



The

# PERFORMAX System

## Sales & Marketing Management System

### The BUSINESS PROBLEMS we help solve with our System?

- ❑ Your Sales Force needs to be focused, proactive & disciplined to sell new business, and protect the old
- ❑ You need defined & repeatable Selling Processes to replicate "best selling practices"
- ❑ Your Customers and Markets may be changing. Many are in tough shape because of the economic decline
- ❑ Your traditional Products and Services are being replaced by new ones, often bought by different Decision Makers
- ❑ Your Sales Managers need tools to manage more effectively and know what's working, what isn't, & to take quick action
- ❑ Sales needs to be linked into your Company Business Planning & Management System.

All of the above need a Toolkit and a System that helps everyone change and adapt quickly!!!

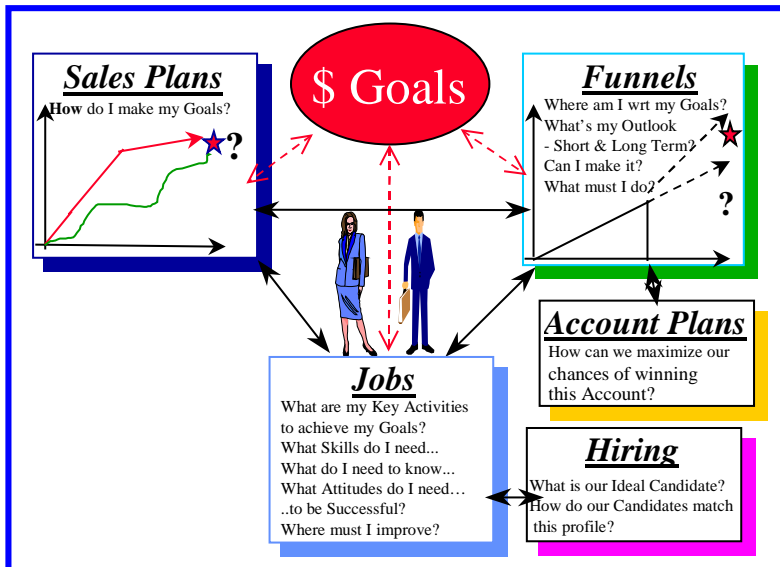
### THE SOLUTION

We customize and train your Sales Reps, Sales Managers and Marketing Managers around your new selling models, and use The PERFORMAX System as the tool kit

and tracking system to ensure you are all winning!

### SYSTEM OBJECTIVE:

The PERFORMAX System helps sales be more effective, even in times of adversity, eg: when you need to deploy and adopt new selling models, quickly!



It has been installed over 50 times: in large corporations to a 3 person firm, often with positive results in a very short time. (see our worldwide reference list).

It is a Goal oriented, predictive system to

answer the following 6 key questions for the whole Sales Team, eg: for Sales Professionals, Sales Managers & Executives...

- What is my main (annual) \$ Goal?
- What is my Action Plan to exceed my \$ Goal?
- How am I doing -v- this Goal on a YTD basis?
- What is my Forecast...both short term, and long term -v- my \$ Goal?
- What *must* I do to exceed my \$ Goal?
- Where *must* I improve to exceed my \$ Goal?

**WE HELP YOU SELL MORE... Even in times of extreme change!**

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For Marketing Managers it answers:

- **What is my Forecast...both short term, & long term -v- my Product Line Goals?**
- **Do we have enough in the Funnel to make our Goals, and where should I mount Lead Generation Programs?**
- **Where & why are we Winning/Losing?**

### WHAT DOES IT PROVIDE?

From an Overall Company Process....



When implemented using our **Opportunity Management** Program, our system provides a closed loop, predictive process linked to the Company's Business Plan.

From an individual User's View....

It provides Sales Managers and Sales Staff with a defined selling process and a set of integrated, electronic tools to:

- Develop proactive, measurable Plans to exceed their main \$ Sales Goal
- Manage their Funnel of Sales Opportunities, Contacts & Sales Activities to exceed their Goal

- Fill their Funnels with high quality Sales Opportunities
- Develop Winning Strategies for the larger Sales Opportunities
- Create a Personal Focus on the right things to be doing, and then assess their Skills, Knowledge & Personal Traits needed to succeed
- Create a Continuous Improvement, and therefore Coachable, Process!!!

***It integrates Market Planning, Sales & Funnel Planning & the HR Process into an integrated Sales Process!!!***

### TYPICAL IMPLEMENTATION

1. Develop a mutually agreeable Program Plan
- 2a. A defined Selling Process(es): eg:
  - To sell New Accounts
  - To expand the base within Customers
- 2b. Opportunity Tracking & Forecasting System [OT&F]
- 3a. "Ideal Person" Job Models for:
  - Sales Professionals
  - Sales Management
  - Technical Support Staff
  - Sales Executives
- 3b. Personal Success Checklists to define and focus people in their new role [PSC]
- 3c. A Recruiting Guide using the PSC.
5. Plans [Plans] for: VP Sales, VP Marketing Sales Managers & Sales Professionals
6. Opportunity Development Planning Process, Winning the Big Deal [WTBD]
7. A Roll-out Process for: Executives, Sales & Marketing Managers, Sales Professionals
8. Follow-ups for:
  - Sustainability via Management Coaching
  - Key Account Plans

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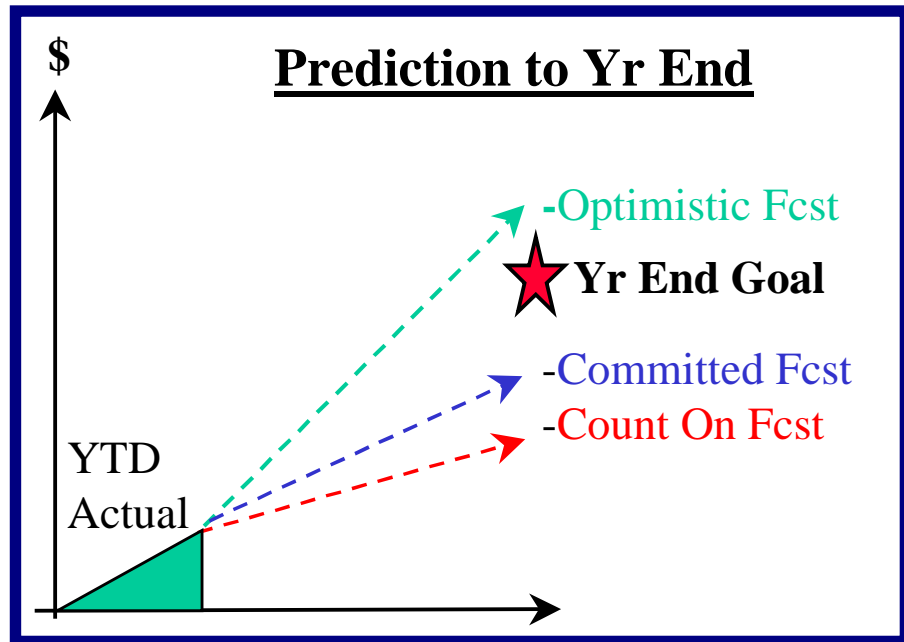
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## PERFORMAX's Predictive Management System

As per the earlier specifications, the PERFORMAX System continuously looks ahead to Predict Year End Attainment versus \$ Goals.

Using our proprietary discrete arithmetic algorithms, the system calculates an "Optimistic" and "Count On" Forecast until Year End.

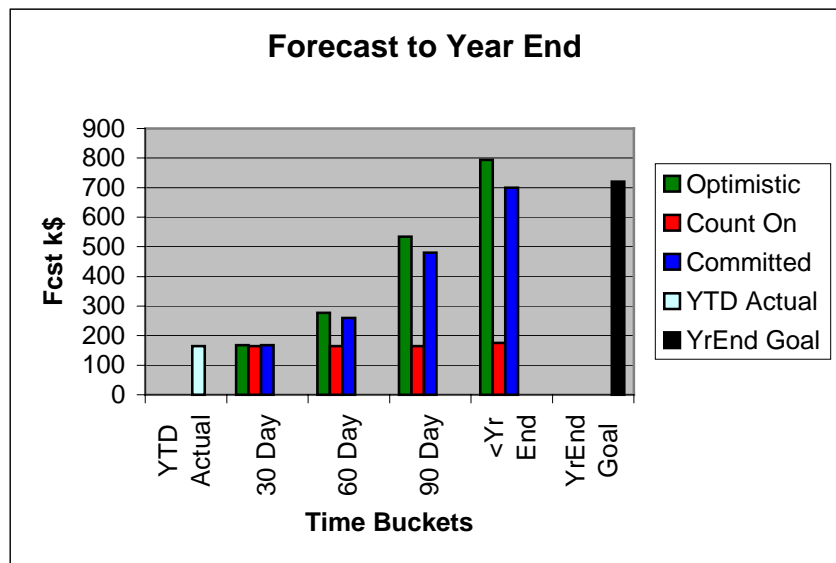
This is intended to help guide a sales person or sales manager to enter their "Committed" Forecast



This predictive system helps everyone in sales develop any one of 3 basic strategies to make Year End Goal (Yr End Goal):

- S1: Either create or find more sales opportunities
- S2: Or improve my win ratio for existing sales opportunities by developing better opportunity plans
- S3: Or both of S1 and S2 above.

The above is calculated by the System, and typical Graphical Representations might include the above graphic.



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**Sales & Marketing Management System**

## **The PERFORMAX System (Release 1)**

The Base System includes an Excel Workbook for each Sales Person and Manager containing:

- A Goal Sheet (normally used for setting Annual Goals, eg: Revenue and Margin)
- An Opportunity Tracking & Forecast Tool [Funnel] with a:
  - Win/Lost Summary + Product Breakout for 12 Products+ Lead Codes
- A Personal Checklist for Success [PSC]
- An Annual Sales Plan [Plan]

The Management Forecast Roll Ups are performed via:

1. The Sales Reps e-mailing their Funnels into their Manager
2. The Manager rolling these up into a Summary View using an Excel Consolidate Function
3. Some standard or ad hoc Reports are available via the Excel Database.

## **The PERFORMAX System EDB (Release 2)**

Designed for larger sales forces, the Base System includes an Excel Workbook for each Sales Person containing:

- A Goal Sheet for setting Annual Goal (eg: Revenue or Margin) & showing graphically whether the Sales Person can achieve the Goal or not (based on their current funnel)
- An Opportunity Tracking & Forecast Tool [Funnel] with a:
  - Win/Lost Summary + Product Codes + Source of Lead Codes + Market Codes
  - This Tool can interface to and with Outlook
- A Personal Checklist for Success [PSC]
- An Annual Sales Plan [Plan]

The Excel Funnel Sheet has additional logic to create a summary file from the Funnel for emailing to the appropriate Sales Manager.

The Management Forecast Roll Ups are performed via:

1. The Sales Reps e-mailing their Funnels into their Manager
2. The above function is more automated for both the Sales Person and the Manager, who is given a Control Screen and Log to manage the Roll Up Process more effectively.
4. The Manager is given an Access DB from the Roll Ups from which he or she can produce standard or ad hoc Reports.

This Roll Up Process can be applied to a multi level organization.

In addition to the Forecast Roll Up, each Manager also has their own:

- Goal Sheet (normally used for setting Annual Goals, eg: Revenue and Margin)
- Personal Checklist for Success [PSC]

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Annual Sales Plan [Plan]

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## Customer References from around the World...

(all the customers below used some version or components of our System)

"We enjoyed a very successful 1994 business performance with significant revenue growth and 100% increase in profits." Julian David, NSM, **IBM UK's Commercial Division**

"We've more than doubled our high end systems business... productivity per sales rep experienced a similar increase... their productivity is at least a third higher than the industry average." Dave Black, CEO, **Silicon Graphics, Canada**

"Simware, like many other software company, arrived at a crossroad where, in order to survive, it became necessary to Invent a new product line, change our Marketing Approach and change our Sales Model from a Product Push to a Solution/Partner Pull. Since Performax had worked with us in the past, I called on them again to help with this mission critical challenge. Their consultants took great care in helping us define and implement a new Sales Culture and related Processes (backed by their Performax System). The discipline inherent to the system enables us to manage and target our Value & Solution offerings much more effectively." Glen Brownlee, CEO, **Simware, Ottawa**

"The process works like crazy." Jim Rawlings, VP Bus. Development, **Simware, Ottawa**

"At that time, we were significantly behind plan and didn't know if we had enough opportunities to make our year end objectives. However, we did manage to make our quota, and one of the key reasons was our commitment to an Opportunity Management process. Your assistance in helping us develop an Opportunity Management system was very important to our success." Neil Isford, Director, Personal Systems Solutions, **IBM Canada**

"As a result of your program, not only have the above issues improved dramatically [forecasting], but StorageTek achieved the forecasted Q3 sales targets that we believed difficult to attain." Michael McLay, Vice President, Sales, **StorageTek Canada Inc.**

"We grew more than 25% which allowed us to gain a couple of points in market share... we ended up with a very profitable organization as a result of a significant increase in productivity." Carlos Fernandez, Manager Select Accounts, **IBM de Chile**

"...we have created an effective business development capability, which, in 6 months built a frontlog of some \$120 million in fully qualified opportunities, the highest of any OMS operation

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worldwide, won two major contracts totaling \$50 million in contract value, one against the market leading competitor, clearly defying the odds..." Gerry Lalonde, Managing Director, **Digital's OMS Division**

"I would thoroughly recommend CCMC (now PERFORMAX) and your Opportunity Management process to any other organization whose sales are slumping. I look forward to working further with you." Gerry Graham, Vice President Sales, **Moore Business Forms & Systems (Canada)**

"In fact, I now see that this approach and program is laying bare many of IBM Corp's key problems and more important, makes them relatively simple to fix." Mauricio J. Castro, **IBM Latin America HQ**

"After a series of quarterly losses, we are now to report to our shareholders that the last quarter was profitable. This is, obviously, a major achievement and we appreciate the role you placed in our success."

Michael M. Greenberg, Chairman, **ISG Technologies**

"The system has provided a foundation of a consistent sales & sales management process across the whole company. We all now speak the same language. The largest single sale of this company to date, over \$55 million, was a textbook application of the sales process." Bob Acosta, VP Sales, **HNC ISG**

"The focus on opportunity management and the availability of meaningful data to analyze our sales cycle resulted in a 30% sales productivity improvement and a 40% decrease in the length of the sales cycle." George Staikos, VP North American Sales, **Platform Computing, Toronto**

"What a powerful System: we thought it would take 6 months to take effect, and after only 3, it's making a difference" Greg Nordal, VP & GM, **Dun & Bradstreet, Canada**

"As we embarked on a journey **to implement an Integrated Sales Management System. With your help and guidance we were able to roll this out in the 4th quarter and are now using the system regularly. In my opinion, the system is simple but effective but more importantly, your tenacity in ensuring the engagement of the entire management team through regular funnel reviews has enhanced our ability to sustain the funnel and to use it as a coaching tool**" Bruce Calder, General Manager, Corporate Sales, **BC TEL**

"PERFORMAX was engaged to help define and "Ideal Culture" to facilitate the change from an Engineering and Operations driven to one where the "Customer is King". **Since the implementation of The PERFORMAX System the results have been impressive. Every member of the sales team is consistently using the system - a major feat for any sales**

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*organization. The team has been able to identify individuals in need of help who would otherwise have slipped through the cracks. From a Marketing perspective, the System has provided a vehicle to capture marketing information and build it into the sales forecast.” Mike Gormick, Director of Sales & Marketing, **BC Hydro***

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