IMR 2.0 Platform
The Sales Playbook

Powered by PipelineDeals

ISA Leading the Channel Forward®

IMR 2.0 Platform

The Sales Playbook

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Leading the Channel Forward®

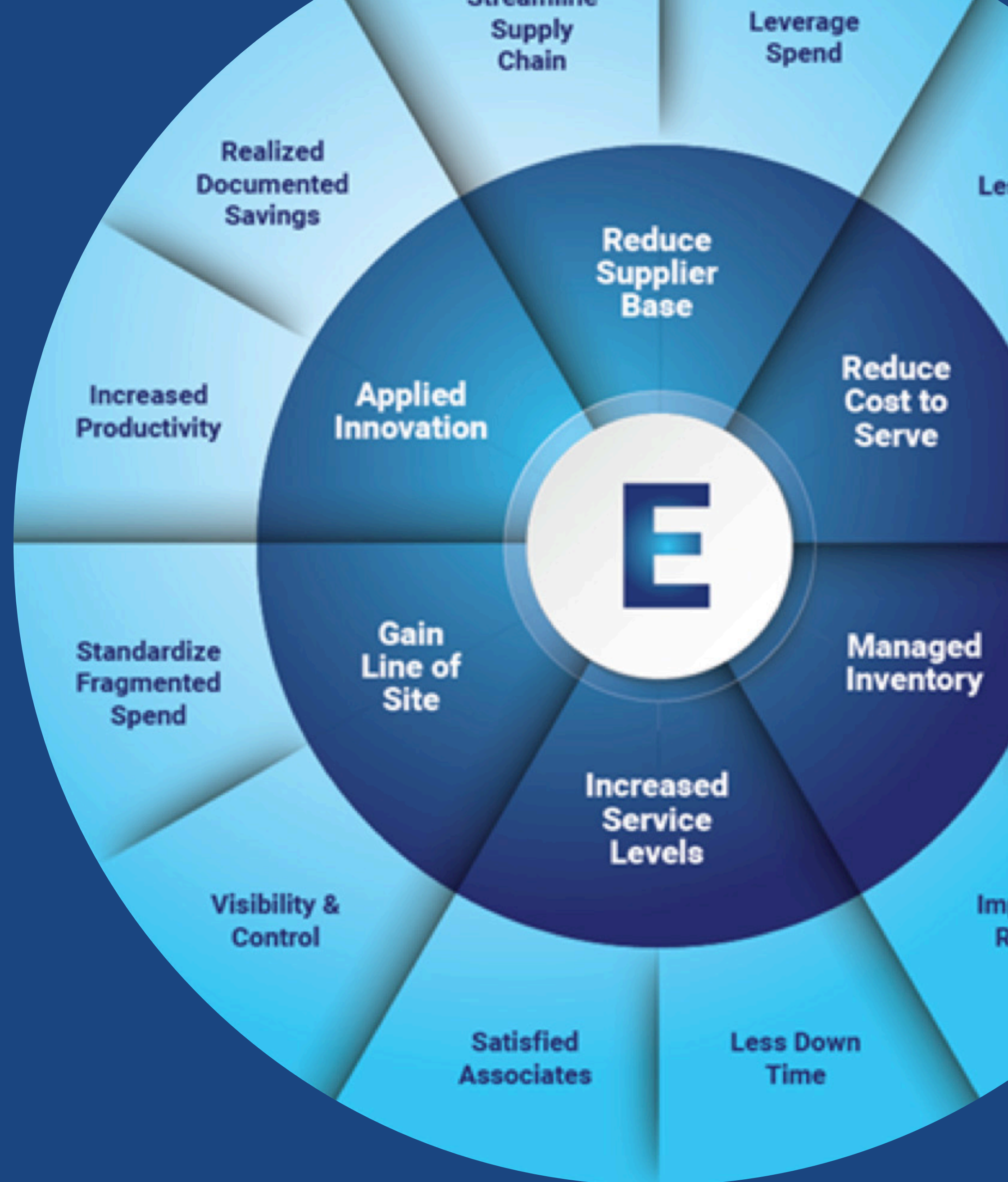
The Case for Change

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.

Leading the Channel Forward®

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 — a**lign 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

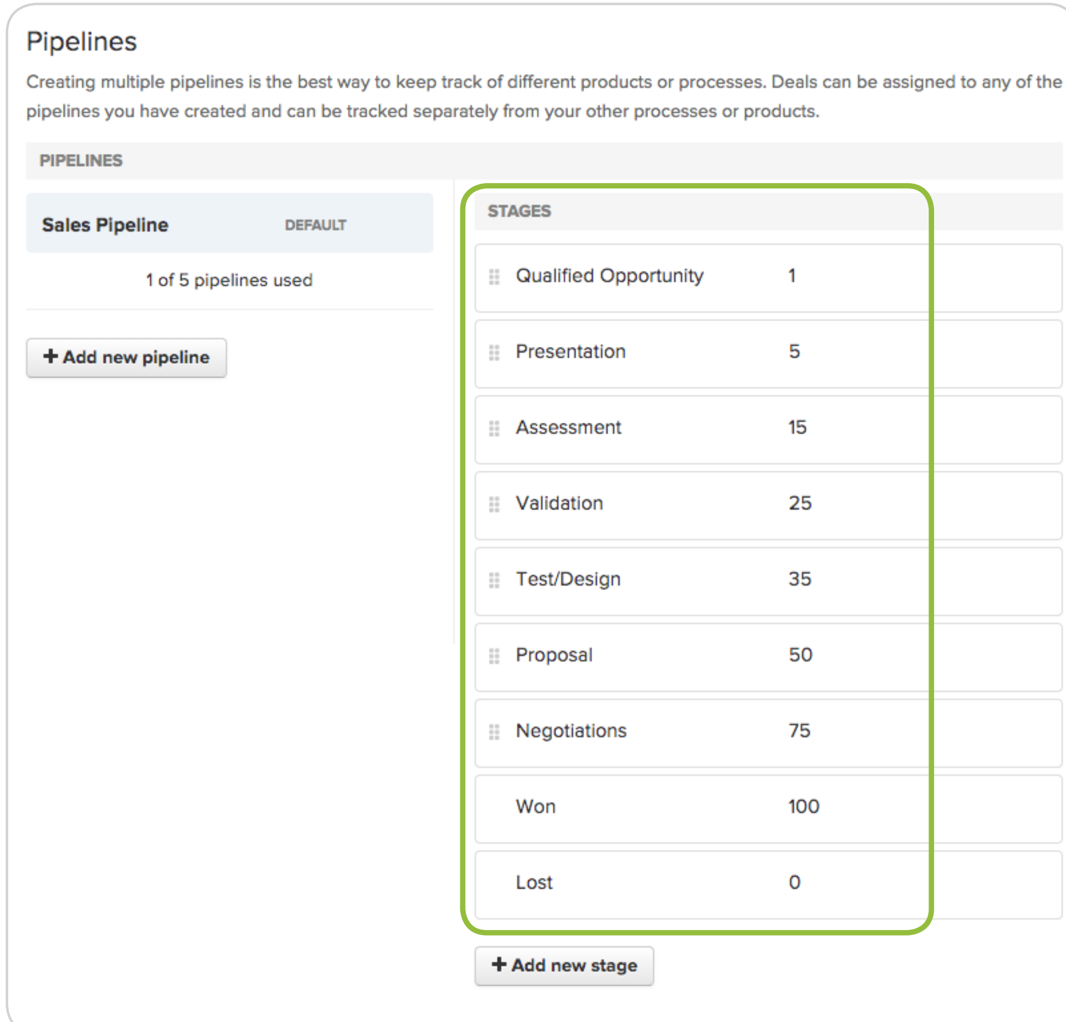
Probability by Deal Stage

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%.



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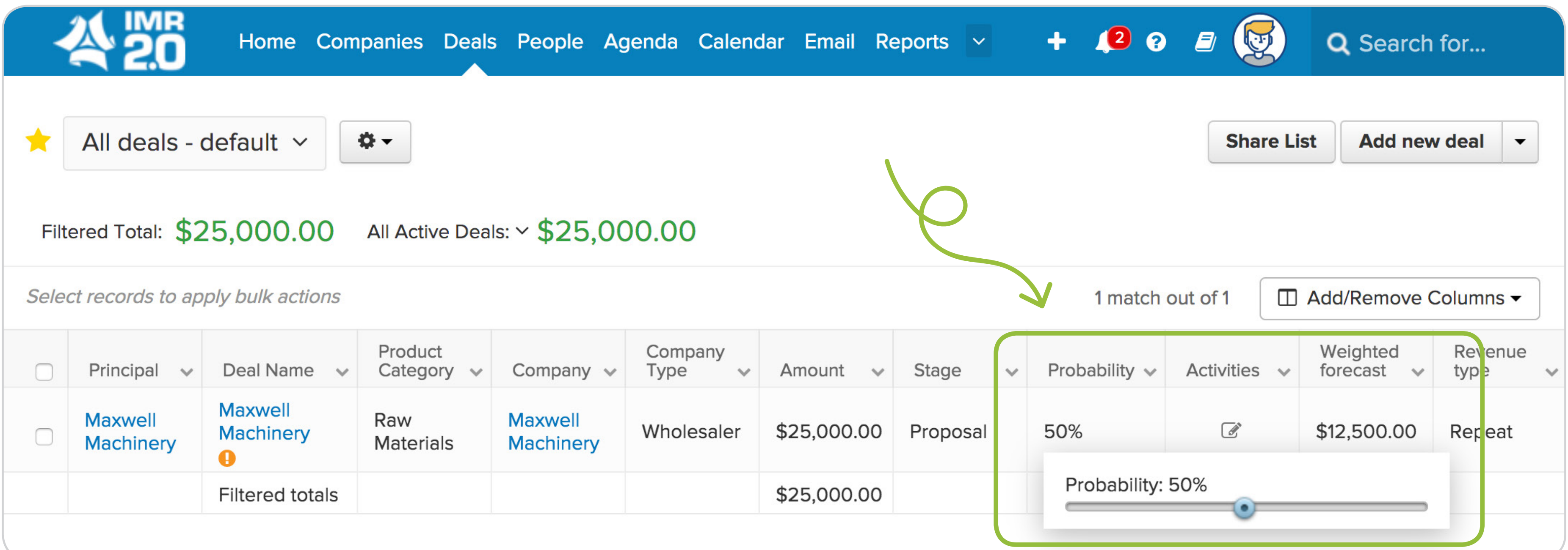
The Sales Process — Our Common Language

Probability by Deal Stage

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



ISA Leading the Channel Forward®

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

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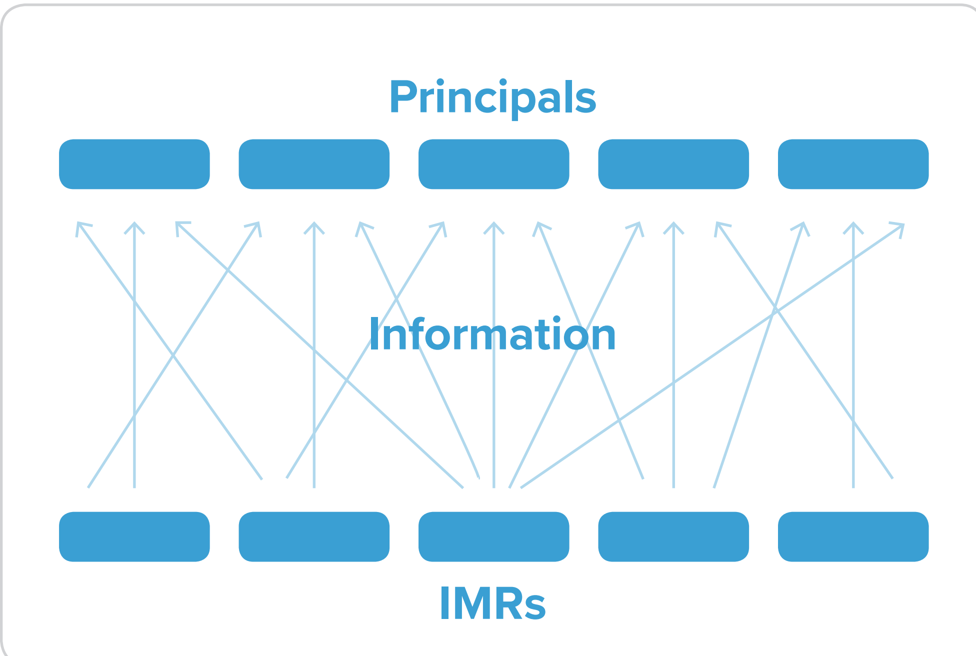
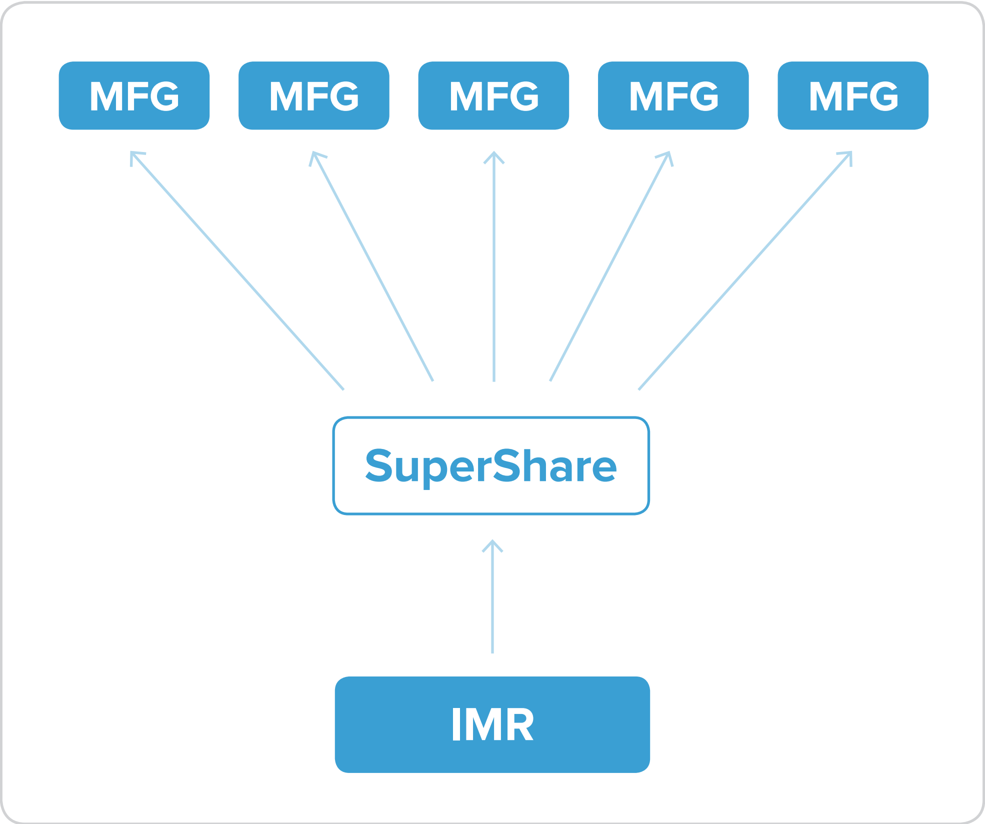
IMR 2.0 Platform — **Current State**



- 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



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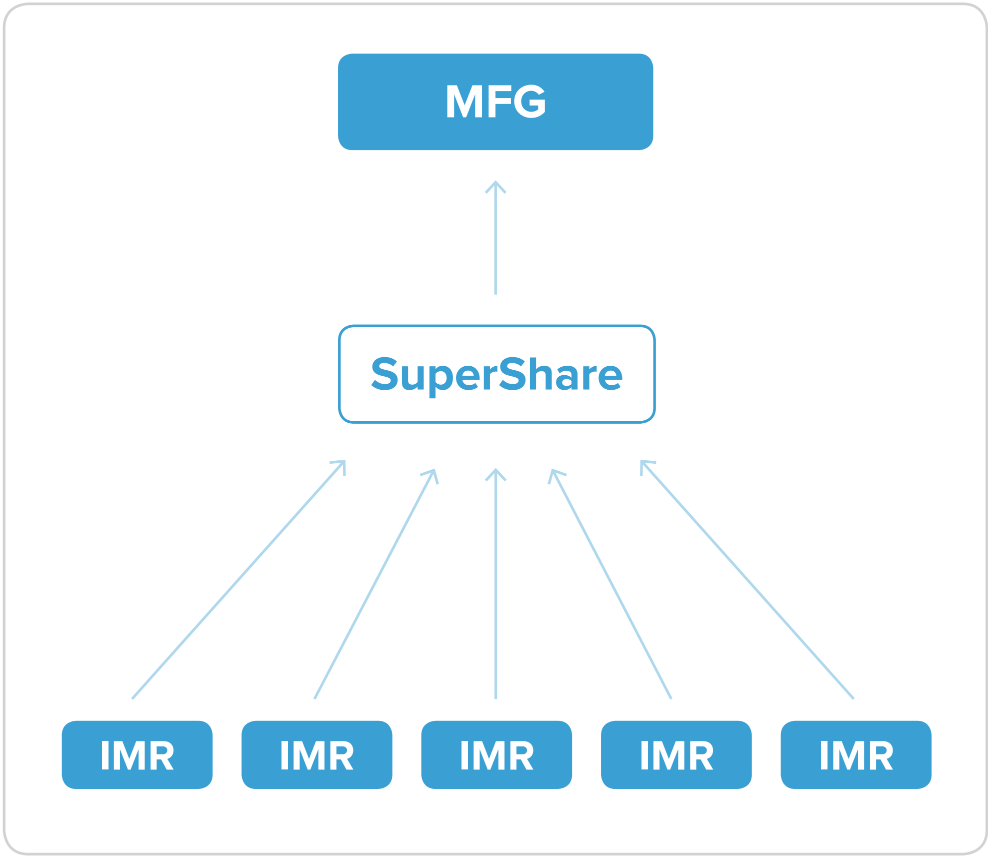
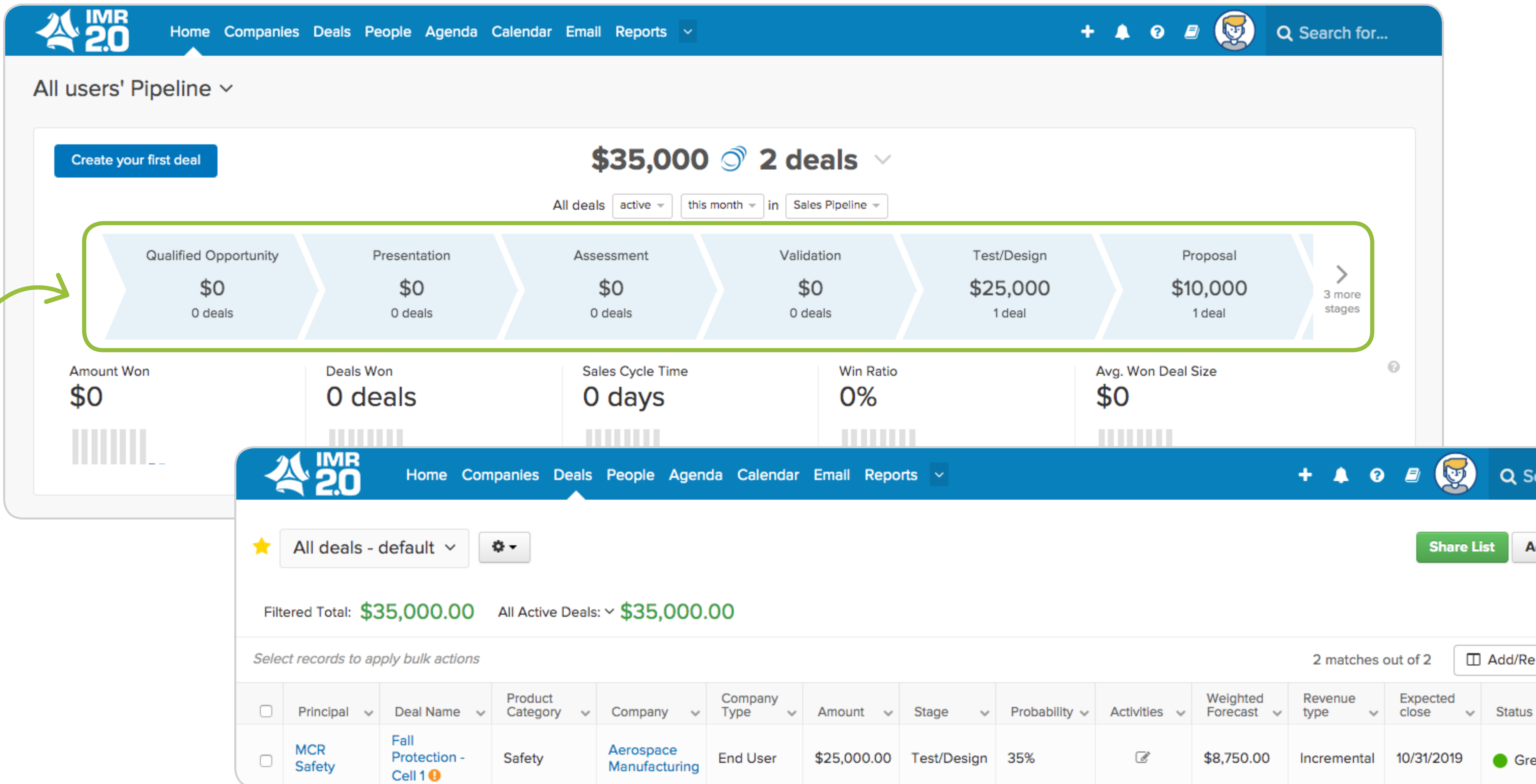
IMR 2.0 Platform
Future State — Manufacturers



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.



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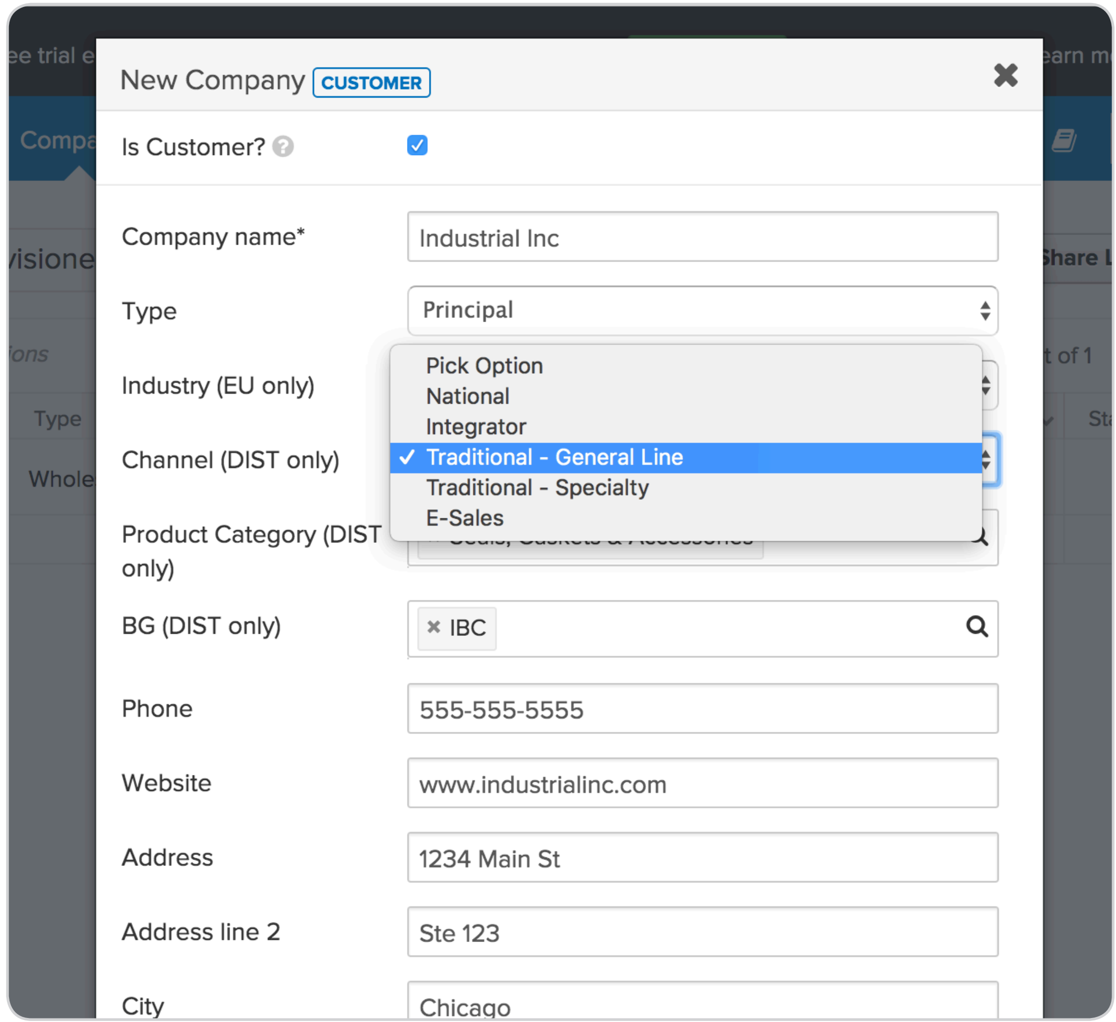
IMR 2.0 Platform
Company

PIPELINEDEALS TIP

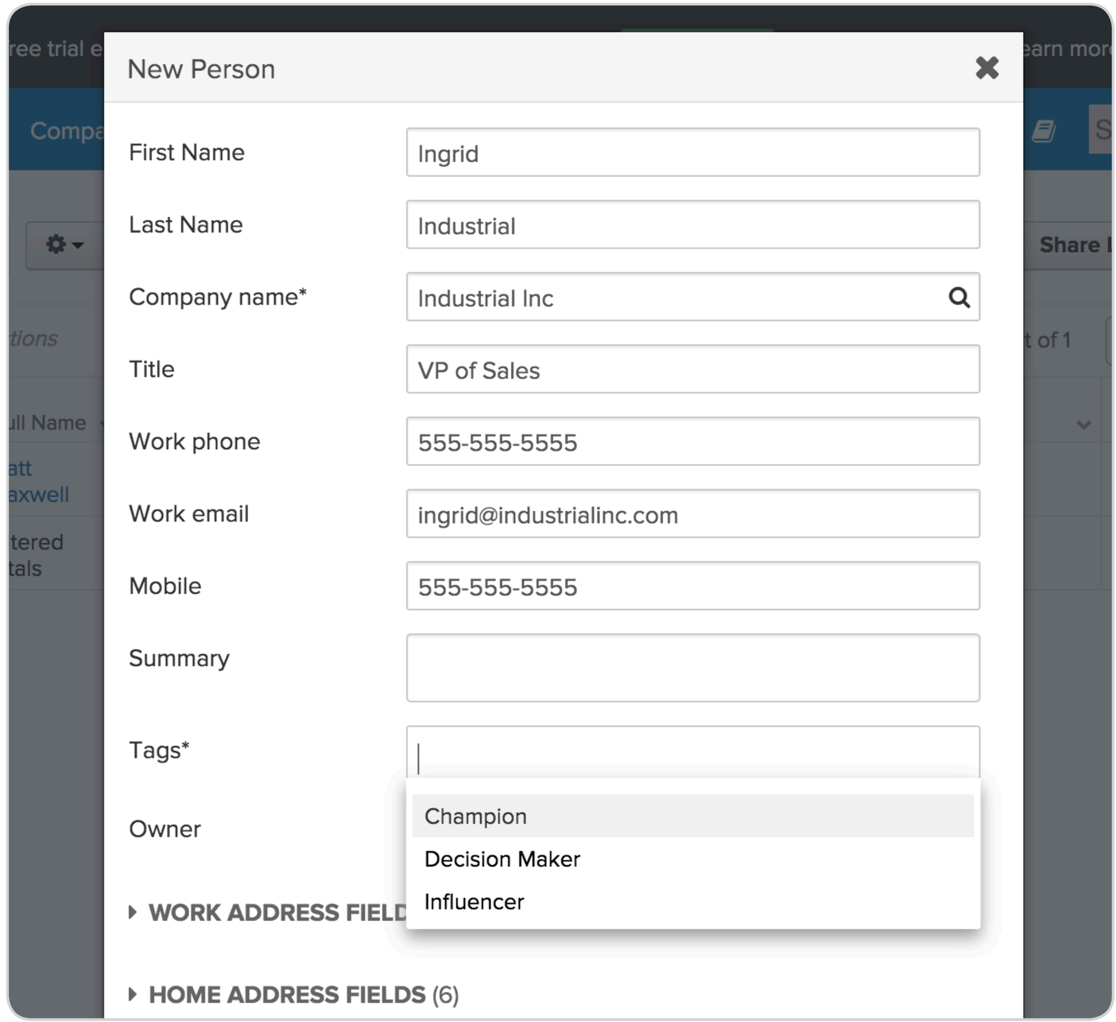
Adding a new **Company** is easy with custom IMR form fields, such as this Channel dropdown.



IMR 2.0 Platform
Person

PIPELINEDEALS TIP

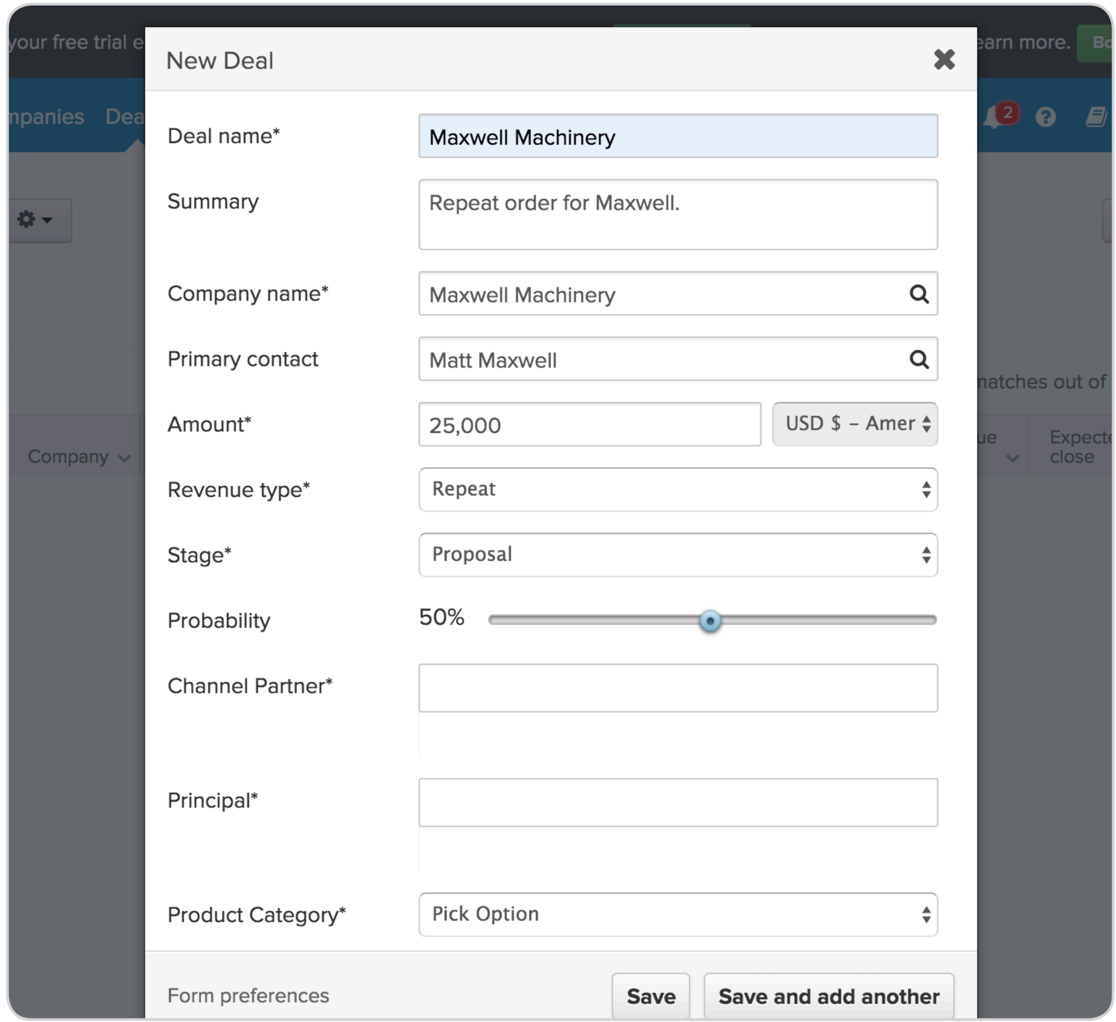
Adding a new **Person** is easy with form fields customized for the way IMRs sell and tags for Champion, Decision Maker, and Influencer.



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.



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

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SuperShare

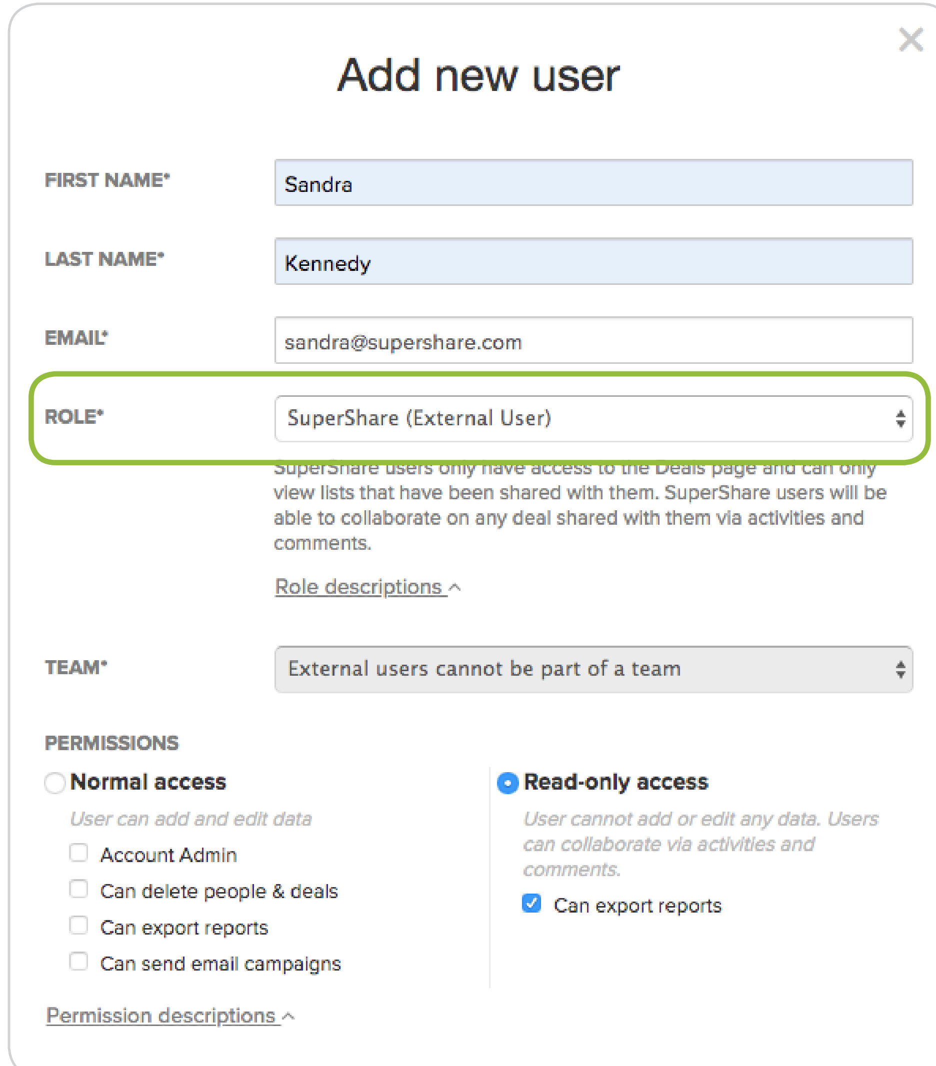
SuperShare was created with you, the IMR, in mind. This feature enables you to share your opportunities by Principal without them being a PipelineDeals user.

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.

ACCOUNT SETTINGS > USERS > ADD NEW USER

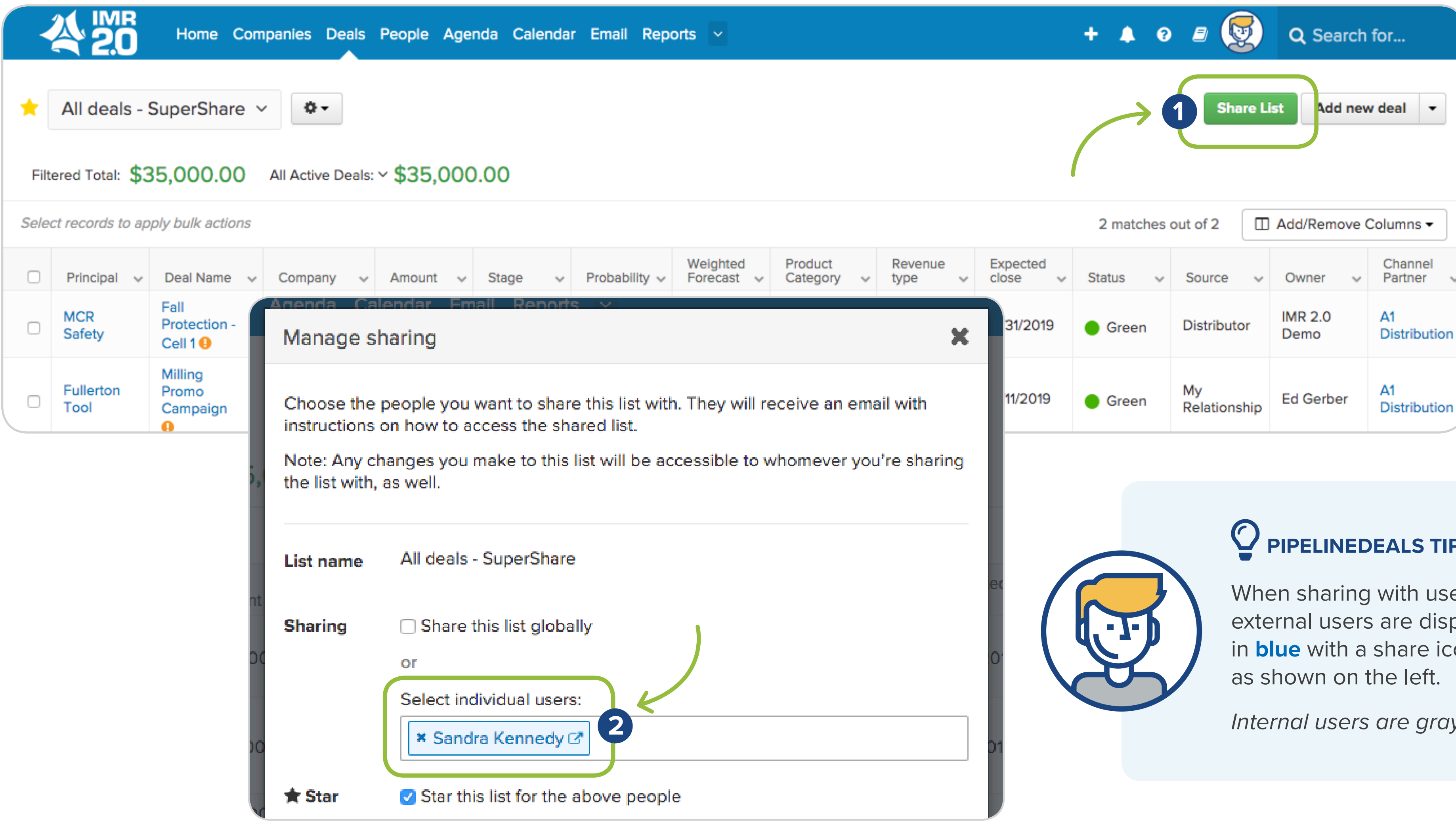


PIPELINEDEALS TIP

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.

IMR 2.0 Platform

SuperShare



PIPELINEDEALS TIP

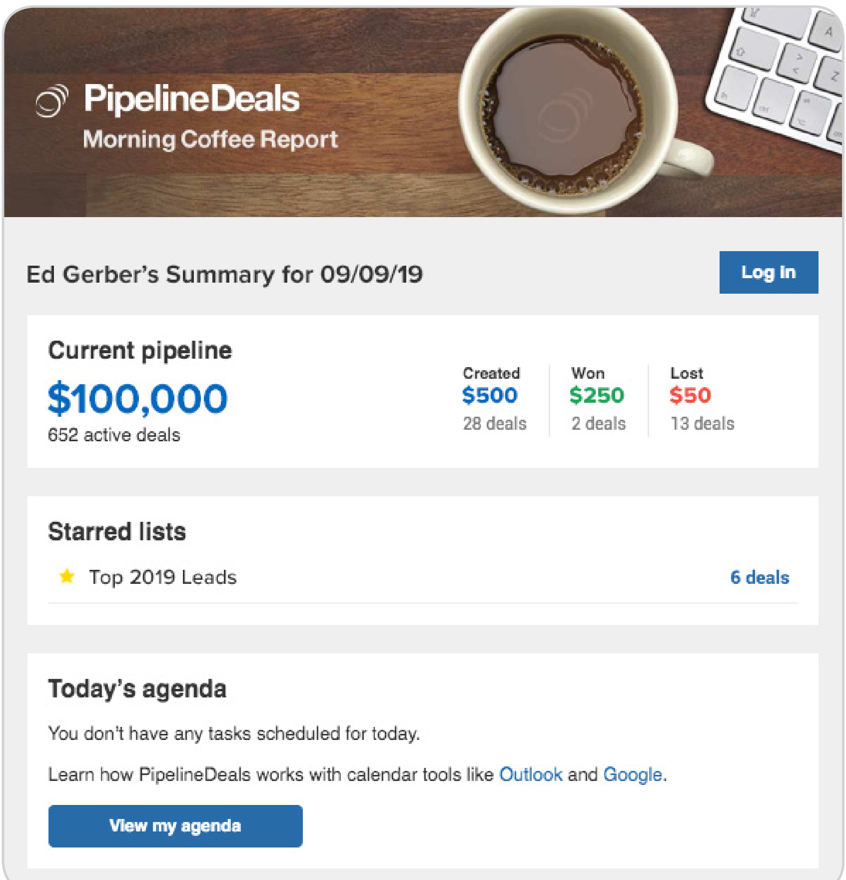
When sharing with users, external users are displayed in **blue** with a share icon, as shown on the left.

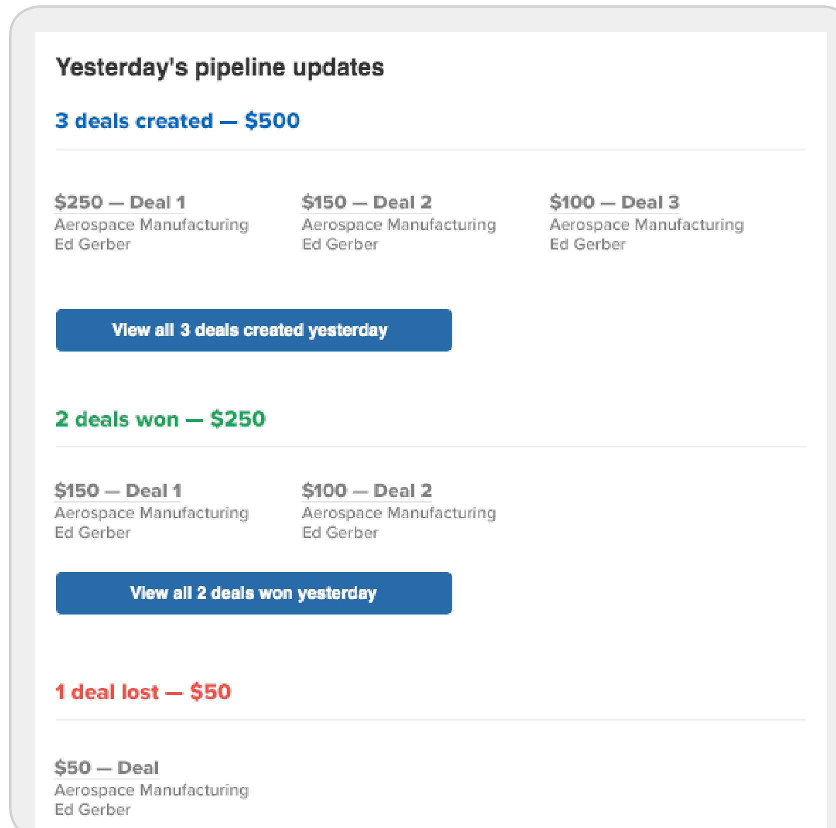
Internal users are gray.

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.





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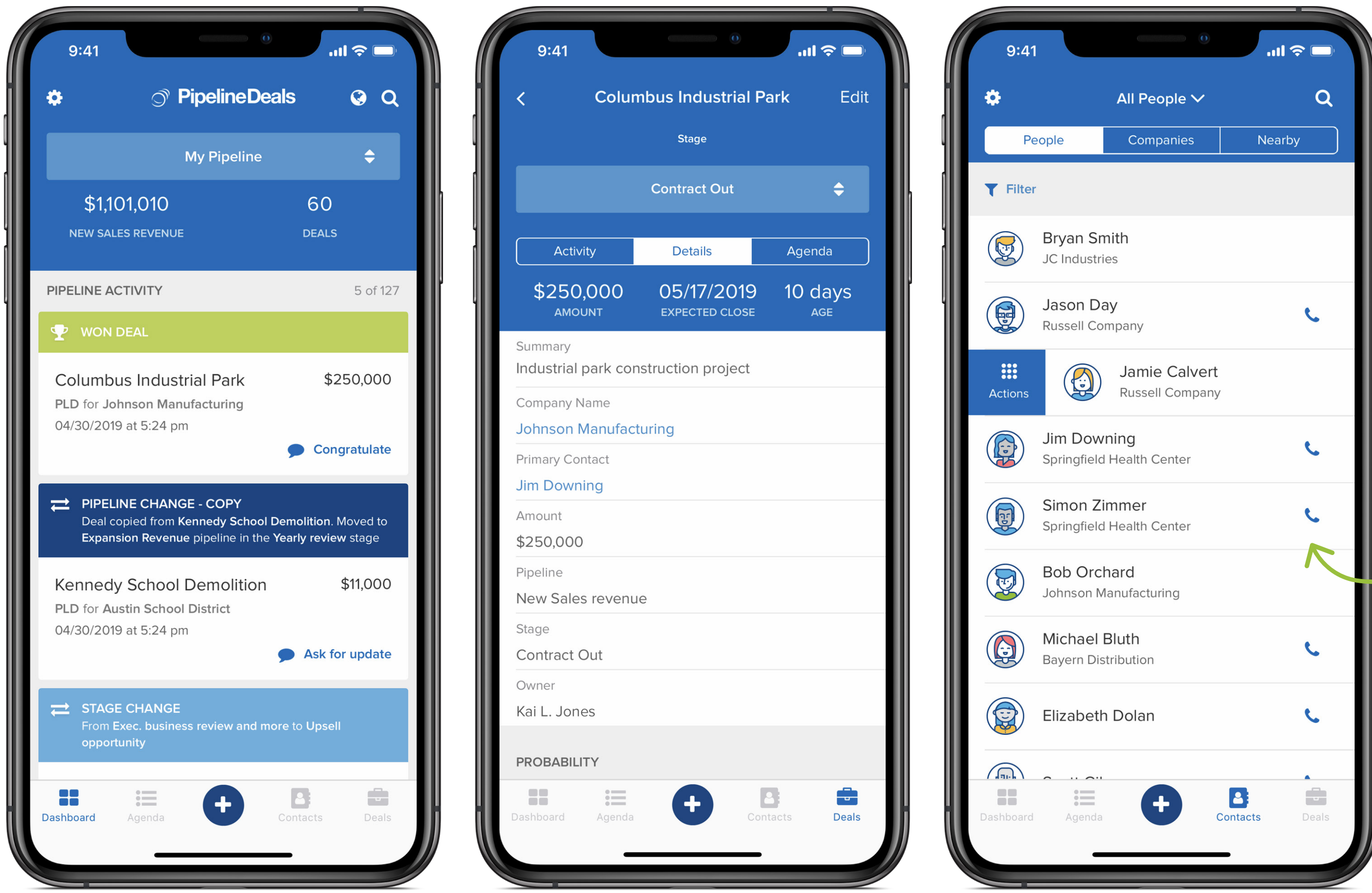
IMR 2.0 Platform — other features

Mobile



Perfect for sales teams on the go!

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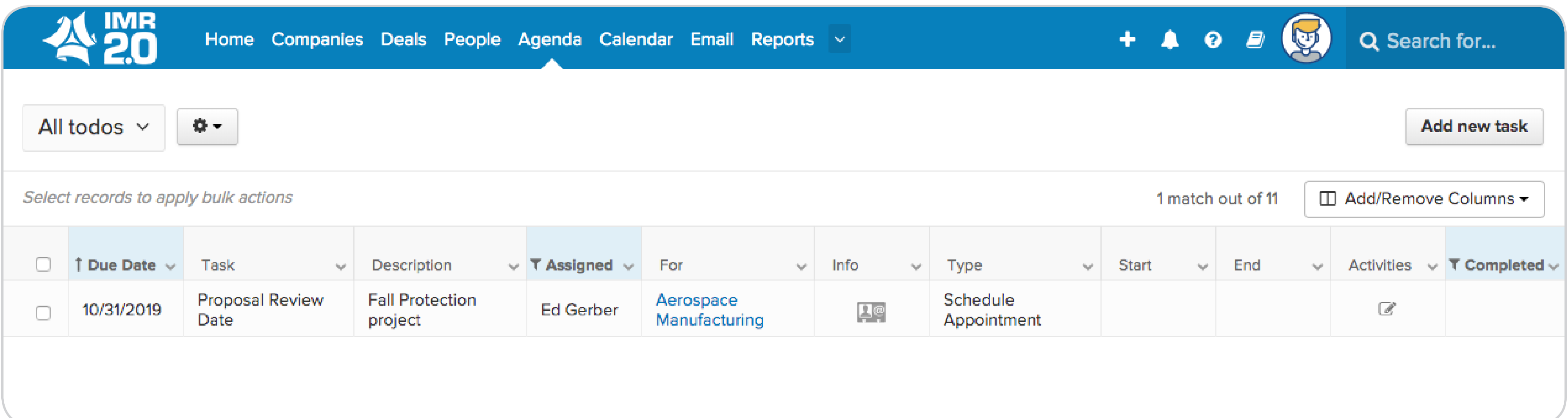
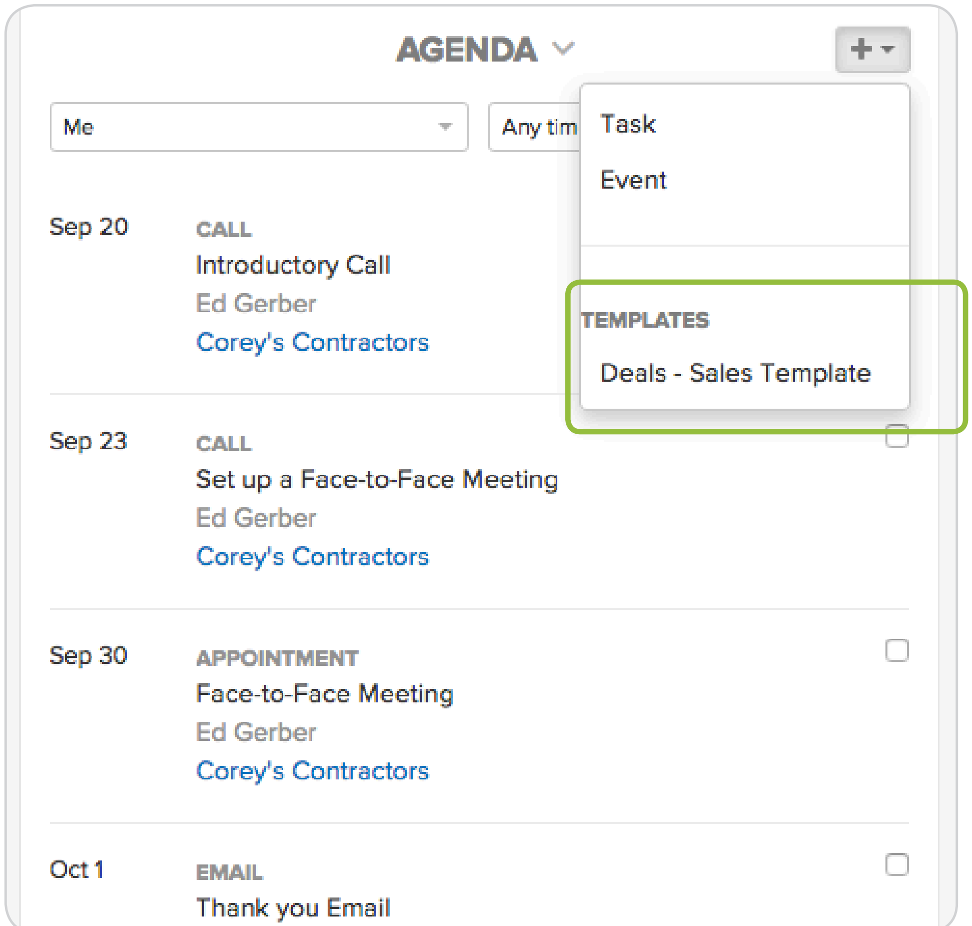
IMR 2.0 Platform — other features
Agenda

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



IMR 2.0 Platform — other features
Workflow

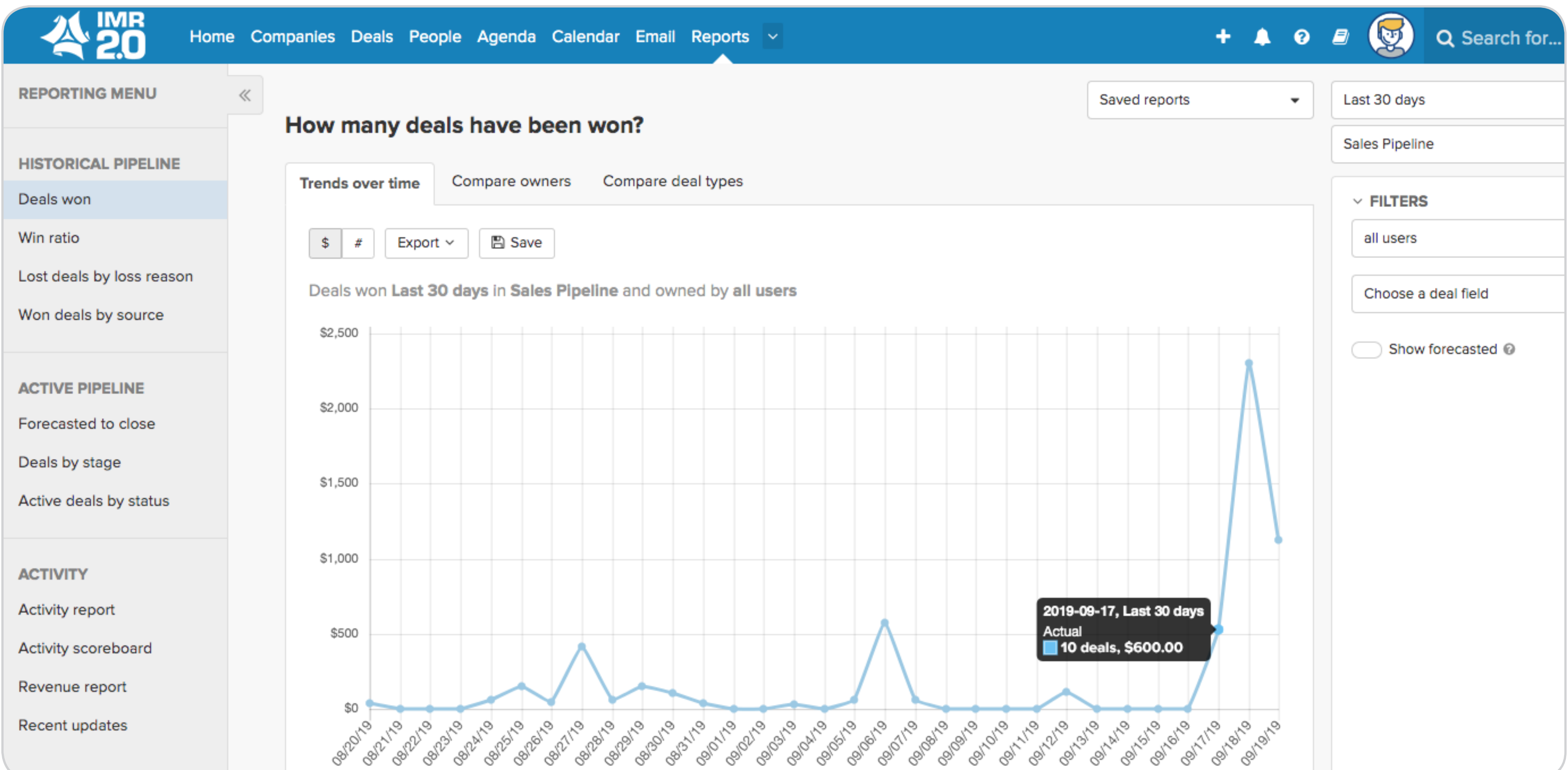


Takes the guesswork out of lead follow-up.

IMR 2.0 Platform — other features

Reporting

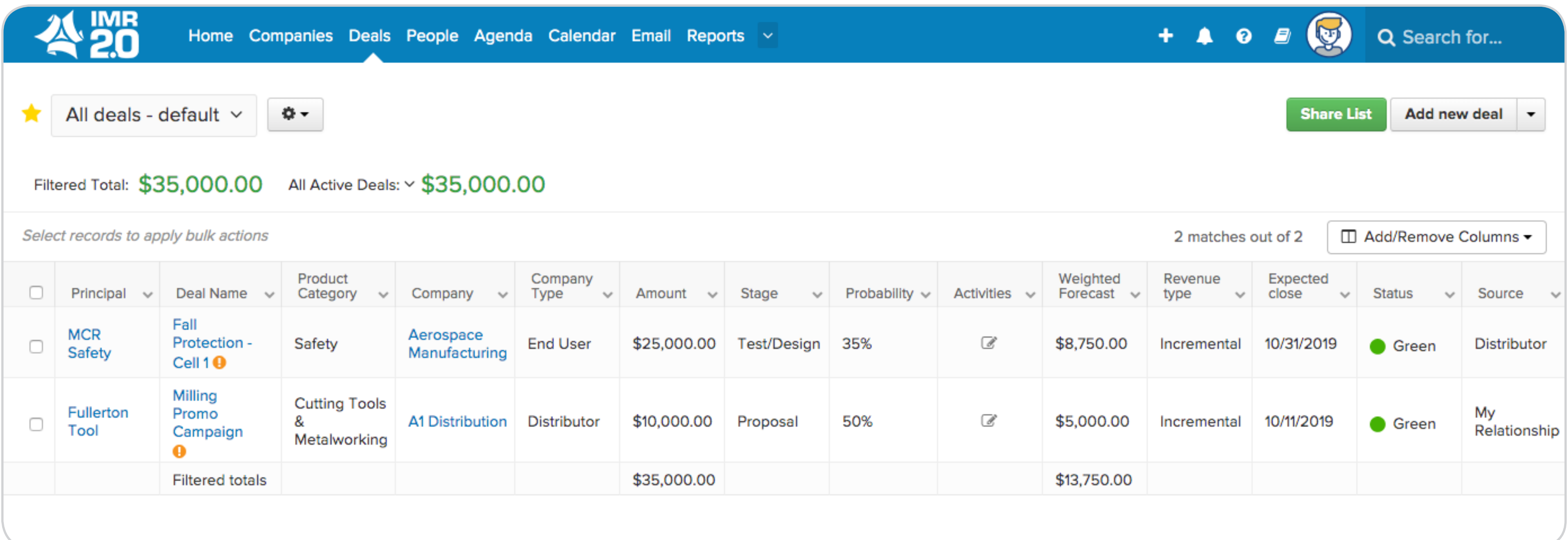
Easily track data and create powerful reports. Track your team's performance metrics, the types of deals you acquire, or any custom data point you want.



IMR 2.0 Platform — other features

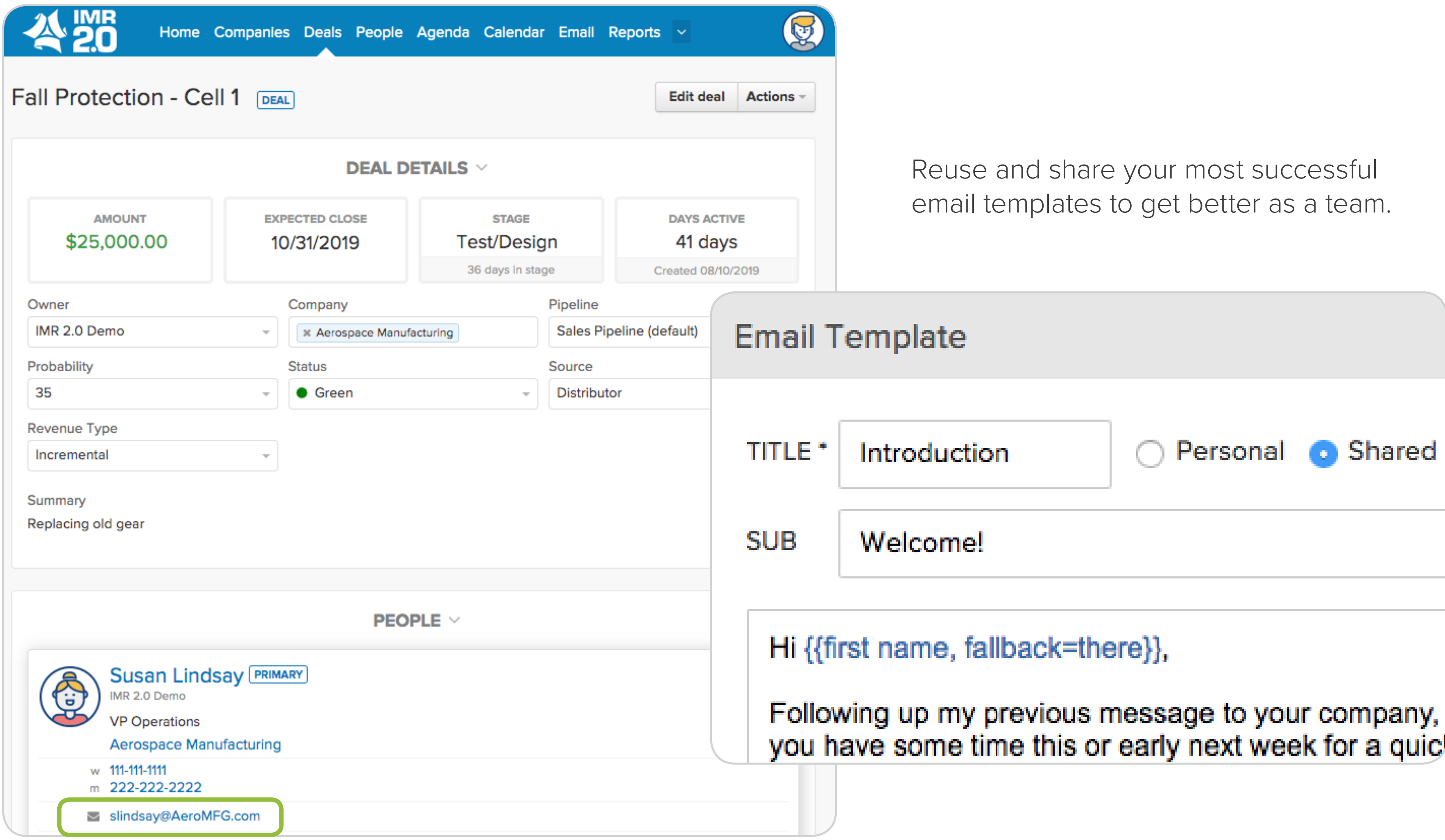
Deal List Views

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



IMR 2.0 Platform — other features

Email Templates

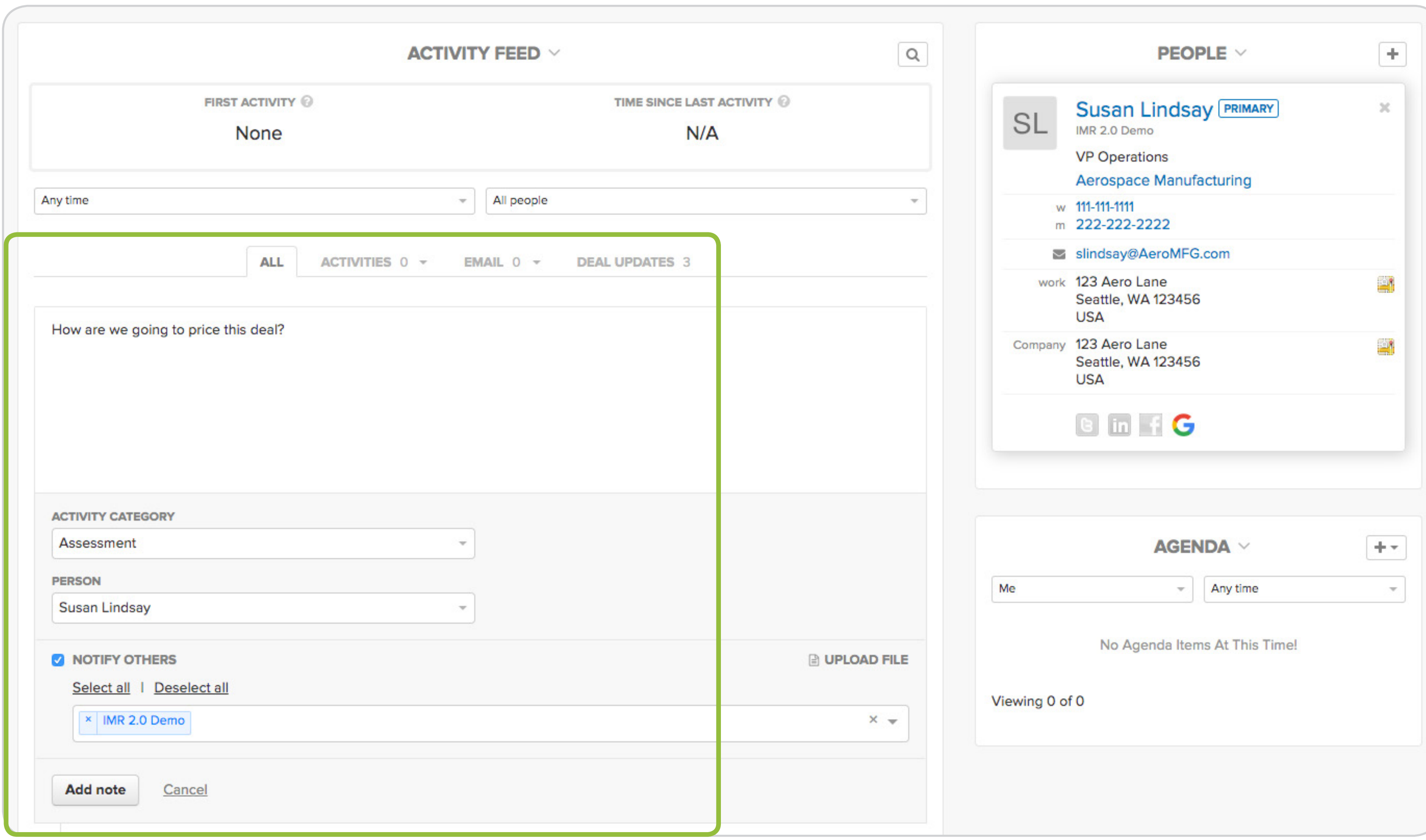


Reuse and share your most successful email templates to get better as a team.

IMR 2.0 Platform — other features

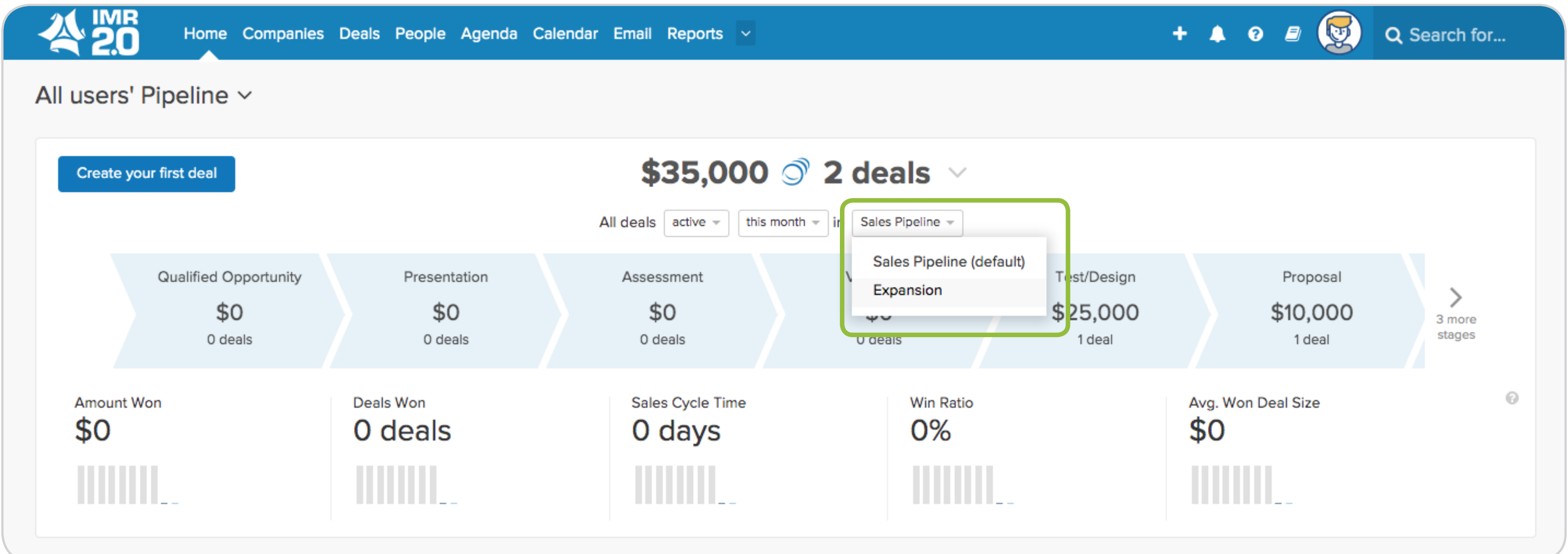
Collaboration

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



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.

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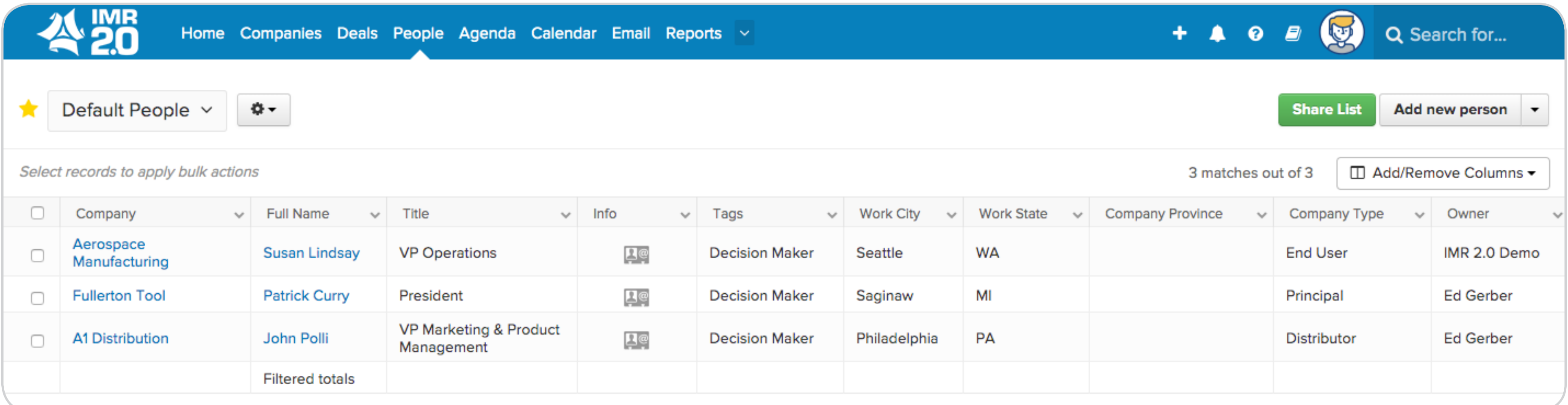
IMR 2.0 Platform — other features

People List Views

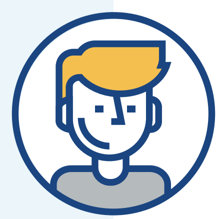


PIPELINEDEALS TIP

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.



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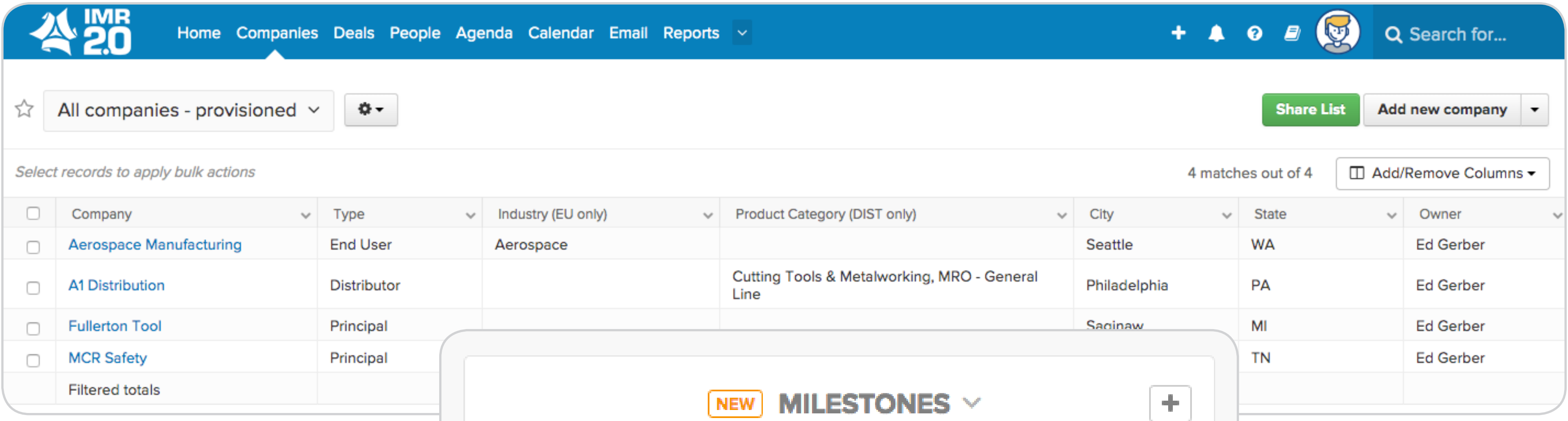
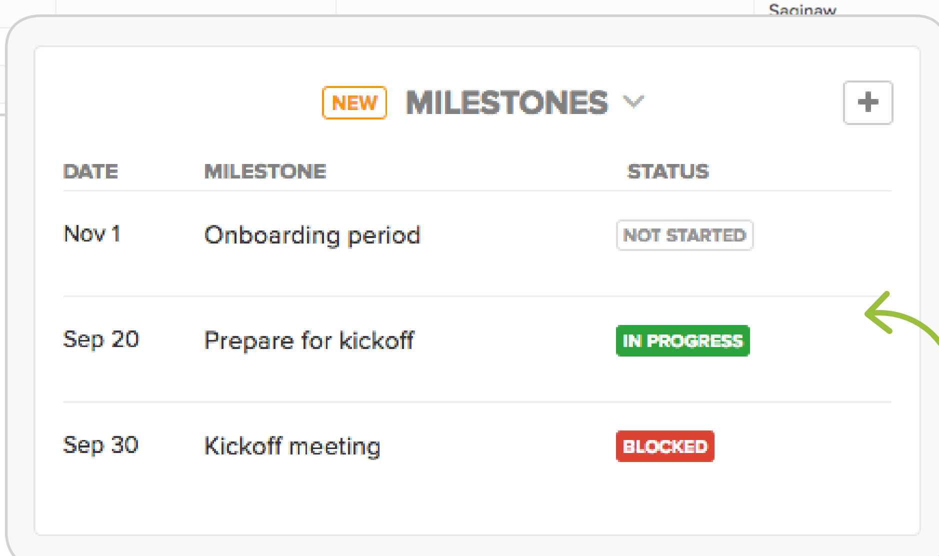
IMR 2.0 Platform — other features

Company Management



COMPANY LIST VIEW



CUSTOMER PROFILE

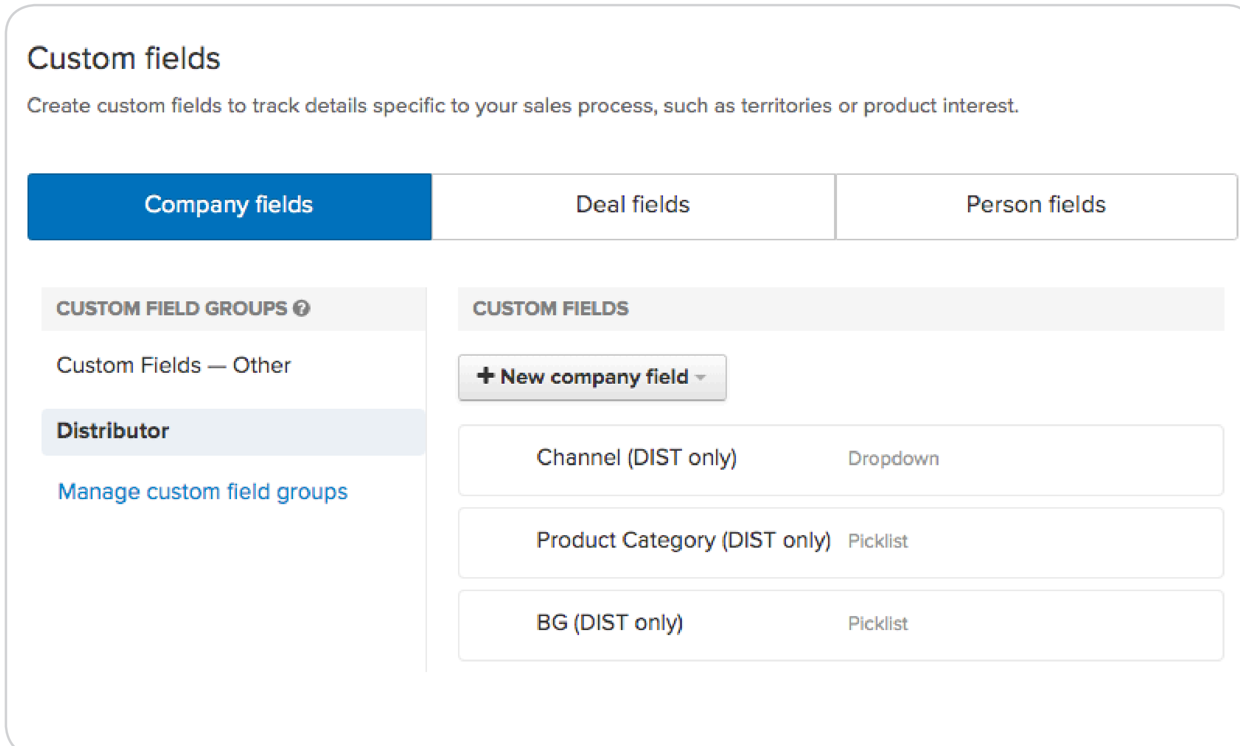
Exceed your customers' expectations by always being one step ahead with **Milestones**.

IMR 2.0 Platform — other features

Custom Fields

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

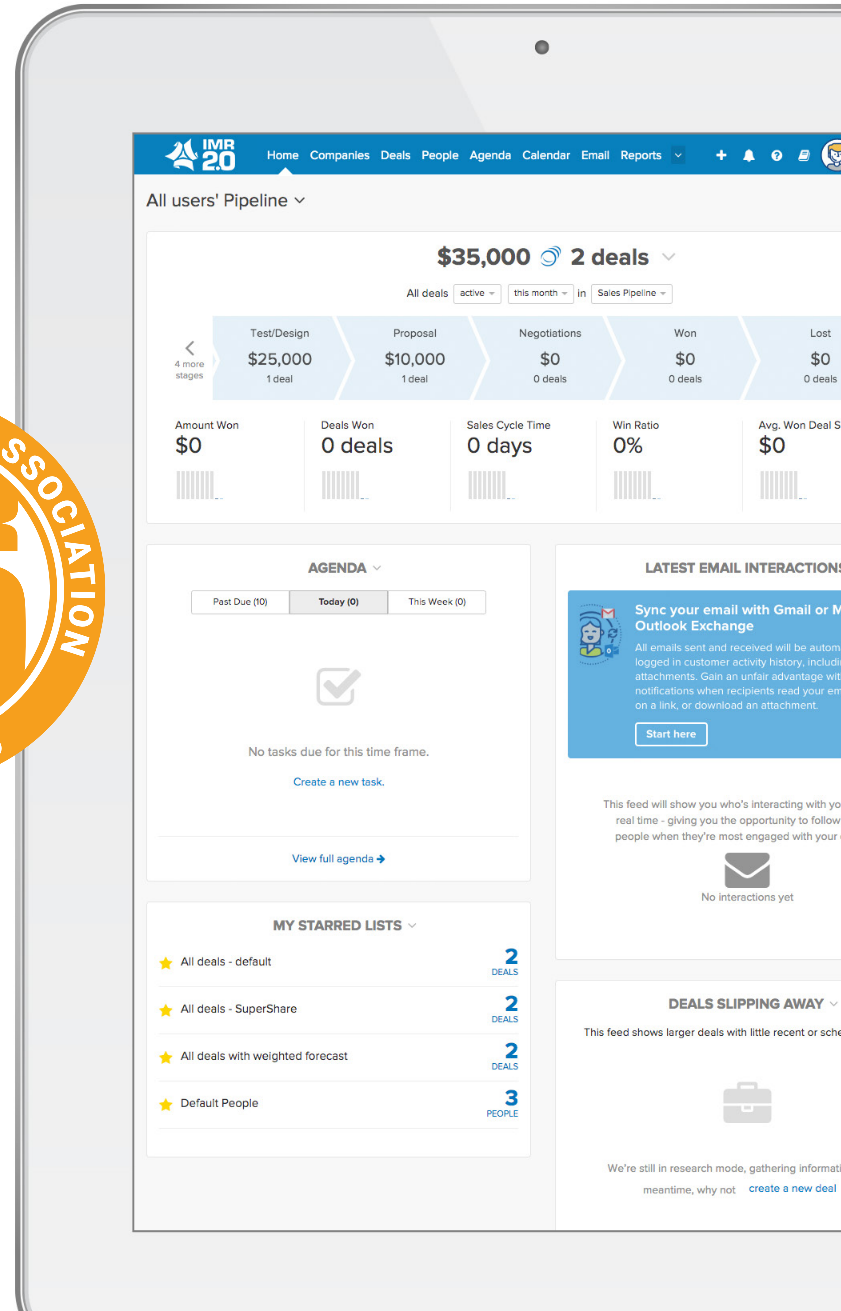
- Deal Stages
- Probability by Stage
- Principal
- Channel Partner
- Product Group
- Company Type
- Industry Segment
- Channel Segment
- Buying Group



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

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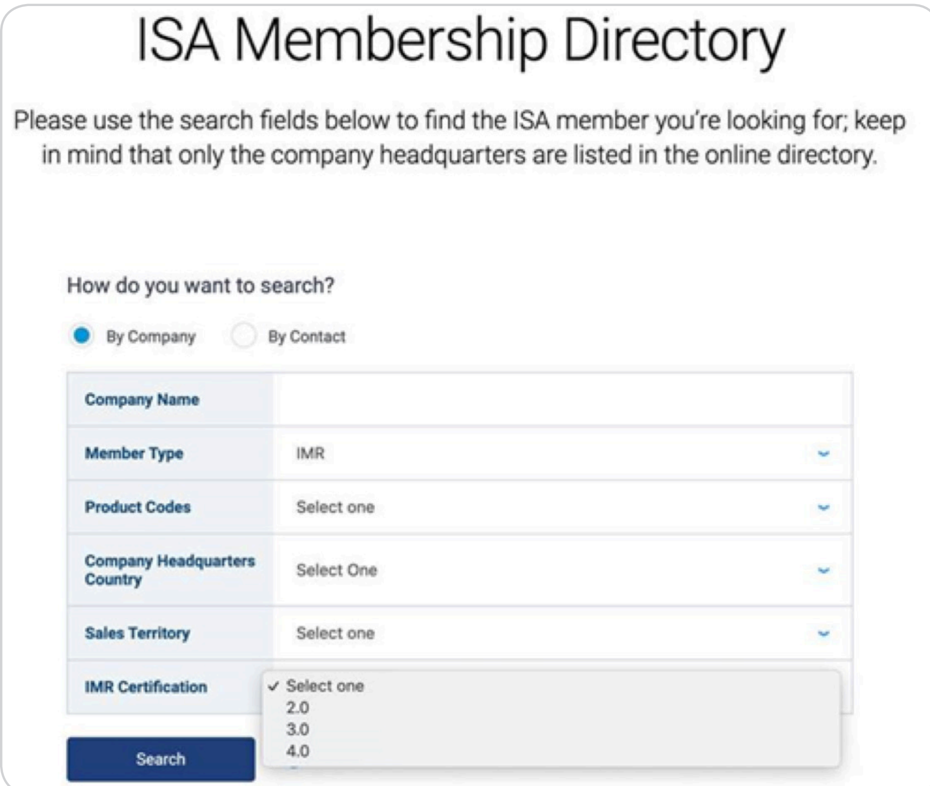
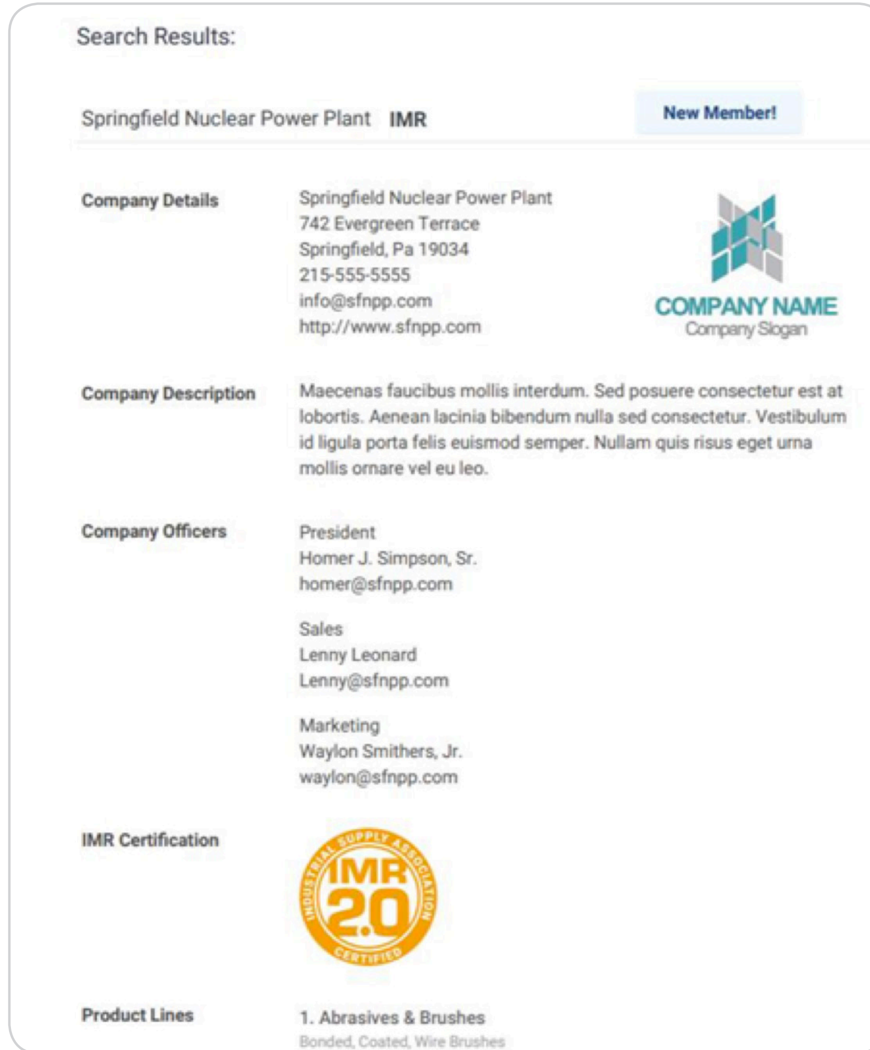
IMR 2.0 Certification = Differentiation





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.

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www.pipelinedeals.com/imr