

# Bid Grid for Infor CRM

The Bid Grid for Infor CRM helps you achieve consistent and accurate forecasting through an automated assessment of your sales opportunity status.





#### Introduction

A sales person will often rely on experience and gut feel to estimate the probability of closing a deal. Collier Pickard has developed a question-and-answer grid, based on years of experience and best practice, to help improve forecasting and act as a guide in long term account development. We call this tool the Bid Grid.

# Easy, yet effective opportunity management

The Bid Grid is a visualisation tool within the Infor CRM opportunity management and pipeline forecasting module. It provides a method of recording opportunity-related information in a structured, reportable and visual manner.

The grid is configured with questions and answers that are <u>unique to your business</u> under these headings:

- → Why Buy? Why would the customer buy from you?
- → Why Buy Now? What are the compelling events for buying within a timeframe?
- → Why Buy Now From Us? Have you differentiated yourself sufficiently in the competitive marketplace?

By focusing on these questions with answers that reflect <u>your</u> qualification points and business values, the Bid Grid helps you achieve a more accurate and consistent sales pipeline and greater potential for evaluation of lost and won

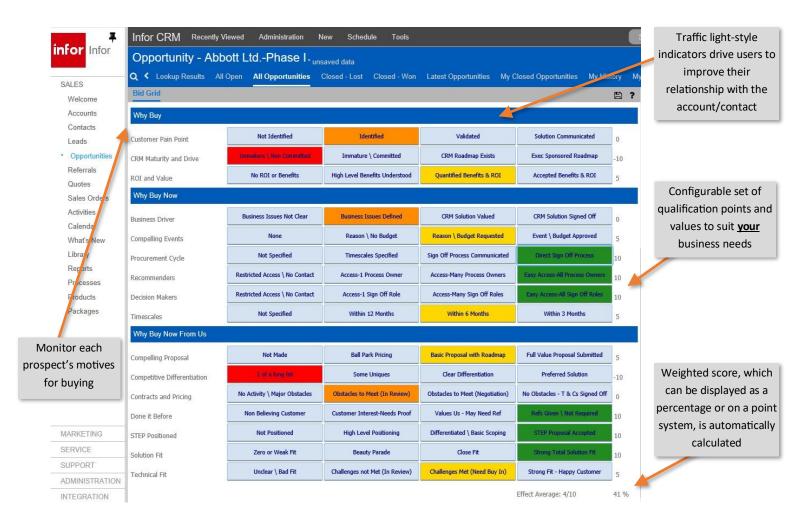
opportunities. This gives you the ability to highlight key areas which need to be improved for a higher win rate and focus on the areas that make you the differentiator in your industry.





## Benefits of using the Bid Grid

- It makes the capture of complex data quick and straightforward
- It makes the review (the visualisation) of complex data very simple
- · It enables opinion (gut feel) to be quantified and ranked
- It enables a real value to be attached to non-financial measurements
- It enables objective forecasting to be ranked one against another
- It increases accuracy in your sales pipeline
- It spawns beneficial customer-focused activities
- It embodies best practice in customer relationship management



### **Further information**

Get in touch for more information about Collier Pickard's Bid Grid for Infor CRM we'd be happy to discuss your needs. T: +44 (0)1959 560410
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