



Sales **Q**uantification-using **O**ptimal
Algorithm-based **D**ecision **M**odeling

"One Score" for **Revenue Maximization**

SQOAD Method

SQOAD is a data-driven tool and methodology that:

- **Analyzes** company sales data to identify variables unique to the business
- **Quantifies** these variables using algorithms to come up with an Optimal Strategy
- **Measures** on-going Compliance against the Optimal Strategy
- **Optimizes** Revenue



Optimization
Methodology

+

CRM
Data

+

Compliance
Tool

Data Science + AI

Revenue Modeling meets Sales Optimization

How it Works

SQOAD

On-ground

Nudges

Prompts

Proactive Push

Real-time Action

Variable Algorithms

- Total Leads
- Lead Quality
- Sales Stages
- No. of Follow ups
- No of touch points
- Time between Stages
- Time between Follow ups
- Type of Leads: Fresh/Referral
- others

Optimal Compliance

- Incremental Revenue
- Optimal Revenue
- Aspirational Revenue

One
Compliance
Score

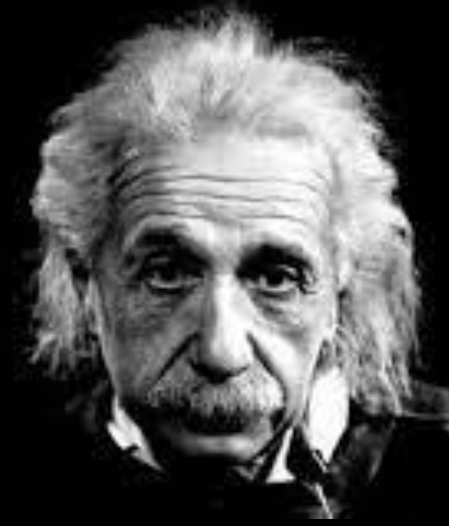
**SALES
DATA**

Simply put...

Technology **leads**
to Automation

Automation **leads**
to Information

Information **leads**
to Intelligence



“If you can't explain
it simply, you don't
understand it well
enough.”

Albert Einstein
smarty-pants physicist

CRMs | Sales
Automation Tools

Prospect Information |
Sales Data | Billing
Systems



SQOAD AI

SQOAD Lead

Prospect Profile

Geography
Revenue
Deal Size
Referral Type
Contact
Sales Stage
Date
Potential Value

Lead Scoring

Highest win-rate
Probability of closure
Highest Revenue
Optimal Discount
Sales Stage Movement

Ready Feed

- Prospecting Databases
- Sales Resources
- Marketing Keywords
- AI Sales Bot
- Website Leads
- Customer Referrals
- Social Media
- Digital Marketing

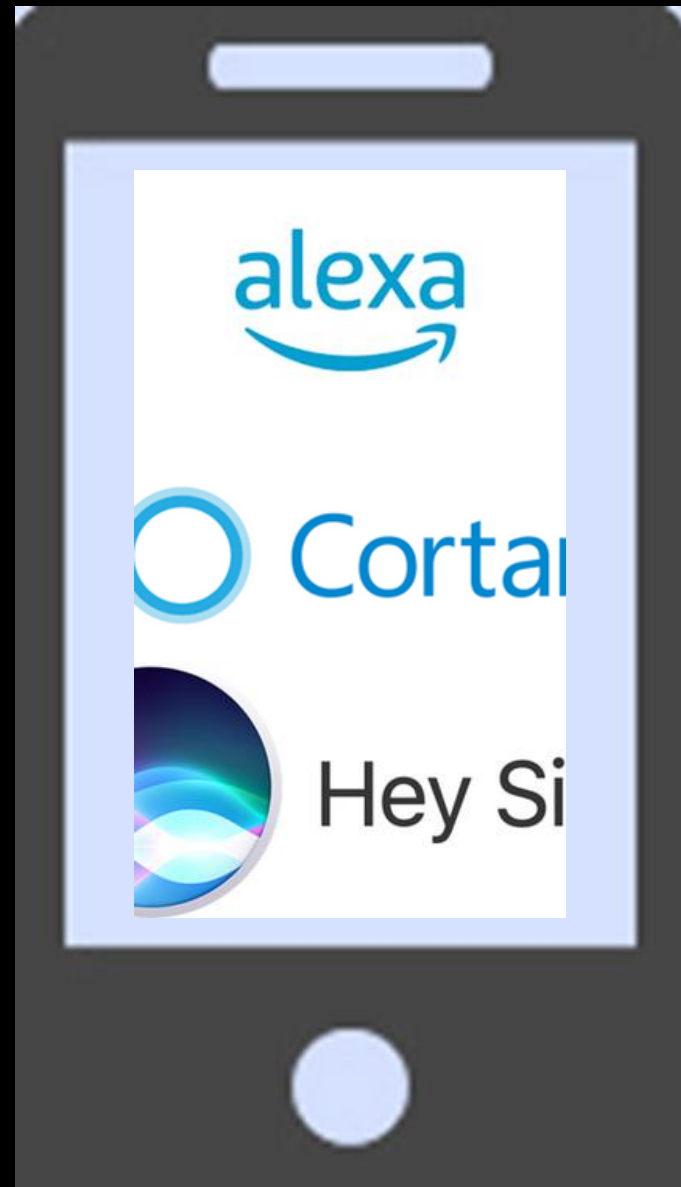
Scoring & Ranking

Improved Compliance = Increased Conversions

Prospecting AI

SQOAD Beat

Improved Compliance = Increased Conversions



Digital Sales Assistant

Prospect Profiles

Easy Adopters

Revenue Earners

Hard to Get

Sales Enablement

How to Pitch

Product mix to offer

Potential Price to offer

Optimal Discount

How to move to next sales stage

Ready Resources

Pitch Modules

Pitch Guidance

Product Material

Ready Reckoner

AI Sales Bot

Proactive Nudge

Compliance

SQOAD Command

Pipeline Fields

- Sales Person
- Lead Name
- Contact
- Address
- Center Distance
- Lead Source
- Sales Stage
- Business Type
- Profit-Making
- Collateral
- Has Loans
- Years Operated
- Sector

Quantifying Variables

- Lead Source
 - - New
 - - Repeat
 - - Referral
- Time between stages
- No. of contact points
- Repeat Customer
- Collateral
- Loan Amount
- Interest

Scenario Building

"Sales Mix" Simulations

Hypothesis Modeling

Optimal Strategy

- Ideal no. of Leads
- Minimum Leads per stage
- Optimal Time in each stage
- Max contact points
- Referrals and Repeat leads
- Number of visits

Optimal Strategy

One Module

SQOAD Lead: Prospecting AI

SQOAD Beat: Digital Sales Assistant

SQOAD Command: Optimal Strategy

One Matrix



**= Revenue
Maximization**

SQOAD Model

68%

Current Compliance %	68%
Current Revenue	xx,00,000

Revenue	\$	Variance %
Incremental	xx,00,000	%
Optimal	xx,00,000	%
Exponential	xx,00,000	%

My Company		Sales Team Member					Lead Names					Total Compliance %
Variables	Quantification	1	2	3	4	5	A	B	C	D	E	
Total Leads	<i>if more than x = +1</i>	Green	Red	Green	Yellow	Red	Green	Red	Green	Yellow	Red	88%
Lead Source		Yellow	Green	Red	Yellow	Red	Yellow	Green	Red	Yellow	Red	76%
- Hunting	+1											78%
- Farming	+3											79%
- Referral	+5											92%
Leads in each stage	<i>if more than x = +1</i>	Green	Red	Green	Yellow	Red	Green	Red	Green	Yellow	Red	87%
Time between stages	<i>'-1' for 4 - 5</i>	Green	Yellow	Red	Green	Yellow	Green	Yellow	Red	Green	Yellow	76%
No. of contact points	<i>+1 for 1 - 3 contacts;</i>	Green	Yellow	Red	Green	Yellow	Green	Yellow	Red	Green	Yellow	45%
Churn	<i>-1' above x %age</i>	Green	Red	Green	Yellow	Red	Green	Red	Green	Yellow	Red	56%
Coverage	<i>-1' above x %age</i>	Green	Red	Green	Yellow	Red	Green	Red	Green	Yellow	Red	77%
Total Spend	<i>if more than x = +1...</i>	Green	Red	Yellow	Red	Yellow	Green	Red	Yellow	Red	Yellow	79%
Yield against revenue	<i>% value</i>	Green	Red	Yellow	Green	Yellow	Green	Red	Green	Yellow	Yellow	68%
Compliance %		82%	55%	65%	67%	53%	91%	45%	67%	71%	44%	

Improved Compliance = Increased Revenue

SQOAD Scorecard

Revenue	\$	Variance %
Incremental	xx,00,000	%
Optimal	xx,00,000	%
Exponential	xx,00,000	%

Referrals	+4%
Farming Leads	-1%

Closing time (WoW)	+8%
Coverage / Churn	+1%

Yield	+1%
Expense	-2%

What's working

Not working

Lead time reduced

-7% MoM
- Sales stages 1 – 4 improvement

Total Prospects Low

- Push LinkedIn Marketing
- Purchase Databases
- Push referrals

Churn decreased

-1% MoM
- Client Outreach started

Farming Leads Low

- Sales Team Training
- Mailer to current clients

Yield Improvement

+1% MoM
- Travel expenses reduced

Sales Stage time marginally high

+3% MoM
- Closing training recommended

Focus recommendation: Overall marketing push needed

CRM Adoption Low

- 7% MoM
- Conduct Session

Improved Compliance = Increased Revenue

What does the client get



Benchmarking

To other “like” companies of the same size & industry based on our expertise and experience
Benchmarking

Day 1



Reporting

Not just on performance but on strategy-compliance

Day 60



Diagnostic

Diagnostic Reporting
A quantified view of what is the sales set-up, team, process and revenue, showing what is working and where the gaps are

Day 15



Scenario-building

Other ways to build the company sales strategy & team eg: change the geo –split, team-split, time split or process changes

Day 75



Optimal Model

Based on quantifying the variables to come up with an “Optimal Sales Strategy”

Day 30

Next Steps

- Send us some sample data
- Get a SQOAD Diagnostic
- Grow Your Business with us!

<https://www.sqoadai.com/>