



IMR 2.0 Platform The Sales Playbook

Powered by  PipelineDeals



IMR 2.0 Platform The Sales Playbook

Powered by  PipelineDeals

Table of Contents:

Introduction	3
Sales Process	8
Platform.....	9
Certification.....	11

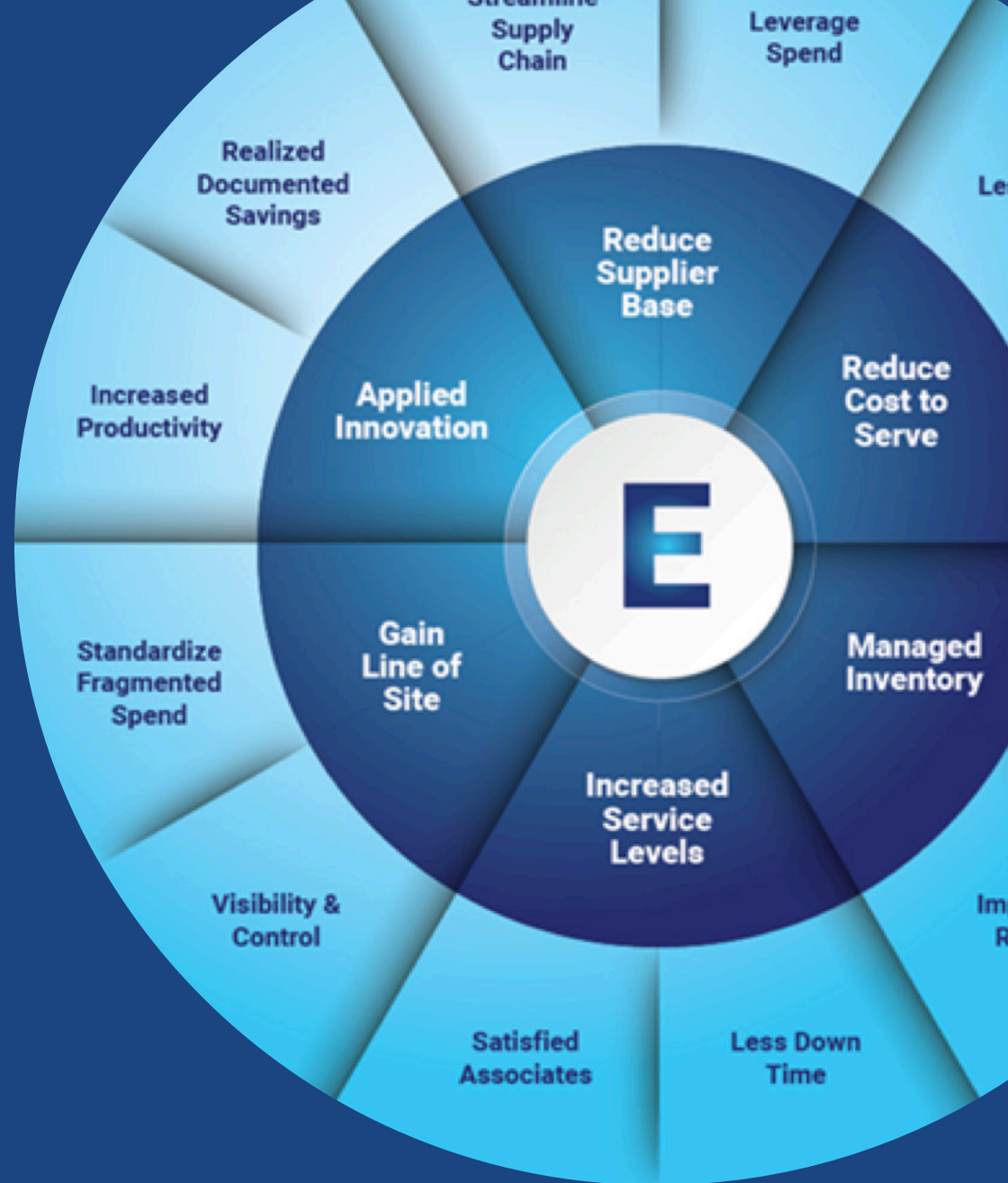
The Case for Change

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



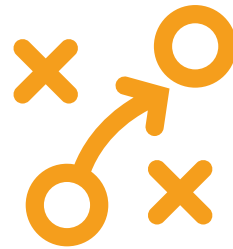
IMR Network — Purpose

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.

IMR 2.0

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.



IMR 2.0

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 IMR 2.0 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

IMR 2.0 Deal Stages ensure alignment with the end customer, increasing probability of success.

1 Qualified Opportunity

Once you have determined that a lead is a good opportunity for your organization, you will move them into the “Qualified Opportunity” stage. This will allow you to have clarity between what is just a lead that needs nurturing and an opportunity that is qualified and ready to move through the rest of the process.

2 Presentation

The “Presentation” stage is vital to have as a deal stage. It’s often the starting point for tracking potential revenue from a deal. This is where you are conveying **relevance** and **capability** — demonstrating to the prospect that you are a serious contender for the opportunity.

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 customers 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

IMR 2.0 Deal Stages ensure alignment with the end customer, increasing probability of success.

7 Negotiations

It's now time for the "Negotiations" stage, where you bring **value** and **satisfaction**. Work with the customer here to secure the right solution, at the right price and with the right timeline.

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.

9 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 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

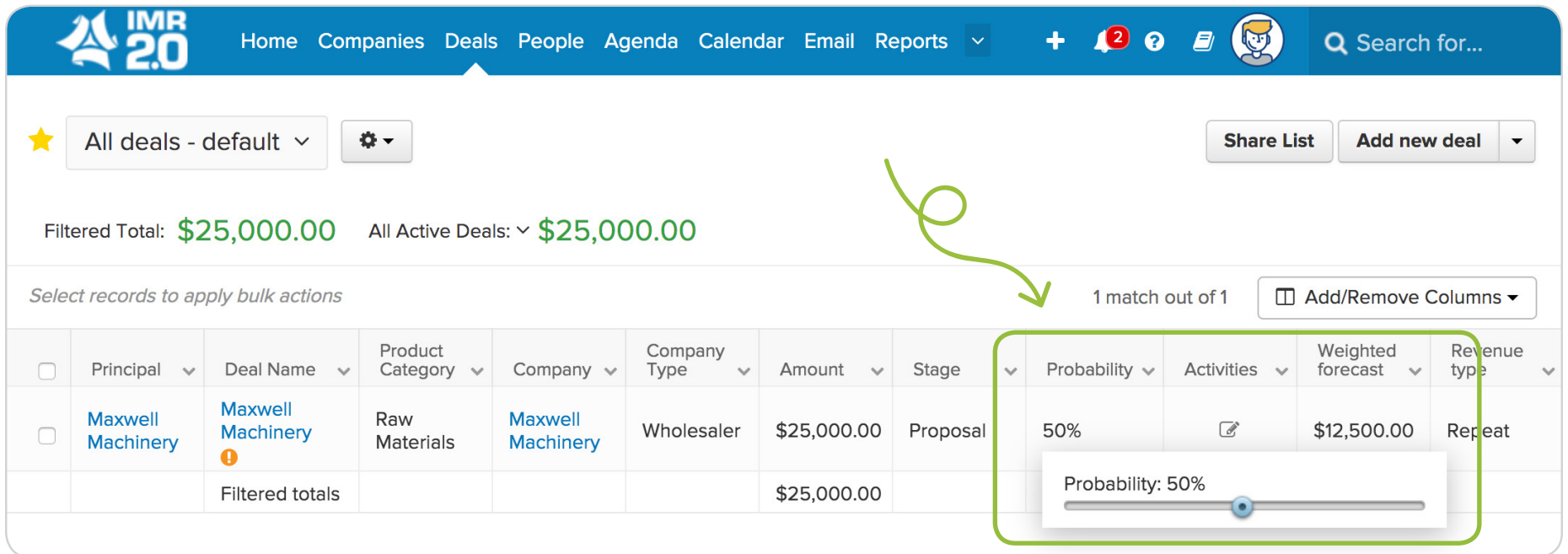
Qualified Opportunity	1
Presentation	5
Assessment	15
Validation	25
Test/Design	35
Proposal	50
Negotiations	75
Won	100
Lost	0

+ Add new stage

The Sales Process — Our Common Language

Probability by Deal Stage

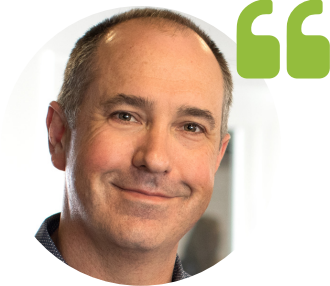
You can also adjust the probability of each deal to fit your own sales process.



The screenshot displays the IMR 2.0 platform interface. The top navigation bar includes links for Home, Companies, Deals, People, Agenda, Calendar, Email, and Reports. A search bar is located on the right. Below the navigation bar, there's a section for deal management with a star icon, a dropdown menu set to 'All deals - default', and a settings gear icon. To the right are buttons for 'Share List' and 'Add new deal'. The main content area shows a summary: 'Filtered Total: \$25,000.00' and 'All Active Deals: \$25,000.00'. Below this is a table of deals. The first deal is 'Maxwell Machinery' with a probability of 50%. A green arrow points to the 'Probability' column, and a green box highlights the probability adjustment slider for the 'Maxwell Machinery' deal, which is currently set at 50%.

Principal	Deal Name	Product Category	Company	Company Type	Amount	Stage	Probability	Activities	Weighted forecast	Revenue type
Maxwell Machinery	Maxwell Machinery	Raw Materials	Maxwell Machinery	Wholesaler	\$25,000.00	Proposal	50%		\$12,500.00	Repeat
	Filtered totals				\$25,000.00					

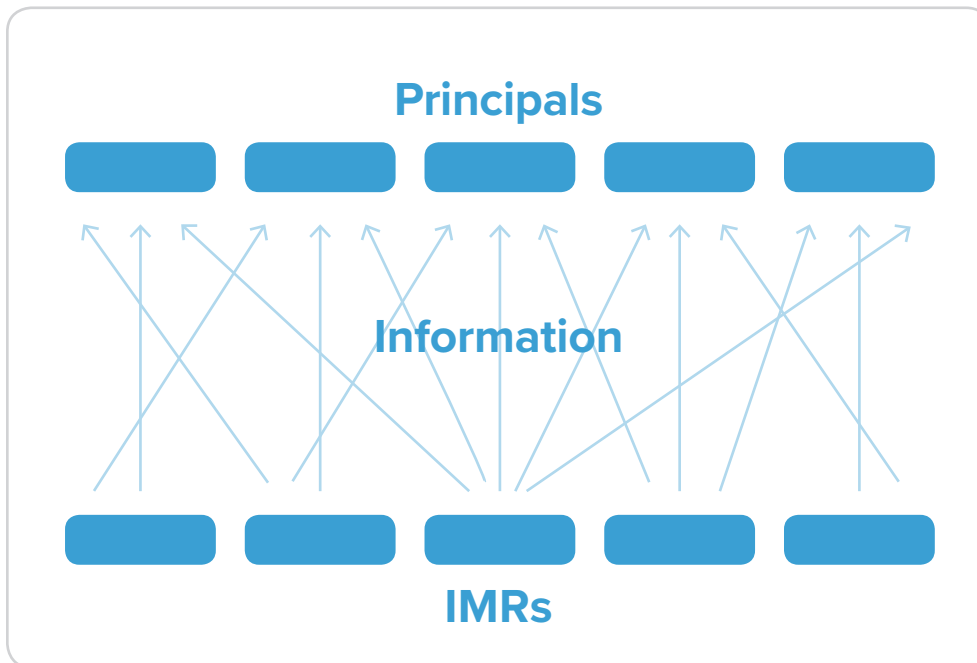
IMR 2.0 Platform



Working with ISA and the IMR Network, we built the IMR 2.0 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

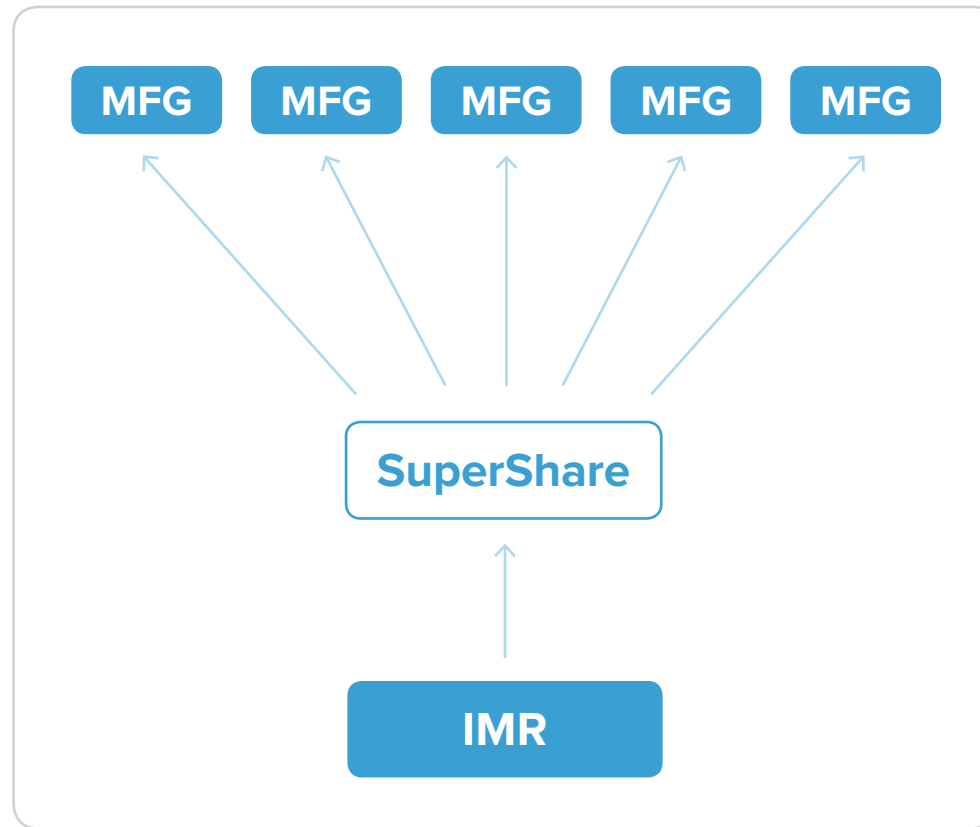
IMR 2.0 Platform — Current State



- 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.

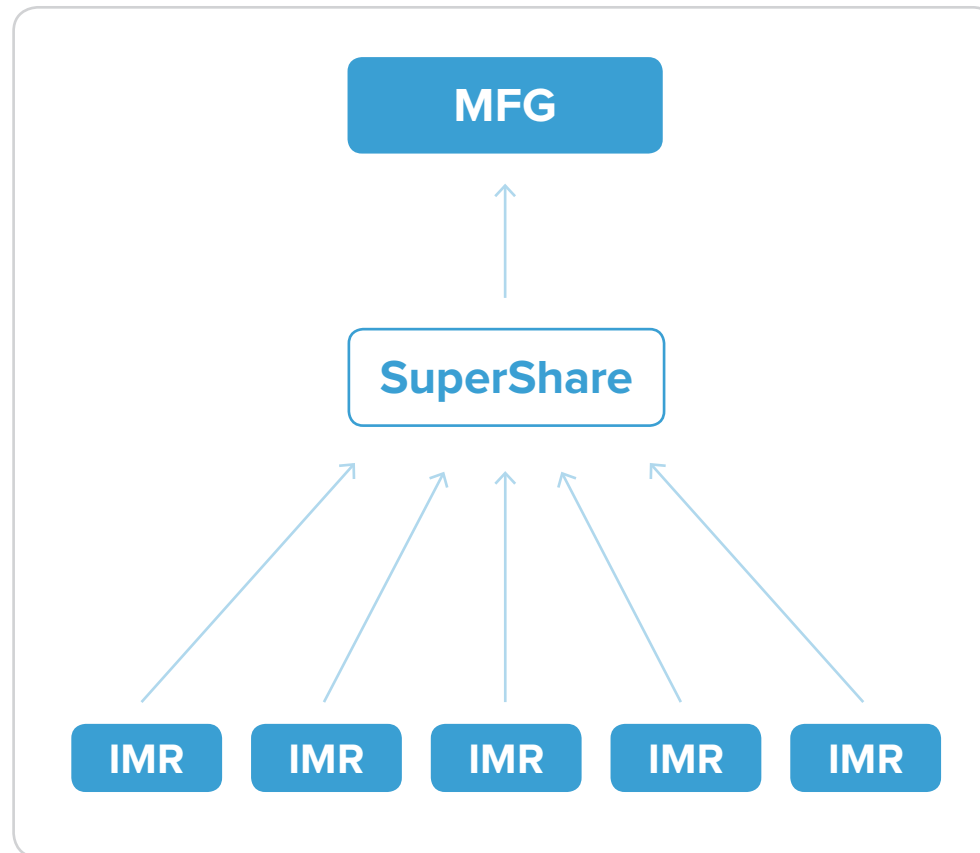
IMR 2.0 Platform

Future State — IMRs



IMR 2.0 Platform

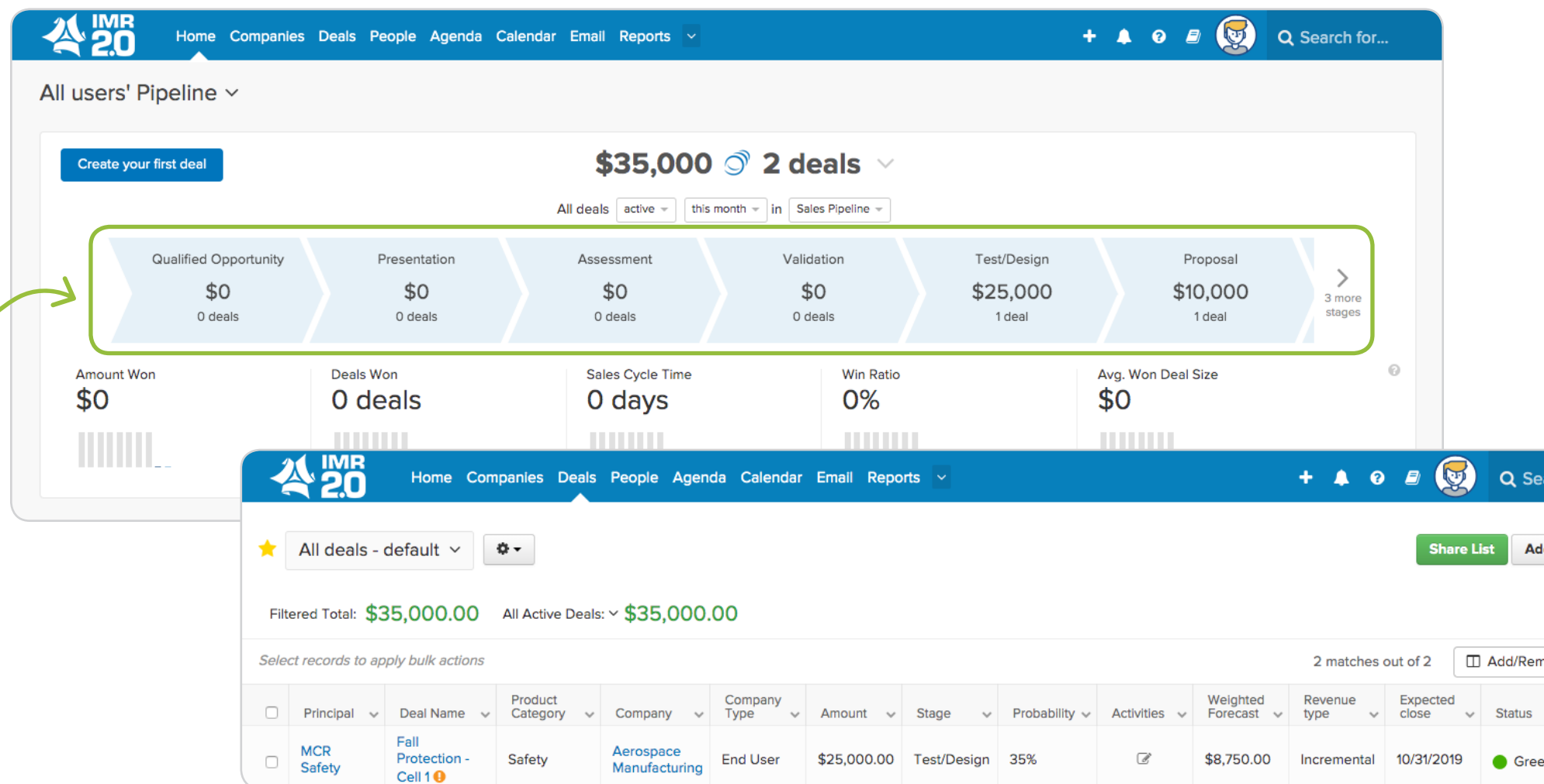
Future State — Manufacturers



IMR 2.0 Platform

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 IMR 2.0 reporting module.



IMR 2.0 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* Industrial Inc

Type Principal

Industry (EU only)

Channel (DIST only) ☒ Traditional - General Line

Product Category (DIST only)

BG (DIST only) × IBC

Phone 555-555-5555

Website www.industrialinc.com

Address 1234 Main St

Address line 2 Ste 123

City Chicago



ISA

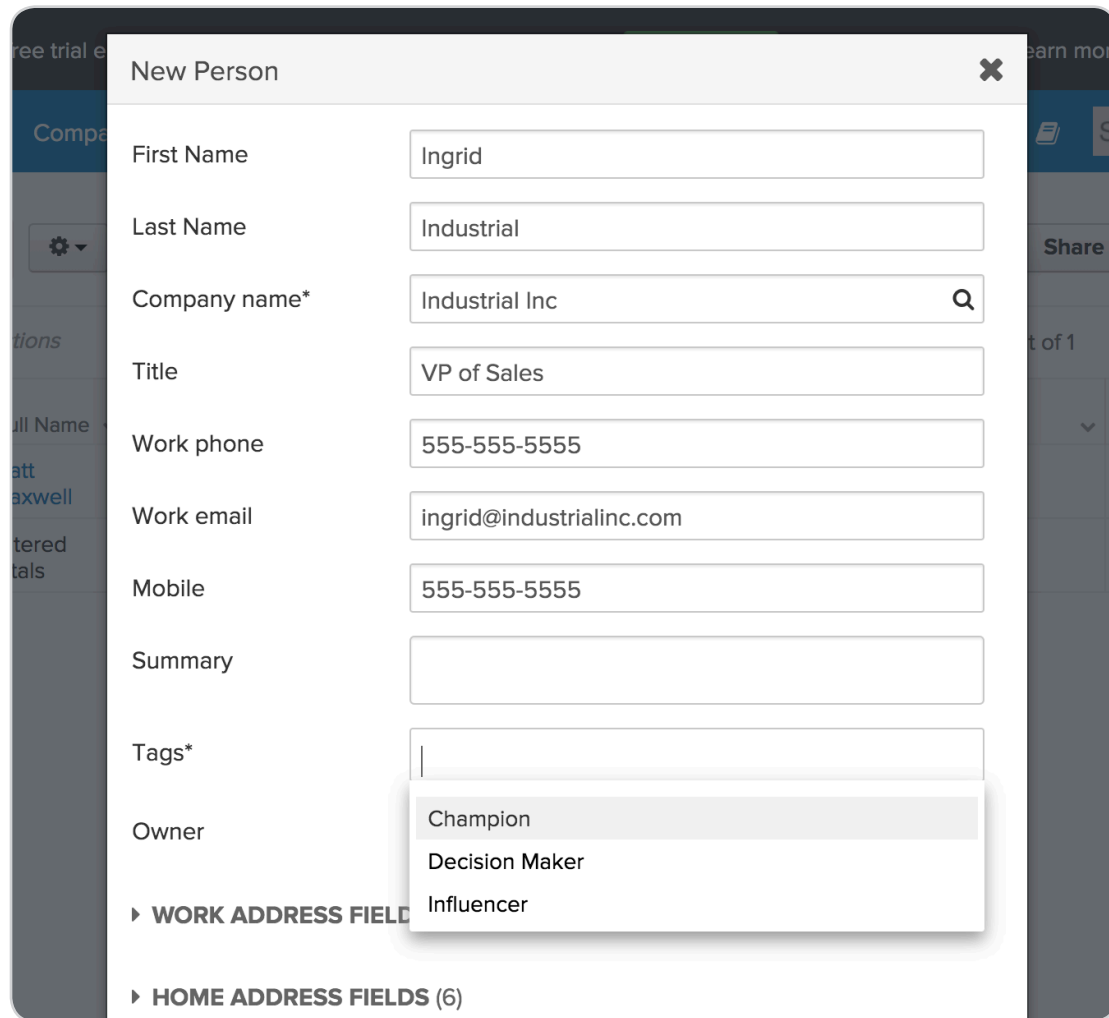
Leading the
Channel Forward®

IMR 2.0 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: Ingrid

Last Name: Industrial

Company name*: Industrial Inc

Title: VP of Sales

Work phone: 555-555-5555

Work email: ingrid@industrialinc.com

Mobile: 555-555-5555

Summary:

Tags*:

Owner:
Champion
Decision Maker
Influencer

▶ WORK ADDRESS FIELDS

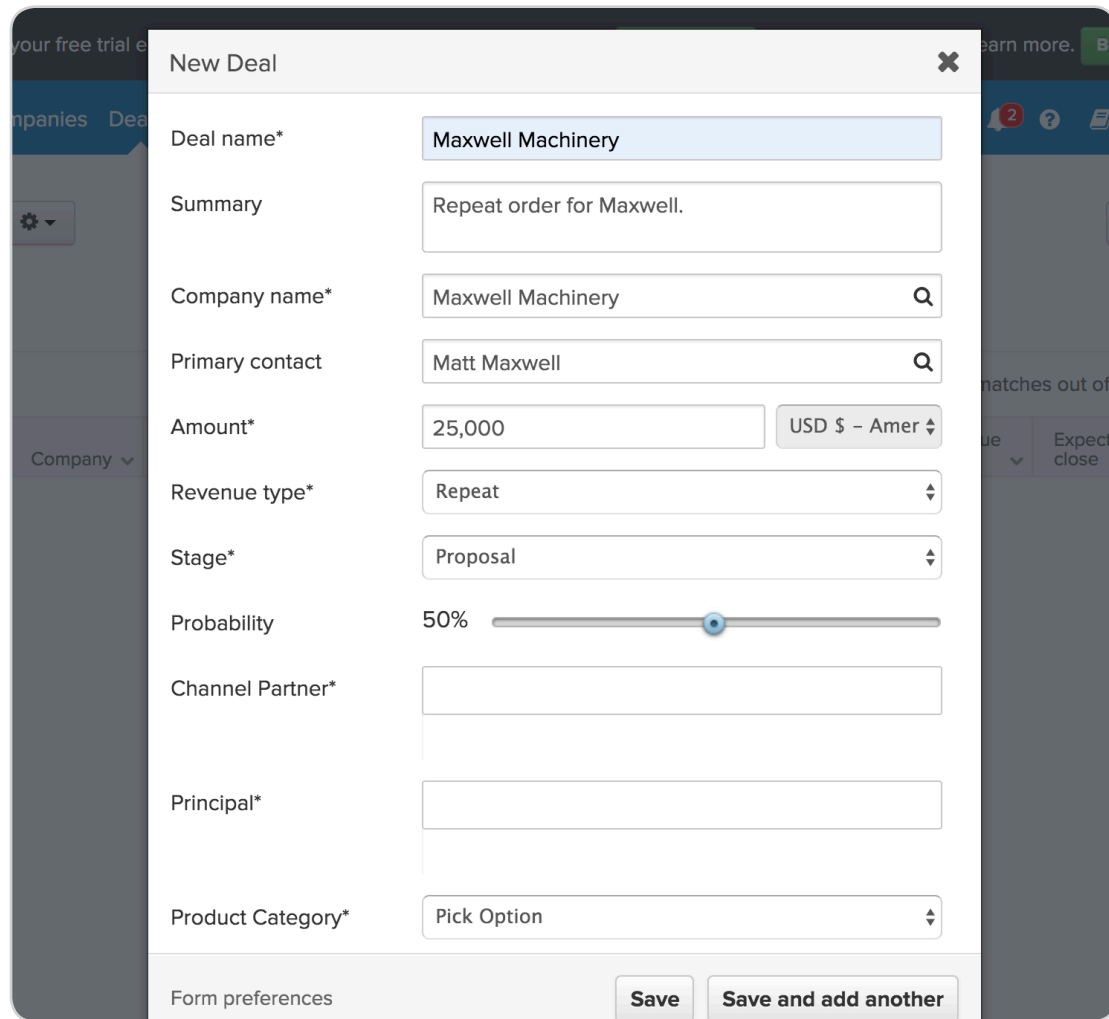
▶ HOME ADDRESS FIELDS (6)

IMR 2.0 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* Maxwell Machinery

Summary Repeat order for Maxwell.

Company name* Maxwell Machinery

Primary contact Matt Maxwell

Amount* 25,000 USD \$ - Amer

Revenue type* Repeat

Stage* Proposal

Probability 50%

Channel Partner*

Principal*

Product Category* 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**

IMR 2.0 Platform 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.



ACCOUNT SETTINGS > USERS > ADD NEW USER

×

Add new user

FIRST NAME*

Sandra

LAST NAME*

Kennedy

EMAIL*

sandra@supershare.com

ROLE*

SuperShare (External User)

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*

External users cannot be part of a team

PERMISSIONS

☐ Normal access

User can add and edit data

☐ Account Admin

☐ Can delete people & deals

☐ Can export reports

☐ Can send email campaigns

☒ Read-only access

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

☒ Can export reports

[Permission descriptions ^](#)



IMR 2.0 Platform

SuperShare

The screenshot displays the IMR 2.0 Platform interface. At the top, a navigation bar includes links for Home, Companies, Deals, People, Agenda, Calendar, Email, and Reports. A search bar is located on the right. Below the navigation bar, a filter dropdown shows 'All deals - SuperShare'. A green arrow points to a green 'Share List' button, which is labeled with a circled '1'. Below this, a table of deals is visible, with columns for Principal, Deal Name, Company, Amount, Stage, Probability, Weighted Forecast, Product Category, Revenue type, Expected close, Status, Source, Owner, and Channel Partner. Two deals are listed: 'MCR Safety' and 'Fullerton Tool'. A modal window titled 'Manage sharing' is open in the foreground. It contains instructions on how to share the list and a note that changes to the list will be accessible to all users. The modal has a 'List name' field set to 'All deals - SuperShare'. Under the 'Sharing' section, there is an option to 'Share this list globally' (unchecked) or to 'Select individual users:'. A green arrow points to the 'Select individual users' field, which contains a dropdown menu with 'Sandra Kennedy' selected, labeled with a circled '2'. At the bottom of the modal, there is a 'Star' section with a checked box for 'Star this list for the above people'.

IMR 2.0 Platform

Home Companies Deals People Agenda Calendar Email Reports

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

Select records to apply bulk actions

2 matches out of 2

Principal	Deal Name	Company	Amount	Stage	Probability	Weighted Forecast	Product Category	Revenue type	Expected close	Status	Source	Owner	Channel Partner
MCR Safety	Fall Protection - Cell 1								31/2019	Green	Distributor	IMR 2.0 Demo	A1 Distribution
Fullerton Tool	Milling Promo Campaign								11/2019	Green	My Relationship	Ed Gerber	A1 Distribution

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

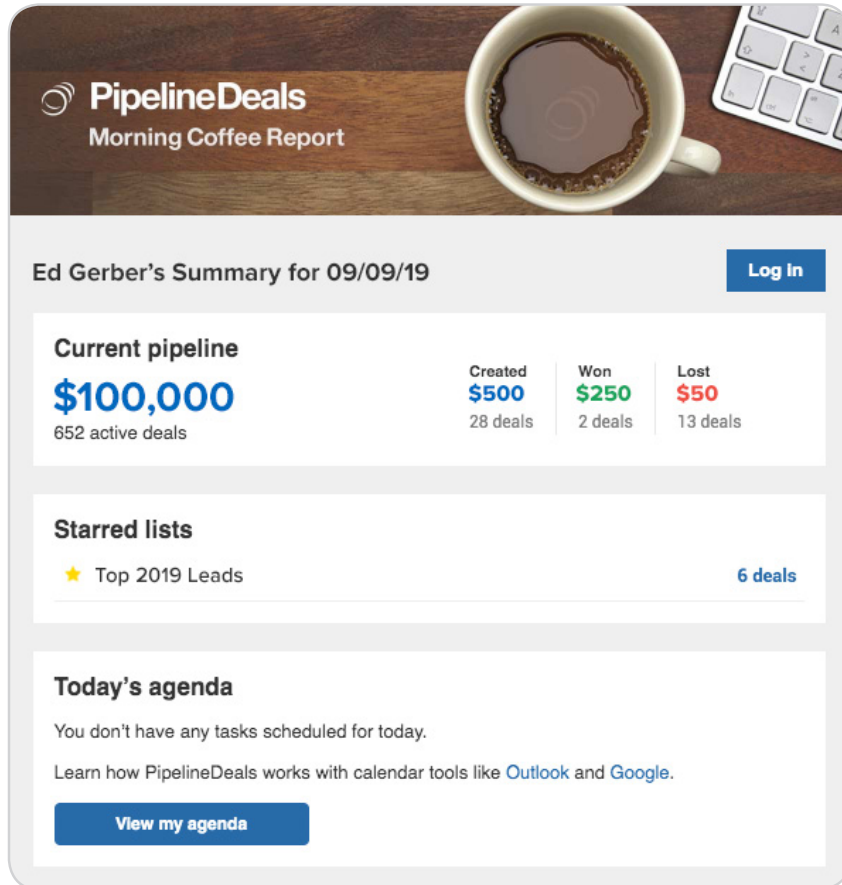
When sharing with users, external users are displayed in **blue** with a share icon, as shown on the left.

Internal users are gray.

IMR 2.0 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.



The screenshot shows the 'Morning Coffee Report' dashboard for PipelineDeals. The header features the PipelineDeals logo and a background image of a coffee cup and keyboard. The main content area is titled 'Ed Gerber's Summary for 09/09/19' and includes a 'Log In' button. The 'Current pipeline' section displays a total value of \$100,000 and 652 active deals, along with a breakdown of deals created (\$500, 28 deals), won (\$250, 2 deals), and lost (\$50, 13 deals). The 'Starred lists' section shows a list titled 'Top 2019 Leads' with 6 deals. The 'Today's agenda' section states that there are no tasks scheduled for today and provides a link to learn how PipelineDeals works with calendar tools like Outlook and Google, with a 'View my agenda' button.

PipelineDeals
Morning Coffee Report

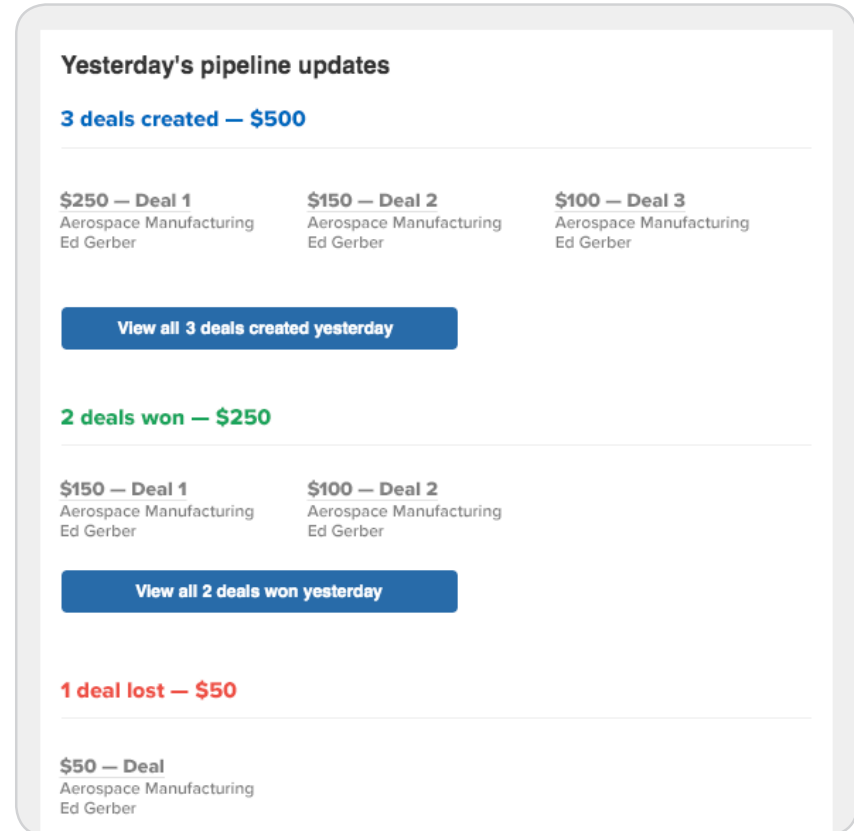
Ed Gerber's Summary for 09/09/19 [Log In](#)

Current pipeline
\$100,000
652 active deals

Created	Won	Lost
\$500	\$250	\$50
28 deals	2 deals	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](#)



The screenshot shows the 'Yesterday's pipeline updates' section. It features three categories: '3 deals created — \$500', '2 deals won — \$250', and '1 deal lost — \$50'. Each category lists specific deals with their values and the company 'Aerospace Manufacturing Ed Gerber'. There are buttons to 'View all 3 deals created yesterday', 'View all 2 deals won yesterday', and a button for the lost deal.

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
---	---	---

[View all 3 deals created yesterday](#)

2 deals won — \$250

\$150 — Deal 1 Aerospace Manufacturing Ed Gerber	\$100 — Deal 2 Aerospace Manufacturing Ed Gerber
---	---

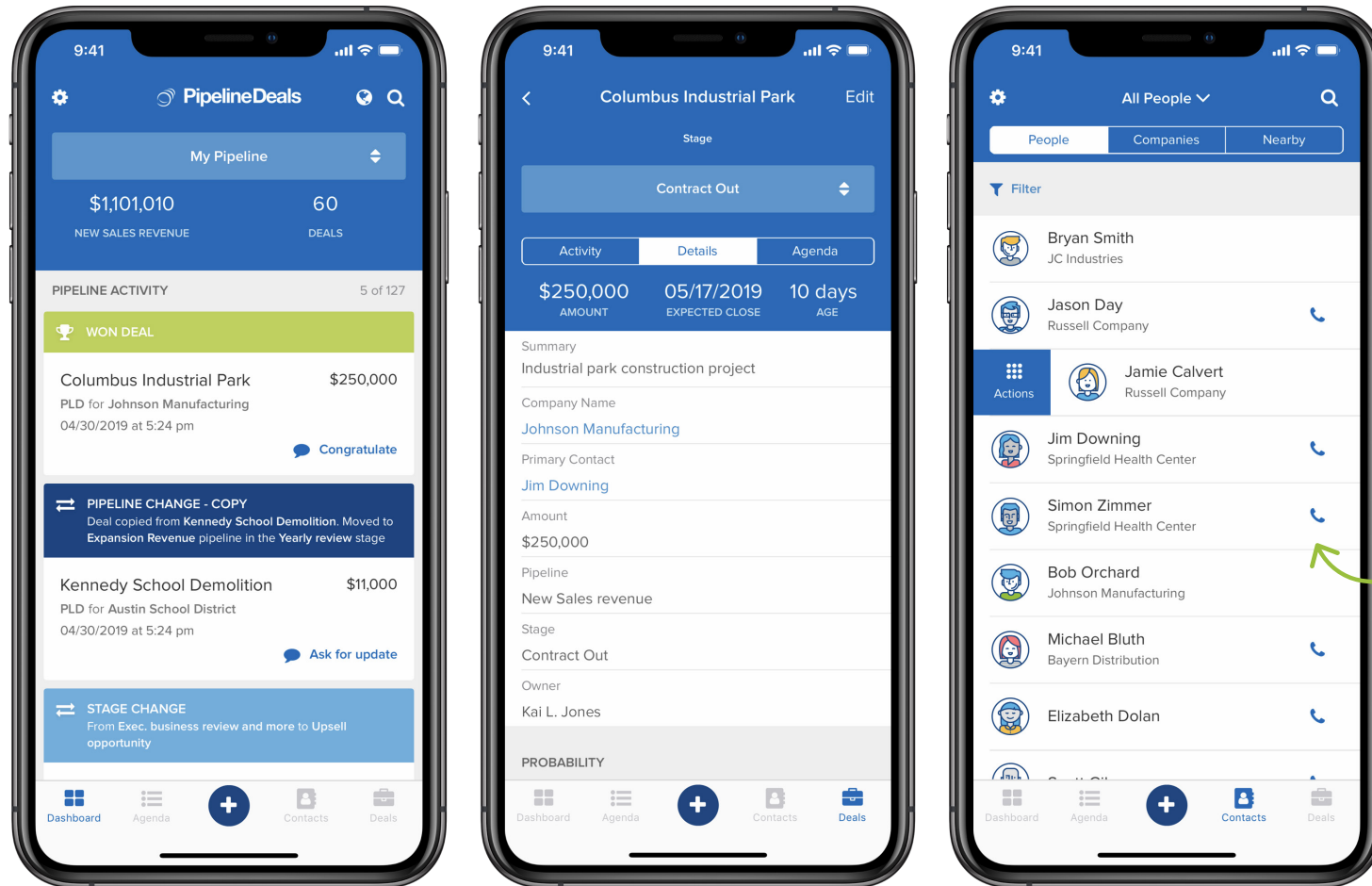
[View all 2 deals won yesterday](#)

1 deal lost — \$50

\$50 — Deal Aerospace Manufacturing Ed Gerber
--

IMR 2.0 Platform — other features

Mobile

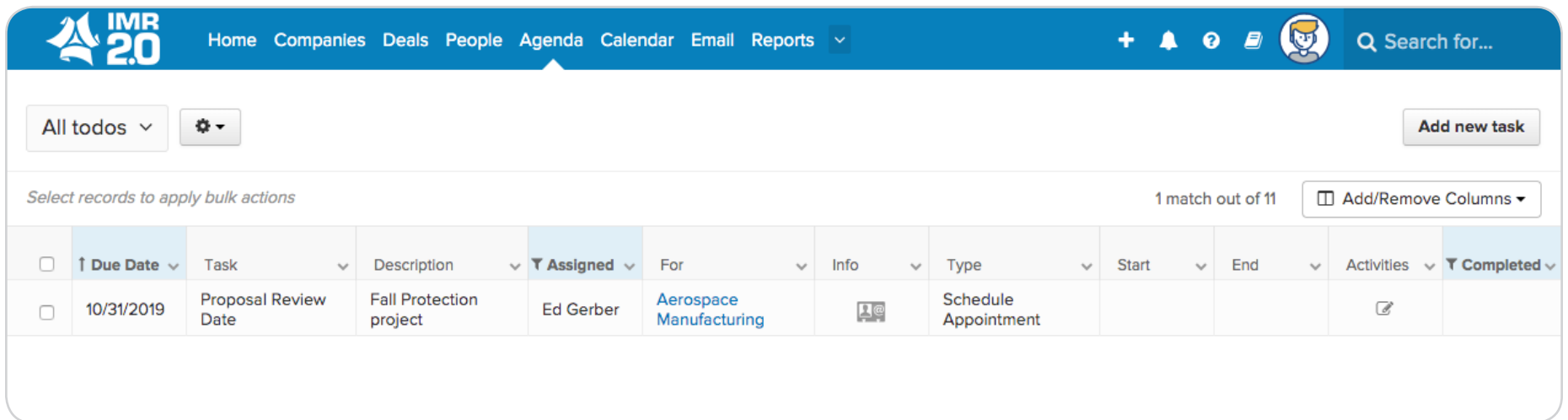


Perfect for
sales teams
on the go!

IMR 2.0 Platform — other features

Agenda

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



The screenshot displays the IMR 2.0 Agenda interface. The top navigation bar includes links for Home, Companies, Deals, People, Agenda (selected), Calendar, Email, and Reports. A search bar is located on the right. Below the navigation bar, there is a section for 'All todos' with a settings icon and an 'Add new task' button. The main area shows a table of tasks with the following columns: Due Date, Task, Description, Assigned, For, Info, Type, Start, End, Activities, and Completed. A single task is listed: '10/31/2019' (Due Date), 'Proposal Review Date' (Task), 'Fall Protection project' (Description), 'Ed Gerber' (Assigned), 'Aerospace Manufacturing' (For), and 'Schedule Appointment' (Type). The 'Completed' column is highlighted in red.

☐	Due Date	Task	Description	Assigned	For	Info	Type	Start	End	Activities	Completed
☐	10/31/2019	Proposal Review Date	Fall Protection project	Ed Gerber	Aerospace Manufacturing		Schedule Appointment				

IMR 2.0 Platform — other features

Workflow

The screenshot displays the 'AGENDA' view in the IMR 2.0 Platform. At the top, there is a dropdown menu set to 'Me' and a button labeled 'Any time'. A menu is open, showing options for 'Task' and 'Event'. Below this, a list of tasks is shown for the dates Sep 20, Sep 23, Sep 30, and Oct 1. Each task entry includes a date, a task type (CALL, APPOINTMENT, EMAIL), a description, the contact name (Ed Gerber), and the company name (Corey's Contractors). A green box highlights the 'TEMPLATES' section in the menu, which includes the option 'Deals - Sales Template'. A green arrow points from this box to the text 'Takes the guesswork out of lead follow-up.'

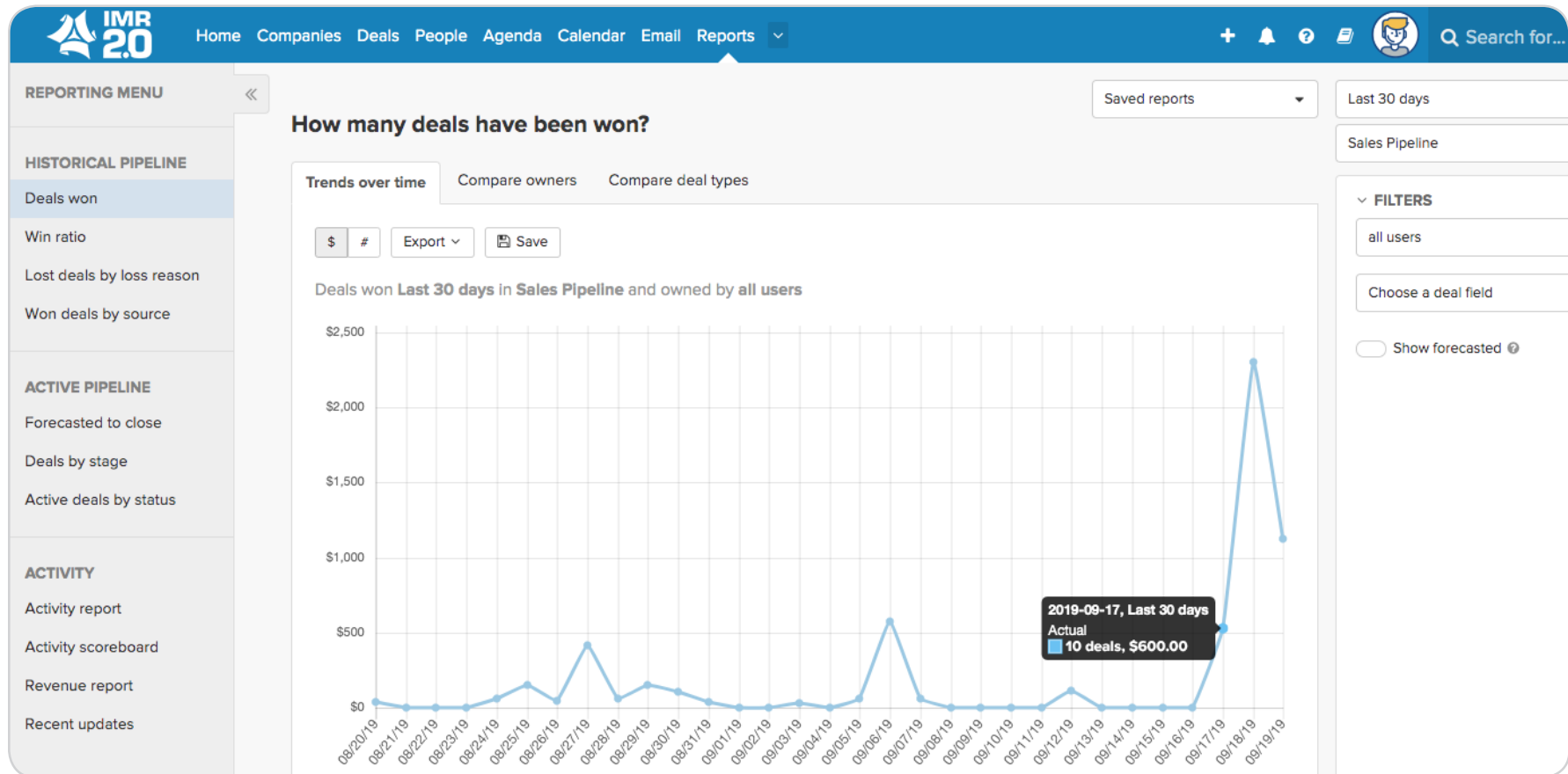
Date	Task Type	Description	Contact	Company
Sep 20	CALL	Introductory Call	Ed Gerber	Corey's Contractors
Sep 23	CALL	Set up a Face-to-Face Meeting	Ed Gerber	Corey's Contractors
Sep 30	APPOINTMENT	Face-to-Face Meeting	Ed Gerber	Corey's Contractors
Oct 1	EMAIL	Thank you Email		

Takes the guesswork out of lead follow-up.

IMR 2.0 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.



IMR 2.0 Platform — other features

Deal List Views

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

The screenshot displays the IMR 2.0 Platform interface for Deal List Views. The top navigation bar includes links for Home, Companies, Deals, People, Agenda, Calendar, Email, and Reports. A search bar is located on the right. Below the navigation bar, there's a filter dropdown set to 'All deals - default' and a 'Share List' button. The summary section shows 'Filtered Total: \$35,000.00' and 'All Active Deals: \$35,000.00'. A table with 15 columns (Principal, Deal Name, Product Category, Company, Company Type, Amount, Stage, Probability, Activities, Weighted Forecast, Revenue type, Expected close, Status, Source) displays two deals. The first deal is 'MCR Safety' with a value of \$25,000.00, and the second is 'Fullerton Tool' with a value of \$10,000.00. A 'Filtered totals' row at the bottom shows a total of \$35,000.00.

IMR 2.0

Home Companies Deals People Agenda Calendar Email Reports

+ [Icons] Search for...

★ All deals - default [Settings]

Share List Add new deal

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

Select records to apply bulk actions 2 matches out of 2 [Add/Remove Columns]

☐	Principal	Deal Name	Product Category	Company	Company Type	Amount	Stage	Probability	Activities	Weighted Forecast	Revenue type	Expected close	Status	Source
☐	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	Distributor
☐	Fullerton Tool	Milling Promo Campaign	Cutting Tools & Metalworking	A1 Distribution	Distributor	\$10,000.00	Proposal	50%		\$5,000.00	Incremental	10/11/2019	Green	My Relationship
		Filtered totals				\$35,000.00				\$13,750.00				

IMR 2.0 Platform — other features

Email Templates

The screenshot displays the IMR 2.0 Platform interface. At the top, a navigation bar includes links for Home, Companies, Deals, People, Agenda, Calendar, Email, and Reports. The main header shows the deal name 'Fall Protection - Cell 1' with a 'DEAL' tag and buttons for 'Edit deal' and 'Actions'. Below this, the 'DEAL DETAILS' section is expanded, showing a grid of 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). A form below these metrics includes fields for Owner (IMR 2.0 Demo), Company (Aerospace Manufacturing), Pipeline (Sales Pipeline (default)), Probability (35), Status (Green), Source (Distributor), Revenue Type (Incremental), and a Summary (Replacing old gear). The 'PEOPLE' section below lists contact information for Susan Lindsay, VP Operations at Aerospace Manufacturing, including her phone numbers and email address (slindsay@AeroMFG.com).

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

Email Template

TITLE * ☐ Personal ☒ Shared

SUB

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

IMR 2.0 Platform — other features

Collaboration

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

The screenshot displays the IMR 2.0 Platform interface, divided into two main sections: **ACTIVITY FEED** and **PEOPLE**.

ACTIVITY FEED (Left Panel):

- Filters: **FIRST ACTIVITY** (None), **TIME SINCE LAST ACTIVITY** (N/A).
- Dropdowns: **Any time**, **All people**.
- Tabbed view: **ALL**, **ACTIVITIES 0**, **EMAIL 0**, **DEAL UPDATES 3**.
- Form (highlighted with a green box):
 - Text input: "How are we going to price this deal?"
 - ACTIVITY CATEGORY**: Assessment
 - PERSON**: Susan Lindsay
 - ☒ **NOTIFY OTHERS**
 - Buttons: **Select all**, **Deselect all**
 - Tag: **IMR 2.0 Demo**
 - Buttons: **Add note**, **Cancel**
- Buttons: **UPLOAD FILE**, **x**

PEOPLE (Right Panel):

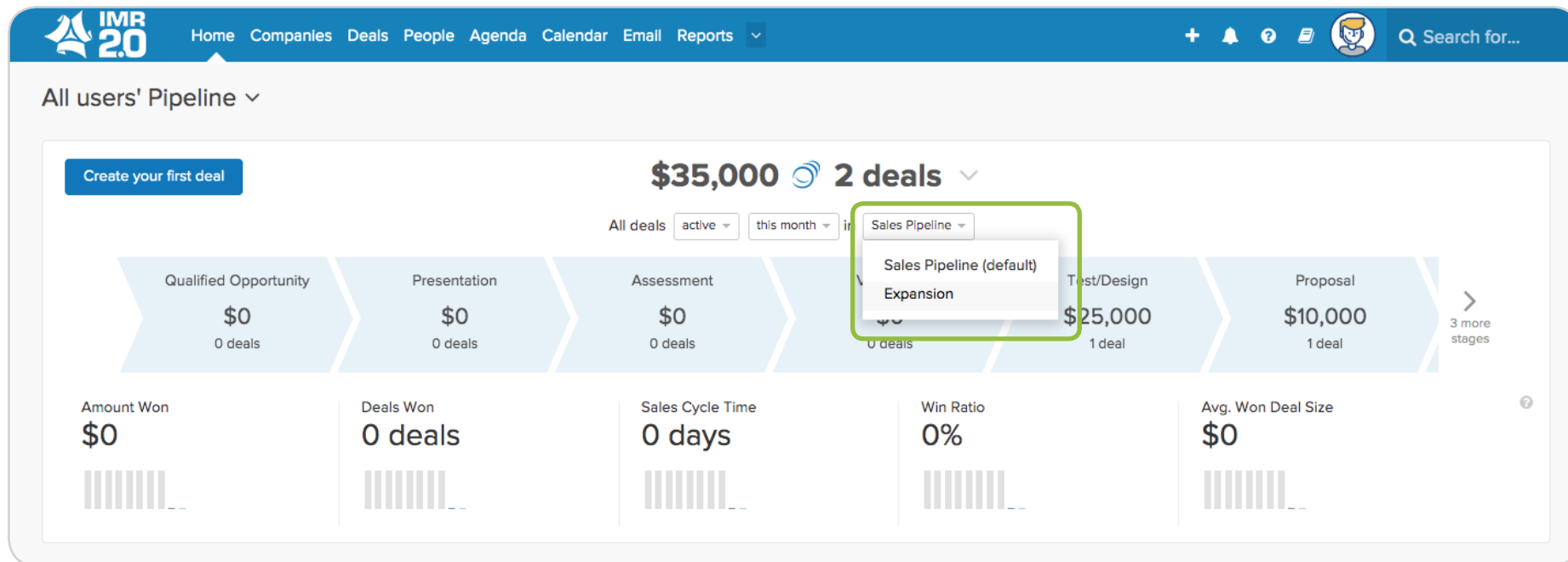
- Susan Lindsay** (PRIMARY)
- IMR 2.0 Demo
- VP Operations
- Aerospace Manufacturing
- Phone: 111-111-1111, 222-222-2222
- Email: slindsay@AeroMFG.com
- Work Address: 123 Aero Lane, Seattle, WA 123456, USA
- Company Address: 123 Aero Lane, Seattle, WA 123456, USA
- Social media icons: Twitter, LinkedIn, Facebook, Google+

AGENDA (Bottom Right):

- Dropdowns: **Me**, **Any time**
- Text: No Agenda Items At This Time!
- Text: Viewing 0 of 0

IMR 2.0 Platform — other features

Multiple Pipelines



PIPELINEDEALS TIP

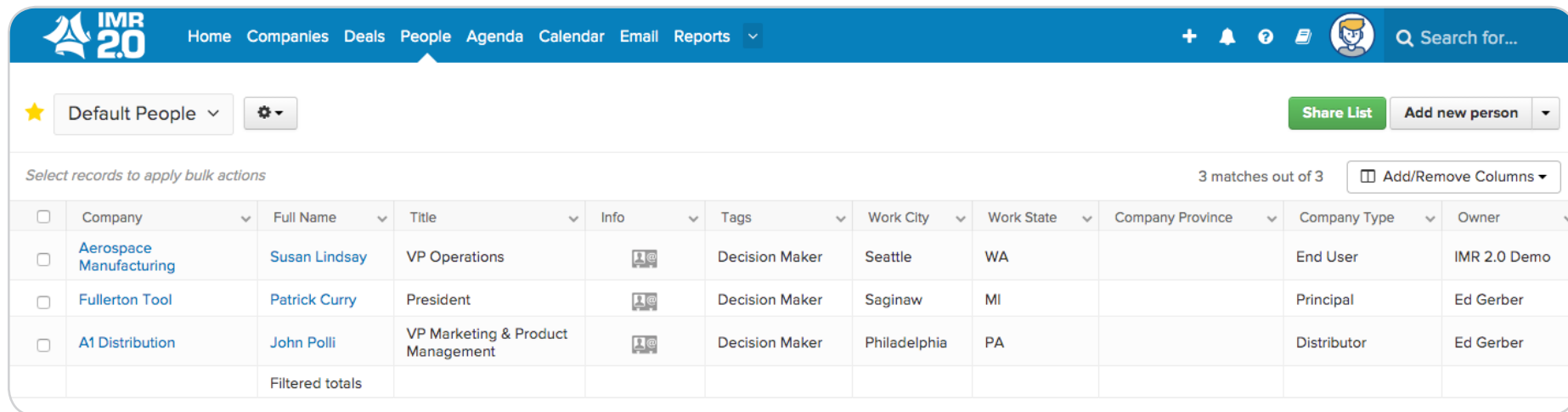
Develop plan users get two Pipelines, while Grow users have access to five Pipelines.



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

IMR 2.0 Platform — other features

People List Views



☐	Company	Full Name	Title	Info	Tags	Work City	Work State	Company Province	Company Type	Owner
☐	Aerospace Manufacturing	Susan Lindsay	VP Operations		Decision Maker	Seattle	WA		End User	IMR 2.0 Demo
☐	Fullerton Tool	Patrick Curry	President		Decision Maker	Saginaw	MI		Principal	Ed Gerber
☐	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.

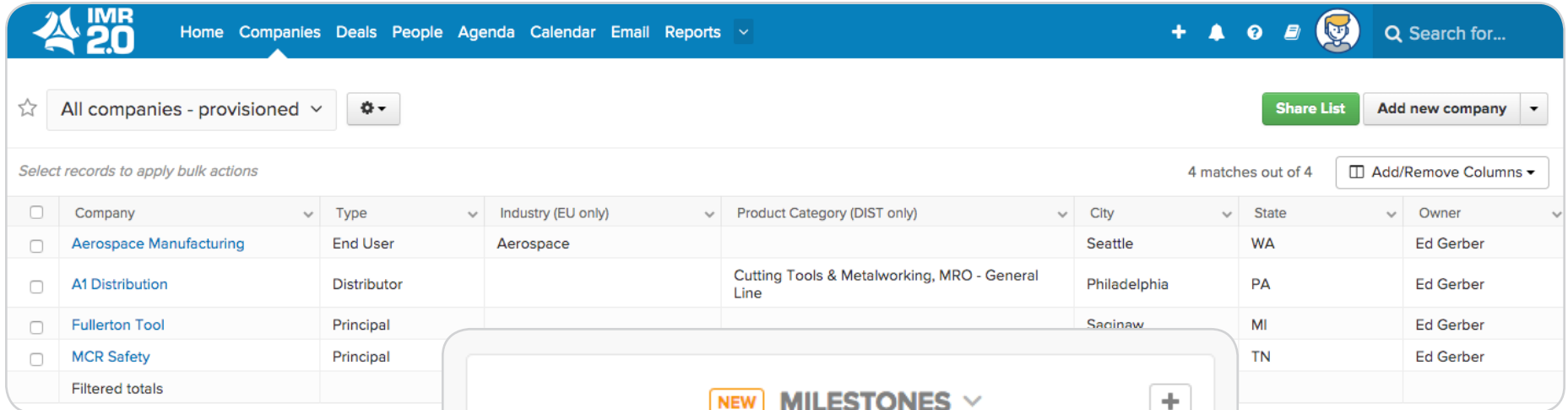
Leads in PipelineDeals are most commonly classified as unqualified contacts that do not have a corresponding deal.

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



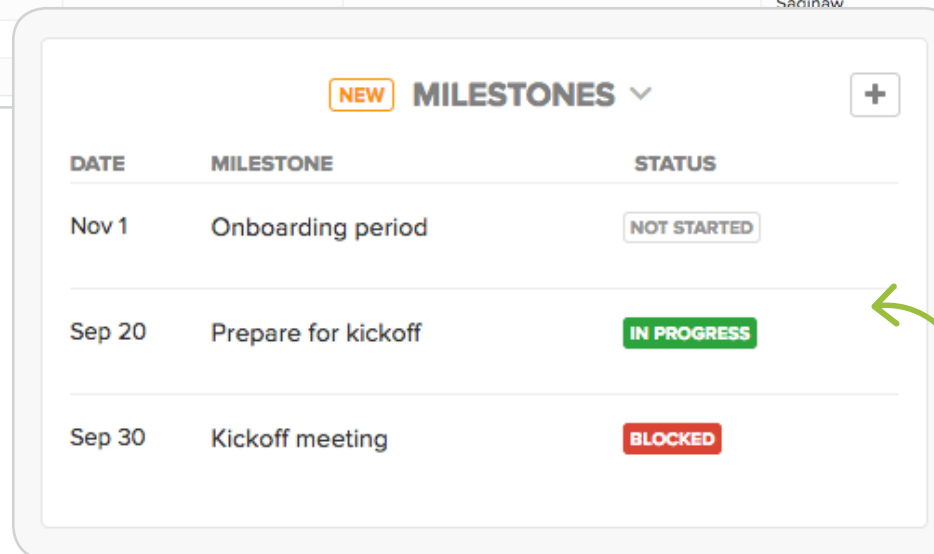
IMR 2.0 Platform — other features

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



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**.

IMR 2.0 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

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

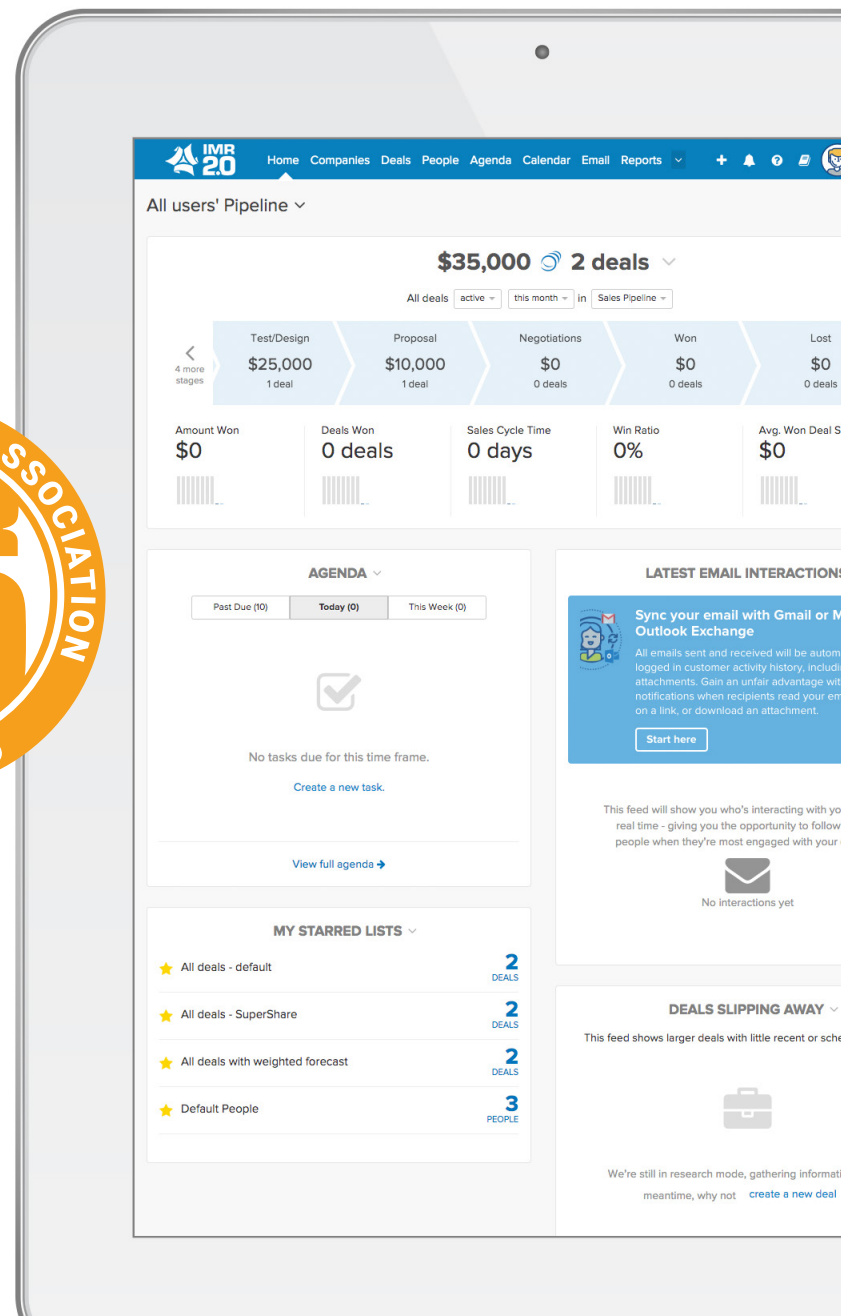
IMR 2.0 Platform | The Sales Playbook | pg 36

 **ISA** | Leading the Channel Forward®

IMR 2.0 Platform

Benefits are Clear

- IMR 2.0 Platform — simple and effective.
- 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 IMR 2.0 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

IMR 2.0 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 the company headquarters are listed in the online directory.

How do you want to search?

☒ By Company ☐ By Contact

Company Name	
Member Type	IMR
Product Codes	Select one
Company Headquarters Country	Select One
Sales Territory	Select one
IMR Certification	✓ Select one 2.0 3.0 4.0

Search

Search Results:

Springfield Nuclear Power Plant IMR

New Member!

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

IMR Certification



Product Lines

1. Abrasives & Brushes
Bonded, Coated, Wire Brushes

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 IMR 2.0 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 IMR 2.0 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.





Powered by  PipelineDeals

www.pipelinedeals.com/imr