

Sales, marketing and invoicing for SaaS products

In the context of Tractebel's digital transformation, this document aims to clarify the sales and marketing process involved in a Software as a Service commercialization.

I will first present the common process to find leads (potential customers) and sign deals for any SaaS startup and then I will suggest a tailor made solution taking into account our available resources.

I. The Sales environment in a SaaS startup

The Sales ecosystem is usually composed of 4 main entities :

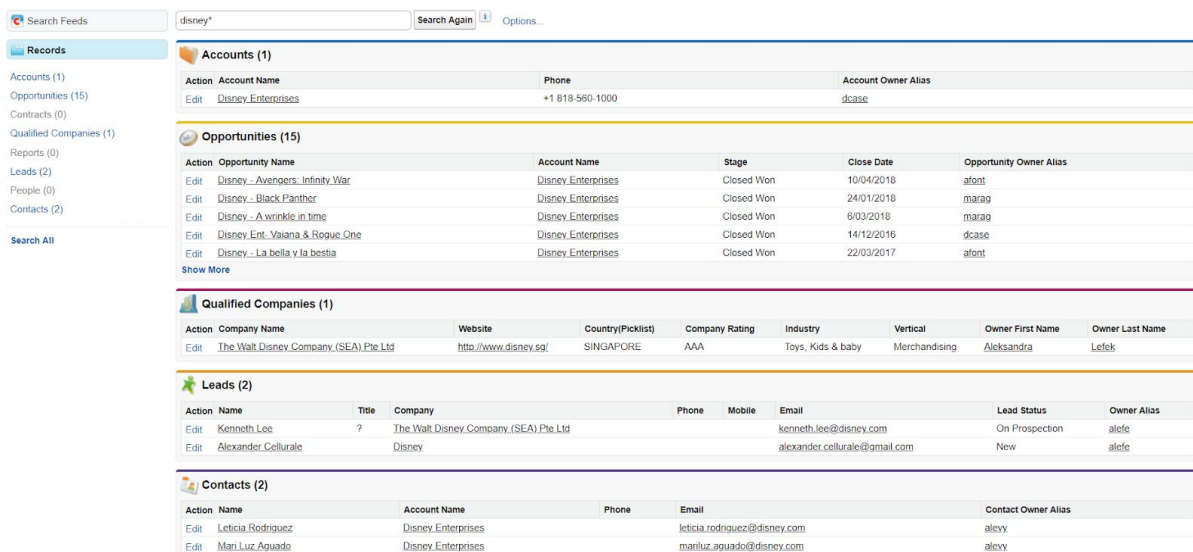
Digital Marketing : Writes articles, designs visuals and logos, runs email campaigns, manages ads and SEO. Leads generated by this process are called inbound leads.

Sourcing : Scraps the internet and databases to find potential clients as well as their contact info. Leads generated by this process are called outbound leads.

Sales Development Representative (SDR) : Takes care of the prospection through email and calls. Their goal is to convince a potential client to schedule a demo appointment with an AE, therefore converting the lead (inbound or outbound) into an opportunity.

Account Executive (AE) : Handles software demos. Negotiates pricing if needed and has good knowledge of the legal contract. Ultimately seals the deal and maintains the relationship with the client in the future.

The tool used to keep track of all the actions of the Sales team is called a **Customer Relationship Manager (CRM)**. Here is Salesforce (<https://www.salesforce.com/uk/>) as an exemple.



The screenshot shows the Salesforce CRM interface with a search bar containing 'disney'. The left sidebar shows navigation options like 'Records', 'Accounts (1)', 'Opportunities (15)', 'Qualified Companies (1)', 'Leads (2)', and 'Contacts (2)'. The main content area displays several data tables:

Accounts (1)			
Action	Account Name	Phone	Account Owner Alias
Edit	Disney Enterprises	+1 818-560-1000	dcase

Opportunities (15)					
Action	Opportunity Name	Account Name	Stage	Close Date	Opportunity Owner Alias
Edit	Disney - Avengers: Infinity War	Disney Enterprises	Closed Won	10/04/2018	afont
Edit	Disney - Black Panther	Disney Enterprises	Closed Won	24/01/2018	marag
Edit	Disney - A wrinkle in time	Disney Enterprises	Closed Won	6/03/2018	marag
Edit	Disney Ent - Vaiana & Rogue One	Disney Enterprises	Closed Won	14/12/2016	dcase
Edit	Disney - La bella y la bestia	Disney Enterprises	Closed Won	22/03/2017	afont

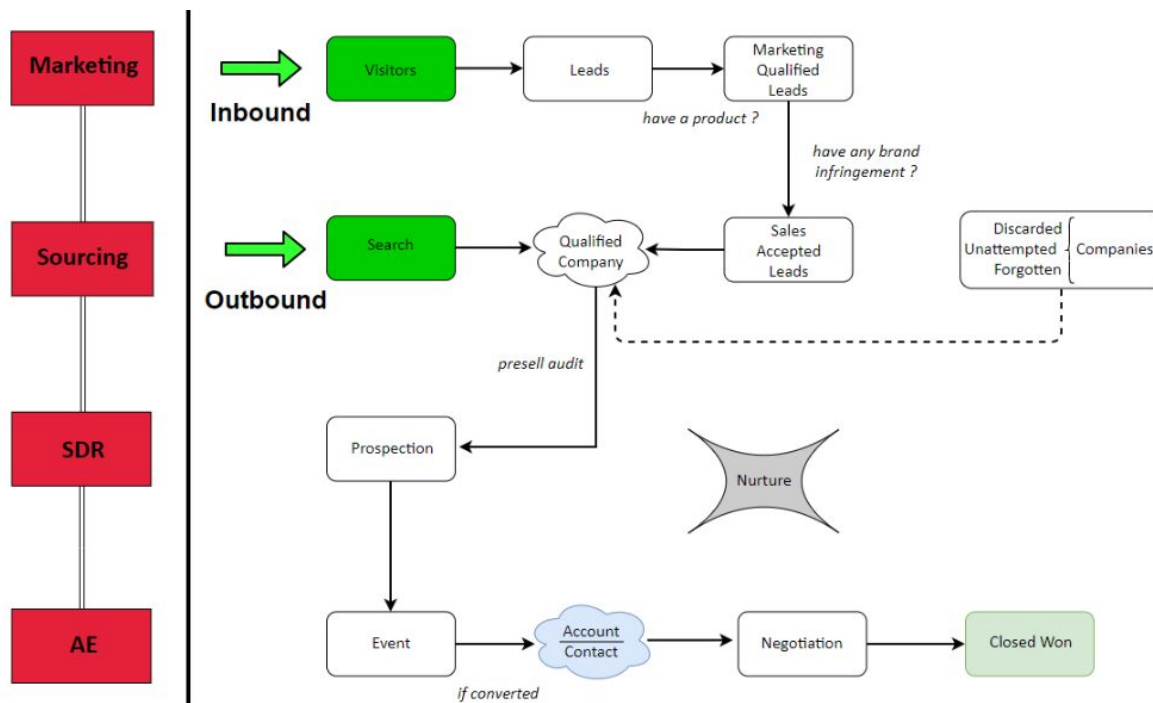
Qualified Companies (1)								
Action	Company Name	Website	Country(Picklist)	Company Rating	Industry	Vertical	Owner First Name	Owner Last Name
Edit	The Walt Disney Company (SEA) Pte Ltd	http://www.disney.sg/	SINGAPORE	AAA	Toys, Kids & baby	Merchandising	Aleksandra	Lefek

Leads (2)								
Action	Name	Title	Company	Phone	Mobile	Email	Lead Status	Owner Alias
Edit	Kenneth Lee	?	The Walt Disney Company (SEA) Pte Ltd			kenneth.lee@disney.com	On Prospection	alefe
Edit	Alexander Celluraie		Disney			alexander.celluraie@gmail.com	New	alefe

Contacts (2)					
Action	Name	Account Name	Phone	Email	Contact Owner Alias
Edit	Leticia Rodriguez	Disney Enterprises		leticia.rodriguez@disney.com	alevy
Edit	Mari Luz Aguado	Disney Enterprises		mariluz.aguado@disney.com	alevy

This allows you to see which company you already contacted, which leads, which contact infos you have, and which contracts you have already signed with a company if there are any.

This workflow illustrates the process of how a SaaS startup can get leads into the CRM and when each entity's actions are needed in order to convert these leads and sign new deals.



II. Suggestions for TRiceR

Getting forward with our current resources

To make things less complex, we shall simplify our case in the following manner :

- Sourcing, SDR and AE can all be regrouped into one role that we will call "Business Developer" (BD)
- Leverage the Tractebel network to get as much organic outbound leads as possible
- Marketing should provide the structure of the communication (email templates, logos, visuals, additional information reports)
- We should designate two or three BD to take care of all the inbound leads, software's demos and contract negotiations

In my opinion, the best way for Marketing to generate inbound leads is to make sure the SEO of the landing page is on point as well as running ads with a good conversion rate. Likewise, writing articles on established platforms such as LinkedIn or Tractebel-Engie's blog could be a successful strategy. Having neat visuals across the board is a plus to catch people's attention.

To clarify, Business Developer is not an open position. This is a role anybody can take part in as a part time or in their free time.

I don't think that we should hire sales or support for TRiceR until we start generating some revenue and have an idea of what kind of budget is available to us.

Therefore, I think it is fair that employees that go out of their way to help us sign big contracts should be rewarded.

Details about the CRM

I don't know which CRM Tractebel is working with today. Maybe a shared excel file could be good enough in the beginning.

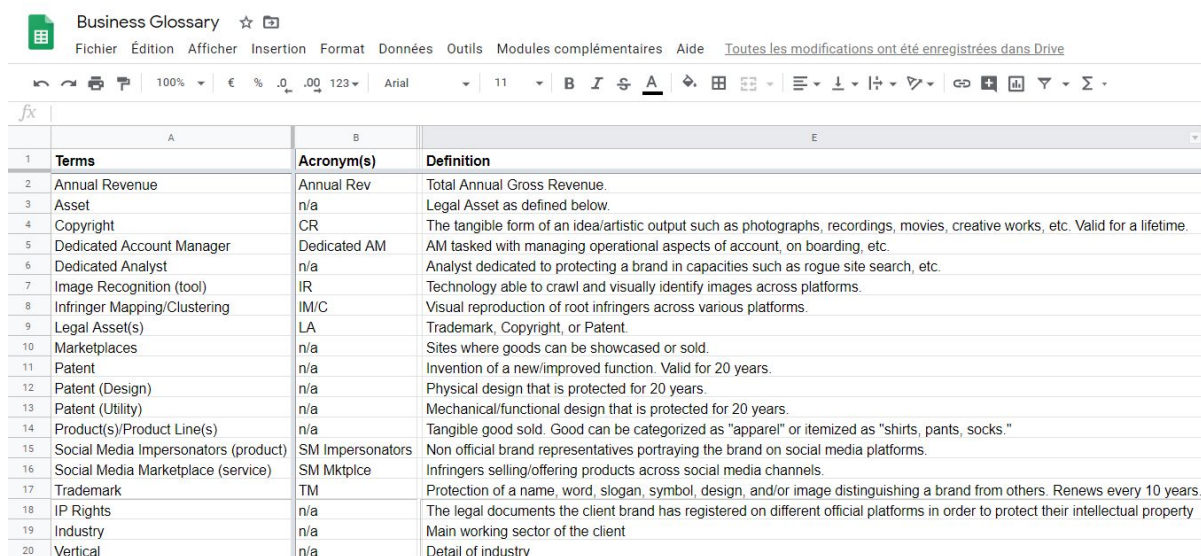
Nevertheless, we need to centralize all customer data somewhere. For example, earlier this month I received a list of beta users with their emails and companies but this was a screenshot via WhatsApp. I think it is obvious that this kind of very valuable information needs to be formatted and stored in a database accessible to all BDs.

If somebody from Tractebel Germany wants to help us find new clients, he needs to be able to see which company we already talked to or which leads are in the pipeline but haven't been activated yet.

Business glossary

On the same note, it is best practice to write a business glossary (see below) to clarify technical terms used across teams (IT, Sales, Marketing) in order to avoid confusion/miscommunication as we will have more and more people involved in the project. However, this document is very annoying to write and painful to maintain so I suggest we skip this part.

Let's all try to use the same words for the same concepts and teach them to new members of the project.



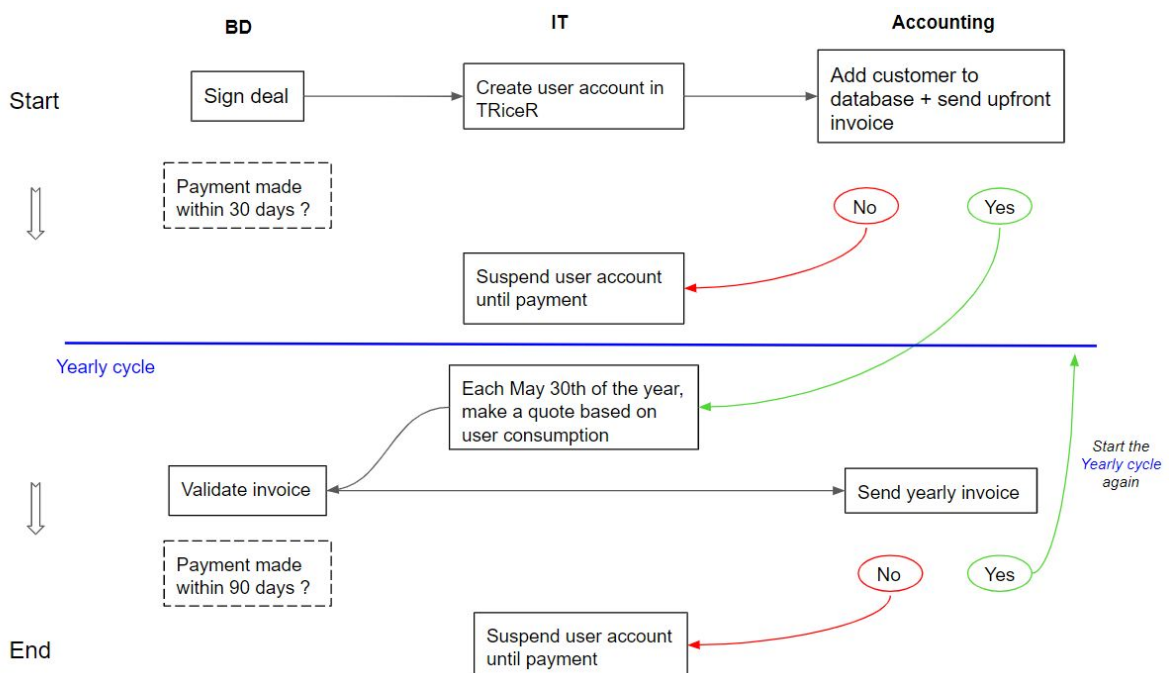
1	Terms	Acronym(s)	Definition
2	Annual Revenue	Annual Rev	Total Annual Gross Revenue.
3	Asset	n/a	Legal Asset as defined below.
4	Copyright	CR	The tangible form of an idea/artistic output such as photographs, recordings, movies, creative works, etc. Valid for a lifetime.
5	Dedicated Account Manager	Dedicated AM	AM tasked with managing operational aspects of account, on boarding, etc.
6	Dedicated Analyst	n/a	Analyst dedicated to protecting a brand in capacities such as rogue site search, etc.
7	Image Recognition (tool)	IR	Technology able to crawl and visually identify images across platforms.
8	Infringer Mapping/Clustering	IM/C	Visual reproduction of root infringers across various platforms.
9	Legal Asset(s)	LA	Trademark, Copyright, or Patent.
10	Marketplaces	n/a	Sites where goods can be showcased or sold.
11	Patent	n/a	Invention of a new/improved function. Valid for 20 years.
12	Patent (Design)	n/a	Physical design that is protected for 20 years.
13	Patent (Utility)	n/a	Mechanical/functional design that is protected for 20 years.
14	Product(s)/Product Line(s)	n/a	Tangible good sold. Good can be categorized as "apparel" or itemized as "shirts, pants, socks."
15	Social Media Impersonators (product)	SM Impersonators	Non official brand representatives portraying the brand on social media platforms.
16	Social Media Marketplace (service)	SM Mktplce	Infringers selling/offering products across social media channels.
17	Trademark	TM	Protection of a name, word, slogan, symbol, design, and/or image distinguishing a brand from others. Renews every 10 years.
18	IP Rights	n/a	The legal documents the client brand has registered on different official platforms in order to protect their intellectual property
19	Industry	n/a	Main working sector of the client
20	Vertical	n/a	Detail of industry

Pricing & Upsell

If we would like to develop a feature that we judge too good to be added to the existing product for the price we are currently selling it, we can sell it as a package to new customers at a higher price or “upsell” the new feature to our existing customers.

Invoicing process

Here is a suggestion of a workflow between Business Developers, IT and Accounting relying on good communication between the 3 entities in order to achieve a smooth invoicing process.



Final words

As a conclusion, I would like to highlight the importance of communication (internal and external) about our projects in order to organically leverage the existing network of Tractebel’s employees and clients. I strongly believe that this is our best strategy to launch and maintain successful apps without having to invest a lot of money upfront.