

# Selling online

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Keith Bohanna, Near Future

We help clients  
to **plan** for  
and **manage**  
**change**

threeyxiz





Client planning

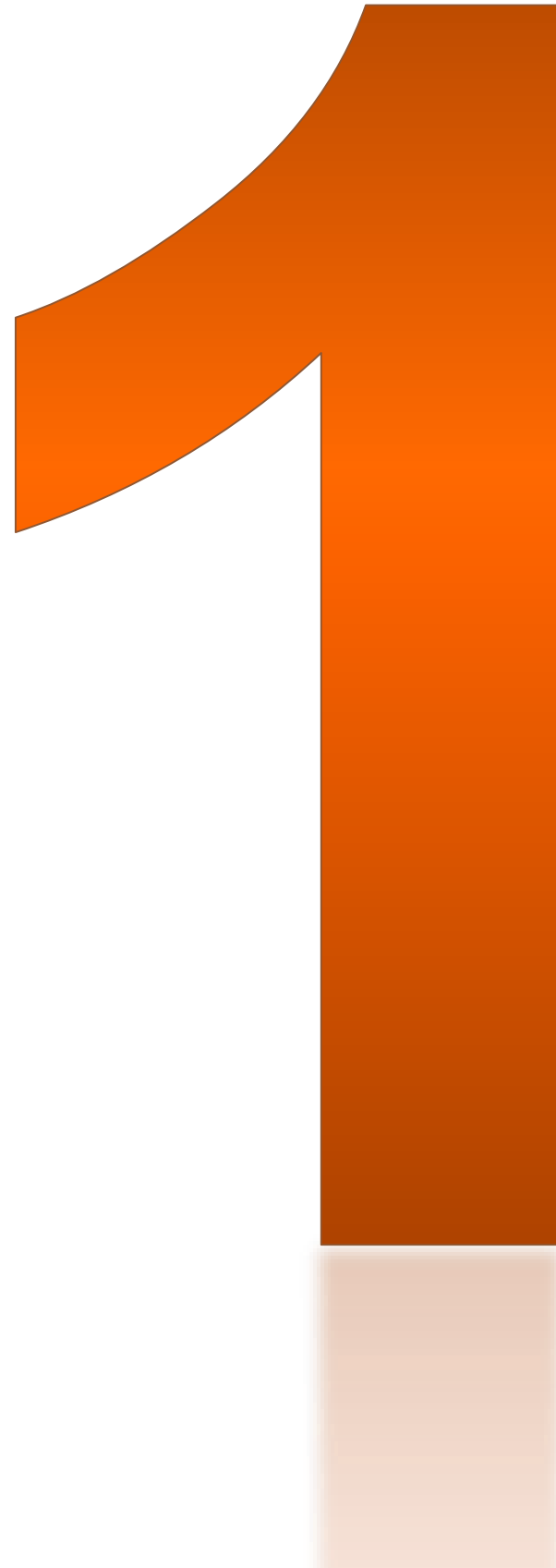
checklist

or

Our 9 steps

TO  
HAPPINESS

**BASELINE**





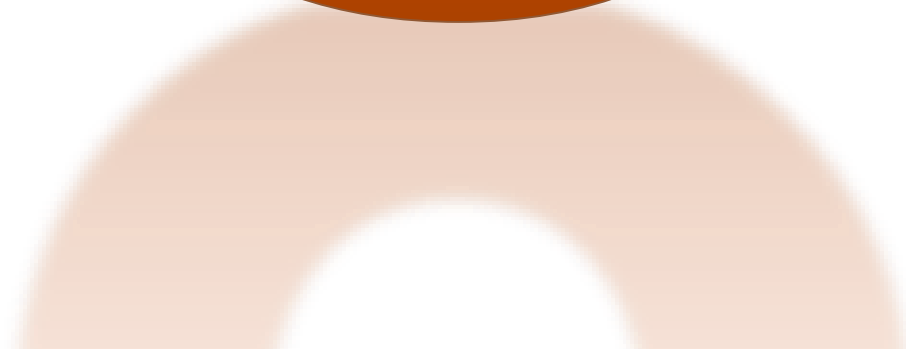
Current Overall Business  
Objectives &

**key projects in progress  
or planned**

2

# Organisation chart

3



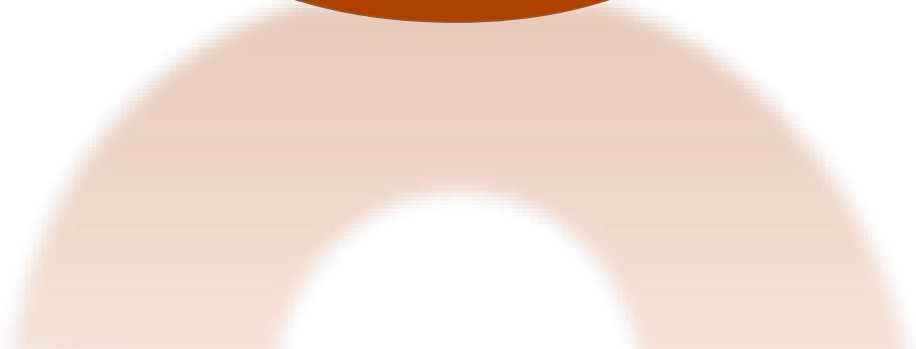
# Current Sales Cycle

4

4

# Current Marketing and Sales Plan

5

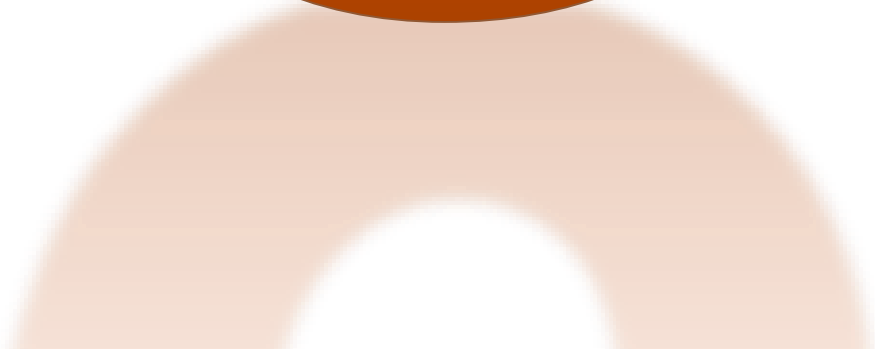




# Current digital assets assessment

# **ENVIRONMENT ANALYSIS**

6



Purchasing cycle of your  
prospects

# Key phases of that cycle

Relevant channels

Key influencers

Key decision maker (and budget holder)

Key offline and digital touchpoints

**Key phases of that cycle**

**Relevant channels**

Key influencers

Key decision maker (and budget holder)

Key offline and digital touchpoints

Key phases of that cycle

Relevant channels

# Key influencers

Key decision maker (and budget holder)

Key offline and digital touchpoints

Key phases of that cycle

Relevant channels

Key influencers

**Key decision maker (and  
budget holder)**

Key offline and digital touchpoints



**Key phases of that cycle**

**Relevant channels**

Key influencers within a prospect

Key decision maker (and budget holder)

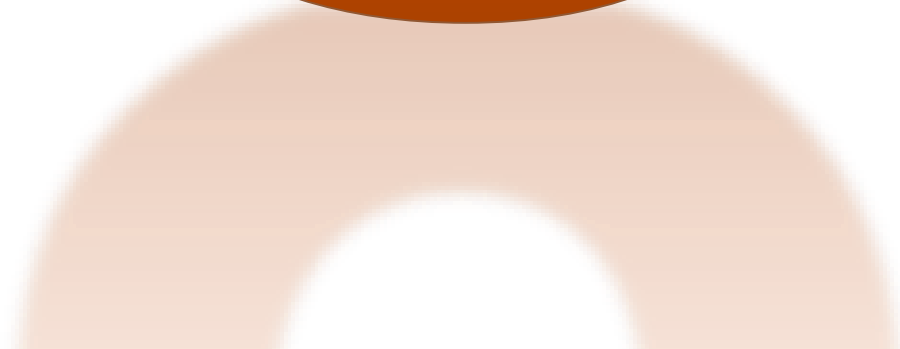
**Key offline and digital  
touchpoints**



Competitive analysis (be  
wary of this)

**LOOKING  
FORWARD**

8



Short term (1 year)  
resource availability

# Time and focus of key people

Skill sets and attitude

Organisation structure

Budget

Technology and other constraints

Time and focus of key people

# **Skill sets and attitude**

Organisation structure

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Time and focus of key people

Skill sets and attitude

# **Organisation structure**

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Time and focus of key people

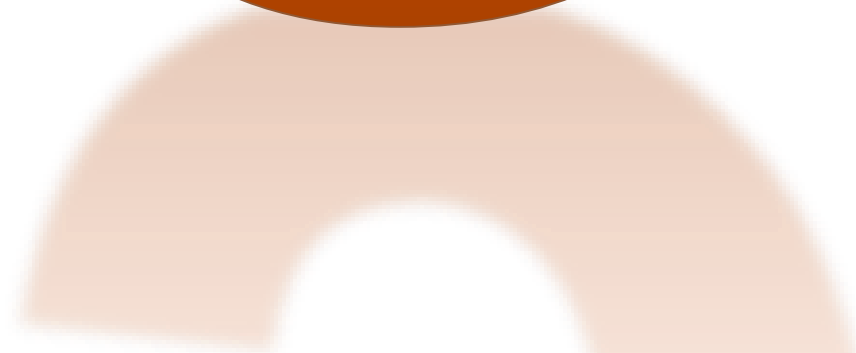
Skill sets and attitude

Organisation structure

Budget

**Technology and other  
constraints**

9



**Agree overall strategy**

**AND**

**Realistic short term action  
plan**

- **Agree Key**

## **Performance Indicators**

- Small number of actions
- Regular review and learning

- Agree Key Performance Indicators
- **Small number of actions**
- Regular review and learning

- Agree Key Performance Indicators
- Small number of actions
- **Regular review and learning**



**TYPICALLY?**

**PICK 3**

# **Website refurbish or a Knock and Rebuild**

A CRM (contact management)

Analytics dashboard & KPI reporting

Email newsletter

Linkedin cohesion and updates linked to blogging

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Thanks  
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