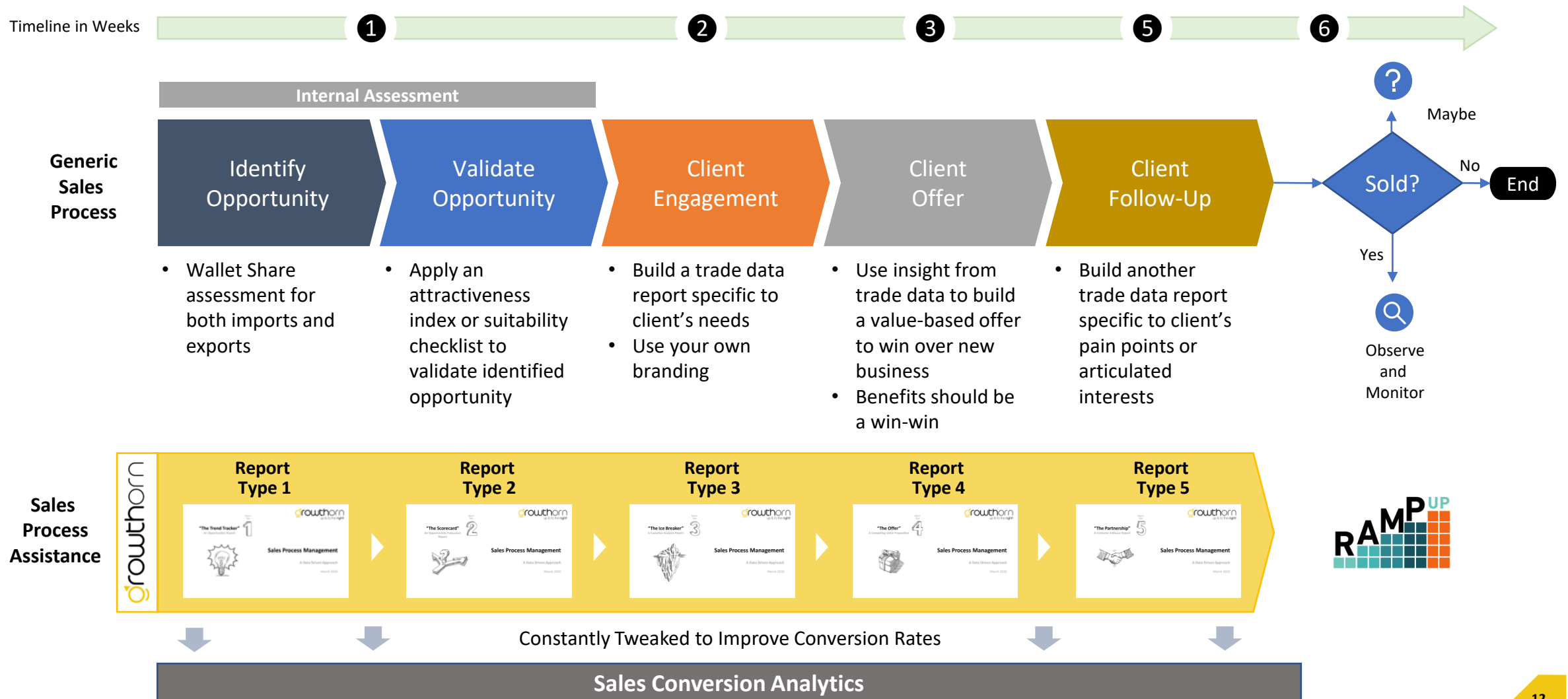


The Offer

Value Pricing & Benefits

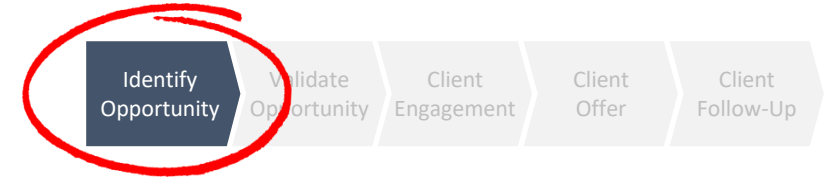


Generic Sales Process to Existing Clients

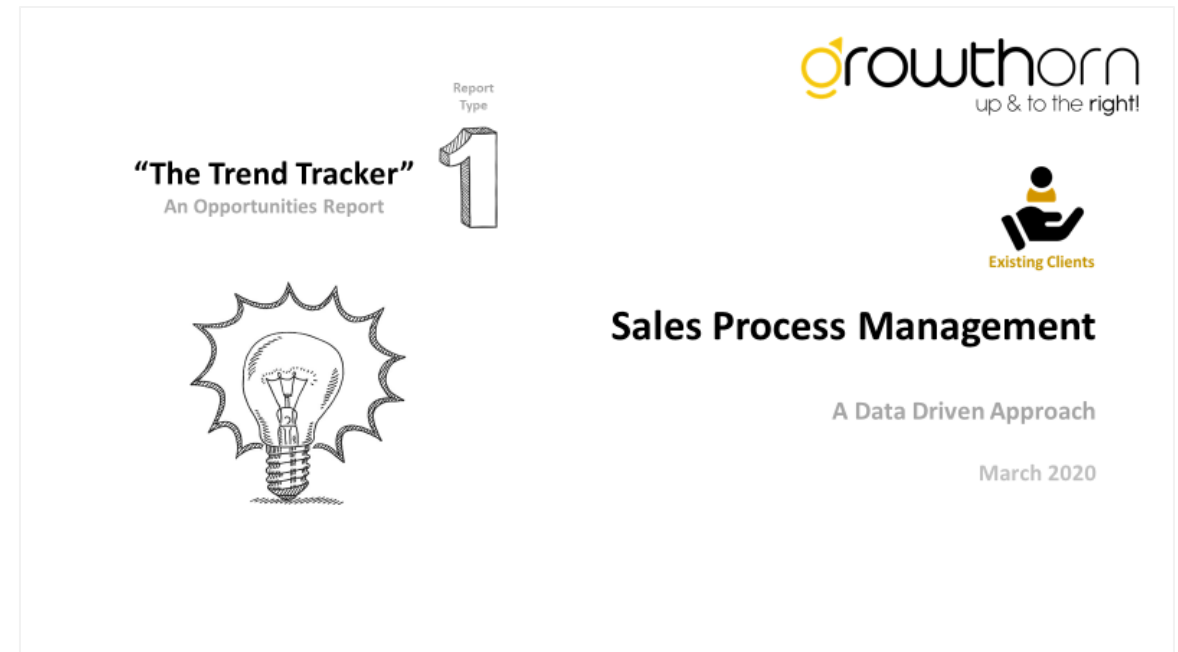


Generic Sales Process to Existing Clients

Report Type 1 – Opportunities Discovery



- Monitor wallet share of existing clients
- Identify if intervention is required
- Map opportunities identified from Opportunities Report to existing clients
- Update Scorecard



Report Type 1

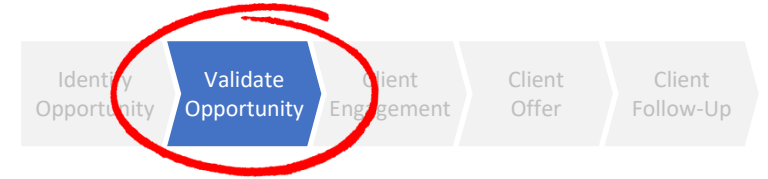
“The Trend Tracker”
An Opportunities Report

Sales Process Management
A Data Driven Approach
March 2020

Existing Clients

Generic Sales Process to Existing Clients

Report Type 2 – Opportunities Evaluation



- Existing Clients can be mapped as:
 1. Platinum / Key Accounts
 2. Other Accounts (with the idea being to grow some of these into Key Accounts)
- When building the scorecards there may be a need to split them separately into the above two client categories

Report Type 2

“The Scorecard”
An Opportunities Evaluation Report

2

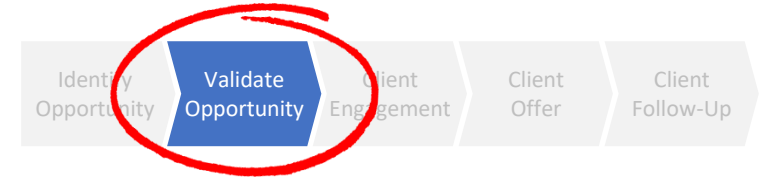
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Existing Clients

Generic Sales Process to Existing Clients

Report Type 2 – Opportunities Evaluation



Scorecard Definitions

Criteria Measure Type	Moderate					Good					Very Good					Excellent				
	M-2	M-1	M+0	M+1	M+2	G-2	G-1	G+0	G+1	G+2	V-2	V-1	V+0	V+1	V+2	E-2	E-1	E+0	E+1	E+2
Share % Favourable	0-5%	6-10%	11-15%	16-20%	21-25%	26-30%	31-35%	36-40%	41-45%	46-50%	51-55%	56-60%	61-65%	66-70%	71-75%	76-80%	81-85%	86-90%	91-95%	96-100%
Share % Unfavourable	96-100%	91-95%	86-90%	81-85%	76-80%	71-75%	66-70%	61-65%	56-60%	51-55%	46-50%	41-45%	36-40%	31-35%	26-30%	21-25%	16-20%	11-15%	6-10%	0-5%
Growth % Range	x ≤ 5%					-5% ≤ x ≤ 20%					10 ≤ x ≤ 20%					20%				
Count No. Favourable	x ≤ 1					1 ≤ x ≤ 3					3 ≤ x ≤ 5					4				
Count No. Unfavourable	+5					3 ≤ x ≤ 5					1 ≤ x ≤ 3					x ≤ 1				
Yes/No Binary Favourable	No					Maybe					1 ≤ x ≤ 3					x ≤ 1				
Yes/No Binary Unfavourable	Yes					Maybe					1 ≤ x ≤ 3					x ≤ 1				
Score	5	10	15	20	25	30	35	40	45	50	55	60	65	70	75	80	85	90	95	100



Key Monitoring Areas	Criteria Measure Type	Sub-Weighting	Weighting
Wallet Share (Imports or exports or both)			33.34%
1. Wallet share of customer's overall trade	Share % Favourable	20%	
2. Wallet share of customer's Top 20 Tariffs	Share % Favourable	20%	
3. Wallet Share of customer's Top 5 Trade Routes	Share % Favourable	20%	
4. Wallet share of customer's dominant Mode of Transport	Share % Favourable	20%	
5. Wallet Share trend of customer's overall trade	Share % Favourable	20%	
Competitive Landscape			33.33%
1. Customer's Top 3 Clearing Agents excluding you	Share % Unfavourable	20%	
2. No. of Clearing Agents above wallet share of 5% excluding you	Count No. Favourable	20%	
3. No. of Clearing Agents above wallet share of 5% in Top 20 Tariffs	Count No. Unfavourable	20%	
4. Clearing Agents of customer who have grown above 15% for last 4 years	Count No. Unfavourable	20%	
5. New Clearing Agents for customer in last year	Count No. Unfavourable	20%	
Market Attractiveness			33.33%
1. Customer's trade growth over last 4 years	Growth % Range	25%	
2. Customer's market share growth for last 4 years in Top 10 tariffs	Growth % Range	25%	
3. Customer's Top 10 Tariff codes combined growth in last 4 years	Growth % Range	25%	
4. Rulings / Duty Rate increase etc in Top 10 Tariffs	Yes/No Binary Favourable	25%	

* These are merely guidelines and can be adjusted as required. However, it is advisable to maintain the preferred choice over a reasonable period so that comparisons can be made.



* Scorecard rating can be for imports, exports or a combined view of both.

Wallet Share Scorecard

Trader	Example Company
Period	Oct 2020 - Dec 2020
Trade Type	Imports

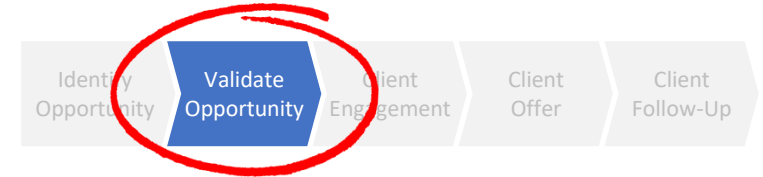
Imports Perspective

Overall Rating ● G +2

Criteria	Moderate					Good					Very Good					Excellent				
	M-2	M-1	M+0	M+1	M+2	G-2	G-1	G+0	G+1	G+2	V-2	V-1	V+0	V+1	V+2	E-2	E-1	E+0	E+1	E+2
Wallet Share																				
Wallet share of customer's overall trade	●																			
Wallet share of customer's Top 20 Tariffs	●																			
Wallet Share of customer's Top 5 Trade Routes			●																	
Wallet share of customer's dominant Mode of Transport	●																			
Wallet Share trend of customer's overall trade			●																	
Competitive Landscape																				
Customer's Top 3 Clearing Agents excluding you	●																			
No. of Clearing Agents above wallet share of 5% excluding you													●							
No. of Clearing Agents above wallet share of 5% in Top 20 Tariffs													●							
Customer's Clearing Agents who've grown > 15% for last 3 years																			●	
New Clearing Agents for customer in last year																			●	
Market Attractiveness																				
Customer's trade growth over last 3 years																			●	
Customer's market share growth for last 3 years in Top 10 tariffs																			●	
Customer's Top 10 Tariff codes combined growth in last 3 years																			●	
Rulings / Duty Rate increase etc in Top 10 Tariffs													●							

Generic Sales Process to Existing Clients

Report Type 2 – Opportunities Evaluation



Imports Perspective

Overall Rating ● G +2

Criteria	Moderate					Good					Very Good				Excellent					
	M-2	M-1	M+0	M+1	M+2	G-2	G-1	G+0	G+1	G+2	V-2	V-1	V+0	V+1	V+2	E-2	E-1	E+0	E+1	E+2
Wallet Share		●																		
Wallet share of customer's overall trade		●																		
Wallet share of customer's Top 20 Tariffs		●																		
Wallet Share of customer's Top 5 Trade Routes			●																	
Wallet share of customer's dominant Mode of Transport		●																		
Wallet Share trend of customer's overall trade			●																	
Competitive Landscape																				
Customer's Top 3 Clearing Agents excluding you	●																			
No. of Clearing Agents above wallet share of 5% excluding you											●									
No. of Clearing Agents above wallet share of 5% in Top 20 Tariffs											●									
Customer's Clearing Agents who've grown > 15% for last 3 years																			●	
New Clearing Agents for customer in last year																			●	
Market Attractiveness																				
Customer's trade growth over last 3 years																			●	
Customer's market share growth for last 3 years in Top 10 tariffs																			●	
Customer's Top 10 Tariff codes combined growth in last 3 years																			●	
Rulings / Duty Rate increase etc in Top 10 Tariffs													●							

Consolidate individual Scorecards into a single Corporate Scorecard

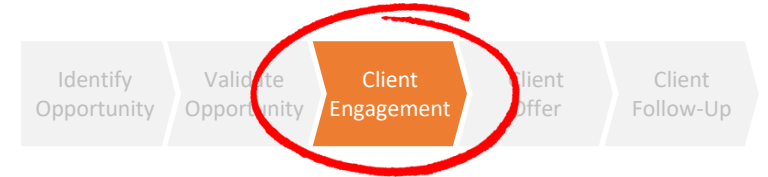
Key Trade Activity Indicators		
Metric Name	Performance	Alert
Value		●
Volume		●
Average Unit Price		●
No. of Trades		●
No. of Traders		●
Trade Density		●
% Top 5 Traders of Total		●
No. of Countries of Origin		●
% Top 5 C of O of Total		●
Dominant Mode of Transport		●
Dominant Port of Entry		●
Regulatory Activity		●

All individual Clients are monitored on a quarterly / bi-annual basis to assess changes in their 'scorecard scores'. This also helps validate opportunities and threats.

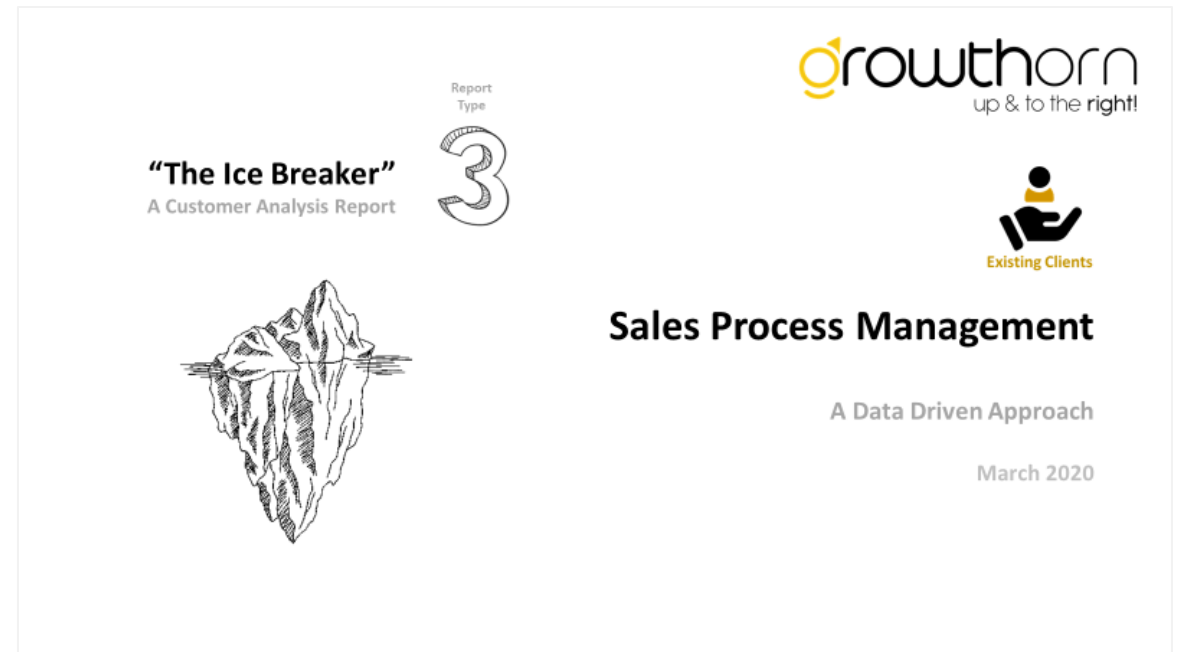
Prioritise

Generic Sales Process to Existing Clients

Report Type 3 – Client Engagement



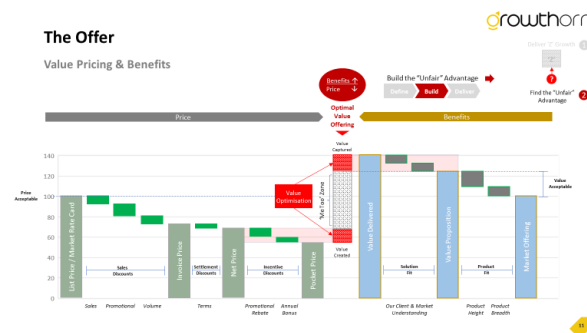
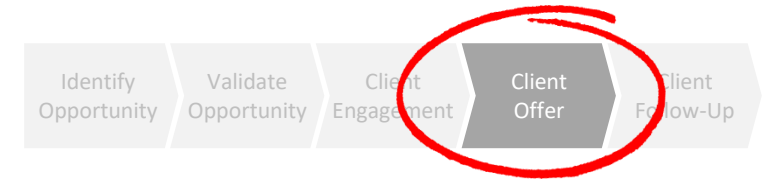
- Prepare a Report with your own corporate identity and branding
- Report creates an opportunity to demonstrate “exceeded” customer service
- Report contents include:
 - Trade activity over last few years
 - Tariff code(s) performance
 - Trader analysis (a view of how client compares)
 - Trade routes, modes of transport, country analysis etc.
 - AUP analysis
 - Threats and opportunities (legislative views and potential actions)
 - Legislative changes or proposed changes



Generic Sales Process to Existing Clients

Report Type 4 – Client Offer

- Prepare an offer to the client that clearly displays what the proposed value add is expected to be
- Show value add in expected savings numbers
- Savings determined by balancing price and benefits (Value!)



Report Type 4

"The Offer"
A Compelling Value Proposition

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Existing Clients

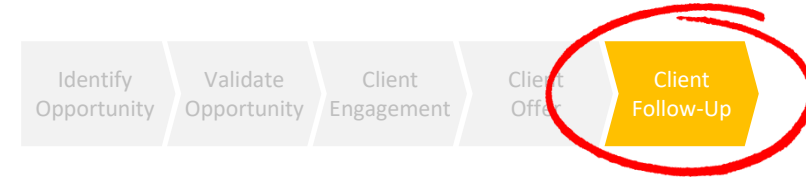
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Generic Sales Process to Existing Clients

Report Type 5 – Client Relationship Building

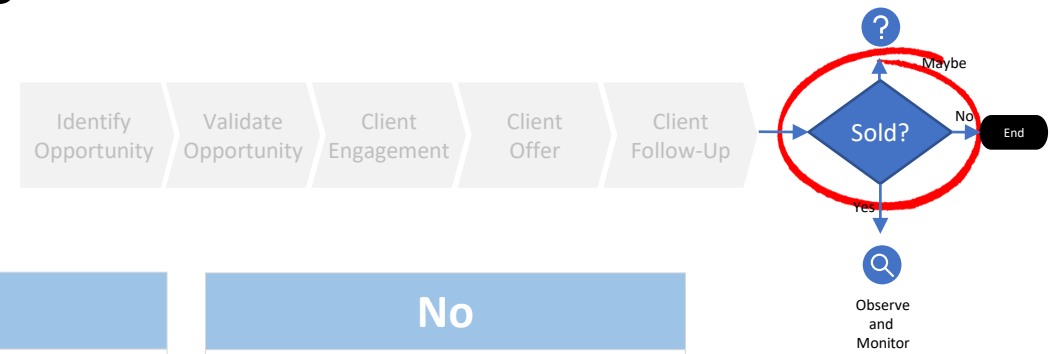


- Prepare Report for the client that focuses on their pain points, concerns or potential opportunities i.e., personalised to their needs
- This report will relate to trade that is specific to them as well as to their market in general
- This report can also demonstrate the potential savings that were highlighted in ‘The Offer’



Generic Sales Process to Existing Clients

Client Decision and Outcome



Yes

- Capture reasons for success and identify similar profile opportunities with other customers (Reporting Type 1)
- Capture client baselines so that you can demonstrate growth.
- Recheck Validation Checklist / Scorecard (Reporting Type 2) to ensure similar client profiles are better weighted (Reporting Type 2).
- Monitor results and outcomes

Maybe

- Capture reasons and concerns.
- Identify opportunities to address concerns. If practical run opportunities through reporting Type 1 process.
- Establish a communication “keep-in-touch” approach:
 - Blog (keep abreast of changes in industry)
 - Newsletter
 - ‘Subscribe’ to Savino for future reports
- Baseline their industry so that you can:
 - monitor change
 - Prepare a Client Offer (Reporting Type 4) in the future
- Propose a re-engagement date.

No

- Client extremely unlikely to budge or ROI and effort is unattractive.
- Recheck Validation Checklist / Scorecard (Reporting Type 2) to ensure similar clients or targets are filtered earlier.
- Capture reasons and rationale and validate against existing clients.

Sales Conversion Analytics



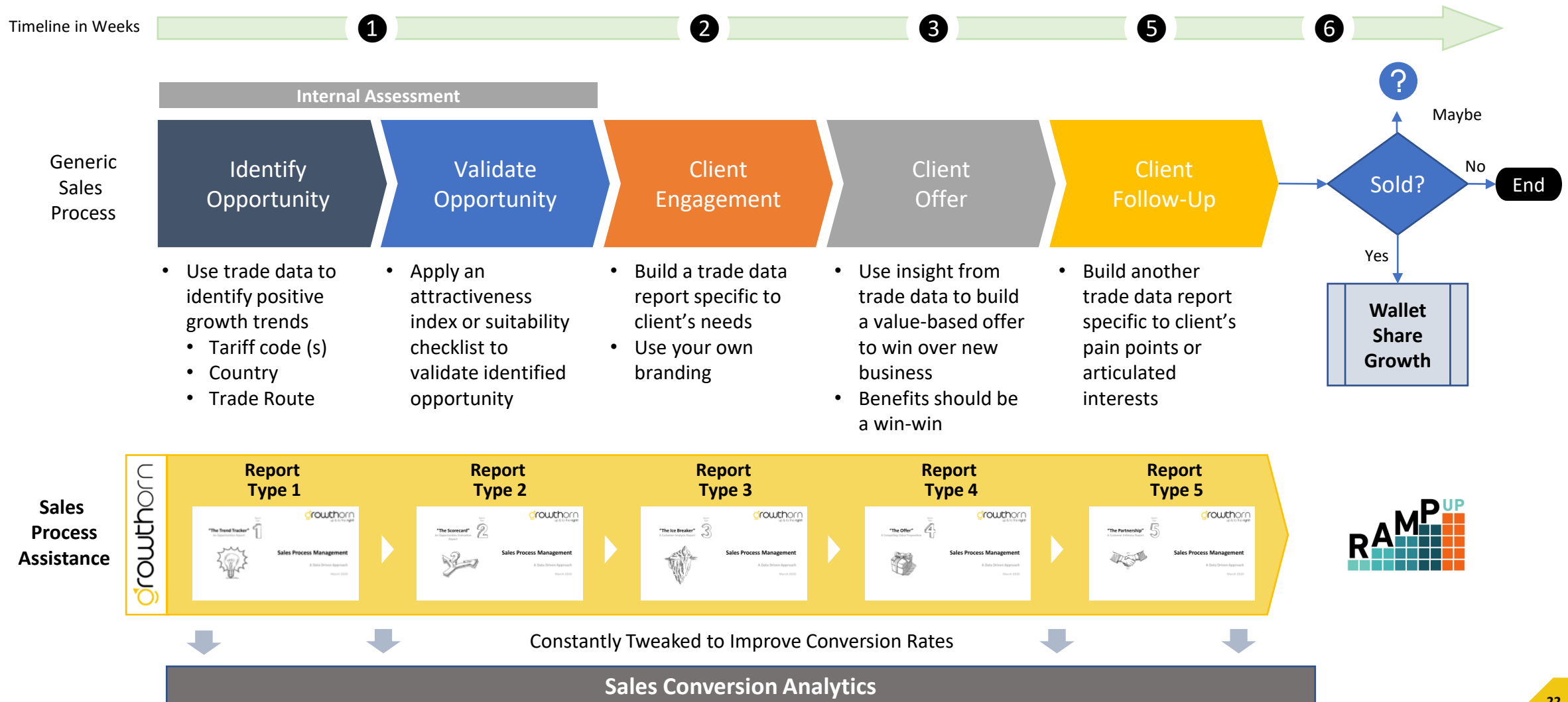


New Client Sales Process Management

Using trade data to grow new client sales



Generic Sales Process to New Clients

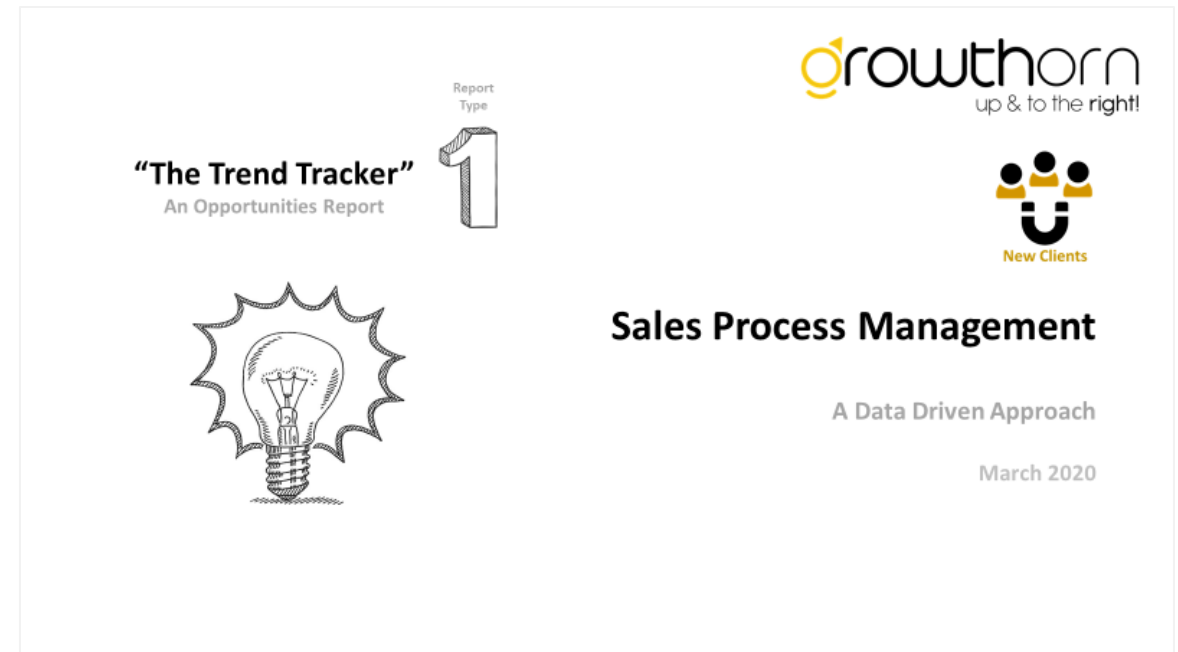


Generic New Sales Process

Report Type 1 – Opportunities Search



- Identify trends that are increasing:
 - Tariff codes
 - Trade routes that are developing
 - Countries of origin/destination that are growing
 - Average Unit Price (AUP) changes
 - Other Clearing Agents growing or shrinking
 - Behavioural shifts in the market
- Prepare Report with list of opportunities



Report Type **1**

“The Trend Tracker”
An Opportunities Report

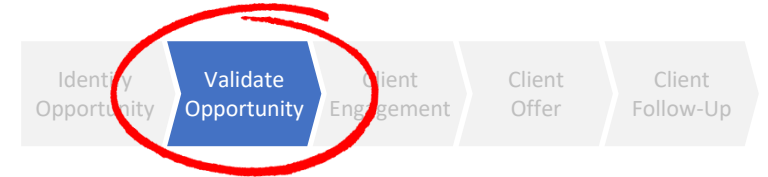
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growthhorn up & to the right!

New Clients

Generic New Sales Process

Report Type 2 – Opportunities Evaluation



- Configure Validation Checklist / Scorecard (Opportunity Attractiveness)
- Run opportunity through above Validation Checklist to score on suitability criteria, for example, the suitability of:
 - The tariff code
 - Trade route
 - Legislative landscape/outlook
 - Expected margins
 - Barriers to entry
 - Competitive density
 - Number of clearing agents overall
 - Number of clearing agents per trader
 - Average clearing agent size (Agent and share of the market)
 - Competitive advantages
 - Strategic Alignment (fits in with business plans)
 - Operational Alignment (existing/past knowledge and process efficiencies are attractive)
- Create Report with scores and opportunity prioritisation

Report Type 2

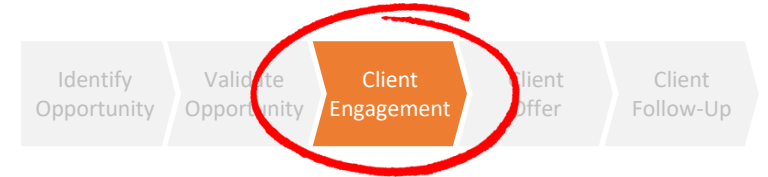
“The Scorecard”
An Opportunities Evaluation Report

Sales Process Management
A Data Driven Approach

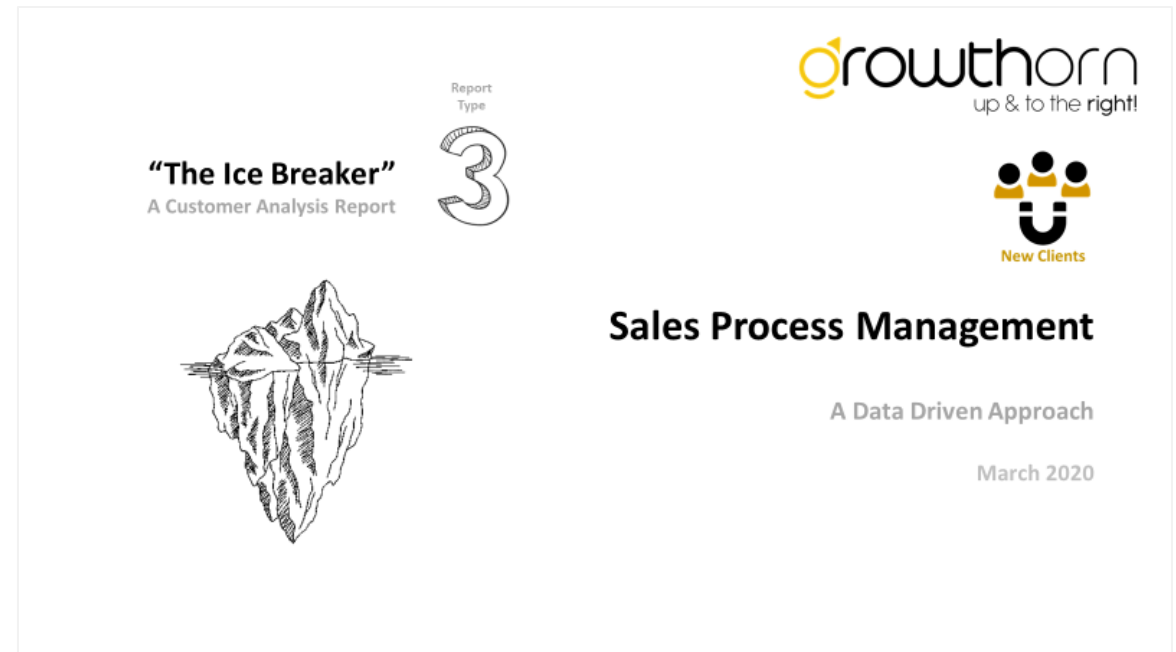
March 2020

Generic New Sales Process

Report Type 3 – Client Engagement



- First (or near first) Call to Client
- Prepare a Report with your own corporate identity and branding
- Report creates an opportunity to engagement and discuss (non sales mode)
- Report contents include:
 - Trade activity over last few years
 - Tariff code(s) performance
 - Trader analysis (a view of how client compares)
 - Trade routes, modes of transport, country analysis etc.
 - AUP analysis
 - Threats and opportunities (legislative views and potential actions)
 - Legislative changes or proposed changes



Report Type 3

“The Ice Breaker”
A Customer Analysis Report

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New Clients

Sales Process Management

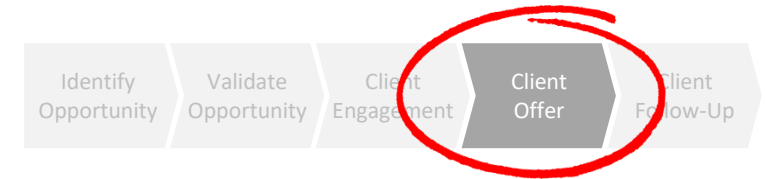
A Data Driven Approach

March 2020

Generic New Sales Process

Report Type 4 – Client Offer

- Prepare an offer to the client that clearly displays what the proposed value add is expected to be
- Show value add in expected savings numbers
- Build Case Study of similar examples (related to similar tariff codes and similar trade routes)



Report Type 4

“The Offer”
A Compelling Value Proposition

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New Clients

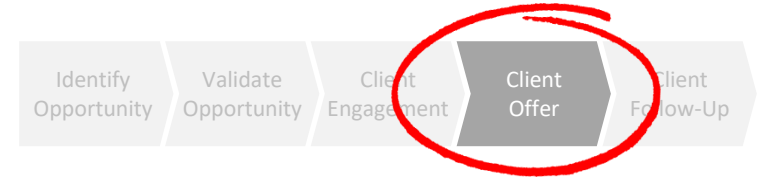
Sales Process Management

A Data Driven Approach

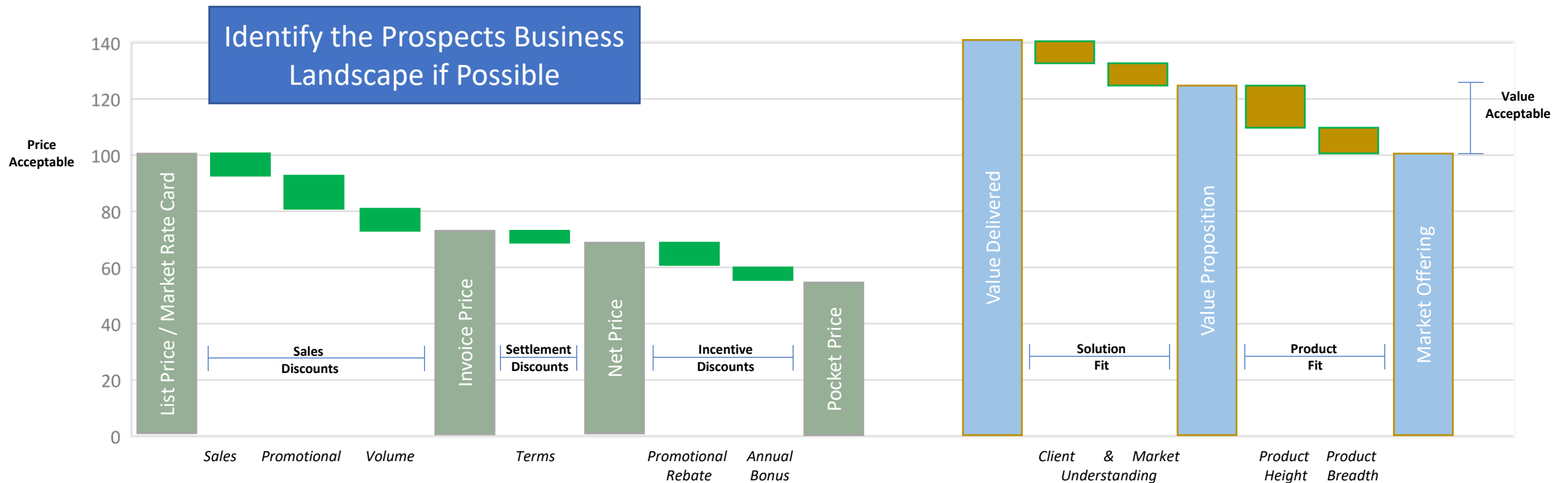
March 2020

Generic New Sales Process

Report Type 4 – Client Offer



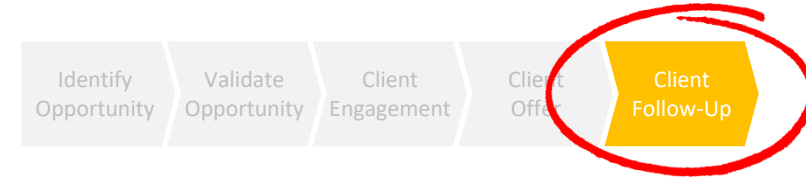
Optimal Value Offering



Generic New Sales Process

Report Type 5 – Client Relationship Development

- Prepare Report for the client that focuses on their pain points, concerns or potential opportunities
- This report will relate to trade specific to them as well as to their market in general
- This report can also demonstrate the potential savings that were highlighted in The Offer



Report Type 5

"The Partnership"
A Customer Intimacy Report

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New Clients

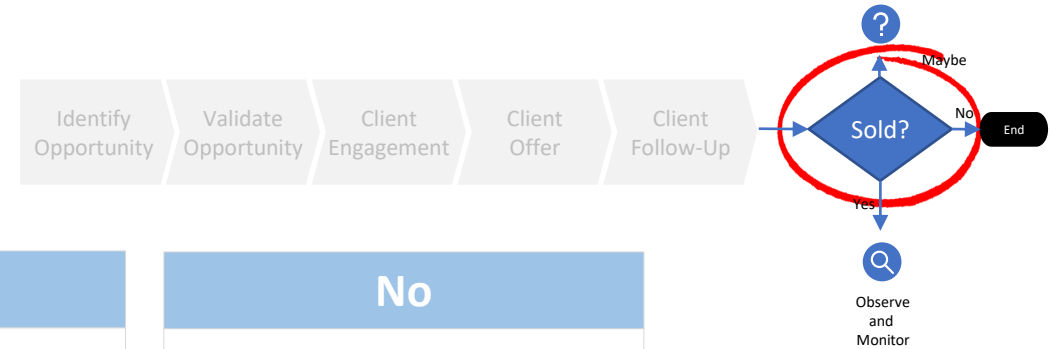
Sales Process Management

A Data Driven Approach

March 2020

Generic New Sales Process

Client Decision and Outcome



Yes

Wallet Share Growth

- Capture reasons for success and identify similar profile opportunities with other customers (Report Type 1)
- Capture client baselines so that you can demonstrate growth.
- Recheck Validation Checklist / Scorecard (Reporting Type 2) to ensure similar client profiles are better weighted (Reporting Type 2).
- Migrate to Existing Client process

Maybe

- Capture reasons and concerns.
- Identify opportunities to address concerns. If practical run opportunities through reporting Type 1 process.
- Establish a communication “keep-in-touch” approach:
 - Blog (keep abreast of changes in industry)
 - Newsletter
 - ‘Subscribe’ to Savino for future reports
- Baseline their industry so that you can:
 - monitor change
 - Prepare a Client Offer (Report Type 4) in the future
- Propose a re-engagement date.

No

- Client extremely unlikely to budge or ROI and effort is unattractive.
- Recheck Validation Checklist / Scorecard (Report Type 2) to ensure similar clients or targets are filtered earlier.
- Capture reasons and rationale and validate against existing clients.

Sales Conversion Analytics



Contact Details

Get hold of us to find out more.....



www.growthhorn.com



sales@growthhorn.com



Other Consulting Offerings



Sales Process Management

- Build a predictable, measurable and sustainable sales process
- Improved sales conversions and relationship building
- Enhanced service delivery and customer satisfaction



Project Delivery

- New product development – cradle to ‘cradle’
- Help with entry into new markets and new routes to market
- Wicked problem solving and facilitation



Growth Management

- Identify and define approaches to grow existing and new markets
- Identify and define approaches to row existing and new products
- Innovation and disruption



Value Management

- Lean process and waste management
- Streamlined costing
- Pricing and optimal revenue management
- ‘More-with-less’ leverage philosophy



Performance Management

- Strategic and operational alignment
- Strategic objectives and KPIs
- Scorecards, dashboards and measurement
- Gap analysis
- Processes and projects