



ISA SalesWerks Platform

The Sales Playbook



ISA SalesWerks The Sales Playbook

Powered by  PipelineDeals

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The Case for Change

Our New Reality

Traditional supply channels and supporting sales models are no longer keeping up with End User needs and the rise of Industry 4.0.

Channel 2.0 is a strategic framework focused on the **End User** first, their changing needs, and the waterfall effect of new drivers and capabilities needed by all stakeholders to thrive as the channel continues to evolve.

Learn more at: www.isapartners.org/channel-2-0



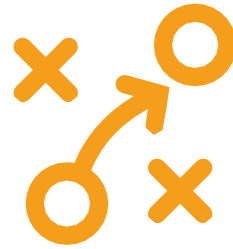
IMR Network — Purpose

Advancing the Professionalism and Utilization of Industrial Manufacturer Representatives



Do Business with the Best

Connect with the channel's most successful reps and the manufacturers who need and use IMRs most.



Elevate Your Game

Get the knowledge and skills you need to compete at a higher level and prepare for the future.



Forge Winning Partnerships

Build lasting relationships with the right people, doing the right things, at the right time.

ISA SalesWerks Objective

To create a new standard of expectations helping Manufacturers and Independent Reps (IMRs) create better strategic value for each other while satisfying the End User and Channel 2.0 needs.



ISA SalesWerks

Objective

1. Establish Channel 2.0 best practices for IMRs and Manufacturers so they are part of the channel transformation not a victim of it
2. Increase level of sales leadership and sales process sophistication between IMRs and Manufacturers
3. Strengthen the strategic connection between Manufacturers and IMRs
4. Create an ISA certification and industry standard platform for IMRs and Manufacturers that automates a LEAN sales process and becomes the foundation and driver of the ISA SalesWerks initiative and beyond
5. Certification = Differentiation

The Sales Process — Our Common Language

It doesn't matter how talented your sales team is or how hard you work.

Without a roadmap for success, you're making your life a lot harder than it needs to be.

A sales process is a set of repeatable steps that helps your sales team convert a prospect into a customer.

Having a standardized sales process adds structure and accountability to your sales activities, leading to a higher win rate and shorter sales cycles.

The Sales Process — Our Common Language

8 Reasons Why You Need One:

- 1. Have a clear path for sales reps to follow** — better than winging it.
- 2. Faster onboarding** — simple and nearly foolproof while taking some burden off the sales manager.
- 3. The ability to continually refine winning sales methods** — knowing why you are winning or not.
- 4. Predictability of sales revenue** — more reliable forecasts with data driven close ratios.
- 5. Be better at qualifying leads** — more effective in helping identify high potential, life long customers.
- 6. Common language and process** — simplifies communication and collaboration
- 7. Greater insight to sales effectiveness** — reveals impact of sales decisions along the sales process.
- 8. A better overall customer experience** — align with how the customer wants to buy not how you want to sell.

The Sales Process — Our Common Language

ISA SalesWerks Deal Stages ensure alignment with the end customer, increasing probability of success.

1 Qualified Opportunity

A qualified opportunity fits within your organization's core strengths, resources and go market strategy. Once you have confirmed that the opportunity is a good match, you will move the lead into the "Qualified Opportunity" stage. This will allow you to have clarity between what is just a lead and an opportunity that is qualified to move the sales process

2 Presentation

The "Presentation" stage is where you convey **relevance** and **capability** - demonstrating to the prospect that you are a serious contender for the opportunity. This stage is often the starting point for tracking potential revenue from a deal.

3 Assessment

After completing a thorough presentation and the prospect has agreed to move forward in the process, you will move them into the "Assessment" stage. This stage is about **discovery** and **clarity**, learning what the prospect is doing today, what is working, and understanding the goals they want to achieve.

4 Validation

The "**Validation**" stage is designed for **agreement** and **alignment**. This takes the Assessment stage to the next level, where you are validating their current state, gaining a deeper knowledge of their pain points, understanding their needs and future state objectives. This is your time to start bridging any gaps they have and further demonstrate that you are the right solution.

5 Test/Design

The Test/Design stage is where you design a solution that **bridges the gap** between the customer's current and desired future state with dollarized value and ROI.

6 Proposal

"Proposal" is your **competence** and **assurance** stage. This is the stage where you are making it abundantly clear that you can and will deliver them a solution that meets their needs and will be a low risk decision.

The Sales Process — Our Common Language

ISA SalesWerks ensures alignment with the end customer, increasing probability of success.

7 Negotiations

It's now time for the "Negotiations" stage, where the customer will make the **value** and **ROI connection**. Work with the customer to secure the right solution at the right price and timeline that works for all parties.

8 Won

Great job! Now go and serve your new customer. Make sure to track the reason why you are winning deals, what worked, what can be used again, where was there friction that you can iron out in the future and how you can duplicate this success.

8 Lost

Losing a deal can be one of the best tools for future growth. In PipelineDeals you can track your lost reasons as well. Make it mandatory to give a reason why a deal is lost. Each month review your won and lost deals so that you can better understand what pivots are necessary in your process or business to lose less and win more.



PIPELINEDEALS TIP

When your PipelineDeals trial account is created, we will add these custom ISA SalesWerks deal stages for you

The Sales Process — Our Common Language

Probability by Deal Stage

Probability is associated with each stage and indicates how likely a deal is to close.

Use the default deal stages, or customize your sales process by editing and adding new deal stages.

The 0% probability stage represents a lost deal and the 100% probability stage represents a won deal.

You can have custom deal stages at each whole percentage point from 1% to 99%.

Pipelines

Creating multiple pipelines is the best way to keep track of different products or processes. Deals can be assigned to any of the pipelines you have created and can be tracked separately from your other processes or products.

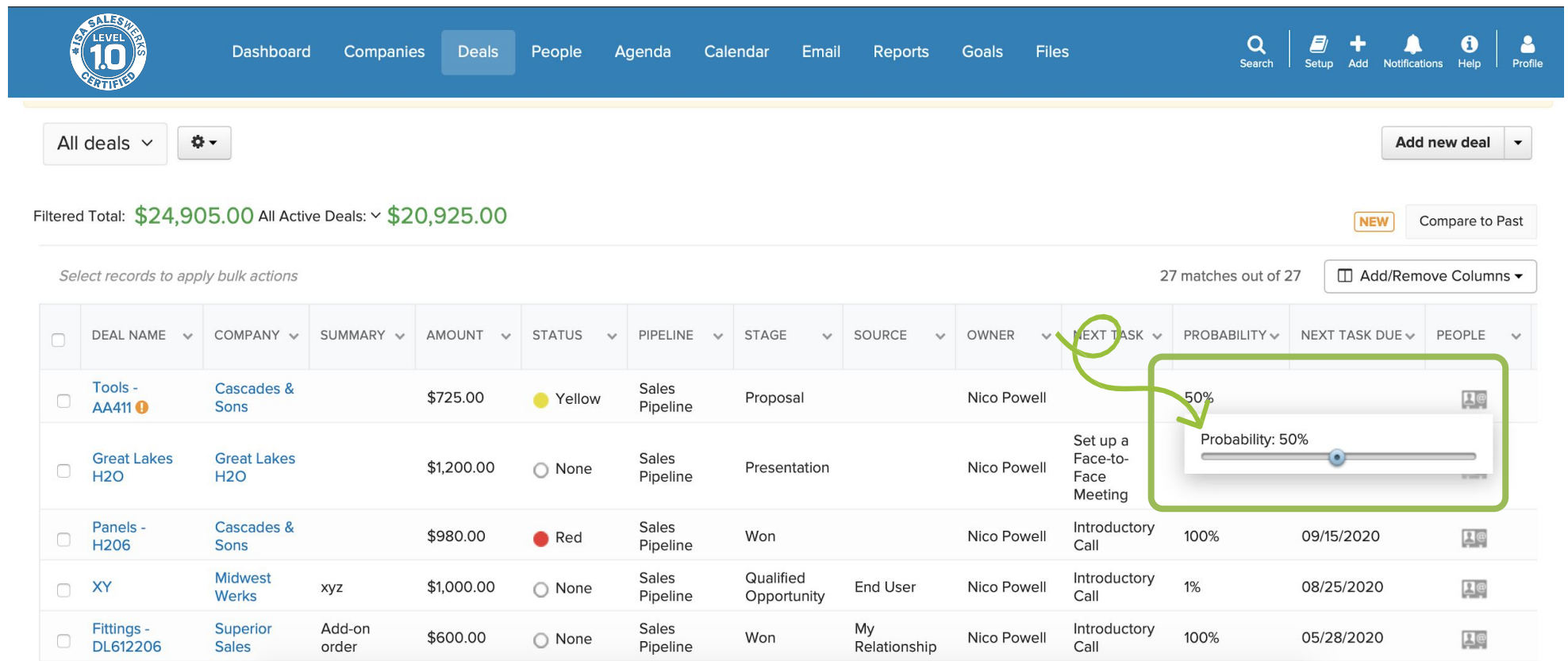
PIPELINES	
Sales Pipeline	DEFAULT
1 of 5 pipelines used	
+ Add new pipeline	

STAGES	
Qualified Opportunity	1
Presentation	5
Assessment	15
Validation	25
Test/Design	35
Proposal	50
Negotiations	75
Won	100
Lost	0
+ Add new stage	

The Sales Process — Our Common Language

Probability by Deal Stage

You can also adjust the probability of each deal to fit your own sales process.



The screenshot displays the ISA SalesWerks platform interface. At the top, there is a navigation bar with the ISA SalesWerks logo (Level 10 Certified) and menu items: Dashboard, Companies, Deals (selected), People, Agenda, Calendar, Email, Reports, Goals, and Files. On the right side of the navigation bar are icons for Search, Setup, Add, Notifications, Help, and Profile.

Below the navigation bar, there are filters for "All deals" and a settings icon. An "Add new deal" button is located on the right. The main content area shows a summary: "Filtered Total: \$24,905.00 All Active Deals: \$20,925.00". There is a "NEW" badge and a "Compare to Past" button.

The main table displays a list of deals with columns: DEAL NAME, COMPANY, SUMMARY, AMOUNT, STATUS, PIPELINE, STAGE, SOURCE, OWNER, NEXT TASK, PROBABILITY, NEXT TASK DUE, and PEOPLE. The table shows 27 matches out of 27. A green box highlights the "NEXT TASK" and "PROBABILITY" columns for the second deal, "Great Lakes H2O". A slider is shown for the "Probability: 50%" field, with a blue dot indicating the current value. A green arrow points from the "50%" text above the slider to the slider itself.

DEAL NAME	COMPANY	SUMMARY	AMOUNT	STATUS	PIPELINE	STAGE	SOURCE	OWNER	NEXT TASK	PROBABILITY	NEXT TASK DUE	PEOPLE
Tools - AA411	Cascades & Sons		\$725.00	Yellow	Sales Pipeline	Proposal		Nico Powell		50%		
Great Lakes H2O	Great Lakes H2O		\$1,200.00	None	Sales Pipeline	Presentation		Nico Powell	Set up a Face-to-Face Meeting	50%		
Panels - H206	Cascades & Sons		\$980.00	Red	Sales Pipeline	Won		Nico Powell	Introductory Call	100%	09/15/2020	
XY	Midwest Werks	xyz	\$1,000.00	None	Sales Pipeline	Qualified Opportunity	End User	Nico Powell	Introductory Call	1%	08/25/2020	
Fittings - DL612206	Superior Sales	Add-on order	\$600.00	None	Sales Pipeline	Won	My Relationship	Nico Powell	Introductory Call	100%	05/28/2020	

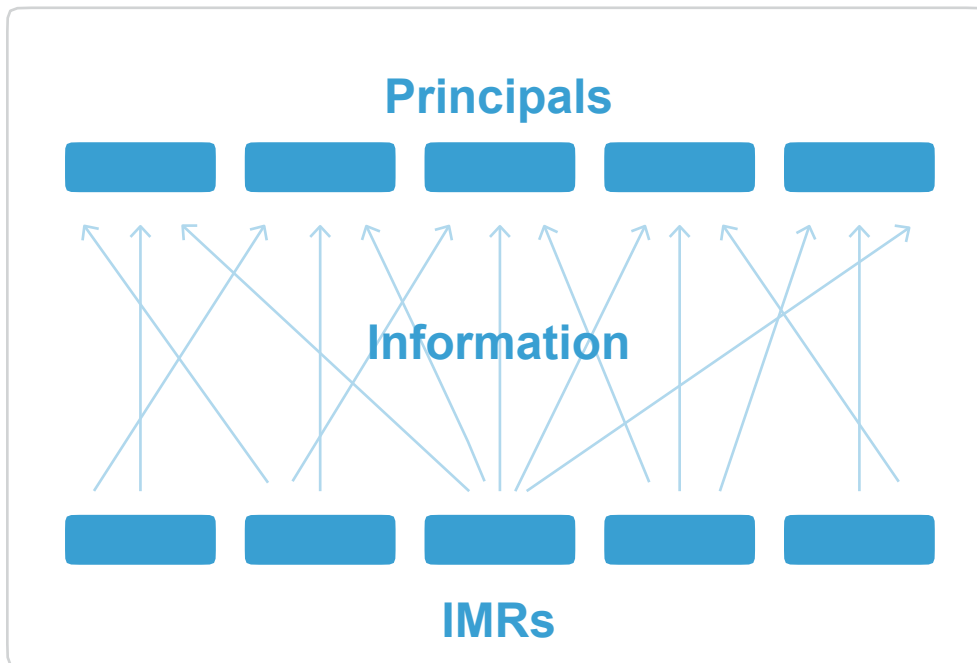
ISA SalesWerks Platform



Working with ISA and the IMR Network, we built the ISA SalesWerks Platform with industry specific custom fields that will get the IMR ready to go right out of the box – no IT needed. Our goal from day one was to keep it simple yet highly effective for ISA’s IMR community.

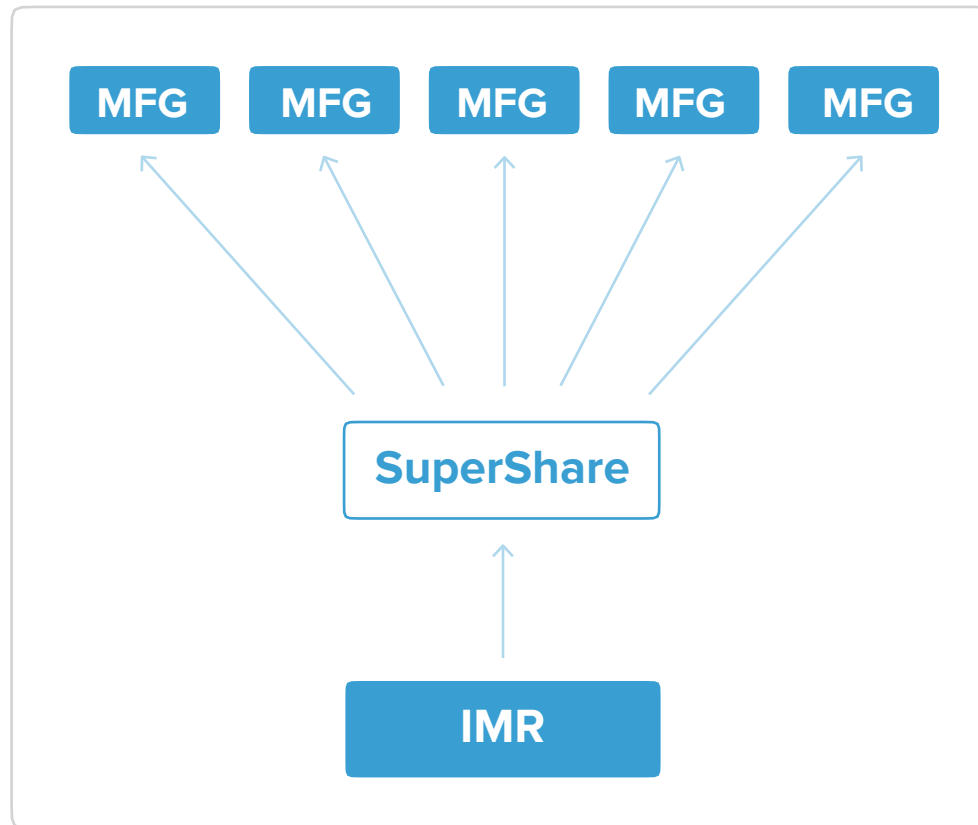
— **JP Werlin, Co-Founder and CEO of PipelineDeals**

Traditional Pipeline Sharing — Current State

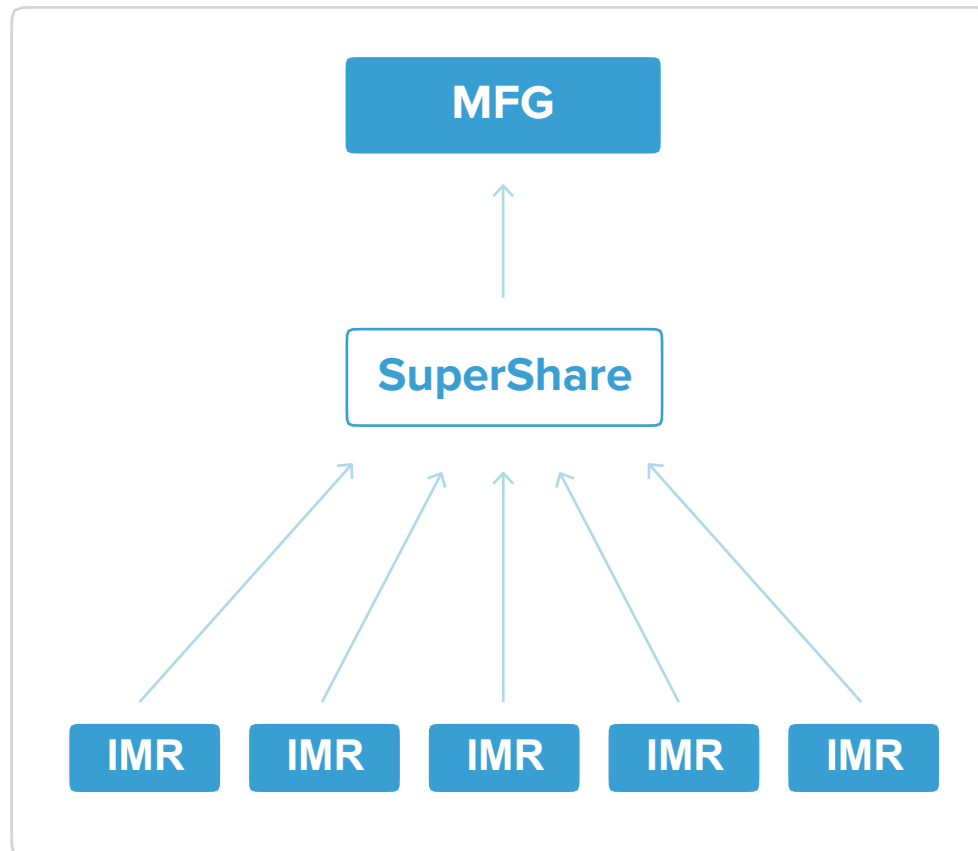


- ↳ No common language or sales process.
- ↳ No standard approach to information.
- ↳ Numerous different formats being shared.
- ↳ Symbolic vs actionable information.
- ↳ Rearview vs. real-time collaboration.
- ↳ Wasted value added resources.
- ↳ Missed opportunity to win faster and better.

ISA SalesWerks Platform Future State – IMRs



ISA SalesWerks Platform Future State – Manufacturers



ISA SalesWerks

LEAN Industry Standard

The Pipeline is a simple way to see how many deals and dollar value you have for each stage along the sales process. The Pipeline can be viewed in a simple visual like below or in as much detail as you choose through the ISA SalesWerks reporting module.



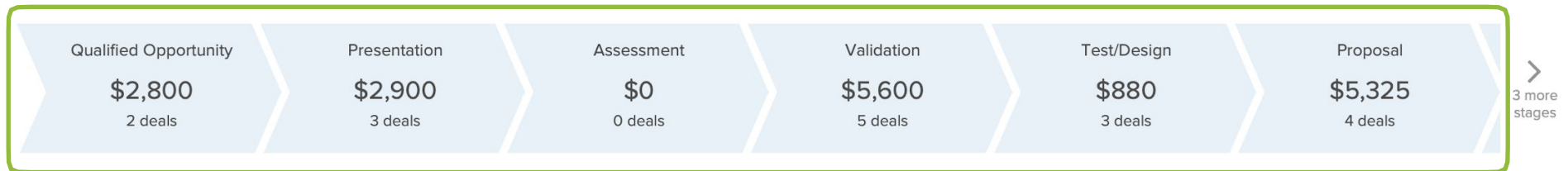
Dashboard Companies Deals People Agenda Calendar Email Reports Goals Files

Search Setup Add Notifications Help Profile

My Pipeline ▾

All deals active ▾ this year ▾ in Sales Pipeline ▾

\$19,825 **19 deals** ▾



Amount Won **\$3,780** | Deals Won **4 deals** | Sales Cycle Time **48 days** | Win Ratio **80%** | Avg. Won Deal Size **\$945**



Dashboard Companies Deals People Agenda Calendar Email Reports Goals Files

★ All deals - default ▾

Share List Ad

Filtered Total: **\$35,000.00** All Active Deals: ▾ **\$35,000.00**

Select records to apply bulk actions

2 matches out of 2

<input type="checkbox"/>	Principal ▾	Deal Name ▾	Product Category ▾	Company ▾	Company Type ▾	Amount ▾	Stage ▾	Probability ▾	Activities ▾	Weighted Forecast ▾	Revenue type ▾	Expected close ▾	Status
<input type="checkbox"/>	MCR Safety	Fall Protection - Cell 1	Safety	Aerospace Manufacturing	End User	\$25,000.00	Test/Design	35%		\$8,750.00	Incremental	10/31/2019	● Green

ISA SalesWerks Platform - Company

PIPELINEDEALS TIP

Adding a new **Company** is easy with custom IMR form fields, such as this Channel dropdown.



New Company **CUSTOMER** ✕

Is Customer? ?

Company name*

Type

Industry (EU only)

Channel (DIST only)

Product Category (DIST only)

BG (DIST only) Q

Phone

Website

Address

Address line 2

City

Channel (DIST only) dropdown options:

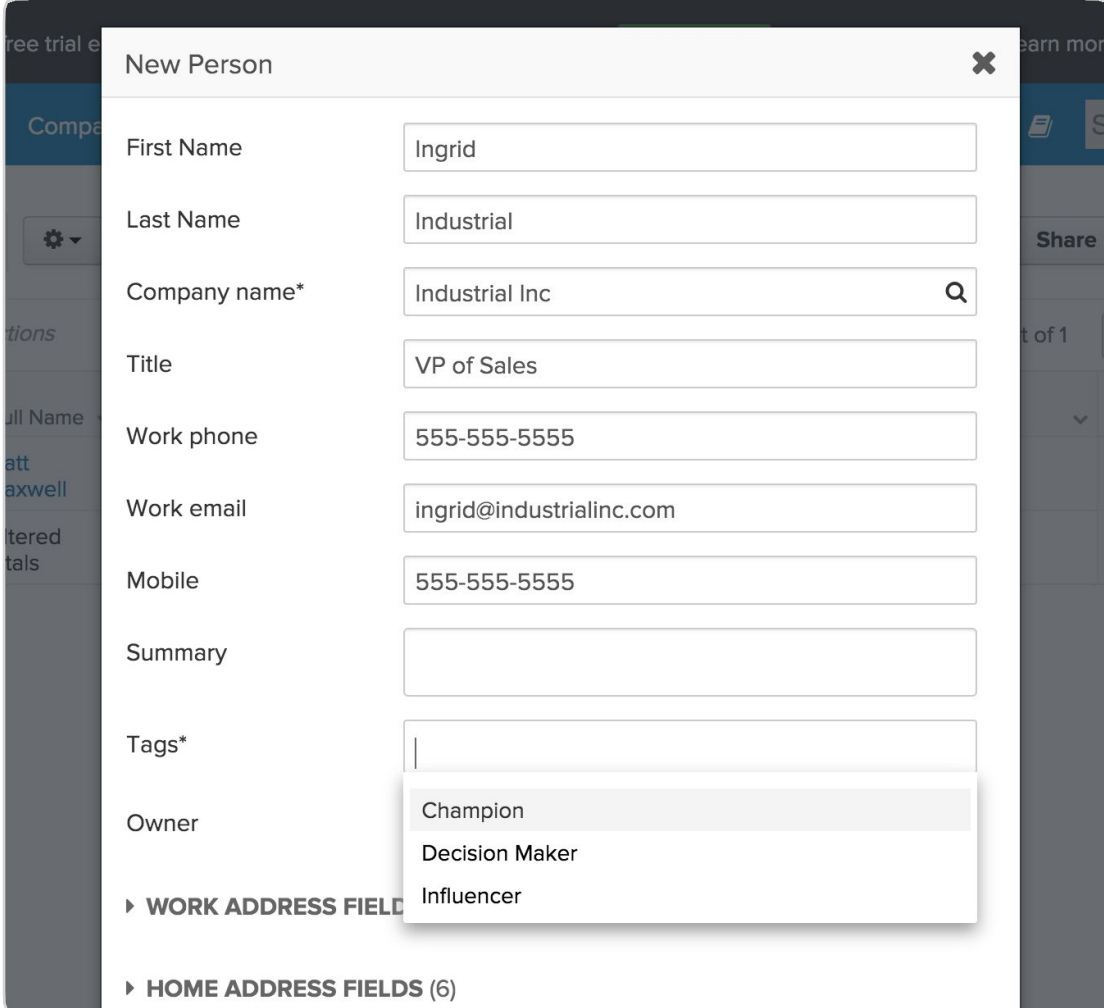
- Pick Option
- National
- Integrator
- Traditional - General Line**
- Traditional - Specialty
- E-Sales

ISA SalesWerks Platform

Person

PIPELINEDEALS TIP

Adding a new **Person** is easy with form fields customized for the way IMRs sell and tags for Champion, Decision Maker, and Influencer.



New Person

First Name	<input type="text" value="Ingrid"/>
Last Name	<input type="text" value="Industrial"/>
Company name*	<input type="text" value="Industrial Inc"/> <input type="button" value="Q"/>
Title	<input type="text" value="VP of Sales"/>
Work phone	<input type="text" value="555-555-5555"/>
Work email	<input type="text" value="ingrid@industrialinc.com"/>
Mobile	<input type="text" value="555-555-5555"/>
Summary	<input type="text"/>
Tags*	<input type="text"/>
Owner	<ul style="list-style-type: none">ChampionDecision MakerInfluencer

▶ WORK ADDRESS FIELDS

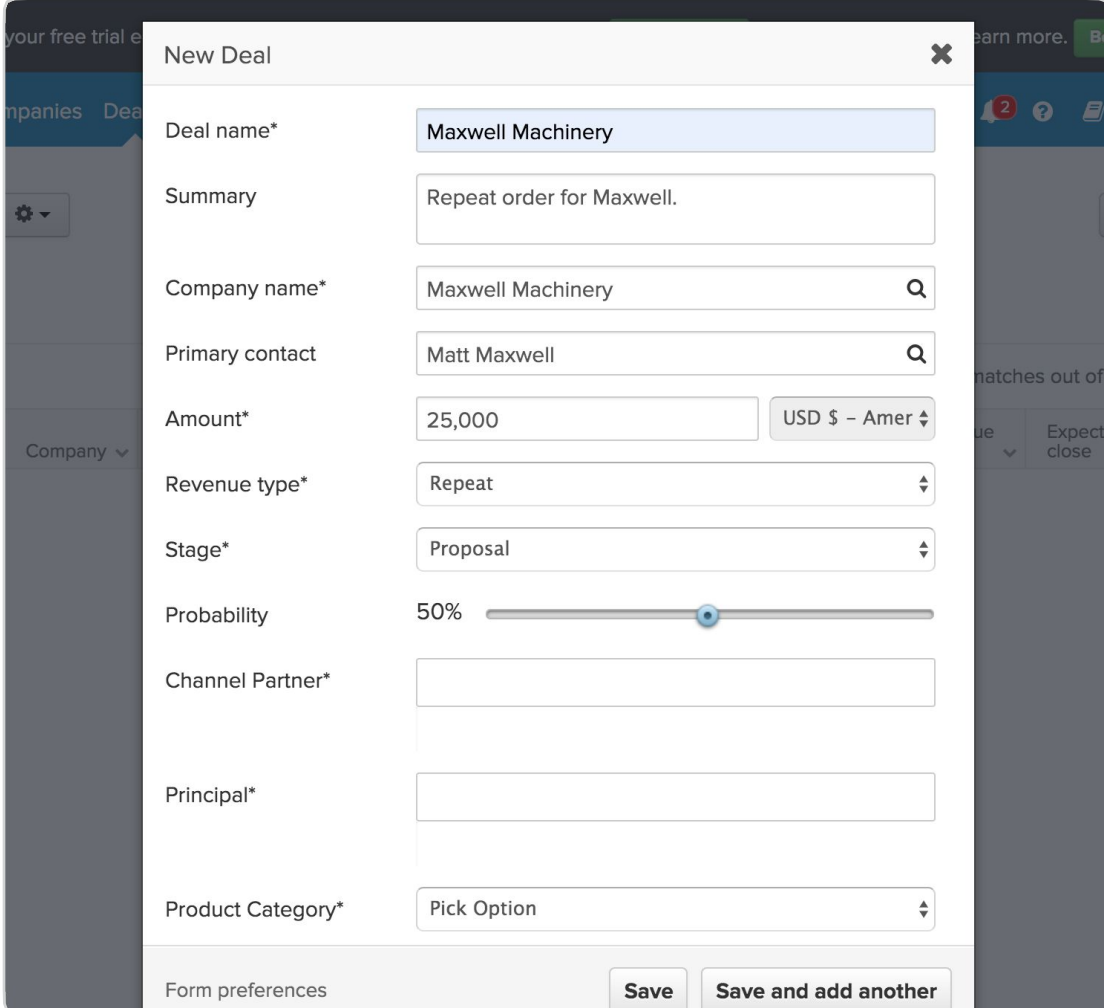
▶ HOME ADDRESS FIELDS (6)

ISA SalesWerks Platform

Deal

PIPELINEDEALS TIP

Adding a new **Deal** is easy with form fields — such as Channel Partner and Principal — customized for the way IMRs sell.



New Deal

Deal name*	<input type="text" value="Maxwell Machinery"/>
Summary	<input type="text" value="Repeat order for Maxwell."/>
Company name*	<input type="text" value="Maxwell Machinery"/>
Primary contact	<input type="text" value="Matt Maxwell"/>
Amount*	<input type="text" value="25,000"/> USD \$ - Amer
Revenue type*	<input type="text" value="Repeat"/>
Stage*	<input type="text" value="Proposal"/>
Probability	50% <input type="range" value="50"/>
Channel Partner*	<input type="text"/>
Principal*	<input type="text"/>
Product Category*	<input type="text" value="Pick Option"/>

Form preferences Save Save and add another

SuperShare



Gone are the days of activity based “call reports” and rear view spreadsheets.

— **Craig Lindsay, President of Pacesetter Sales, IMR Network Chair**



Now we can focus our efforts on real-time collaboration helping each other win deals faster together.

— **Patrick Curry, President of Fullerton Tool, IMR Network Co-Chair**

ISA SalesWerks Platform

ACCOUNT SETTINGS > USERS > ADD NEW USER

SuperShare

SuperShare was created with you, the IMR, in mind. This feature enables you to share your opportunities by Principal without them being a PipelineDeals user.

The first step is to head to your **users section** to add this “External User”.

After this external users has been created and added, you will head to the list view from the “Deals” tab you are looking to share.

Once you’ve created a saved list, the next step will be to click on “Share List” as seen below.

PIPELINEDEALS TIP

It’s important to know before saving and sharing this view, you’ll want to do all of your filtering, by Principle or product for instance. You’ll also want to have multiple lists saved depending on the Principle you’re sharing with.



Add new user

FIRST NAME*

LAST NAME*

EMAIL*

ROLE*

SuperShare users only have access to the Deals page and can only view lists that have been shared with them. SuperShare users will be able to collaborate on any deal shared with them via activities and comments.

[Role descriptions ^](#)

TEAM*

PERMISSIONS

Normal access

User can add and edit data

- Account Admin
- Can delete people & deals
- Can export reports
- Can send email campaigns

[Permission descriptions ^](#)

Read-only access

User cannot add or edit any data. Users can collaborate via activities and comments.

- Can export reports

ISA SalesWerks Platform

SuperShare

ISA SALESWERKS LEVEL 10 CERTIFIED

Dashboard Companies Deals People Agenda Calendar Email Reports Goals Files

Search Setup Add Notifications Help Profile

★ All deals - SuperShare

Filtered Total: \$24,905.00 All Active Deals: \$20,925.00

Select records to apply bulk actions

27 matches out of 27 Add/Remove Columns

PRINCIPAL	DEAL NAME	COMPANY	AMOUNT	STAGE	PROBABILITY	WEIGHTED FORECAST	PRODUCT CATEGORY	REVENUE TYPE	EXPECTED CLOSE	STATUS	SOURCE
Puget Metals	Tools - AA411						er Tools	Repeat	08/01/2020	Yellow	
Puget Metals	Great Lakes H2O						lubricants ent	Incremental	08/03/2020	None	

Manage sharing

Choose the people you want to share this list with. They will receive an email with instructions on how to access the shared list.

Note: Any changes you make to this list will be accessible to whomever you're sharing the list with, as well.

List name: All deals - SuperShare

Sharing: Share this list globally

or

Select individual users:

- Sandra Kennedy

★ Star Star this list for the above people

PIPELINEDEALS TIP

When sharing with users, external users are displayed in blue with a share icon, as shown on the left.

Internal users are gray.

ISA SalesWerks Platform — Other Features

Morning Coffee Report

Get informed first thing in the morning with a daily email overview of yesterday's success and the latest numbers to move the needle today.

PipelineDeals
Morning Coffee Report

Ed Gerber's Summary for 09/09/19 [Log In](#)

Current pipeline
\$100,000
652 active deals

Created	Won	Lost
\$500 28 deals	\$250 2 deals	\$50 13 deals

Starred lists
★ Top 2019 Leads [6 deals](#)

Today's agenda
You don't have any tasks scheduled for today.
Learn how PipelineDeals works with calendar tools like [Outlook](#) and [Google](#).
[View my agenda](#)

Yesterday's pipeline updates

3 deals created — \$500

\$250 — Deal 1 Aerospace Manufacturing Ed Gerber	\$150 — Deal 2 Aerospace Manufacturing Ed Gerber	\$100 — Deal 3 Aerospace Manufacturing Ed Gerber
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[View all 3 deals created yesterday](#)

2 deals won — \$250

\$150 — Deal 1 Aerospace Manufacturing Ed Gerber	\$100 — Deal 2 Aerospace Manufacturing Ed Gerber
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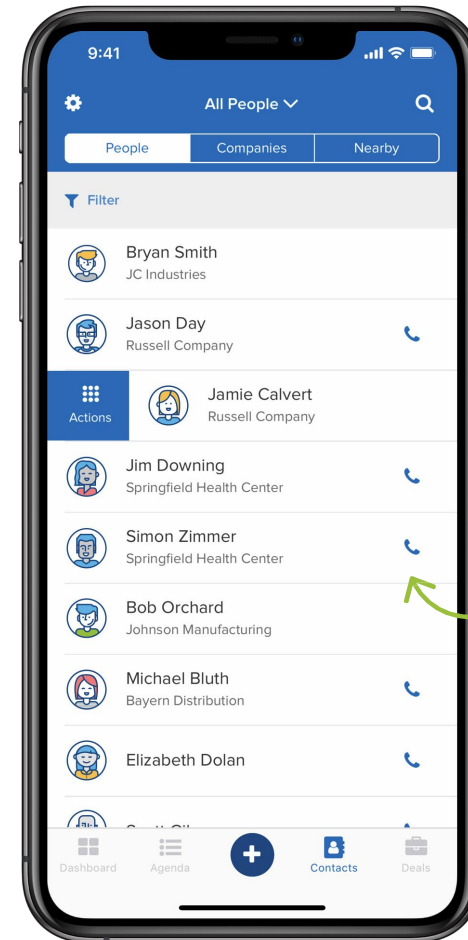
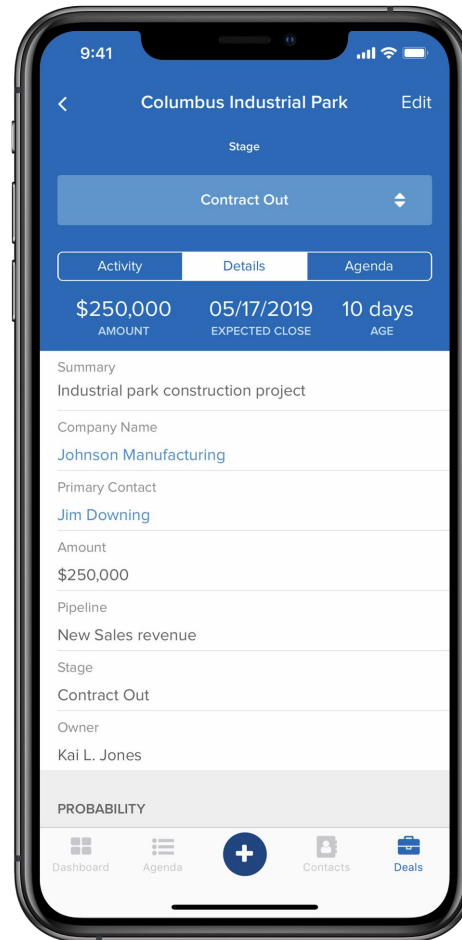
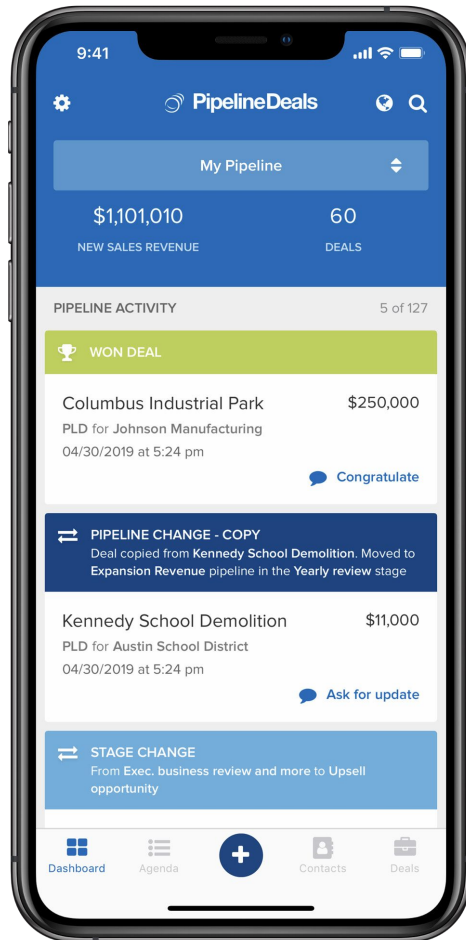
[View all 2 deals won yesterday](#)

1 deal lost — \$50

\$50 — Deal Aerospace Manufacturing Ed Gerber
--

ISA SalesWerks Platform — Other Features

Mobile



Perfect for sales teams on the go!

ISA SalesWerks Platform — Other Features

Agenda

The agenda keeps deals from slipping through the cracks. Overdue tasks are highlighted in red.

Select records to apply bulk actions 39 matches out of 53 Add/Remove Columns

<input type="checkbox"/>	↑ DUE DATE	TASK	DESCRIPTION	ASSIGNED	FOR	INFO	TYPE	START	END	ACTIVITIES	COMPLET...
<input type="checkbox"/>	10/18/2019	Add a person	Click the '+' icon at the top of your screen, then select 'Person'.	Nico Powell							
<input type="checkbox"/>	10/19/2019	Import your data	Upload a CSV of your contacts by clicking 'Import' on the 'People' tab.	Nico Powell							

ISA SalesWerks Platform — Other Features

Workflow

The screenshot displays the 'AGENDA' view in the ISA SalesWerks platform. At the top, there is a dropdown menu set to 'Me' and a filter set to 'Any time'. Below this, a list of tasks is shown for various dates:

- Sep 20**: CALL - Introductory Call - Ed Gerber - Corey's Contractors
- Sep 23**: CALL - Set up a Face-to-Face Meeting - Ed Gerber - Corey's Contractors
- Sep 30**: APPOINTMENT - Face-to-Face Meeting - Ed Gerber - Corey's Contractors
- Oct 1**: EMAIL - Thank you Email

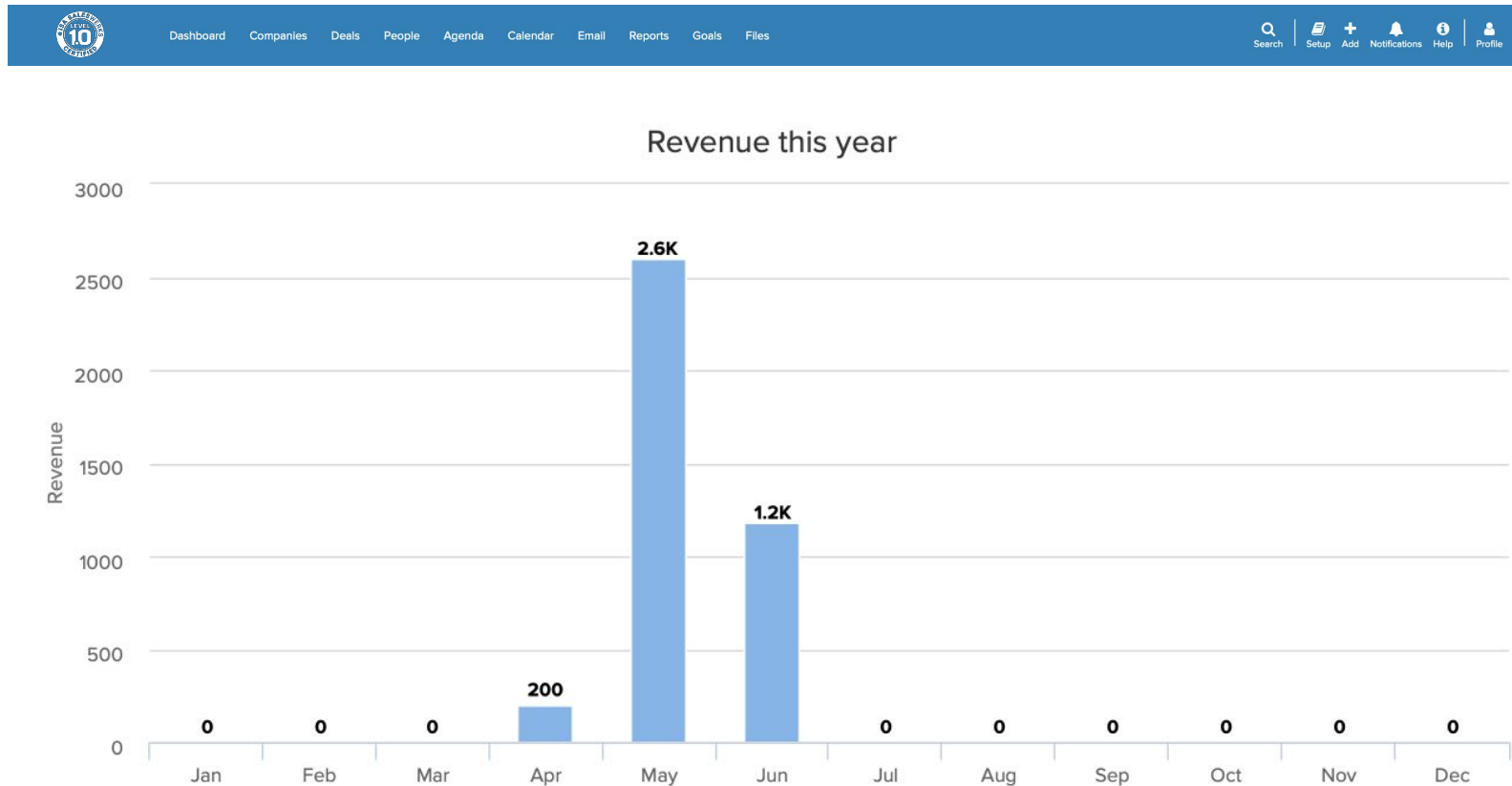
A dropdown menu is open over the 'Sep 23' task, showing options for 'Task' and 'Event'. Below these, a section titled 'TEMPLATES' is highlighted with a green box, containing the option 'Deals - Sales Template'. A green arrow points from this box to the explanatory text on the right.



Takes the guesswork out of lead follow-up.

ISA SalesWerks Platform — Other Features Reporting

Easily track data and create powerful reports. Track your team's performance metrics, the types of deals you acquire, or any custom data point you want.



ISA SalesWerks Platform — Other Features

Deal List Views

Deal List Views increase visibility into all Deals. Easily filter and sort by each column.

★ All deals - default ⚙️ Share List Add new deal

Filtered Total: **\$24,905.00** All Active Deals: **\$20,925.00** NEW Compare to Past

Select records to apply bulk actions 27 matches out of 27 Add/Remove Columns

<input type="checkbox"/>	PRINCIPAL	DEAL NAME	PERFORMANCE LANE	PRODUCT CATEGORY	COMPANY	COMPANY TYPE	AMOUNT	STAGE	PROBABILITY	ACTIVITIES	WEIGHTED FORECAST	REVENUE TYPE	EXPECTED CLOSE	STATUS	SOURCE	OV
<input type="checkbox"/>	Puget Metals	Tools - AA411 🔔	Puget Metals	Hand & Power Tools	Cascades & Sons	End User	\$725.00	Proposal	50%		\$363.00	Repeat	08/01/2020	● Yellow		Ni Pc
<input type="checkbox"/>	Puget Metals	Great Lakes H2O		Chemicals, Lubricants and Equipment	Great Lakes H2O	End User	\$1,200.00	Presentation	56%		\$672.00	Incremental	08/03/2020	○ None		Ni Pc
<input type="checkbox"/>	Midwest Werks	Panels - H206	Midwest Werks	Welding & Soldering	Cascades & Sons	End User	\$980.00	Won	100%		\$980.00	Repeat	06/01/2020	● Red		Ni Pc
<input type="checkbox"/>	Midwest Werks	XY		Bearings	Midwest Werks	Principal	\$1,000.00	Qualified Opportunity	1%		\$10.00			○ None	End User	Ni Pc

ISA SalesWerks Platform — Other Features

Email Templates

The screenshot displays the ISA SalesWerks platform interface. At the top, there is a navigation bar with the ISA SalesWerks logo (Level 10 Certified) and menu items: Dashboard, Companies, Deals, People, Agenda, Calendar, Email, and Reports. The main content area shows a deal titled "Fall Protection - Cell 1" with a status of "DEAL". Below this, there are four key metrics: Amount (\$25,000.00), Expected Close (10/31/2019), Stage (Test/Design, 36 days in stage), and Days Active (41 days, Created 08/10/2019). The deal details section includes fields for Owner (IMR 2.0 Demo), Company (Aerospace Manufacturing), Pipeline (Sales Pipeline (default)), Probability (35), Status (Green), Source (Distributor), and Revenue Type (Incremental). A summary section indicates "Replacing old gear". Below the deal details, there is a "PEOPLE" section featuring a contact card for Susan Lindsay, Primary Contact, VP Operations at Aerospace Manufacturing. Her contact information includes phone numbers (111-111-1111, 222-222-2222) and an email address (slindsay@AeroMFG.com) which is highlighted with a green box.

Reuse and share your most successful email templates to get better as a team.

The screenshot shows the "Email Template" configuration interface. It features a title field with the value "Introduction" and two radio buttons for "Personal" (unselected) and "Shared" (selected). Below this is a subject field with the value "Welcome!". The main body of the email template is displayed in a text area, containing the text: "Hi {{first name, fallback=there}},
Following up my previous message to your company, you have some time this or early next week for a quick".

ISA SalesWerks Platform — Other Features

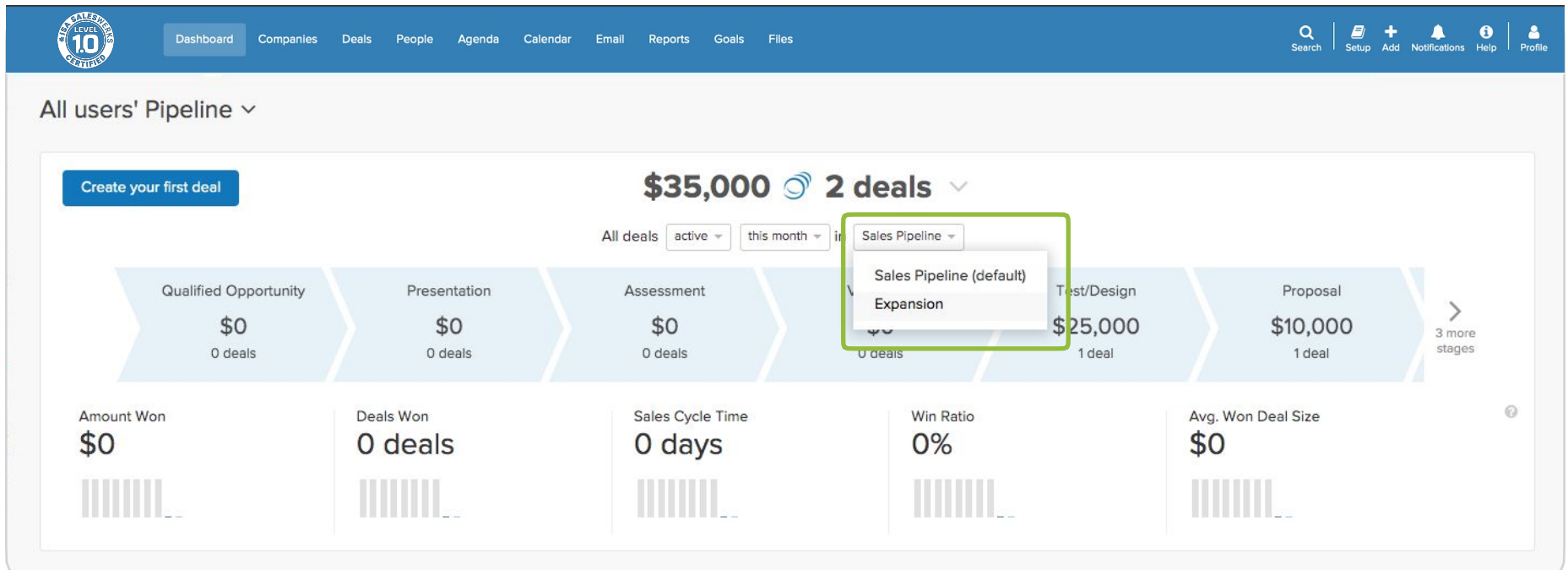
Collaboration

PipelineDeals helps you guide your teams with activity tracking so you're always in the know.

The screenshot displays the 'ACTIVITY FEED' section of the ISA SalesWerks platform. The interface is divided into two main columns. The left column, titled 'ACTIVITY FEED', contains a search bar, filters for 'FIRST ACTIVITY' (set to 'None') and 'TIME SINCE LAST ACTIVITY' (set to 'N/A'), and dropdown menus for 'Any time' and 'All people'. Below these are tabs for 'ALL', 'ACTIVITIES 0', 'EMAIL 0', and 'DEAL UPDATES 3'. A text input field contains the note: 'How are we going to price this deal?'. Below the input are dropdown menus for 'ACTIVITY CATEGORY' (set to 'Assessment') and 'PERSON' (set to 'Susan Lindsay'). There is a checked checkbox for 'NOTIFY OTHERS' with 'Select all' and 'Deselect all' options. A tag for 'IMR 2.0 Demo' is visible. At the bottom are 'Add note' and 'Cancel' buttons. The right column, titled 'PEOPLE', shows a profile card for 'Susan Lindsay' with contact information and social media icons. Below the profile is an 'AGENDA' section with filters for 'Me' and 'Any time', and a message: 'No Agenda Items At This Time!'. At the bottom of the agenda section, it says 'Viewing 0 of 0'.

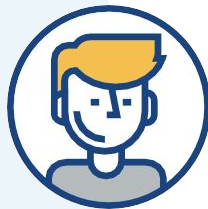
ISA SalesWerks Platform — Other Features

Multiple Pipelines



💡 PIPELINEDEALS TIP

Develop plan users get two Pipelines, while Grow users have access to five Pipelines.



Accurately track multiple sales workflows for your different processes, products, and services.

ISA SalesWerks Platform — Other Features

People List Views

<input type="checkbox"/>	Company	Full Name	Title	Info	Tags	Work City	Work State	Company Province	Company Type	Owner
<input type="checkbox"/>	Aerospace Manufacturing	Susan Lindsay	VP Operations		Decision Maker	Seattle	WA		End User	IMR 2.0 Demo
<input type="checkbox"/>	Fullerton Tool	Patrick Curry	President		Decision Maker	Saginaw	MI		Principal	Ed Gerber
<input type="checkbox"/>	A1 Distribution	John Polli	VP Marketing & Product Management		Decision Maker	Philadelphia	PA		Distributor	Ed Gerber
		Filtered totals								

PIPELINEDEALS TIP

People in PipelineDeals can be designated as contacts or leads.

Leads in PipelineDeals are most commonly classified as unqualified contacts that do not have a corresponding deal.

Contacts in PipelineDeals are qualified contacts that have a corresponding deal or contacts that you have done business with in the past.



ISA SalesWerks Platform — Other Features

Company Management

Company	Type	Industry (EU only)	Product Category (DIST only)	City	State	Owner
Aerospace Manufacturing	End User	Aerospace		Seattle	WA	Ed Gerber
A1 Distribution	Distributor		Cutting Tools & Metalworking, MRO - General Line	Philadelphia	PA	Ed Gerber
Fullerton Tool	Principal			Saginaw	MI	Ed Gerber
MCR Safety	Principal				TN	Ed Gerber
Filtered totals						

COMPANY LIST VIEW

NEW MILESTONES

DATE	MILESTONE	STATUS
Nov 1	Onboarding period	NOT STARTED
Sep 20	Prepare for kickoff	IN PROGRESS
Sep 30	Kickoff meeting	BLOCKED

CUSTOMER PROFILE

Exceed your customers' expectations by always being one step ahead with **Milestones**.

ISA SalesWerks Platform — Other Features

Custom Fields

We did the work for you and added these Custom Fields relevant to IMRs.

- ↳ Deal Stages
- ↳ Probability by Stage
- ↳ Principal
- ↳ Channel Partner
- ↳ Product Group
- ↳ Company Type
- ↳ Industry Segment
- ↳ Channel Segment
- ↳ Buying Group

Custom fields

Create custom fields to track details specific to your sales process, such as territories or product interest.

Company fields	Deal fields	Person fields
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CUSTOM FIELD GROUPS ⓘ

Custom Fields — Other

Distributor

[Manage custom field groups](#)

CUSTOM FIELDS

+ New company field ▾

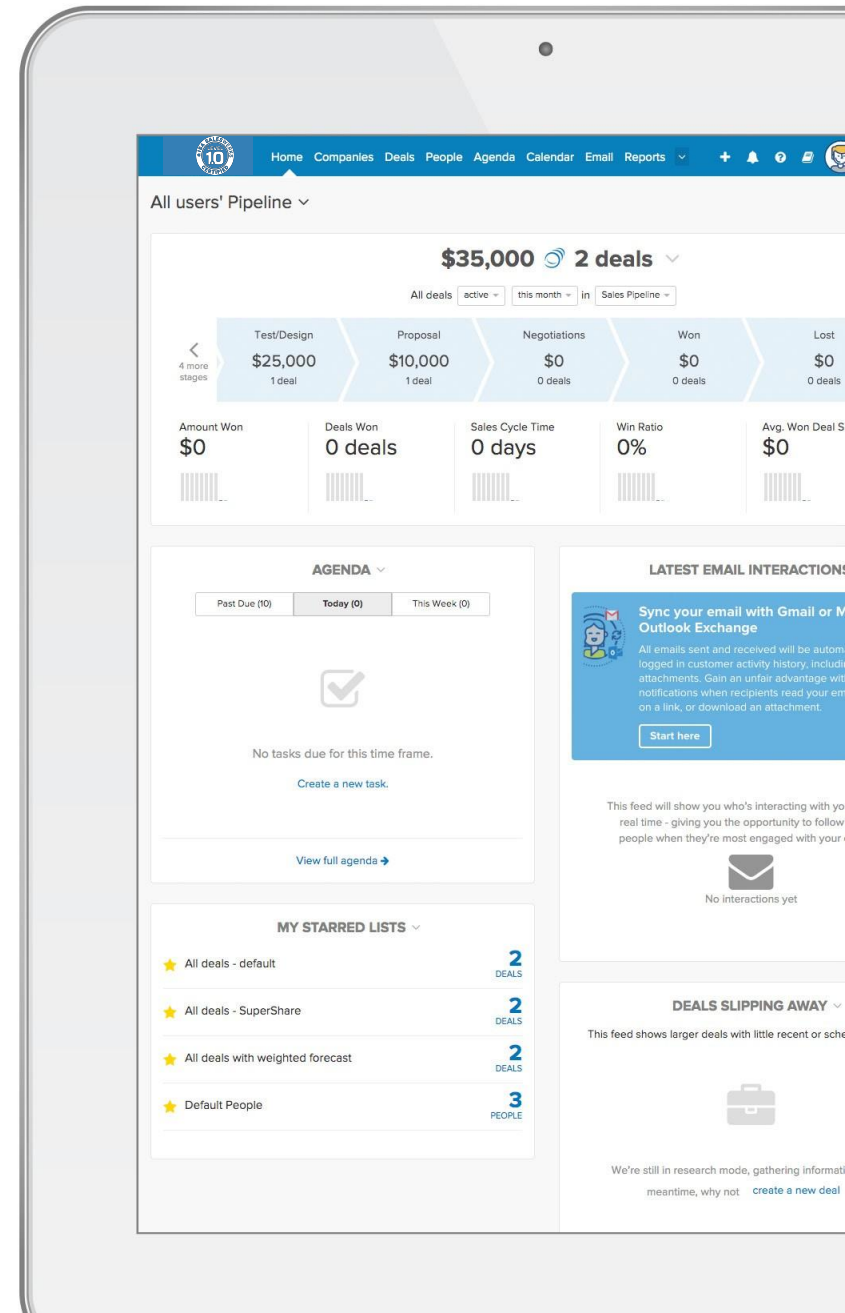
Channel (DIST only)	Dropdown
Product Category (DIST only)	Picklist
BG (DIST only)	Picklist

ISA SalesWerks Platform

Benefits are Clear

ISA SalesWerks Sales Process and Industry-Specific Fields built right in—no programming needed.

- ↳ Common language and sales process.
- ↳ Standard approach to information.
- ↳ Standard format being shared.
- ↳ Actionable information.
- ↳ Real-time collaboration.
- ↳ LEAN — better use of resources.
- ↳ Win deals faster and better.



Certification



IMRs that lean into this ISA SalesWerks platform and sales process will create real differentiation for their business while elevating their employees' skill sets and principals' success.

— Ed Gerber, President and CEO of the ISA

ISA SalesWerks Certification = Differentiation

ISA Membership Directory

Please use the search fields below to find the ISA member you're looking for; keep in mind that only company headquarters are listed in the online directory.

How do you want to search?

By Company By Contact

Company Name	Input Text
Member Type	Select a Member Type
Product Codes	Select Product Code(s)
Company HQ Country	Select Company HQ Country
Sales Territory	Select Sales Territory
Service	Select Service

SalesWerks Certified

Search

Reset Search

Search Results:

Springfield Nuclear Power Plant IMR

New Member!

Hide Profile ▲

Company Details
Springfield Nuclear Power Plant
742 Evergreen Terrace
Springfield, Pa 19034
215-555-5555
info@sfnpp.com
http://www.sfnpp.com



Company Description
Maecenas faucibus mollis interdum. Sed posuere consectetur est at lobortis. Aenean lacinia bibendum nulla sed consectetur. Vestibulum id ligula porta felis euismod semper. Nullam quis risus eget urna mollis ornare vel eu leo.

Company Officers
President
Homer J. Simpson, Sr.
homer@sfnpp.com

Sales
Lenny Leonard
Lenny@sfnpp.com

Marketing
Waylon Smithers, Jr.
waylon@sfnpp.com

SalesWerks Certification



Product Lines

1. Abrasives & Brushes
Donded, Coated, Wire Brushes

16. Machinery
Cutting, Forming, Sanding, Sawing, Woodworking, Dust & Mist Collection

18. Material Handling
Storage Equipment, Carts, Dollies, Hoppers, Casters, Wheels, Chain, Slings

Conclusion

There's no doubt the MROP space is transforming as ISA members think differently about their business to compete better.

As outlined in this Playbook, the ISA SalesWerks Platform delivers on the vision of helping Manufacturers and Independent Reps (IMRs) create better strategic value for each other while satisfying the evolving End User and Channel 2.0 needs. It's all about collaboration made simple by transforming the traditional legacy relationship to a new strategic ISA SalesWerks Partnership.

About ISA

Founded in 1902, the Industrial Supply Association (ISA) is the association for the industrial maintenance, repair, operations, and production (MROP) channel. Our purpose is to help members develop and advance their companies and careers.

As a channel association, we are focused on the End User's evolving needs and the drivers and capabilities needed for all stakeholders (Distributors, Manufacturers, and Independent Reps) to thrive in Channel 2.0 and beyond.

For more information, please visit:
www.isapartners.org



About PipelineDeals

Founded in 2006, PipelineDeals is the sales pipeline enablement platform that helps sales teams across a breadth of industries close more deals faster. Today more than 18,000 users across the world utilize PipelineDeals to gain visibility into their sales pipeline to accelerate opportunities, close more deals, and grow their businesses.

Headquartered in Seattle, WA, PipelineDeals has made the annual Inc. 5000 list since 2014, recognized as one of the fastest-growing companies in the U.S. The company's award-winning Customer Teams offer leading U.S.-based customer support and service.

If you have feedback or questions regarding your account setup, please email imr2.0@pipelinedeals.com.



