FocalCXM
REMARKABLE EXPERIENCES

Leveraging Decision Microservices to optimize Consultative Sales Processes

Backdrop

Across industries, Business Development and Sales Teams have to nurture their Leads through the funnel, manage them by updating them properly and showing the right content to the right stakeholders at the right time.

Discovery → Demo → Proof of Concept → Closed Won

Problem Statement (3 Sample Questions)

Discovery	Demo	Proof of Concept	Closed Won

Funnel Management

- How can we ensure that across the organization, every sales rep follows the same process to move prospects down the funnel?
- How can we ensure that all the sales teams (new/existing) ask the same set of questions to ensure that there is alignment when qualifying the prospects?
- How can we ensure that the right content is displayed to the right stakeholder at the right time? (given there is not enough data for ML yet)

Discovery | Demo | Proof of Concept | Closed Won

Sample Training

Definition

Confirm a new LEAD is qualified and move to as an opportunity to the Discover stage or nurture the LEAD in QUALIFYING until the customer confirms a purchase action is expected.

Key Data Fields

1. Type of Business: Hospital/Spa
2. Owns a Device?: Yes/No (Drop-Down)
3. Urgency to Act: Open Text
4. Business Drivers (COIN): Open Text
5. TBD : Open Text

Guidance for Success

Validate Qualification:

Validate Customer has:

- A need Org can likely support
- A commitment to make decision
- Some compelling reason to act (Urgency to Act)
- Budget

Update Details: Opportunity Profile

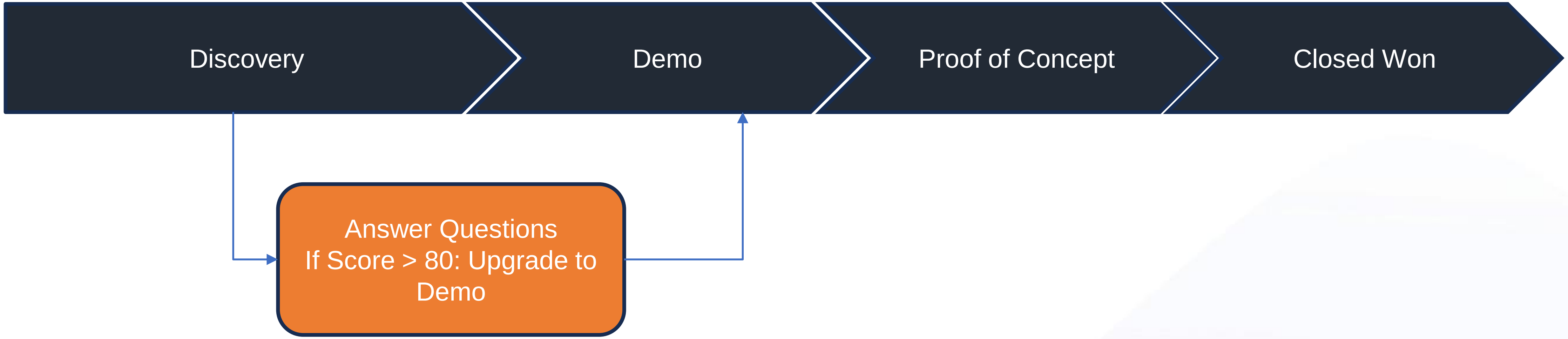
VERIFIABLE OUTCOMES:

- Get verbal confirmation a purchase action is expected

Real World Use Cases

Use Case #1: Demo

- How can we ensure that across the organization, every sales rep follows the same process to move prospects down the funnel?

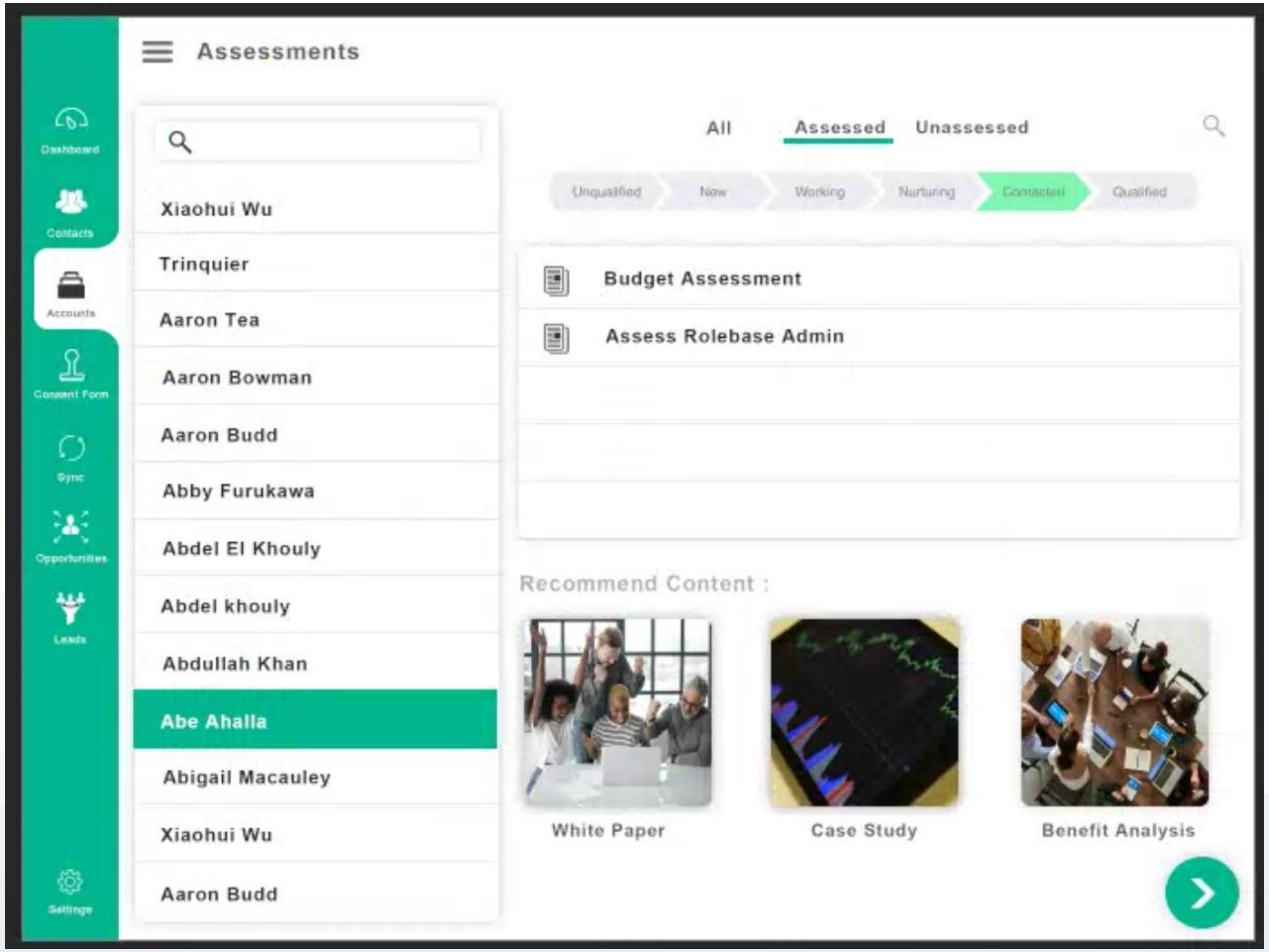


Define the questions and assign scores accordingly.
If scores meet the threshold, upgrade the customer to next level

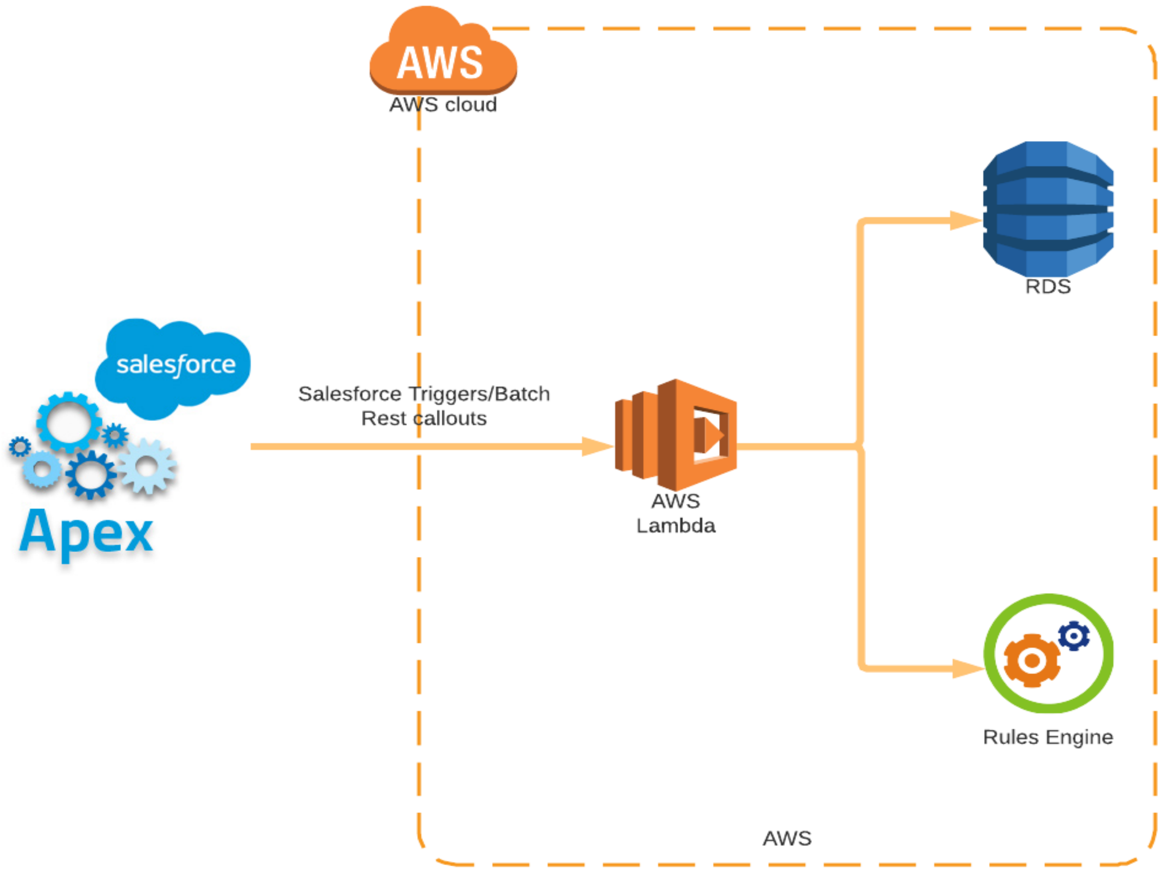
Use Case #2: Demo

- How can we ensure that the right content is displayed to the right stakeholder at the right time?

Assign Content to Stages. As customers are in each stage, empower the sales teams to show the right content without too much thinking.



Use Case #3: Sales & Compliance



Problem Statement

- IT Teams have a need to deploy quickly
- Compliance teams care about local regulations and violations
- Sales teams care about instant validation of events

Use Case #4: Global Rebates

The Project

An agile rebate management platform that delivers customer incentives and drives adoption of goods and services.

The Customer

Top 3 Animal Health Company with global presence

Solution

The OpenRules engine was engineered to reside securely within our client's firewall where all data is kept secure. This allows FocalCXM to integrate other critical client systems to deliver an end-to-end solution, while still using core systems that were already in place. This meant a reduction in implementation costs and improving the ROI on this solution.

- Accurate financial calculations
- Plan and budget customer rewards
- Empower sales representatives with preapproved rebate offerings
- Easily auditable calculations and payments
- Automated customer communications
- Flexible approval workflows

Value Delivered

Global System with extreme accuracy

Improved Compliance and forecasting

Lower Cost of Ownership & Better ROI

Technology Stack

Veeva

AWS

CLASSIC OPEN RULES BRDMS

Challenges

- Accurate Contract Creation
- Delegated approval workflows
- Large amounts of sales data
- Complex rebate calculations
- Complex system integration

Next Steps

- WEKA to build rules from data
- Leveraging LLMs as applicable

Next Steps

Thank you