

**AP Meeting with TrustSphere (8 Sep)  
with Ridwan Ismeer, Product Team & Annabel Koh, Sales Team**

Meeting with Sales Executive

5:30 - 6:10pm

1. Stages of Sales Cycle
  - a. Prospecting phase
    - leads from Marketing department
    - prospecting email → follows templates → keywords!
  - b. Set up initial meeting
    - follow up from meeting
    - might be stuck here for awhile
    - people just keep Re: to same chain of email
  - c. POC agreement\*
    - trial
  - d. Technical visibility call/configuration call
    - Specific to TrustSphere
    - POC agreement NDA
  - e. Analysis session
  
2. Interesting Measures to Look At
  - a. Time taken between stages
  - b. Conversion rates
    - Response rate of prospects → meeting
    - Conversion rate from meeting → POC
    - Factors to consider that might affect conversion rates:
      1. no. of people in contact with within 1 account
      2. profile of clients speaking with
  - c. Amount of time spent communicating internally
    - Over-collaboration
  - d. Overlap of relationships
    - Same account, different salespeople, different contact person?
  - e. Relationships
    - Strong, weak (frequency) hot, cold (recency)
    - Strong relationship turning cold
  
3. Others
  - a. Sales team work with a variety of sectors e.g. financial sector
  - b. No particular specialty
  - c. Could investigate response rates per sector, interactions

**Additional Requests for Ridwan**

6:10 - 6:15pm

1. List of partners
2. Sales email templates
  - a. prospecting emails

**Deliverable for Client by 13 Sep, Tue**

6:15 - 6:20pm

1. Mock up with defined metrics

**Data Clarification**

6:20 - 6:30pm

1. Is the staff list updated?
  - a. Some people in activity report have not emailed for days
  - b. Did not appear in staff list
  - c. Ridwan to send updated list
2. Staff date joined?
  - a. Not available
3. Some emails without domains
  - a. Instant messages
  - b. Irrelevant to us
4. General email accounts e.g. customer@trustsphere
5. Some emails without subject headers?
6. Elaboration on Trustsphere - SugarCRM/Salesforce tie up
  - a. Some clients, some partners
  - b. Ridwan to send partner list so we can analyse nature of relationships