

Sales Process Playbook



Alpha Lifecare 

Introduction

Purpose

The purpose of this Playbook is to provide you, our sales people, with a sales process to follow. This process will provide greater consistency and a standard to follow across our business units and improve the overall Client Experience.



Structure of this Playbook

The playbook is structured according to each stage of the Sales Process outlined at the beginning of this playbook:

1. **Create a Gameplan**
2. **Engage Client**
3. **Develop Solution**
4. **Submit Proposal**
5. **Close**

Within each process stage, there will be further detail on the steps required and any related supporting tools.

Our Vision

Making Lives Better.



Our Mission

We make lives better by caring further.

Helping more people, more often.



Our Values

Our values are embedded across our business. They help us grow and develop, and help create the future we want to experience.



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Sales Process Wheel



Sales Process Wheel

Stage	1. Create a Gameplan	2. Engage Client	3. Develop Solution	4. Submit Proposal	5. Close
Purpose	Enabling a focused approach to execute the sales strategy	Engage, build rapport, and understand client requirements	Create and design solution	Present proposal, negotiate and nurture	Confirm and close
People	Business Development Manager, Territory Manager, Business Unit Manager, Marketing Manager	Customer Service, Business Development Manager, Territory Manager, Marketing Manager, Clinical Support	Marketing Manager, Category Manager, Product Manager, Clinical Support	Customer Service, Marketing Manager, Tender Coordinator, Business Unit Manager	Customer Service, Territory Manager, Marketing Manager, Business Unit Manager, Business Development Manager, Project Delivery Team
Process	<ul style="list-style-type: none"> 1a. Review portfolio and identify opportunities 1b. Research opportunity scope 1c. Create plan to engage client 	<ul style="list-style-type: none"> 2a. Initiate engagement and make contact 2b. Identify BANT 	<ul style="list-style-type: none"> 3a. Prepare the solution 3b. Solution engagement meeting 3c. Establish and refine needs, wants, and goals, and explore additional opportunities or products 3d. Validate solution 3e. Handle objections and trial close 	<ul style="list-style-type: none"> 4a. Provide proposal to client 4b. Follow up within 24 hours to confirm receipt and understanding, and agree on follow-up actions 4c. Complete follow-up actions and close sale 	<ul style="list-style-type: none"> 5a. Close opportunity in CRM 5b. Nurture and grow account
Systems & Enabling Tools	<ul style="list-style-type: none"> BCI Website Territory Plan Google Salesforce Customer Websites 	<ul style="list-style-type: none"> Product Catalogue Experience Centre Client events Salesforce Demo Days Tradeshows 	<ul style="list-style-type: none"> Presentation template Email templates/scripts Salesforce 	<ul style="list-style-type: none"> Salesforce Presentation Template 	<ul style="list-style-type: none"> Salesforce © Alpha Lifecare

Roles and Responsibilities

This playbook outlines the sales cycle with respect to key sales roles. Team members outside these roles do however have identified tasks that relate to the sales process, and these actions are included within the playbook. Any additional steps required by these roles to complete the identified tasks have not been detailed here.

The key sales roles outlined within this booklet are:

Marketing Manager	The Marketing Manager plans, implements, and oversees marketing strategies to promote a company's products or services, collaborating with various departments and identifying target audiences to achieve business goals.
Territory Manager	A Territory Manager is responsible for driving sales and building relationships within a specific geographic area, developing strategies to increase sales and market share.
Business Development Manager	A Business Development Manager focuses on identifying and pursuing new business opportunities within their Business Unit, to drive growth, develop client relationships, and increase revenue for a company by developing strategies and leading initiatives.
Business Unit Manager	A Business Unit Manager oversees the operations, strategy, and performance of a specific business unit, ensuring profitability, growth, and alignment with company goals, while also managing teams and resources.
Category Manager	A Category Manager oversees and optimizes the performance of a specific product category, focusing on strategies to drive sales and maximize profitability through market research, product selection, pricing, and promotion.
Product Manager	A Product Manager defines the companies product strategy, roadmap, and ensure it aligns with business objectives, and then rallies a cross-functional team working with procurement, marketing and sales to bring that vision to life.
Tenders Coordinator	A Tenders Coordinator manages the entire bid submission process, from initial proposal to final submission, ensuring all requirements are met and deadlines are adhered to, while coordinating with different departments and tracking progress.
Clinical Support	A Clinical Support Specialist provides training, education, and resources to support the correct use of our products from a clinical perspective, collaborates with product development teams, and builds relationships with healthcare professionals.

Stage 1: Create a Gameplan

ENABLING A FOCUSED APPROACH TO EXECUTE THE SALES STRATEGY

Overview

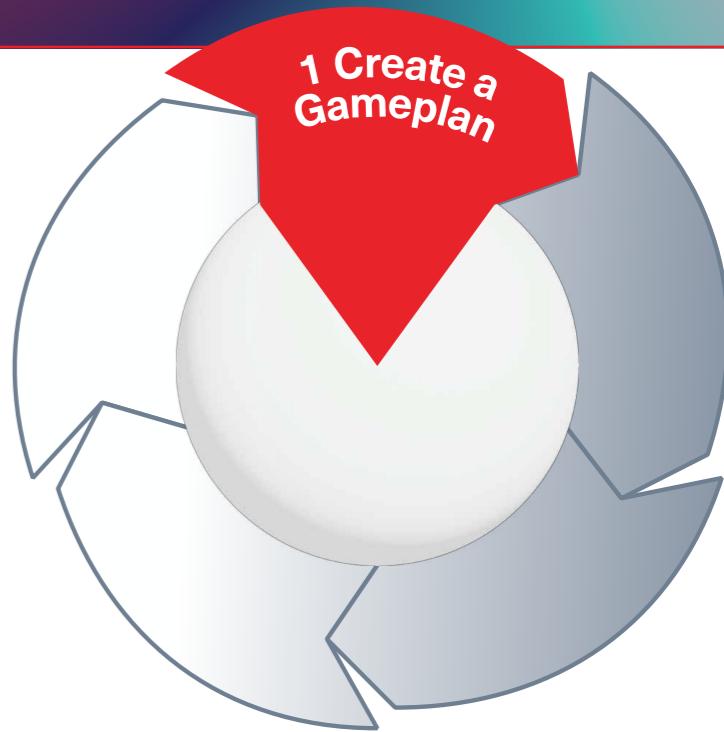
This stage focuses on developing a game plan using Alpha Lifecare sales tools to take a strategic approach to sales by identifying potential opportunities, researching prospects, and formulating a plan to prepare to qualify and engage customers. The aim is to ensure a targeted and effective sales strategy for our products.

Alpha Tip

When thinking/creating a Game Plan – take into consideration all available sales strategy documentation, including:

- Sales Territory Plans;
- Sales Budget Review.

A portfolio can only be reviewed once it is made up of prospects. To have opportunities we need to identify and convert leads and develop these to prospects. Let's understand the difference between Leads, Prospects and Existing Clients before we explore and review the Portfolio.



 Roles

These steps relate to the

Business Development Manager,
Territory Manager,
Business Unit Manager and
Marketing Manager roles.

Steps

1a. Review portfolio and identify opportunities

1b. Research opportunity scope

1c. Create plan to engage client

1a. Review Portfolio and Identify Opportunities

At Alpha Lifecare, lead generation occurs through multiple channels.

Incoming Leads (General)

Incoming leads are usually generated by:

- **Website Enquiries** - Potential clients complete web contact forms after browsing product information or downloading resources.
- **Phone Enquiries** - Prospects call directly after seeing advertisements or receiving referrals.
- **Social Media Platforms** - Particularly LinkedIn, where strategic content sharing and engagement with healthcare professionals can spark interest in Alpha Lifecare's solutions.
- **Conferences & Events** - Attending industry conferences, trade shows, and networking events provides opportunities to showcase Alpha Lifecare's solutions, connect with decision-makers, and generate leads through direct engagement.

Sales Team Driven Lead Generation

Driven by the sales team leads can be sourced from various places:

- **Industry Research** - Monitoring publications for facility expansions or equipment upgrades.
- **Construction Tracking** - Using the BCI website to identify new hospital construction projects.
- **Local Provider Research** - Researching healthcare providers such as occupational therapists or physiotherapy clinics in target areas.
- **Social Media Platforms** - Particularly LinkedIn, where you can look for targeted business, healthcare professionals, and decision makers who would benefit from Alpha Lifecare's solutions.
- **Customer Visits** - Engaging directly with existing and potential clients through on-site visits to understand their needs, demonstrate products, and build strong relationships that can lead to new opportunities and repeat business.

 **Alpha Tip**

Word-of-mouth referrals from satisfied clients remain particularly powerful in the healthcare sector, where professional networks and trust play crucial roles in purchasing decisions.

Portfolio Review Process

When conducting your portfolio review, systematically assess leads, existing clients (up-sell / cross sell other products) and potential prospects to identify growth areas:

- Understand customers future and current needs
- Review equipment replacement cycles for existing clients
- Analyse facility expansion plans in your territory
- Identify facilities that have recently received funding
- Monitor regulatory changes that could drive equipment upgrades
- Look for products approaching end-of-life
- Consider products that are currently being sourced elsewhere

Remember to segment your portfolio review by:

- Target Market
- Geographic territory
- Customer or opportunity
- Size and type
- Historical purchasing patterns
- Current Alpha Lifecare product strategy / penetration

Prioritising Leads

Not all opportunities offer equal potential. Consider these factors when determining where to focus your efforts:

- Alignment with Alpha Lifecare's current product focus areas
- Potential revenue value and strategic importance
- Decision timeline and urgency
- Relationship strength (existing clients) and access to decision-makers
- Competitive situation and Alpha Lifecare's differentiation

1b. Research Opportunity Scope

Once promising opportunities are identified, thorough research it is essential to understand the full picture and specific requirements.

Key Research Areas

1. **Organisation Type and Decision-Making Process**
 - Understand the formal and informal decision-making structure
 - Identify key influencers beyond the obvious decision-makers
 - Understand approval thresholds and procurement policies
 - Research the facility's capital equipment approval process
2. **Financial Considerations**
 - Identify funding bodies,
 - Understand budget cycles and financial year timing
 - Research pre-approved spending allocations
3. **Current Equipment and Pain Points**
 - Review previous purchases (Alpha Lifecare and competitors)
 - Research maintenance history and service issues (Alpha Lifecare and competitors)
 - Identify workflow bottlenecks or clinical limitations
 - Understand customer satisfaction with current solutions
4. **Competitive Landscape**
 - Determine which competitors are currently supplying the opportunity
 - Analyse competitor strengths and weaknesses
 - Identify Alpha Lifecare's clear points of differentiation

Research Methods

Leverage multiple sources to build a comprehensive understanding:

- Review past interactions in **Salesforce**
- Utilise industry databases and publications
- Check facility websites and annual reports
- Monitor tender notices and procurement plans
- Network with industry contacts for insider insights
- Review appropriate standards, outcomes and requirements

 All research findings should be thoroughly documented in **Salesforce** to ensure the information is accessible to the entire team and can inform your engagement strategy.

Alpha Tips

- Refer to product Battle Cards
- Discuss with category managers for USP
- Utilise internal experience/resource

1c. Create Plan to Engage Client

With thorough research completed, develop a structured engagement plan tailored to the specific opportunity.

Some elements of an effective an Effective Engagement Plan include:

1. Define Clear Objectives

Be specific about what you aim to achieve with each interaction, it may be or more of the following:

- Initial discovery and needs assessment
- Technical requirements gathering
- Solution presentation and demonstration
- Proposal review and negotiation
- Final decision and implementation planning

2. Stakeholder Engagement Strategy

Tailor your approach for each key stakeholder:

- Clinical leaders: Focus on patient outcomes and safety
- Financial decision-makers: Emphasise ROI and life-cycle costs
- End-users: Highlight ease of use and workflow improvements
- Technical staff: Address integration and maintenance requirements

3. Value Proposition Alignment

Match Alpha Lifecare's values/strengths to the specific needs you've identified:

- Patient safety features and risk reduction
- Staff efficiency and reduced manual handling
- Compliance with quality standards
- Total cost of ownership advantages
- Superior clinical outcomes and patient experience
- Sustainability contributions

4. Internal Resources Required Identify what support you'll need from the Alpha Lifecare team:

- Clinical specialists/Category Manager for demonstrations and discussions
- Customer references for similar installations
- Proposal development support
- Implementation and training resources

For New Prospects: Begin with educational discussions about industry challenges before introducing product specifics. To establish Alpha Lifecare's credibility use case studies and success stories.

For Existing Clients: Reference previous positive experiences and focus on expanding the relationship. Look for cross-selling opportunities based on their current Alpha Lifecare products.

For Competitor Replacement: Focus on pain points with existing solutions and clearly articulate Alpha Lifecare's advantages. Provide strong evidence through testimonials and comparative analysis.

 Document your complete Gameplan in [Salesforce](#) before moving to Stage 2: Engage Client, where you'll implement your strategy and begin the qualification process using BANT methodology.

Alpha Tip

'GIGO' Garbage In, Garbage Out for Data entry into [Salesforce](#). 

Leads, Prospects & Existing Clients

At this stage of the sales process there are leads, prospects & existing clients. It is important to understand the difference. Leads are new contacts who are either unqualified (interest only) or qualified (potential to buy). Prospects are further down the funnel, actively considering a purchase. Existing Clients we focus on retention, recurring revenue, and growth through up-selling and cross-selling.

Leads

 Will be an individual or organisation that has shown a level of interest in our products but has not yet been fully qualified as a sales opportunity. In [Salesforce](#), a Lead is typically at the top of the sales funnel.

Unqualified Leads

These are new contacts who have shown interest but have not been assessed for their buying potential. At Alpha Lifecare this could be in the form of:

For example:

- A hospital administrator who downloaded a brochure on diagnostic imaging equipment but hasn't been contacted yet.

Qualified Leads

Have been contacted and show potential to convert into an opportunity and customers. They meet some form of criteria such as budget, authority, need, and timeline (BANT which is discussed in Stage 2).

 In [Salesforce](#): Leads are stored in the Leads object. They contain information such as name, contact details, company, and lead source (e.g., trade show, website enquiry). Once qualified, Leads are converted into an Account, Contact, and Opportunity in [Salesforce](#).

Alpha Tip

Duplicate Lead Detection alerts may occur at this stage. If lead is a duplicate, merge leads together. When converting leads to opportunities, check there is no account or that the contact is already in the system.

Prospects

A Prospect is a potential client/customer who has been identified as having a genuine interest in our products and is likely to make a purchase.

Some of the characteristics of prospects include:

- Usually qualified leads who have been converted in **Salesforce**.
- Have demonstrated clear buying intent or are actively engaged in the sales process.
- Are nurtured through targeted communication, such as follow-up emails, product demos, or customised proposals.

Some examples for Alpha Lifecare may include:

- A hospital decision-maker involved in evaluating vendors for high-end imaging equipment.
- A physiotherapy chain owner comparing different brands of rehabilitation equipment.

Existing Clients



In Salesforce: A lead is converted into a contact and opportunity created. These are organisations or individuals who have already made at least one purchase from your business and would be in the system.

Some of the characteristics of existing clients include:

- Having a buying history with your company.
- Needing ongoing relationship management, support, and potentially up-selling or cross-selling opportunities.
- Are a valuable source of recurring revenue and referrals.

Examples for Alpha Lifecare:

- A hospital that regularly orders equipment.
- An occupational therapist that routinely purchases mobility aids and rehabilitation supplies.



In Salesforce: Existing clients are managed as Accounts and Contacts. They are no longer classified as Leads or Prospects since they are past the initial acquisition stages. Their purchasing history, service requests, and ongoing interactions are tracked through Quote, Orders, Opportunities and Invoices.

Stage 2: Engage Client

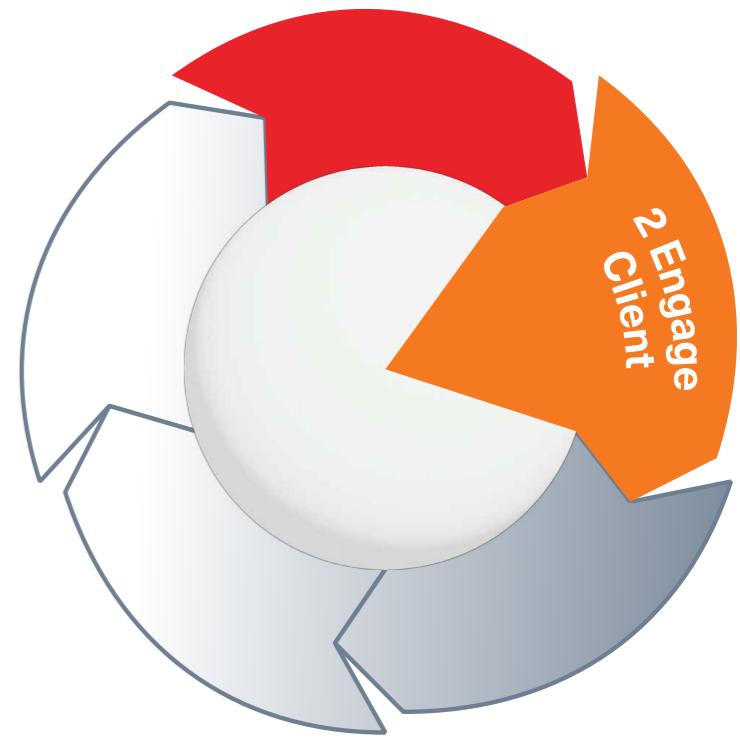
ENGAGE, BUILD RAPPORT, AND UNDERSTAND CLIENT REQUIREMENTS

Overview

This stage focuses on making initial contact with potential clients and qualifying their needs and their buying potential. The goal is to establish a professional connection, gather crucial information, and determine whether to proceed with developing a customised solution. By effectively engaging with clients using a structured approach, sales people can build rapport, identify genuine opportunities, and create a foundation for successful partnerships.



This stage involves sales representatives and Marketing team members working collaboratively to ensure proper client engagement and information capture in **Salesforce**.



❖ Roles

These steps relate to the

Customer Service,

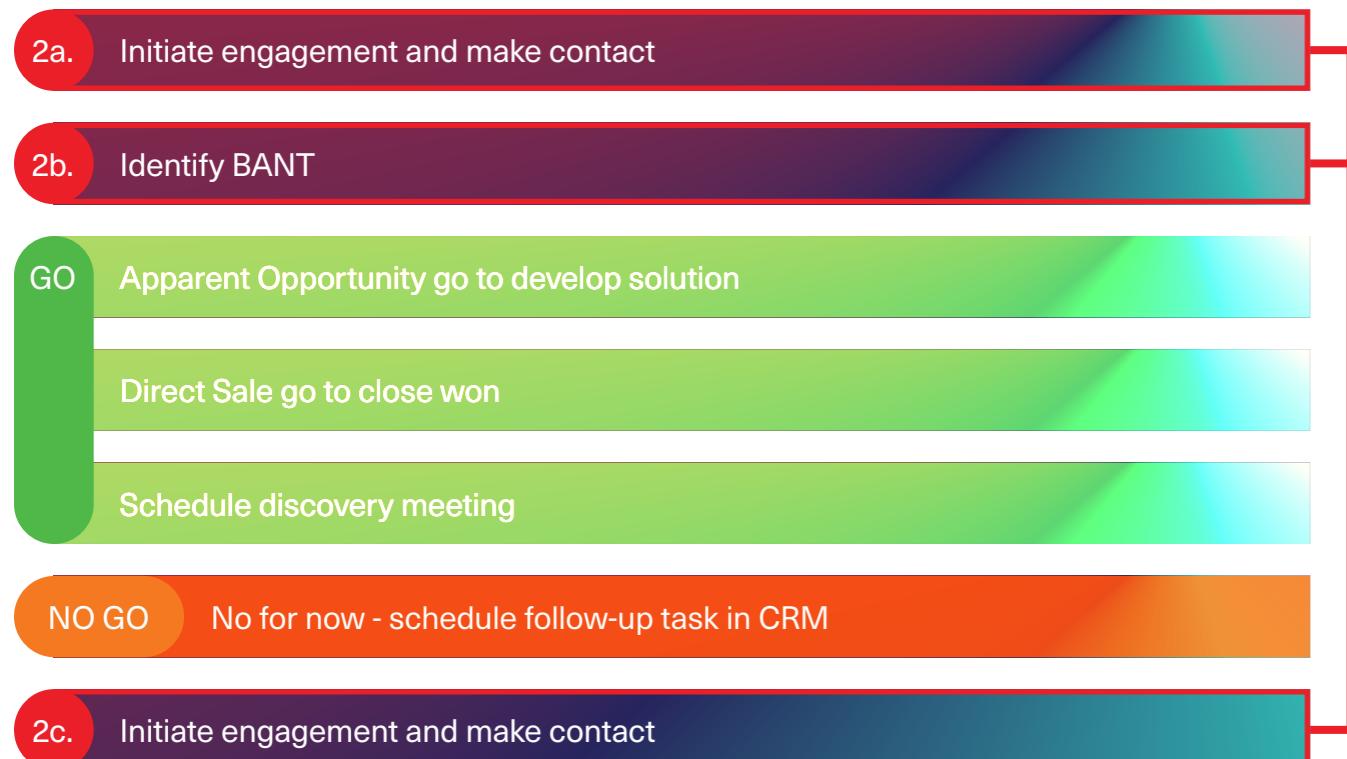
Business Development Manager,

Territory Manager,

Marketing Manager and

Clinical roles.

Steps



2a. Initiate Engagement and Make Contact

Initial Contact Strategy

The first impression with a potential client is crucial as it sets the tone for the entire business relationship. When initiating contact, whether through phone, email, or in-person meeting, take a consultative approach rather than a purely transactional one.

Begin with a professional introduction of yourself and Alpha Lifecare, followed by a brief explanation of why you're reaching out. Reference any previous interactions or referrals if applicable, as this helps establish immediate credibility.

Key Elements of the First Contact

Remember that the healthcare industry values professionalism and knowledge. We need to position Alpha Lifecare as a trusted partner in providing solutions that enhance patient care and operational efficiency.

When making first contact:

- Introduce yourself and Alpha Lifecare clearly - use elevator pitch
- Reference any previous touchpoints (website enquiry, phone call, event meeting, referral)
- Briefly mention the relevant solutions Alpha Lifecare offers that may address their needs
- Aim to schedule a discovery meeting rather than attempting to sell immediately

Contact Methods Based on Client Type

Contact methods will be dependent on client type and salespeople will need to use their discretion.

For larger healthcare facilities (hospitals, aged care groups):

- Phone calls followed by formal emails may be most effective. When possible, aim for video conference or in-person meetings for more substantial discussions.

For smaller practices and independent clinicians:

- Email introductions with educational content may yield better results initially, followed by phone conversations to build rapport.

As a salesperson/team member your time is precious, be deliberate about the time you invest.

Building Rapport Effectively

Building rapport in any sector, particularly healthcare, requires demonstrating understanding of the specific challenges faced by different facilities, practitioners and professionals.

When engaging with healthcare professionals:

1. Acknowledge their time constraints and be concise
2. Demonstrate knowledge of the relevant regulations and industry challenges
3. Ask thoughtful questions about their operational processes and patient care goals
4. Listen actively to their responses, taking careful notes for follow-up opportunities.

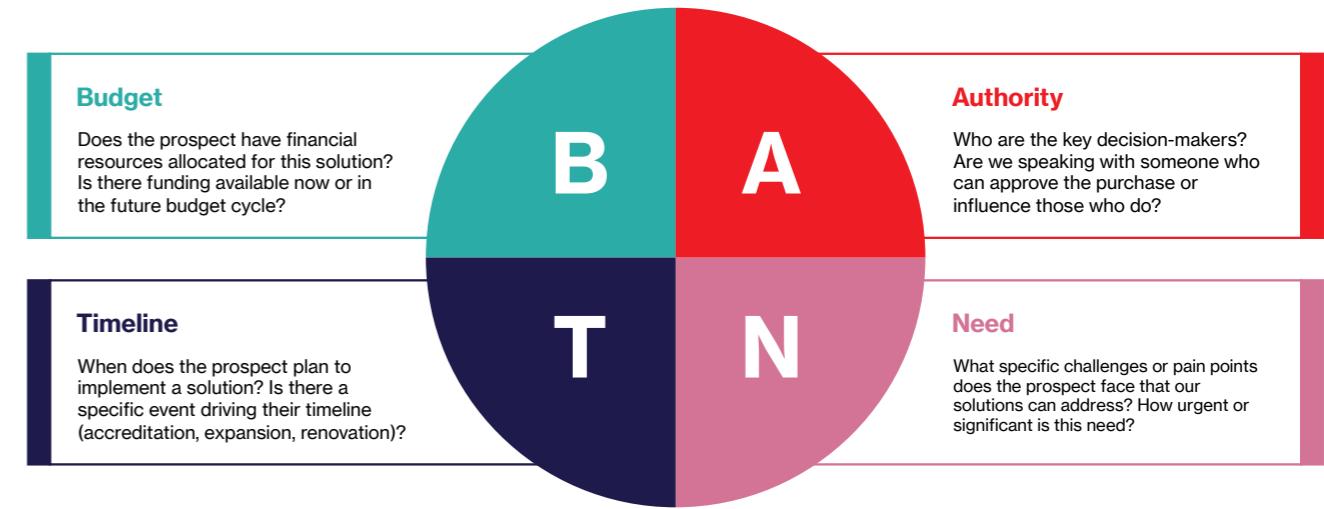
2b. Identify BANT

Understanding the BANT Framework

The qualification process is essential to determine whether an opportunity is worth pursuing. Alpha Lifecare uses both BANT (Budget, Authority, Need, Timeline) to comprehensively assess potential opportunities.

Qualify with BANT

It is vital to qualify all sales opportunities before we expend any significant effort on customer enquiries. The BANT technique assists with qualification.



Salespeople frequently miss their sales targets for almost always the same reason - they have spent too much time on opportunities that didn't close. Good qualification reduces this likelihood.

Alpha Tip

When speaking with clinical staff, focus on patient outcomes. When speaking with administrative or financial decision-makers, emphasise efficiency and return on investment.

Budget

What is the client's budget and does it align with our product offering? Understanding financial capacity early helps qualify prospects and tailor appropriate solutions. Discussing budget upfront enables you to make suitable recommendations based on the client's financial parameters.

Examples of how to approach qualifying on Budget

- “Many of the clients we speak to at Alpha Lifecare Group about projects like this often have a general idea of the cost they’re comfortable with. Do you have a figure in mind?”
- A. If the response is “I have no idea”, your response is “no problem”. “In the interests of transparency, let me give you a broad-based price range” if you know this project is around \$15,000, “I would say if you have no idea, that’s okay, let me give you an insight into what it might be. Some people who would make an investment into a project like this would be paying around the \$15,000 mark, it will not be \$20,000 and it will not be \$10,000. Somewhere around the \$15,000. Can I get some initial feedback on where that figure is sitting with you?”
- “What other solutions are you evaluating?”

Authority

Does my contact have decision-making power? In today's busy business environment, we often speak with intermediaries rather than the final decision-makers. Identifying who truly holds the authority to make purchasing decisions is crucial for an efficient sales process.

Examples of how to approach qualifying on Authority

- “How do you evaluate differing Proposals?”
- “Who else, obviously in addition to yourself would be involved in the final decision?”
- “How do you make your final decision ... other than pricing, what else really matters?”
- “What matters to the additional decision makers?”
- “What concerns do you anticipate they could potentially raise with our Proposal?”

Need

What specific needs does the client have and which of our products best addresses them? It's our responsibility to identify existing needs and match them with optimal solutions. If we cannot effectively communicate how our product delivers value against those specific needs, clients won't make their investment with us. Use the STAR method to help qualify based on Need, see the Appendix for more information.

Examples of how to approach qualifying on Need

- “[Question]”
- “[Question]”
- “[Client NAME], thanks for answering those questions. It certainly gives me a deeper insight into what you are looking to achieve. In the interest of clarification, I am wondering on a scale of 1 to 10, 10 being critical and 1 being ‘get to it when I get to it’, whereabouts is this purchase sitting with you at the moment?”

Timeframe

When is the purchase being considered - imminent or future? Timeframes reflect the client's priorities. Defining when they plan to make a decision is essential, as selling without understanding their timeline is like selling blind.

Examples of how to approach qualifying on Timeframe

- “[Question]”
- “[Question]”
- “Let’s talk about timeframes ... when will a decision be made on this?”
- “What’s driving that timeline?”
- “How important is this to you and where does this stack up in terms of priority and urgency? What are some of the other priorities in play at the moment?”
- “So just to be clear, you will make a decision on this by (date) ... is that about where we are today?”
- “I have delivered a lot of Proposals and sometimes, for various reasons, things change. Can I ask you under what circumstances would your timeframe change on this purchasing decision?”

Effective Questioning Techniques

Skilled questioning is the foundation of successful qualification. Use a mix of open and closed questions to gather comprehensive information while maintaining a conversational flow.

Start with broader questions to understand their overall situation:

"What challenges are you currently facing with your existing equipment?"

"How are these challenges impacting patient care or staff efficiency?"

Then move to more specific qualification questions:

"What timeframe are you working with for implementing a new solution?"

"How is the decision-making process structured for equipment purchases in your organisation?"

"Have you allocated budget for this project, or would this be part of next year's planning?"

Qualification Decision Points

Based on the qualification assessment conducted using BANT, determine the appropriate next steps:

GO

Apparent Opportunity go to Develop Solution

This occurs when the prospect has:

- Clear budget allocation or a funding pathway
- Identifiable decision-makers engaged in the process
- Defined needs that match Alpha Lifecare product solutions
- A reasonable implementation timeline

Direct Sale go to Close Won

When the prospect:

- Has immediate needs for standard products
- Possesses budget authority
- Purchase order received

Schedule Discovery Meeting

When the prospect:

- Shows genuine interest but requires more in-depth needs assessment
- Has potential budget but needs further discussion/exploration
- Involves multiple stakeholders who need to be engaged concurrently

NO GO

No - schedule follow-up task in CRM

When the prospect:

- Lacks budget or a funding pathway
- Has no clear timeline for implementation
- Shows minimal interest or need for our product solutions
- Has decision-makers who are not available / accessible at this stage
- Purchased from competitor

When scheduling the follow up task in the CRM set a clear timeline for follow up. This timeframe will vary and be dependant on the situation / reason for the NO-GO.



Capture this information correctly in **Salesforce** under closed lost and schedule a follow up task to maintain relationship.

Update CRM and Set Follow-Up Cadence

Comprehensive CRM Documentation

 Thorough capturing and documentation in the **Salesforce** ensures continuity throughout the sales process and provides valuable insights for future interactions. After each client engagement, update the CRM promptly with all relevant information.

Essential information to document includes:

- Contact details for all stakeholders involved in discussions, including their roles and influence in the decision-making process.
- Qualification assessment notes detailing budget availability, decision-making authority structure, specific needs identified, and implementation timeline expectations.
- Competitive information, including any mention of other suppliers being considered and how the prospect views their current solutions.
- Next steps agreed upon with the client, including any materials promised, meetings scheduled, or information to be provided.

Establishing an Effective Follow-up Cadence

The right follow-up cadence maintains momentum without overwhelming the prospect. Based on the qualification assessment and client's preferences, establish a structured follow-up plan.

For highly qualified opportunities (“GO” decisions)

Schedule immediate next steps within 1-2 business days to maintain momentum. This may include sending promised information, scheduling a solution development meeting, or arranging a product demonstration.

For discovery phase opportunities

 Set a clear timeline for the discovery meeting and prepare a pre-meeting information pack to help the client prepare. Document the discovery meeting agenda in **Salesforce**.

For “NO-GO” opportunities

Implement a longer-term nurturing strategy. This might include:

- Quarterly check-ins on their current / future situation
- Regular sharing of relevant educational content / case studies etc
- Invitations to Alpha Lifecare events and webinars
- Setting task reminders for significant dates in their budget cycle (if applicable)

Creating Value in Follow-ups

Each follow-up should provide additional value to the client. This could include:

- Relevant case studies from similar healthcare facilities and or products
- New research on patient outcomes related to our equipment
- Updates on technological advancements or regulatory changes
- Educational content that addresses their specific challenges

By providing value with each contact, Alpha Lifecare positions itself as a caring and knowledgeable partner rather than simply a vendor pursuing a sale.

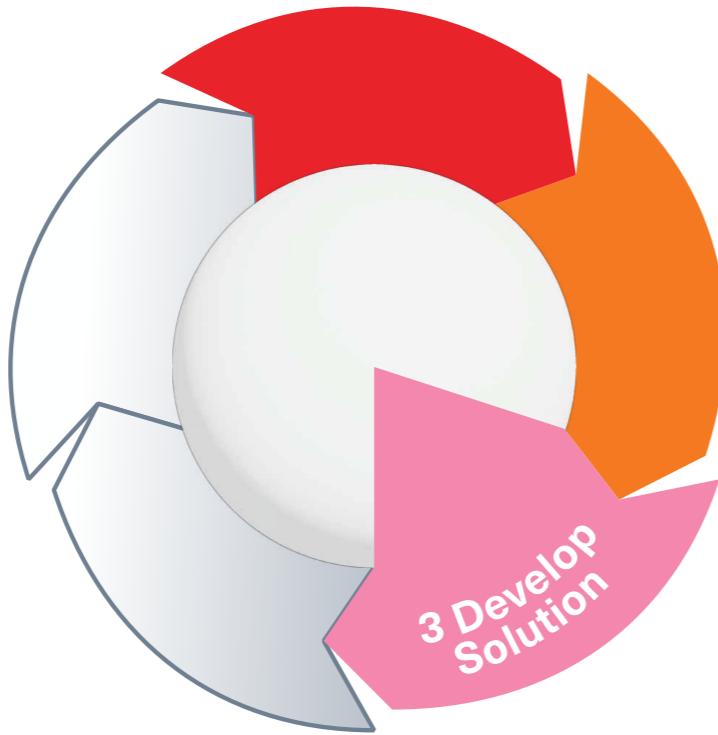
Stage 3: Develop Solution

CO-CREATE AND DESIGN SOLUTION WITH CLIENT

Overview

Developing a solution that meets the client's needs and showcases Alpha Lifecare's unique value proposition in the market is key within this stage.

Preparation for the engagement with the client is critical as it demonstrates you have listened, heard, and genuinely understand the client's specific needs and or pain points. By demonstrating how we solve their challenges it increases the opportunity win rate, shortens the sales cycle and builds long-term partnerships.



(Roles)

These steps relate to the **Marketing Manager**, **Category Manager**, **Product Manager** and **Clinical** roles.

Steps

- 3a. Prepare the solution
- 3b. Solution engagement meeting
- 3c. Establish and refine needs, wants, and goals, and explore additional opportunities or products
- 3d. Validate solution
- 3e. Handle objections and trial close
- GO Submit proposal in CRM
- NO GO Refine solution and trial close
- NO GO Lost
- 3f. Update CRM with relevant information

3a. Prepare the Solution Engagement

Objective

Ensure the solution is aligned with the client's specific challenges, priorities, and goals. You should have some of these details from Stage 2, when you made initial contact.

Alpha Tip

It is always ok to seek further information from the client in preparation for a meeting, this shows you are respectful of their time and engaged in providing a solution specifically addressing their needs.

- Identify key decision makers.
- Who is the competition?
- What is the buying process, funding / budget requirements, timelines?
- Map pain points to solution benefits using a consultative approach.
- Leverage historical data, case studies, and competitor analysis to refine insights.
- Validate client requirements through follow-up discussions and need confirmation emails.

Example questions to ask clients:

- What are your top 3 challenges right now?
- How does your current solution fall short?
- What would a successful implementation look like for you?

When developing the solution pack make sure that Alpha Lifecare is positioned as the best-fit solution by aligning our product features with customer needs.

- Customise features to directly address client pain points.
- Showcase real-world impact through tailored demos and success stories.
- Provide a clear value narrative: "With Alpha Lifecare, you achieve X benefit in Y timeframe, with Z% ROI."
- Develop a solution roadmap that outlines how the implementation will solve client challenges.

3b. Solution Engagement Meeting

A well-structured sales meeting is critical to conducting successful sales conversations, closing deals faster, and building long-term client relationships.

A structured engagement meeting isn't just about delivering information, it's about guiding the client toward a confident buying decision while positioning Alpha Lifecare as a trusted partner.

Alpha Tip

Always have an agenda, this way will avoid the meeting losing focus and client getting distracted.

Meeting Kickoff – Introduction & Agenda

Goal: Build the rapport and set expectations for the discussion.

Script Example:

"Thank you for taking the time today. I'm [Your Name] from Alpha Lifecare, and our goal in this session is to explore how we can support [Client's Business Name] in achieving [specific objective]."

Key Actions:

- Briefly introduce yourself and your team.
- State the purpose of the meeting.
- Confirm any specific areas the client wants to focus on

Alpha Tip

Keep introductions concise—make the conversation about them, not you.

Client's needs

Goal: Show that you understand their business and reinforce why they need a solution.

Key Actions:

- Summarise your understanding of their pain points.
- Ask open-ended questions to confirm or uncover deeper needs.
- Show empathy and position yourself as a trusted advisor.

 **Alpha Tip**

Active listening is key. Take notes and reflect their pain points back to them.

Presenting the Solution

Goal: Demonstrate how Alpha Lifecare addresses their challenges better than alternatives.

Key Actions:

- Present the solution in a way that directly solves their pain points.
- Use other client examples that address similar requirements
- Show a live demo if possible.

Script Example:

"We've worked with companies facing similar challenges, and they saw [X] improvement using Alpha Lifecare. For example, [Client X] reduced operational costs by 20% within six months after implementing our solution."

 **Alpha Tip**

Focus on benefits, not just features. What will the product do for them?

3c. Establish and Refine Needs, Wants, and Goals, and Explore Additional Opportunities or Products

During the Solution Engagement meeting with clients, your primary objective is to refine Alpha Lifecare's offerings. This requires careful alignment with both explicit requirements and underlying needs that may emerge during discussions.

Key responsibilities include:

- Consolidating information gathered throughout your conversations
- Identifying gaps between initial assumptions and actual client requirements
- Adapting proposed solutions based on valuable client feedback

Be prepared to modify your approach when client feedback reveals new insights. This flexibility demonstrates Alpha Lifecare's commitment to delivering truly tailored solutions rather than rigid, pre-packaged offerings.

As you adjust core solutions based on client input, naturally explore opportunities to address additional needs. These might be addressed through complementary products or services from Alpha Lifecare's portfolio. Present these not as upsells but as integrated components of a holistic approach that delivers enhanced outcomes for the client.

Following the meeting:

- Document all refinements, changing priorities, and potential expansions in the CRM
- Use this documentation to guide your next steps
- Position Alpha Lifecare consistently as a responsive partner dedicated to client success

3d. Validate Solution

Before finalising your solution, review it against the refined needs established in Step 3c to ensure perfect alignment with updated requirements. Create a compelling value narrative that pre-emptively addresses potential objections by highlighting how your solution resolves significant pain points.

Key preparation:

- Compare solution components against specific client needs
- Prepare supporting evidence including case studies and testimonials
- Develop ROI calculations that validate your proposed approach
- Anticipate common objections with thoughtful responses

This proactive validation approach builds confidence in your solution whilst creating a natural bridge to handling any remaining objections in the next stage.

3e. Handle Objections and Trial Close

Questions & Handling Objections

Goal: Address concerns and reinforce value to move the conversation forward.

Objections are a natural part of the sales process and often indicate interest.

Use the A.C.C.R. Method to respond effectively:

1. Acknowledge – Show empathy and understanding.
2. Clarify – Ask questions to get to the root of the objection.
3. Counter with Value – Provide evidence, success stories, or alternative solutions.
4. Reconfirm – Ensure the concern has been fully addressed before moving forward.

Alpha Tip

See appendix for more information on handling objections.

Trial Close

A successful trial close helps gauge customer interest without pushing for commitment. Start with natural questions like “How do you see Alpha Lifecare fitting into your current projects?” or “When would you ideally want to begin the process?” These open-ended queries encourage honest feedback while respecting the customer’s pace.

Key Questions

- “How do you feel about what we have discussed so far?”
- “Does this solution align with what you were envisioning?”
- “Level with me... where abouts are you sitting at the moment?”

Listen carefully for hesitation, as this often signals unspoken concerns. Some customers need technical details, while others prefer focusing on practical implementation—let their interests guide you. Keep focused notes for follow-up, always matching your approach to their specific timeline and needs.

Alpha Tips

- Share relevant case studies that mirror the customer’s industry or situation to build credibility.
- Summarise key discussion points throughout the conversation to ensure mutual understanding and demonstrate attentiveness.
- Create a sense of partnership by discussing long-term support and maintenance options beyond the initial purchase.
- Use strategic pauses after key points to allow the customer time to process information and formulate questions.
- Schedule specific follow-up touchpoints before ending the conversation to maintain momentum.

3f. Update CRM with Relevant Information

Always update CRM with information including the presentation. This will assist in the future to understand the customer if the opportunity arises again both of you close the sale now you have history. If you are unable to close the sale you can understand what you have offered previously and tailor future conversations.

Stage 4: Submit Proposal

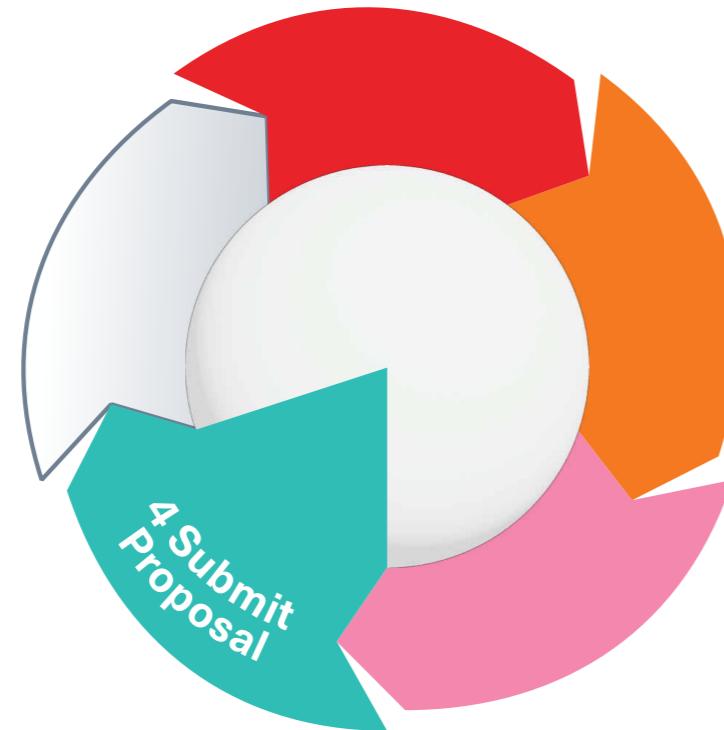
PRESENT PROPOSAL, NEGOTIATE AND NURTURE

Overview

This stage focuses on the critical process of delivering a compelling proposal and solution to the client and effectively guiding them through the decision-making journey.

Providing a well-crafted proposal isn't merely about presenting a solution document—it's about demonstrating value, addressing concerns, and maintaining momentum towards a favourable decision and closed sale.

At Alpha Lifecare, we recognise that the proposal phase represents a pivotal moment where customers assess not only our solutions but also how we engage as potential partners. The way we submit, explain, and follow up on our proposal directly influences how clients perceive our professionalism and commitment to their success.



Roles

These steps relate to the

Customer Service,
Marketing Manager,
Tender Coordinator and
Business Unit Manager roles.

Steps

- 4a. Provide proposal to client
- 4b. Follow up within 24 hours to confirm receipt and understanding, and agree on follow-up actions
- 4c. Complete follow-up actions and close sale
- GO Response Convert in CRM and add expected close date
- NO Response Seek input from business manager and agree actions
- LOST Close lost in CRM with reason
- 4d. Update CRM with relevant information

4a. Provide Proposal to Client

Preparing the Proposal and Quote

The foundation of a successful proposal submission begins with meticulous preparation. Your proposal should reflect both the technical aspects of the solution and the key value propositions that matter most to the client.

Quote

Create the quote using the Salesforce User Guide and in line with Alpha Lifecare protocols. See overleaf for an example quote.

Delivering the Proposal

The method of proposal delivery should align with the client's preferences and the complexity of the solution:

- For complex solutions:** Schedule a dedicated presentation meeting where you can walk through the proposal, highlighting key aspects and answering questions in real-time.
- For straightforward solutions:** Email delivery may be appropriate, accompanied by a personalised message contextualising the proposal.
- For strategic accounts:** Consider an in-person delivery to reinforce the importance of the relationship.

See overleaf (after the quote) for an example proposal.

Alpha Tips

- Review the proposal with a Business Unit Manager before submission to double check and catch any errors or unclear sections.
- Align the proposal format with previous client interactions—if they appreciate visual presentations, ensure the proposal includes relevant visual elements.
- Ensure all pricing is accurate and aligned with what was discussed in previous conversations or meetings.

Example Quote

Quotation																	
QUOTE NUMBER:	EST171335																
QUOTE DATE:	18/3/2025																
EXPIRY DATE:	16/4/2025																
ACCOUNT NUMBER:	46575																
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>BILL TO Aidacare Pty Ltd Building 3A 1 Moorebank Avenue Moorebank NSW 2170 Australia</p> </div> <div style="width: 45%;"> <p>SHIP TO Aidacare Pty Ltd 1323 Pacific Highway Turramurra NSW 2074 Australia</p> </div> </div>																	
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">ITEM</th> <th style="text-align: left;">DESCRIPTION</th> <th style="text-align: center;">QUANTITY</th> <th style="text-align: center;">RATE</th> <th style="text-align: center;">GST</th> <th style="text-align: center;">AMOUNT INC GST</th> </tr> </thead> <tbody> <tr> <td>AJ0390</td> <td>Trix Chair - Shower chair, stool and over toilet frame 610mm & PU Armpad ***SP Price approved by David A.***</td> <td style="text-align: center;">1</td> <td style="text-align: center;">863.50</td> <td style="text-align: center;">\$0.00</td> <td style="text-align: center;">863.50</td> </tr> </tbody> </table>						ITEM	DESCRIPTION	QUANTITY	RATE	GST	AMOUNT INC GST	AJ0390	Trix Chair - Shower chair, stool and over toilet frame 610mm & PU Armpad ***SP Price approved by David A.***	1	863.50	\$0.00	863.50
ITEM	DESCRIPTION	QUANTITY	RATE	GST	AMOUNT INC GST												
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SUB TOTAL: 863.50 GST: 0.00 TOTAL: 863.50																	
<p>We have pleasure in submitting a quotation as per the above details. This quotation is held firm until expiry date 16/4/2025. We will proceed upon receipt of an official order, or if a private sale, a deposit of . Full payment is to be made prior to, or at time of delivery. This quotation is held firm for thirty days. Delivery is 24-48 hours from time of ordering. Please provide quote reference number at time of ordering to ensure correct pricing and products details are supplied. If this quote constitutes a "custom" product, once this quotation has been accepted or an order placed it is not possible to cancel the order or return the item. Do not hesitate to contact your Astris Lifecare contact should you require further assistance.</p>																	
<p>PLEASE MAKE PAYMENT TO:</p> <p>ACCOUNT NAME: Care Quip Pty Ltd BSB: 062-223 ACCOUNT NUMBER: 1151 0204</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%;">CONTACT:</td> <td>Roxley Little</td> </tr> <tr> <td>CONTACT EMAIL:</td> <td>roxley.little@carequip.com.au</td> </tr> <tr> <td>CLIENT ACCEPTANCE:</td> <td></td> </tr> </table>						CONTACT:	Roxley Little	CONTACT EMAIL:	roxley.little@carequip.com.au	CLIENT ACCEPTANCE:							
CONTACT:	Roxley Little																
CONTACT EMAIL:	roxley.little@carequip.com.au																
CLIENT ACCEPTANCE:																	
<p>SPECIAL INSTRUCTIONS:</p> <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div>																	

Example Proposal Page 1/4

Alpha Lifecare ▲

Proposal**Royal North Shore Hospital**

Attention : Rachel McKinnon

Proposal : 00001182

Date : 19/03/2025



Example Proposal Page 2/4

Alpha Lifecare ▲

Proposal 00001182

Proposal for:

Rachel McKinnon

Royal North Shore Hospital
C/- Accounts Payable
hsnsw-accountspayable@health.nsw.gov.au

AU

Ship To:

Rachel McKinnon

Royal North Shore Hospital
RNS DOCK NSY ASB Royal North Shore Hospital
Loading Dock Acute Services Building EILEEN STREET
St Leonards 2065
AU

Name	Description	Qty	Unit Price	GST	Total
KE1050	Contour Multi-X Patient Trolley Electric - Low	2.00	\$11,995.00	\$2,399.00	\$23,990.00
Features Aesthetically designed patient transport, X Ray, procedure and recovery trolley Alloy and stainless steel construction for strength and excellent corrosion resistance Bolt together top allows for versatility and ability to customise for individual requirements Full X Ray translucent top Unobstructed head to foot tracking X Ray cassette holder 2 sided cassette holder allows for X Ray access from both side of the trolley Suits most X Ray cassettes- can be customised Twin column stability 4 x 200mm central locking wheels - 1 x Directional for ease of manoeuvring or 5th wheel option available 5 riser stainless steel dropsides Also Available in wider or narrow version Made in Australia					
	SpecificationsLength - 2135mm Width - 815mm Height Range - 545 - 915mm Mattress Size - 1900 x 680mm Max User Weight - 300kg				
MF1400	100mm Thick Premia Mattress (Square End for Electric Backrest)	2.00	\$795.00	\$159.00	\$1,590.00
KZ0569	Patient Trolley Upgrade – Wide Contour Top, 150mm Wider than standard	2.00	\$1,475.00	\$295.00	\$2,950.00

t: 1300 930 930 | e: info@alphalifecare.com.au | w: alphalifecare.com.au

Example Proposal Page 3/4

Alpha Lifecare 					
Name	Description	Qty	Unit Price	GST	Total
KZ2990	Drainbag Holder (per pair)	2.00	\$125.00	\$25.00	\$250.00
					
KZ2930	Dropdown Push Handles Tall (per pair)	2.00	\$408.33	\$81.67	\$816.66
					
KZ0578	Contour Accessory - IV Pole	2.00	\$241.67	\$48.33	\$483.34
					
KZ1360	Select Accessory - Folding IV Pole - Round	2.00	\$358.33	\$71.67	\$716.66
KZ3210	Folding Monitor Board	2.00	\$766.67	\$153.33	\$1,533.34
					

t: 1300 930 930 | e: info@alphalifecare.com.au | w: alphalifecare.com.au

Example Proposal Page 4/4

Alpha Lifecare 					
Proposal 00001182					
Proposal for:	Rachel McKinnon	SubTotal	\$32,330.00		
	Royal North Shore Hospital	GST	\$3,233.00		
	C/- Accounts Payable	Discount	\$0.00		
	hsnsw-accountspayable@health.nsw.gov.au	Shipping and Handling	\$320.00		
	AU	Total	\$35,883.00		
Alpha Lifecare appreciates the opportunity to assist you with your requirements.					
Should you wish to proceed with this proposal, Alpha Lifecare requests an official purchase order as confirmation. Where possible please note the proposal number on generated purchase orders. If purchasing as a private citizen, payment may be required to confirm your order.					
Please refer to our terms and conditions should you wish to review our conditions of sale.					
If we can be of further assistance in any way at all, please do not hesitate to give us a call. We look forward to working with you!					
Client Acceptance Signature:					
					
Date:					
					
Proposal Prepared By					
t: 1300 930 930 e: info@alphalifecare.com.au w: alphalifecare.com.au					

4b. Follow Up Within 24 Hours

The Critical First Follow-Up

The follow-up after proposal submission is as crucial as the proposal itself. A prompt, thoughtful follow-up demonstrates professionalism and keeps the momentum going.

Why 24 Hours is the Magic Window: Research shows that following up within 24 hours significantly increases proposal consideration rates. This timeframe strikes the perfect balance—allowing the client time to review the materials while ensuring the proposal remains fresh in their mind.

Effective Follow-Up Approach

- Begin with a friendly check-in to confirm they've received and accessed all materials
- Ask if they have any initial thoughts or questions
- Verify their understanding of key aspects of the proposal
- Agree on specific next steps and timeframes

Sample Follow-Up Questions

"I wanted to check if you've had a chance to review the proposal we sent yesterday?"

"Are there any aspects of our solution that you'd like me to clarify further?"

"Based on our discussion, what parts of the proposal resonated most with you?"

"What would be a good timeframe for us to discuss your thoughts on the proposal?"

Handling Common Scenarios

- **If the client hasn't reviewed it yet:** Express understanding and schedule a specific follow-up date.
- **If they have questions:** Address them promptly and offer additional resources as needed.
- **If they seem hesitant:** Explore their concerns without being defensive and look for ways to adapt the solution.

Alpha Tip

Use this follow-up conversation to gauge where the client stands. Their level of engagement and the types of questions they ask can reveal valuable insights about their likelihood to proceed.

4c. Complete Follow-Up Actions and Close Sale

Maintaining Momentum Through Action

The period between proposal submission and decision requires active management. Each follow-up action should move the opportunity closer to closure.

Key Follow-Up Actions:

- Provide any additional information requested by the client
- Facilitate conversations with technical specialists if needed
- Arrange product demonstrations or site visits
- Connect the client with reference customers if appropriate
- Address any emerging concerns or objections

Decision Pathway Management

Based on the client's response to your proposal, you'll need to navigate one of three potential paths:

GO**Update the Opportunity in CRM and add expected close date**

When the client shows clear interest in proceeding, move quickly to:



- Update the opportunity in **Salesforce** and add expected close date
- Begin preparing implementation plans
- Initiate internal resource planning.

NO GO**Seek input from your Business Unit Manager on potential adjustments**

If the client expresses hesitation or raises significant concerns:

- Debrief with your Business Unit Manager regarding potential adjustments on price or product
- Agree on specific actions to address concerns
- Schedule a follow-up discussion with revised approach
- Consider whether adjustments to scope or pricing might help overcome objections

Close Lost in CRM with reason

If the client decides not to proceed:

- Thank them professionally for their consideration
- Request feedback on why they chose a different direction
- Update CRM with detailed reasons for the loss
- Maintain the relationship for future opportunities
- Schedule a follow up task to check in with client

 Alpha Tip

Even with a "no" decision, how you handle the client's response will influence their perception of Alpha Lifecare. Professional grace in handling rejection often leads to future opportunities.

Stage 5: Close**CONFIRM AND CLOSE****Overview**

The Close stage represents the culmination of your sales journey with the customer. It's not merely about securing a signature or receiving a purchase order, but about setting the foundation for a lasting partnership. At Alpha Lifecare, we recognise that closing a deal marks the beginning of a long-term client relationship focused on delivering care and exceptional value. The actions you take during this critical phase will determine not only immediate satisfaction but also future growth opportunities, repeat business, and referrals.

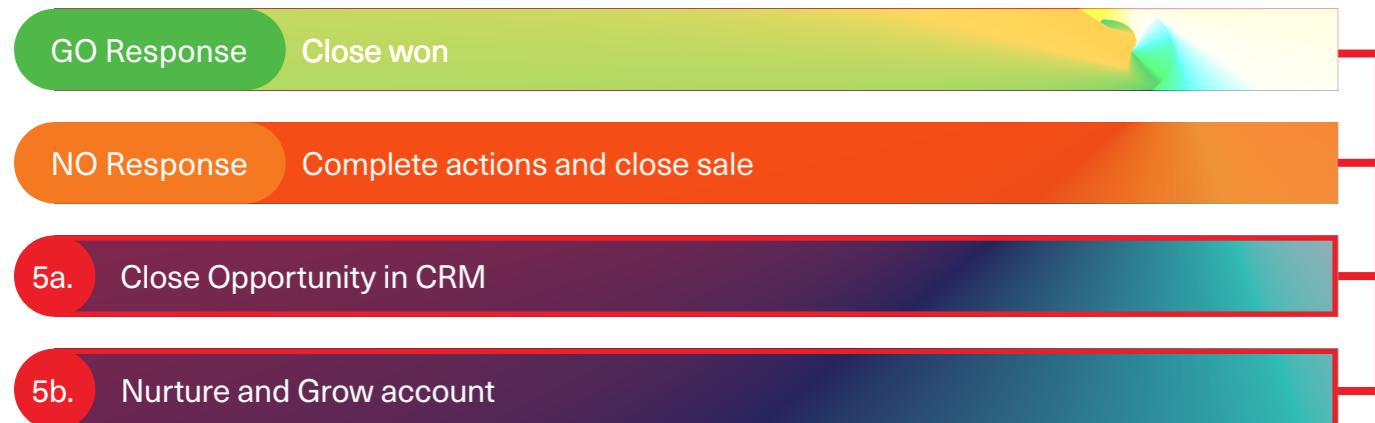


❖ Roles

These steps relate to the

Customer Service,
Territory Manager,
Marketing Manager,
Business Unit Manager,
Business Development Manager and
Project Delivery Team roles.

Steps



Close Won

Purpose

'Close Won' signifies a successful transaction, but more than that it represents the start of a successful partnership that can lead to recurring revenue, additional opportunities, and valuable referrals. A smooth transition from prospect to customer is needed by setting expectations for implementation, the project management process and establishing the groundwork for account growth.

Key Actions

Confirm and Document the Sale



Once a customer has committed to purchase, immediately capture and document all relevant details in the **Salesforce**. This may include confirming the exact products ordered, pricing agreed upon, delivery timeframes, and any special terms or conditions

Ensure all relevant documents are properly attached to the opportunity:

- Signed contracts or agreements
- Purchase orders
- Statement of work
- Implementation requirements
- Special terms or conditions

Thorough documentation prevents misunderstandings and ensures everyone involved has clarity and the client has positive experience.

Communicate Internally

Inform all the relevant internal teams or team members about the new client and their specific requirements. This may include:

- Notifying the operations team for delivery scheduling
- Briefing the project / implementation team on client-specific needs
- Alerting the accounts department for invoicing
- Updating your Sales Manager on the successful close.

Clear internal communication ensures a coordinated approach to onboarding the new client and prevents potential service gaps that could undermine your hard-won relationship. It also sets up the after sales service.

Set Project / Implementation Expectations

Contact the customer within 24 hours of receiving the signed agreement or purchase order to:

"Thank you for choosing Alpha Lifecare. I want to walk you through what happens next so you know exactly what to expect."

If required present a detailed project timeline that outlines key milestones, from order processing to delivery, installation, and initial training.

Be transparent about potential challenges and how they'll be addressed. This proactive approach builds confidence and demonstrates your commitment to their success beyond the sale.

Create a Customer Success Plan

Develop a customised customer success plan that talks to and outlines:

- Implementation milestones and responsibilities
- Key contacts for different aspects of the relationship
- Training schedule for client staff
- Regular check-in points during the first 90 days
- Success metrics that will be tracked

This plan serves as a roadmap for the initial phase of the relationship and helps ensure the customer realises value quickly from their investment.

Introduce the Broader Team

While you'll remain the client's primary point of contact, introduce them to other key team members who will support their journey with Alpha Lifecare. This might include their dedicated account manager, technical support contacts, and project specialists.

Building these additional relationships creates a stronger connection to your organisation and reduces dependency on a single contact point.

Schedule the First Value Check-In

Arrange a specific date and time for your first post-implementation check-in, typically within 2-4 weeks of installation. This meeting should focus on confirming that the solution is performing as expected and identifying any adjustments needed to optimise results. This demonstrates your ongoing commitment to their success and provides an opportunity to address any early concerns before they escalate.

Post-Sale Communications

The way you communicate after securing a 'Close Won' significantly impacts the customer's confidence in their decision. Follow these guidelines for effective post-sale engagement:

Confirmation Email

Send a comprehensive confirmation email that includes:

- A sincere thank you for their business
- A summary of the agreed products/services
- Key implementation dates and milestones
- Introduction to team members involved in their account
- Your contact information for any immediate questions

This email serves as both a reference document and reassurance that their project is actively moving forward.

Executive Outreach

For significant deals, arrange for the Business Unit Manager or an executive from Alpha Lifecare to reach out to their counterpart at the client organisation. This high-level recognition can reinforce the importance of their business and demonstrates organisational commitment to their care and success.

Share Success Resources

Provide access to resources that will help the customer maximise the value of their investment:

- Implementation guides
- Training materials
- Best practice documents
- Access to the Alpha Lifecare knowledge base
- Contact information for technical support

Early access to these resources empowers the customer and demonstrates your commitment to their success beyond the transaction.

5a. Close Opportunity in CRM

Importance of Accurate CRM Closure

Properly closing an opportunity in the CRM is critical for:

- Accurate sales reporting and forecasting
- Informing marketing efforts about successful messaging
- Capturing valuable insights for future opportunities

Thorough and accurate documentation at this stage contributes to organisational learning and continuous improvement of the sales process. It also sets up the cadence for re-engagement with the client if there was no sale.

CRM Update Process



When updating the lost opportunity in **Salesforce** CRM, ensure that you:

- Update all Core Fields
- Document the Decision Process
- Attach Key Documents
- Include notes on all meaningful interactions throughout the process.

5b. Nurture and Grow Account

Develop Account Growth Strategy

To nurture and grow existing accounts and after securing an initial sale for new clients, develop a strategic plan for account growth.

I would suggest that we state something like what you have said and leave it a little more open so it can be adjusted between Business Units if needed.

Each Salesperson is responsible for managing and growing each of their customer accounts. This is achieved through building strong relationships focused on deep knowledge of the customers' needs and how Alpha Lifecare products and service offering supports those needs.

Each Salesperson is responsible for scheduling and proactively conducting "Account Management Touch Points" throughout each year. These are interactions that are intended to build relationships, gain insights on the customer, and find opportunities to deepen our knowledge and grow the account.

The salesperson is responsible for ensuring customer touch points are met for each customer. The touch points are based on the customer grading that is done in conjunction with the Business Unit Manager. Each business unit varies slightly with the number and type of touchpoints per grade however the below is set out as a guide:

Gold

**4 x F2F Meetings per Year (Quarterly),
12 Phone Calls per Year (Monthly)**

Silver

**2 x F2F Meetings per Year (6-Monthly),
6 Phone Calls per Year (Every second month)**

Bronze

**1 x F2F Meeting per Year (Annually),
4 Phone Calls per Year (Quarterly)**

The grading of each account is done based on the opportunity size, not necessarily their previous spend!

Some additional actions may include:

- Identifying additional departments or facilities that could benefit from Alpha Lifecare solutions
- Mapping potential product expansions based on the client's long-term goals
- Planning for regular business reviews to discuss evolving needs
- Establishing targets for account growth in the next 6-12 months

This strategic approach transforms a single transaction into a pathway for ongoing business development and client management.

Implement Regular Touch Points

Establish a structured communication cadence:

- Weekly calls during implementation
- Monthly check-ins during the first quarter
- Quarterly business reviews thereafter
- Annual strategic planning sessions

Regular, purposeful contact keeps you connected to the client's evolving needs and demonstrates your commitment to their long-term success.

Capture Testimonials and Case Studies

Once the client has experienced initial success with your solution, request testimonials or case study participation:

"We're thrilled to see the positive impact our solutions are having on your operations. Would you be open to sharing your experience with others who might benefit from similar improvements?"

These assets not only validate your solution's effectiveness but also deepen the client's commitment by publicly affiliating with your brand.

Leverage for Referrals

Satisfied customers are your best source of new business. After successful implementation and demonstrated results, introduce the possibility of referrals:

"As you've experienced such positive results, would you know of any other facilities facing similar challenges who might benefit from our solutions?"

Time this request appropriately—after the client has experienced tangible value but before the excitement of new results has faded.

Create Opportunities for Client Advocacy

Invite satisfied clients to participate in activities that position them as thought leaders while advocating for your solutions:

- Speaking at industry events
- Participating in user group panels
- Contributing to blog posts or whitepapers
- Joining advisory boards

These opportunities provide value to the client while strengthening their connection to Alpha Lifecare.

Executing the Growth Strategy

Effective account growth requires a disciplined execution.

Below are some key characteristics for disciplined execution.

Quarterly Business Reviews

Conduct formal quarterly business reviews that include:

- Performance metrics for implemented solutions
- User adoption and satisfaction levels
- Identified challenges and resolution plans
- Industry trends and new capabilities
- Strategic alignment discussions for future initiatives

These structured reviews position you as a strategic partner rather than merely a vendor.

Proactive Client Solution Alignment

Continuously align Alpha Lifecare solutions with evolving client needs:

- Monitor industry changes affecting the client
- Track internal initiatives through regular conversations
- Identify new pain points or challenges
- Present solutions before they're explicitly requested

This proactive approach demonstrates your commitment to their success and positions you ahead of competitors.

Continuous Education

Position yourself as a valuable resource for ongoing education:

- Share relevant industry reports and research
- Provide updates on regulatory changes
- Offer access to Alpha Lifecare thought leadership
- Create customised training for new team members

By delivering ongoing value through education, you reinforce your role as a trusted advisor that cares rather than just another supplier.

Measuring Account Growth Success

It is prudent to track key metrics to evaluate account growth and its effectiveness.

These metrics may include:

- Year-over-year revenue growth
- Product penetration (percentage of relevant product portfolio adopted)
- Compare with competitors to identify the addressable market
- Net Promoter Score (NPS) or satisfaction ratings
- Referrals generated
- Contract renewal rates

Regular review of these metrics helps you refine your account growth strategy and focus efforts where they'll have the greatest impact.

Alpha Tip

The way you handle a client after winning their business determines whether you'll win their next business. Every interaction after the initial sale is an opportunity to cement your position as their trusted partner for the long term.



Handover to Project Management Process

After-Sales Process Overview

In some instances, particularly for large client sales, a project is required which has its own process at Alpha Lifecare.

The Project Management process bridges the gap between the sales completion and successful implementation. This critical phase ensures all commitments made during the sales process are fulfilled seamlessly, reinforcing customer confidence in Alpha Lifecare as a trusted partner.

This process officially begins at the Final Quote Review and extends through to ongoing After-Sales Support, creating a cohesive transition from sale to implementation.

Key Process Steps

Final Quote Review

The process commences with a comprehensive review of all quoted items to ensure accuracy and completeness before handover to the implementation team. This includes:

- Confirming product estimated time of arrival
- Reviewing customer specific configurations for consideration
- Verifying all required accessories have been included
- Confirming appropriate mattresses have been selected
- Confirming contact details of key people to communicate implementation

Purchase Order Management

Once the purchase order is received, it serves as the formal commencement of the project implementation phase, triggering internal workflows and resource allocation.

Kick-off Call

A structured transition meeting that brings together the sales team, the client, and an introduction to the product delivery team:

- Provide estimated shipment dates and delivery timeframes
- Secure approval for receiving week schedules
- Exchange contact details for project stakeholders
- Develop and agree upon a comprehensive delivery strategy

Logistics Planning

Typically occurring 3-4 weeks prior to delivery, this stage focuses on finalising the execution details:

- Confirming precise delivery dates with all stakeholders
- Generating serial number reports for asset tracking
- Assigning appropriate manpower and resources for implementation

Delivery Execution

The physical implementation phase where Alpha Lifecare demonstrates its commitment to excellence through:

- Professional unpacking and assembly
- Comprehensive functional testing before handover
- Expert bed setup according to specifications
- Continued support until complete room installation
- Removal of existing products

Education Programme

Knowledge transfer is essential for ensuring maximum benefit from Alpha Lifecare solutions:

- Comprehensive education plan provided
- Specialised 'super users' receive advanced clinical training
- End users receive ward-by-ward practical training (ongoing)
- Comprehensive education materials are provided for ongoing reference

After-Sales Support

Continuous engagement ensures long-term satisfaction and lays the foundation for future opportunities:

- Structured follow-up support based on client needs
- User satisfaction assessment
- Service satisfaction monitoring
- Ongoing Q&A support for emerging questions

Appendix

Key Success Factors for Stage 4

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Abbreviations

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Update CRM with Relevant Information

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Handling Objections

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Qualify with BANT (Need - STAR)

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Key Success Factors for Stage 4

What excellent proposal management looks like:

1. **Responsiveness:** Addressing client questions and requests promptly demonstrates reliability and builds confidence.
2. **Adaptability:** Being willing to adjust aspects of your proposal based on client feedback shows that you're truly listening to their needs.
3. **Value Focus:** Consistently reinforcing the value proposition rather than focusing solely on features or pricing.
4. **Relationship Building:** Using every interaction as an opportunity to strengthen trust and demonstrate partnership potential.
5. **Momentum Maintenance:** Keeping the process moving forward with clear next steps and timeline management.

Remember that the proposal phase is not just about document delivery—it's about actively guiding the client towards a positive decision through thoughtful engagement and demonstrated value.

Designation	Meaning
AHA	Allied Health Assistant
AIN	Assistant in Nursing
BME	Bio medical Engineer
CM	Certified Midwife
CM	Care Manager
CNC	Clinical Nurse Consultant
CNO	Chief Nursing Officer
CFO	Chief Finance Officer
CNE	Clinical Nurse Educator
CNS	Clinical Nurse Specialist
CSM	Clinical Service Manager
CSO	Clinical Support Officer
DON	Director of Nursing
EN	Enrolled Nurse
GP	General Practitioner
HCW	Health Care Worker
HCA	Health Care Assistant
I/C	In Charge
NE	Nurse Educator
NIC	Nurse In Charge
NP	Nurse Practitioner
NUM	Nurse Unit Manager
OT	Occupational Therapist
Physio	Physiotherapist
PT	Physiotherapist
RM	Registered Midwife
RSM	Residential Sales Manager
RN	Registered Nurse
SNM	Senior Nurse Manager
Orderlies	Hospital Porters
OR Manager	Operating Room Manager

Update CRM with Relevant Information

Maintaining Accurate Records

 Comprehensive documentation in **Salesforce** creates organisational memory that benefits both current opportunities and future engagements.

Essential updates to **Salesforce** can include:

- Current proposal status (under review, requiring changes, accepted, rejected)
- Key client feedback and questions
- All follow-up activities and outcomes
- Next steps with specific timelines
- Any competitive insights gathered during discussions

Why Quality Documentation and Data Matters

High-quality and detailed data will lead to:

- Seamless handovers between team members if needed
- Informed business reviews with management
- Valuable insights for future proposals to similar organisations
- Accurate forecasting and resource planning

Documenting Client Interactions

It is also important to clearly document each interaction, for example:

- Who was involved in the conversation
- What specific topics were discussed
- What concerns or objections were raised
- What commitments were made by either party
- What next steps were agreed upon

Alpha Tip

Set a recurring calendar reminder to ensure all **Salesforce** updates are completed promptly after client interactions. This prevents important details from being lost or forgotten.

Handling Objections

In sales, not every customer will immediately agree with our initial approach, and while there seem to be countless ways for a customer to say “no,” most objections fall into just three or four main categories like price, time, and decision-making authority.

When it comes to Alpha Lifecare specifically, there are effective ways to address these common concerns. For performance questions, sharing our testing data and real-world examples is key, letting successful installations tell the story while the science behind our deep penetration technology backs up every claim.

If customers find the application process daunting, it's important to break it down simply by walking through the two-step process and mentioning our support team's guidance, as customers appreciate knowing help is available when they need it.

When cost comes up, the focus should be on long-term value, showing how fewer reapplications and reduced maintenance deliver real savings, supported by actual customer examples of maintenance cost reductions. Price objections are almost guaranteed to arise so you can prepare for them.

For example:

The Customer may say.

“You're too expensive. I can get a similar product for less from your competitor.”

Approach:

Shift focus to value rather than price. Use data or case studies to highlight ROI and long-term benefits.

Objections aren't roadblocks; they're stepping stones to better conversations. By preparing thoughtful responses and approaching each objection as an opportunity to build trust and showcase value, you can transform resistance into rapport. Remember, the key lies in preparation, curiosity, and aligning your strategy with your authentic approach. Every objection you overcome brings you one step closer to closing with confidence.

Qualify with BANT (Need - STAR)

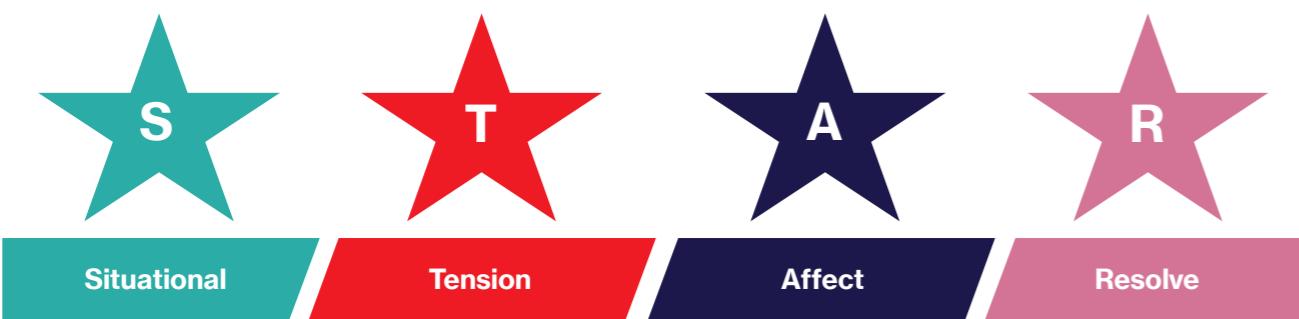
Are they aware of and understand that they have a problem?

When it comes down to it, you're not selling — you're solving problems.

A prospect that understands a problem exists and is actively seeking a solution is a prospect that truly has a need. There are different spectrum's of a prospect's need. One person might have a current solution in place but is unaware of a more effective solution. Another prospect could agree there is a problem but was entirely unaware a solution existed and was not actively looking or has 'dealt with it thus far.'

It's up to you to quickly identify that the need exists, the prospect is aware of their need, and there is an appetite for a solution.

Alpha Lifecare uses the STAR approach for better understanding the needs of our prospect:



Case Studies

As you are having Client conversations, think about any case studies from other Clients that may be relevant.

For example: are there consistent issues across the Client groups or for certain industries, are Clients seeing benefits of complementary [SERVICES/PRODUCTS], is there a noticeable spike in a certain need?

Examples of questions for qualifying on Need with STAR

Situational

What does your current supplier do well?

Tell me about your current [SERVICES/PRODUCTS]?

How long have you been with the current supplier and will you leave them for a better position?

What current challenges have you got with your current supplier?

Can you describe a situation where your current solution fell short?

Tell me about a recent project or initiative that prompted you to look for new solutions.

Tension (Pain Points)

Do you have delays in [SERVICES/PRODUCTS] and what affect does this have on your business?

What specific frustrations are you experiencing with your current solution?

What are the biggest obstacles preventing you from reaching your objectives?

Affect

How have these problems affected your daily operations or overall productivity?

In what ways have these challenges affected your team's performance and morale?

Resolve

What steps have you taken to try to resolve these issues?

What would a successful resolution look like for you?

How do you anticipate your operations will improve once these issues are resolved?

Overall Need Assessment

A simple way to gauge your prospect's need for your solution is to 'get medical'.

Ask them how much their pain points bother them on a scale of 1 – 10.

- "[Client NAME], thanks for answering those questions. It certainly gives me a deeper insight into what you are looking to achieve. In the interest of clarification, I am wondering on a scale of 1 to 10, 10 being critical and 1 being 'get to it when I get to it', whereabouts is this purchase sitting with you at the moment?"

Prospects who rate their pain between 7 to 10 are your most qualified.

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