

NEVALON

TECHNOLOGIES

Opportunity Management System (OMS)

Task Details [Update] [Cancel] [Task List]

*Information required

Project*: Nevalon Sales

Task #: 298

Title*: Company XYZ sales

Type*: Sales Lead

Status*: Open

Priority*: High

Owner*: Chad Lafon

Next Action Date: 9/5/2004

Next Action Description: Call John to follow-up

Lead Source: Word of mouth

Task Description: We need to try to sell lots of widgets to Company XYZ.

The Nevalon Opportunity Management System (OMS) is an Internet application developed to manage the integrated sales and delivery functions for technology. We use OMS for our internal sales and delivery operations and it is one of the tools we use to provide our business development services to technology clients.

OMS is an integrated system that combines the best of contact management, project management, pipeline management, and resource management. A must have system for any organization that requires **solution selling** and **technology delivery** in order to produce revenue.

Although technology sales and delivery are separate functions, they are forever linked and one cannot succeed without the other. The technology sales process spawns multiple pre-sales and technical tasks. The sales opportunity becomes a sales project to be managed in order to close the deal. The closing of the sale leads to the technology delivery function, which spawns operational delivery tasks, yet another project to be managed. After technology delivery, that client relationship is now an opportunity to cultivate and grow because you want it spawn new sales opportunities. And thus the opportunity lifecycle continues. Opportunity management of technology solutions requires high caliber **solution selling** and **technology delivery** expertise. Nevalon ITSS services and our OMS product provide both!

Nevalon OMS functionality:

- Manage contacts and companies.
- Manage sales opportunities and all related tasks to close deal AND deliver the solution.
- Associate the "players" to an opportunity (client contacts and internal staff).
- Maintain multiple opportunity task types.
- Associate task(s) to an opportunity.
- Assign opportunity to proper sales or delivery lifecycle phases.
- Assign opportunity tasks to another resource associated with the project.
- Maintain pipeline opportunity details such as value, close date, etc.
- Manage chronological log of notes for each opportunity, task, and contact.
- Real-time pipeline and opportunity reports available on web for executive management, sales team, and delivery team.

Associated Companies [Manage Companies]

Name: Existing Client?
Company XYZ, Palre

Associated Contacts [Manage Contacts]

Name:
Heavy Ford
John Smith

Notes [Add Note]

User	Timestamp	Note
Chad Lafon	9/31/2004 11:26:34	11/3 called back to talk about project. 25 sales people. Agreed to meet, seemed interested!
Chad Lafon	9/2/2004 10:43:54	Talked to John Smith