

the **TAS GROUP**®



DEALMAKER®
FOR TAS
OPPORTUNITY
AND ACCOUNT
MANAGEMENT

DEALMAKER[®] FOR TAS OPPORTUNITY AND ACCOUNT MANAGEMENT

DEALMAKER[®] FROM THE TAS GROUP

The TAS Group delivers improved sales performance through our unique blend of sales technology and experience, resulting in 89% better quota achievement. Our industry-leading methodology has helped more than 650,000 sales professionals find and close more deals, and our proven sales process makes your forecast and pipelines accurate by putting science behind it. It all gets delivered through our Dealmaker technology - the on-demand Sales Performance Automation application that can operate standalone or be integrated with your existing CRM system to produce sustained, measurable results. And to ensure that your sales teams get the full benefit, our virtual learning system delivers on-the-job training worldwide – reinforced by expert coaching.

DEALMAKER SOLVES THESE PROBLEMS:

My revenue performance falls short of potential. We all know that a sales methodology can increase performance. The trick is getting it to be used in the first place, and getting it to stick for long-term performance. By adding the sales methodology and process science contained in our Dealmaker Sales Performance Automation software, methodology becomes an automated, daily-use activity for your sales team. It's guaranteed to help consistently win more deals.

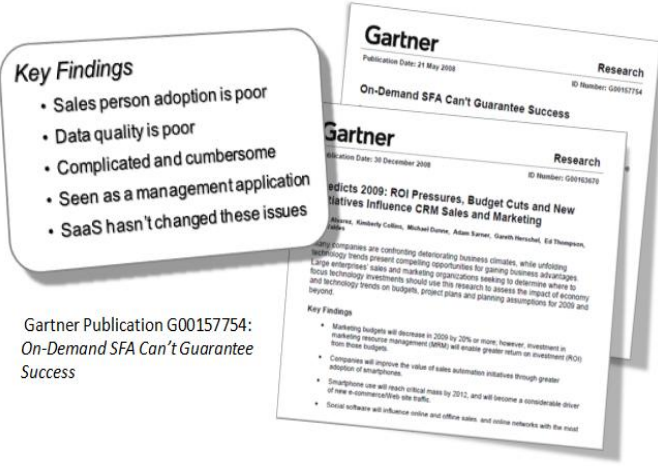
My forecast isn't accurate. Does forecasting feel more like roulette than a business process? The sales process science in our Dealmaker software takes the guesswork out of forecasting. Dealmaker removes the subjectivity that naturally permeates sales people's assessments of where they are in the sales cycle, replacing it with objective in-depth analysis of your team's actual performance and knowledge of what it takes to close deals. The result is a more accurate forecast with early warnings about problem areas for better coaching sooner.

Classroom training is expensive, and, on its own, doesn't produce sustainable results. 87% of skills are lost within one month of traditional classroom sales training. Our Dealmaker Virtual Learning System trains remotely in small, bite-sized pieces that are perfect for modern on-the-job learning and dramatically improved absorption. Post-training, our Dealmaker Sales Performance Automation software can be integrated with your CRM to offer on-demand training content at every step of the sales cycle to achieve daily reinforcement and long-term retention.

The TAS Group received the highest rating of all sales training vendors in the 2009 "Sales Training Vendor Guide" from [ES Research Group](#), Inc. (ESR). This guide rates The TAS Group as the top vendor in the field of 23 leading sales effectiveness companies that ESR's research explored, making it the second straight year that the company was a leader. ESR's guide is based on ESR's objective and proven research methodology, which taps into publicly available information, multiple in-depth interviews with vendor CEOs and/or other senior executives, as well as numerous ongoing interviews with vendor-provided references.

"When it comes to the integration of content, learning and technology that has been proven to directly support sales people, The TAS Group is leading the pack," said Dave Stein, CEO and founder, ES Research Group. "Its Dealmaker product is an innovative solution that has achieved a leadership position in the market."

FROM SALES FORCE 'ACCOUNTING' TO SALES PERFORMANCE AUTOMATION



For sales people, 'SFA' means Sales Force **Accounting**. A recent Gartner report found that, "most sales people see SFA as a management application, rather than a salesperson's tool."

Instead of helping focus representatives on an individual lead and providing tools to help him or her win it, SFAs all too often turn selling into a data entry task where the information is consumed by management, but does not then get turned into helpful guidance for the salesperson.

Sales Performance Automation is a salesperson-centric approach that increases revenue, improves sales forecasts and metrics, and continually reinforces best practices. Increased revenue is delivered through an integrated sales methodology that is automated and constantly used during salespeople's daily activities. Improved forecasting can only be achieved when guesswork is replaced by objective in-depth analysis of sales team's actual, continual performance in reference to the detailed and specific knowledge of what it takes to close deals. Objective forecasting is not only more accurate, but is essential for managers to effectively coach and support their salespeople early in the cycle, when warning signs become evident. Integrated into an SPA approach is sales-learning system that focuses on knowledge and skill acquisition.

Where CRM was Sales Force Accounting, CRM plus Dealmaker is Sales Performance Automation.

CRM 1.0 – SFA	CRM 2.0 – SPA
<ul style="list-style-type: none"> • Data entry clerk • Focused on compliance • Subjective decisions: <ul style="list-style-type: none"> ○ Strategy for selling ○ Selling approach to individuals ○ Materials to use ○ Closure probability ○ Close date ○ Forecasted deal value 	<ul style="list-style-type: none"> • Knowledge worker • Focused on selling • CRM system calculates: <ul style="list-style-type: none"> ○ Strategy for selling ○ Selling approach to individuals ○ Materials to use ○ Closure probability ○ Close date ○ Forecasted deal value

WHAT'S HAPPENING TO SALES TRAINING?

Financial doctrine states that when the economy weakens, travel and entertainment budgets are the first to be cut. This is true for households as well as businesses. With the exception of the months following 9/11, T&E has never before fallen so far or so fast as it has since the recent economic turmoil began in mid-September 2008.

As corporations cut budgets, business travelers and travel managers are looking for ways to save every available penny by flying less and cheaper. As said another way by a corporate travel manager,

"Business travelers are not fools, they know that their bonuses, maybe even their jobs, depend on us cutting costs and riding out this bad patch. Some of them have even come to me with ideas for getting T&E costs down. They know this is no joke."

A recent Gartner report has confirmed that the vast majority of employees prefer on-the-job training to other methods such as classroom based, instructor-led training.

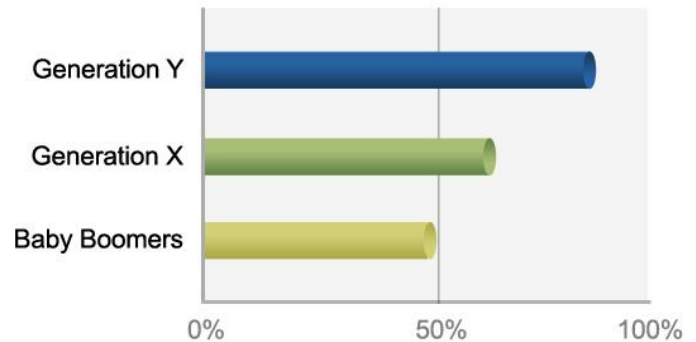
This preference is particularly acute for those of generations X and Y. Despite this and the fact that up to 87% of what is learned in the classroom is lost within a month, most organizations still lock around 60-70% of their training budget in the classroom.

Ernst & Young, IBM, and the authors of "A Guide to Teaching Practice" all conclude that on-the-job training is both the desired way to learn, but also the most effective.

Many companies are turning away from the traditional classroom-based sales training to more efficient, affordable, and effective options. They are doing this by avoiding training events that require travel and large ancillary time commitments, they are taking seriously the 87% loss of skills learned after a class, and considering their sales people's preference for on-the-job training.

The best training solutions are the ones that properly see learning as a process, not a solitary event. This requires constant refreshment of material and reinforcement from management to bolster learning, executive sponsorship, and on-demand tools to help sales people with their daily selling.

Preference for On-the-job Learning



Gartner Research Study, ID # G00162340, published 24 October 2008.

IBM, Global Human Capital Study 2008 "Unlocking the DNA of the Adaptable Workforce"; Ernst & Young, Generations Research Project, 2007; "A Guide to Teaching Practice," authors Louis Cohen, Lawrence Manion and Keith Morrison.

THE DEALMAKER® SALES PERFORMANCE AUTOMATION SYSTEM

Dealmaker is an integrated sales system with learning and best practices constantly reinforced through its everyday use. It combines a proven methodology, embedded into on-demand sales performance automation technology, with effective on-the-job sales training. Since sales performance training is a continual process, Dealmaker breaks down the critical elements of the process into the following stages:

Learn

The best way to learn is in small segments, delivered at the right time. Dealmaker is 100% virtual with sales training delivered through the Dealmaker Virtual Learning System.

Apply

Critical to learning is the application of new skills and insights directly to your real-world accounts and opportunities in workshop webinars or optional face-to-face workshops. Thereafter, sales professionals are following best practice and actively working their deals every day in Dealmaker.

Measure

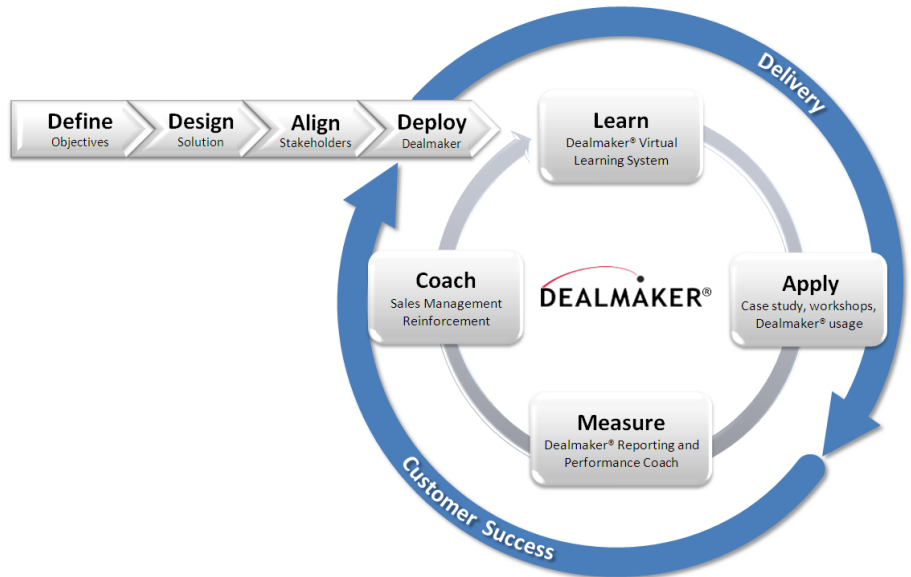
With Dealmaker, sales leaders and professionals can measure how effective their knowledge and selling is, through detailed sales process and performance metrics.

Coach

Identify where problems exist and where additional coaching is required through the Dealmaker sales performance automation application. Refresh your sales team's knowledge and skills anytime through the Dealmaker Virtual Learning System.

Dealmaker Application and Reinforcement Workshop webinars are included with Dealmaker and administered by experts with decades of experience. They are customized to your actual accounts and opportunities and delivered via web, phone, or video-conference worldwide with no travel required.

Dealmaker is also an opportunity and account management performance automation platform, which utilizes industry-leading methodologies from The TAS Group. Integration with existing CRMs such as Salesforce.com, Oracle CRM On-Demand, and Microsoft Dynamics CRM is straightforward and completely transparent to the sales user.



DEALMAKER® SOLUTION IN DETAIL

TARGET ACCOUNT SELLING® METHODOLOGY

Dealmaker increases your win rate by helping you answer critical questions about each of your opportunities, such as:

- Is this an opportunity you should pursue?
- What are the critical issues for the customer?
- What's the compelling event driving their decision to buy now?
- What competitive strategy should you employ to win the deal?
- Who are the real buyers?



ACCOUNT MANAGEMENT METHODOLOGIES

Dealmaker includes account management methodologies designed to optimize and increase the opportunities from you existing accounts. It:

- Profiles and Analyzes customers' business structure and organization
- Segments business/service units or accounts, identifying targets where high mutual value exists, then focuses and prioritizes them
- Creates new opportunities by mapping your solutions to your customer's business based on its understanding of Business Drivers, Initiatives and Critical Success Factors
- Selects an account strategy by analyzing current status, competitive position, and future opportunity, with the relationships, partners, and marketing of your customer
- Creates revenue objectives and business development plan to execute



SALES PROCESS OPTIMIZATION

Dealmaker's opportunity management optimizes your sales process to unlock your customer's buying process. This helps you create value for your customer and win more sales. This means:

- More effective qualification – determined early in the sales cycle
- Sales process aligned with customer's buying process – so you take control
- Standardized sales stages and a common view and approach to opportunities
- Integration of best practice methodologies and activities

Qualifier	Status	Date	Comments	Flag
Has an ROI model been agreed with the customer?	X	msd42008	Not done yet. Need to arrange meeting with procurement department to facilitate this. Need coaching on delivering credible ROI - feel a little unsure here.	?
Is behavior change understood & committed?	✓	09242008		
Has customer's perceived risk been addressed?	✓	04242008	Confirmed w/ mentor.	

DEALMAKER® SOLUTION IN DETAIL

FORECAST ANALYSIS AND PERFORMANCE COACH

Intelligent forecast & pipeline analysis provides insights to historical and future sales opportunity. This increases revenue by delivering actionable intelligence by asking:

- **Forecast Analysis** – Which deals are really going to close in the near term and where are the issues?
- **Pipeline snapshot** – Do you have enough in your pipeline to make your targets?
- **What's Changed** – What's changed in your pipeline over time?
- **Pipeline Health Check** – Which deals in your pipeline are active or inactive?
- **Velocity** – How long does it take to progress a deal?

Region	Target Selected	Target Qualified	Requirements	Evidence	Acquisition	Verbal Order
East Team	\$2,913,181	\$1,342,600	\$1,889,964	\$1,889,964	\$1,889,964	\$1,889,964
West Team	\$5,957,178	\$4,925,300	\$14,000,436	\$14,000,436	\$14,000,436	\$14,000,436
South Team	\$6,029,207	\$1,827,632	\$4,760,372	\$4,760,372	\$4,760,372	\$4,760,372

MARKETVIEW

MarketView allows you to see your company's entire marketplace and the future of your accounts in one view:

- **Sales person/manager view** – see all account plans in one view, to see the gaps and make corrections
- **Global account view** – see all teams and region plans for one global account, to spot growth opportunities
- **Custom view** – compare vertical industry and solution penetration, for example
- Share reports automatically with your teams and regions

Account	Total Revenue	Potential	Current	Installed	Won	Not in plan - current	Not in plan - won
Joe Sales	\$52,790,485	\$0	\$16,194,655	\$6,410,900	\$2,812,165	\$26,245,470	\$4,126,295
A.G. Edwards	\$15,536	\$0	\$15,536	\$0	\$0	\$0	\$0
United Partners	\$0	\$0	\$2,264,840	\$2,200,000	\$1,200	\$6,025,000	\$211,175
Chief Networks, Inc.	\$7,240,000	\$0	\$3,100,000	\$1,910,000	\$2,230,000	\$0	\$0
Edge Communications	\$9,960,174	\$0	\$2,972,489	\$4,200,000	\$980,115	\$5,620,470	\$7,120
salesforce.com, inc.	\$16,240,000	\$0	\$4,240,000	\$0	\$0	\$9,890,000	\$2,110,000
Abbott Distribution	\$8,510,000	\$0	\$0	\$0	\$0	\$6,710,000	\$1,800,000

DEALMAKER VIRTUAL LEARNING SYSTEM ('DVLS')

DVLS enables accelerated and sustained sales performance and revenue growth, through learning, reinforcement, certification and coaching.

- Web 2.0 Sales knowledge portal, sharing 'Best practices' from proven sales methodologies in blogs, streaming movies, worksheets and other documents
- Certification engine for learning, testing and improving best practice knowledge and application
- Customized curricula, specifically tailored for continued learning and coaching
- Educational sales tips and webinar content for in-depth problem analysis and recommendations

IMPLEMENTATION AND CRM INTEGRATION

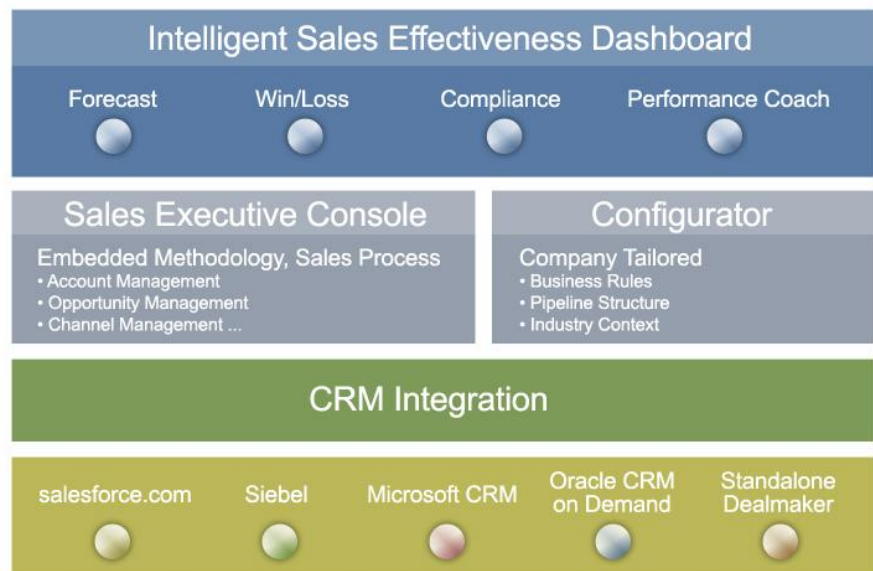
CRM deployment can be problematic. As enterprise-wide systems, they serve more than one master including among others: sales, sales operations, marketing, customer service, product management, and finance. The specific needs and motivations for use of CRMs by sales people can become buried under competing departmental concerns, resulting in the system and tools not being used.

Independent sales analysts at ES Research have looked into why this is. They say, “We have spoken with dozen of sales and sales operations leaders who come to us seeking new ways to try to get their sales people to input data into their corporate CRM systems. There is really only one answer: Make sure that the CRM system delivers value to the rep by helping them sell more.”

The secret to increasing sales use of CRM systems, as ES Research points out, is to help sales people sell more. This is done by installing and integrating a sales methodology directly into their CRM system. It needs to be designed, built, and optimized around how sales people do their job and how they can be more successful. The data they enter must directly help them do their job better.

The TAS Group has designed its technology solutions with its multi-million dollar R&D center to fundamentally improve how companies approach and adopt sales performance solutions. Its globally proven Implementation Services Architecture correctly aligns all customer stakeholder teams for smooth integration. The TAS Group advises and guides the process, while leveraging your specific business expertise with our experience delivering sales acceleration programs.

- A dedicated Project Manager runs your implementation
- Sales Process and Methodology experts work with you to optimize your sales process (optional)
- Technical Implementation Services configures Dealmaker with a best practice sales process or your customized sales processes and integrates with your CRM system
- A global network of native language speaking consultants deliver your Dealmaker Application and Reinforcement Workshop Webinars
- Customer Success ensures that The TAS Group solutions are properly aligned with your unique requirements



ES Research 2008 Sales Training Vendor Guide www.esresearch.com.

THE TAS GROUP SERVICE PORTFOLIO

In addition to Dealmaker Sales Performance Automation Platform, the TAS Group offers:

- CRM Integration
- Consulting Services
- Channel Management Programs
- Workshops

ABOUT THE TAS GROUP

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Headquartered in Seattle, with international offices in the UK and Ireland, the TAS Group is the only sales performance automation organization with a continuous multi-million dollar investment in its own methodology and technology R&D center. The TAS Group also hosts and moderates The Sales 2.0 Network (www.sales20network.com), a global, virtual, thought-leadership forum to discuss issues relevant to sales professionals in a Web 2.0 world.

CONTACT US TO EXPLORE YOUR BUSINESS DRIVERS, SALES PERFORMANCE REQUIREMENTS AND RETURN ON INVESTMENT:

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