**upspring** tip sheet

*Your Social Enterprise Experts*

## Part 4: Tipsheet #17

Exploring some useful tools for taking control of your sales process and maximizing the return of your sales efforts.

Author Fabian Willskytt is a MBA Candidate with a concentration in Sustainable Business at San Francisco State University.
Contact Fabian

## Mission Series

A series of tipsheets for people in mission-oriented organizations focused on improving their 'sales processes' to increase revenue and improve relationships.

**info@
upspringassociates.com**

# Organizing Sales Prospects: Some Tools

### Introduction

Social Enterprises and NGO's want to adopt a business-like approach to revenue generation. Mission-oriented organizations can benefit from effective sales processes just as profit driven companies. This tipsheet presents some tools for taking control of the sales process.

Explore a variety of useful tools that allow professionals in the third sector to organize their sales process and to maximize the return of their efforts.

### Microsoft Office Templates

MS Office is an inexpensive software packet that most organizations are already using. Microsoft provides free Excel templates online that can be used to track sales activity. This service is not as sophisticated as a conventional CRM system, but provides an affordable alternative to small scale organizations.

### Sales Tracker

A sales tracker tracks the number of prospects at each stage of the sales funnel: Awareness, Leads, Prospects, and Sales. By tracking these numbers an organization can more accurately predict future sales, thus taking control over the sales process.

*The Sales Funnel*

## Customer Relationship Management – CRM

CRM systems are used to organize and track an organization's clients. Major systems that are customized for NGO's include: *Blackbaud, Donor Perfect, and Neon CRM*.

| Pro | Con |
|---|---|
| **Save time and money** | Significant up-front cost |
| **Improve interactions with clients** | Requires extensive training for users |
| **Improve relationships with clients** | Risk of differential treatment |

## BATNA – 'Best Alternative To Negotiated Agreement'

BATNA is a course of action that will be taken if negotiations fail and no agreement can be reached. A party's BATNA can be described as a "worst case scenario". It states the points that each party is not willing to go beyond and what they will do in case the opposing party will not budge.

For example, a homeowner is trying to sell her house on the market. While she thinks she should be able to sell it for $250,000, she is not willing to go below $200,000. What will she do if nobody offers more than $200,000? For how long will she keep the house on the market? Will she rent it out for a year? Will she renovate the kitchen to make the house seem more appealing? The BATNA lists and ranks these alternatives to allow for easy comparison.

A BATNA is the standard against which any proposed agreement should be measured. It will protect both parties from accepting terms which are too unfavorable and from rejecting terms it would be in your best interest to accept. Furthermore, understanding the opposing party's BATNA can be an important point of leverage in a negotiation.

## Google Services

Aside from its search engine, Google offers a variety of business services, some of which are particularly useful to professionals in the third sector:

| | |
|---|---|
|  | Google Docs is a cloud service which allows professionals to collaborate and share their work in real time with colleagues regardless of geographic locations. |
|  | Google Hangout allows users to make video conference calls. This service allows organizations to cut back on travel costs. |
|  | Google Analytics is a great tool for tracking web traffic. |
|  | Google Wallet facilitates online donations and reduces administrative costs associated with fundraising. |
|  | AdWords is Google's service for creating simple ads. Qualified NGO's can apply for a Google Grant to receive free advertising worth up to $1,000 per month. |

 **UpSpring serves** the social enterprise community with effective and sustainable consulting services.

We are a HubZone small business, and B Corp founding member based in Santa Fe, New Mexico. Our mission is local, but we take it global: to generate ideas, spark actions, and measure results to solve real world problems.

Contact UpSpring