

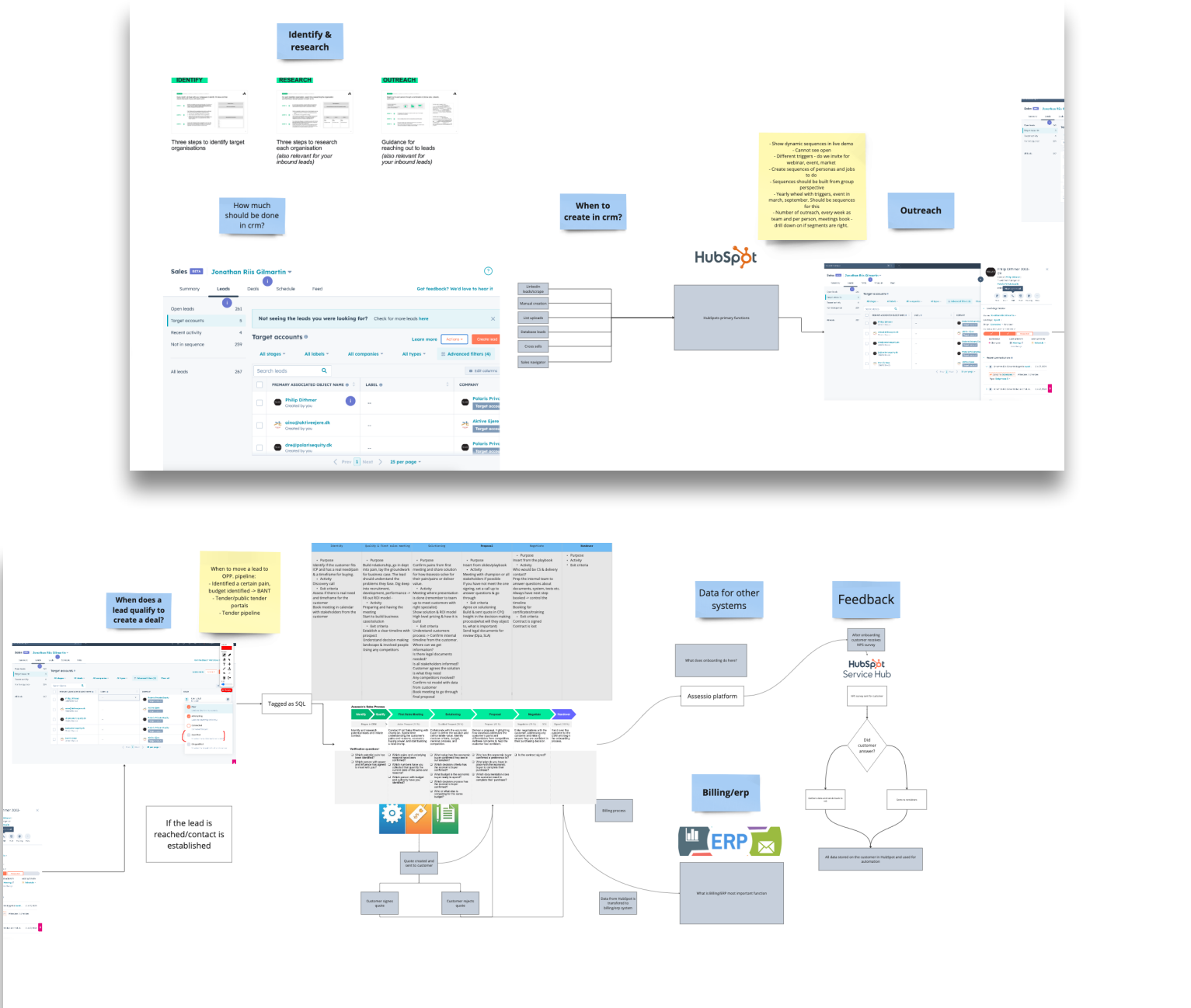
Assessio Sales & marketing key document

From the workshop, we successfully identified the optimal sales process for managing Assessio's leads

- Development of lead score
- Implementation of lifecycle stages and when lead must be passed on to next “step”
- Building explanations of lead score and sales & marketing
- Clear Definitions of MQL, SQL, and the Sales Process



Sunrise X Assessio workshop

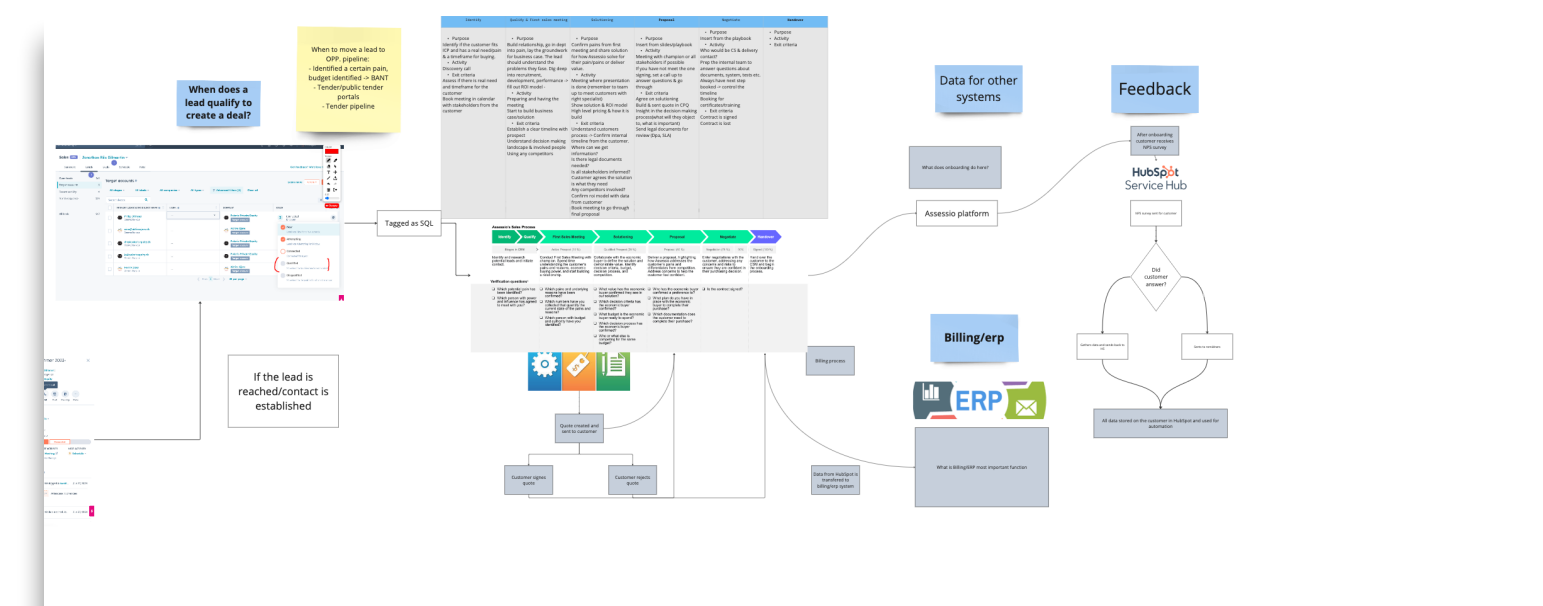
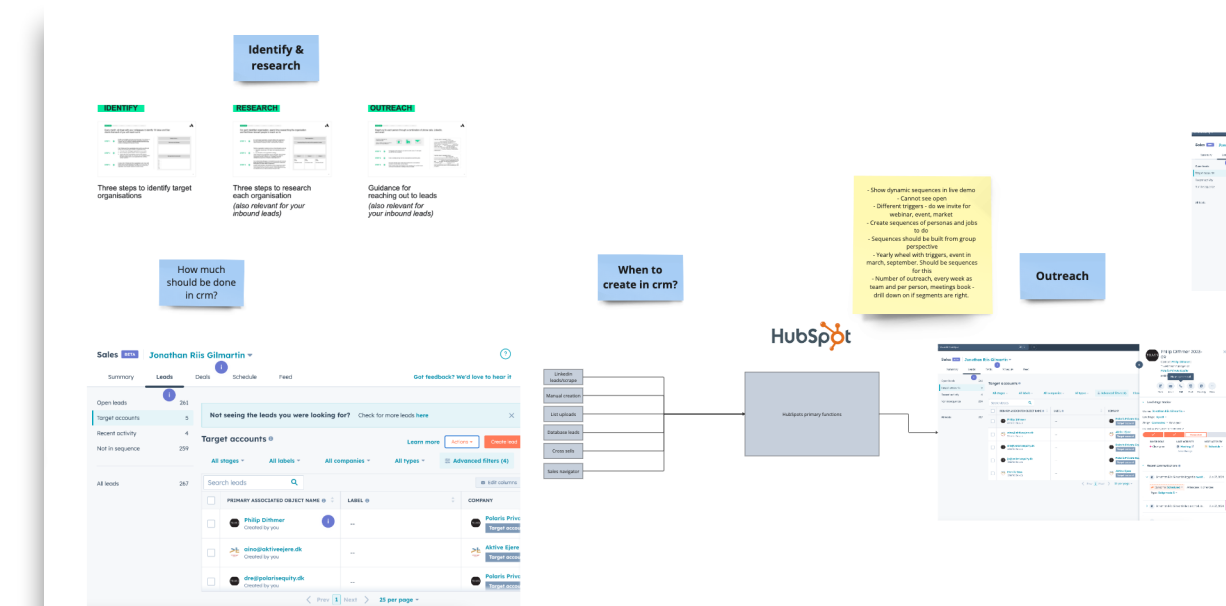


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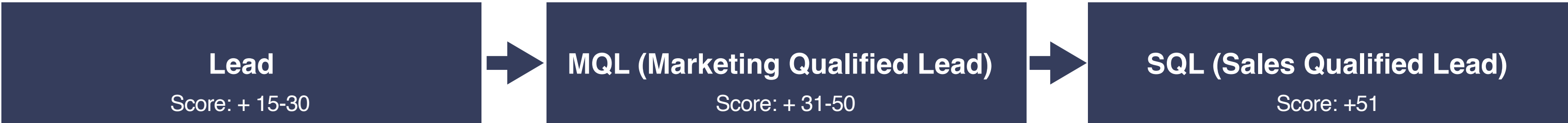


Sunrise X Assessio workshop



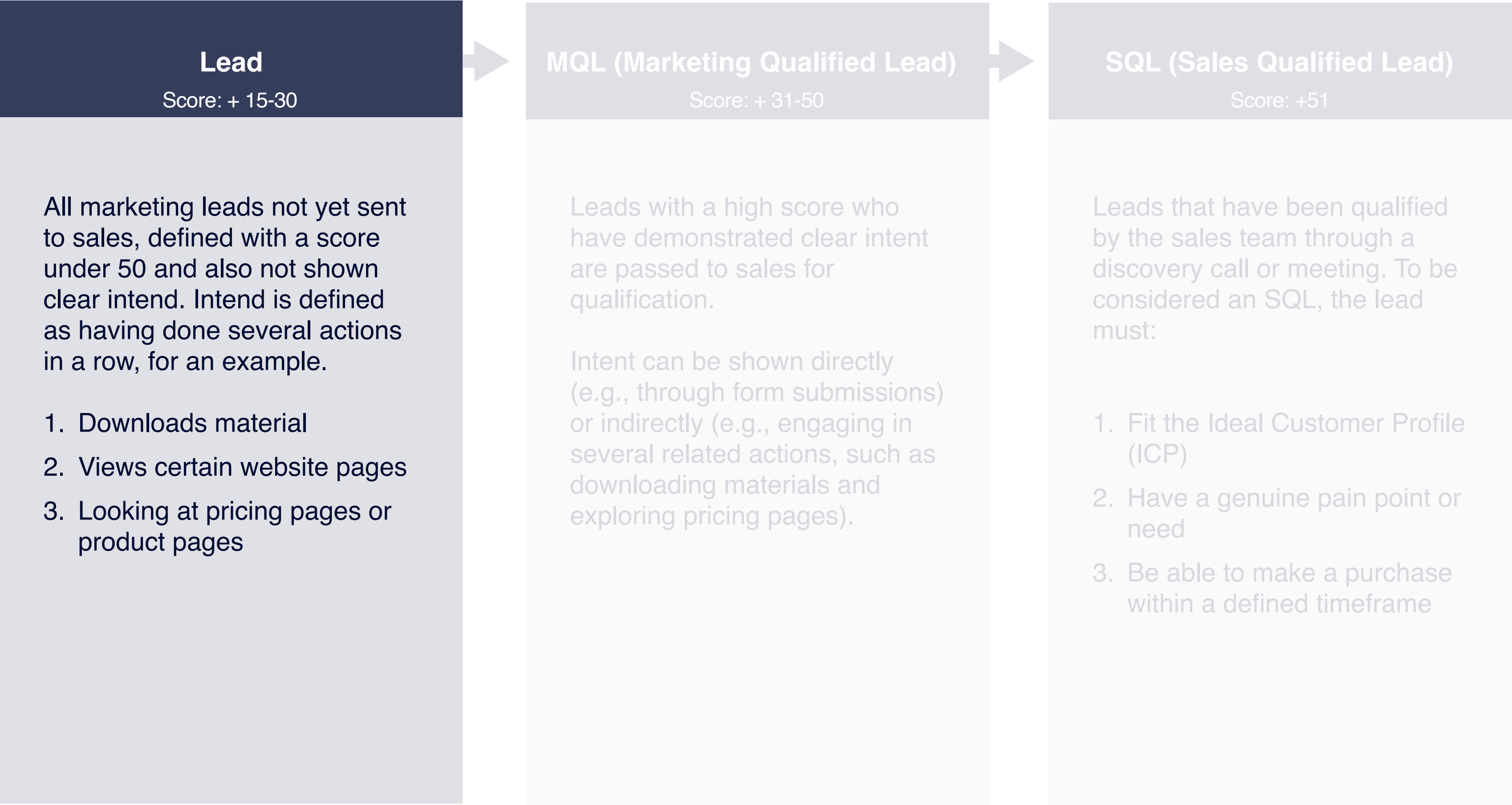


We are introducing a change from last time by including a phase prior to MQL: Leads with a score between 15-30 and no clear intent will now be categorized as Lead



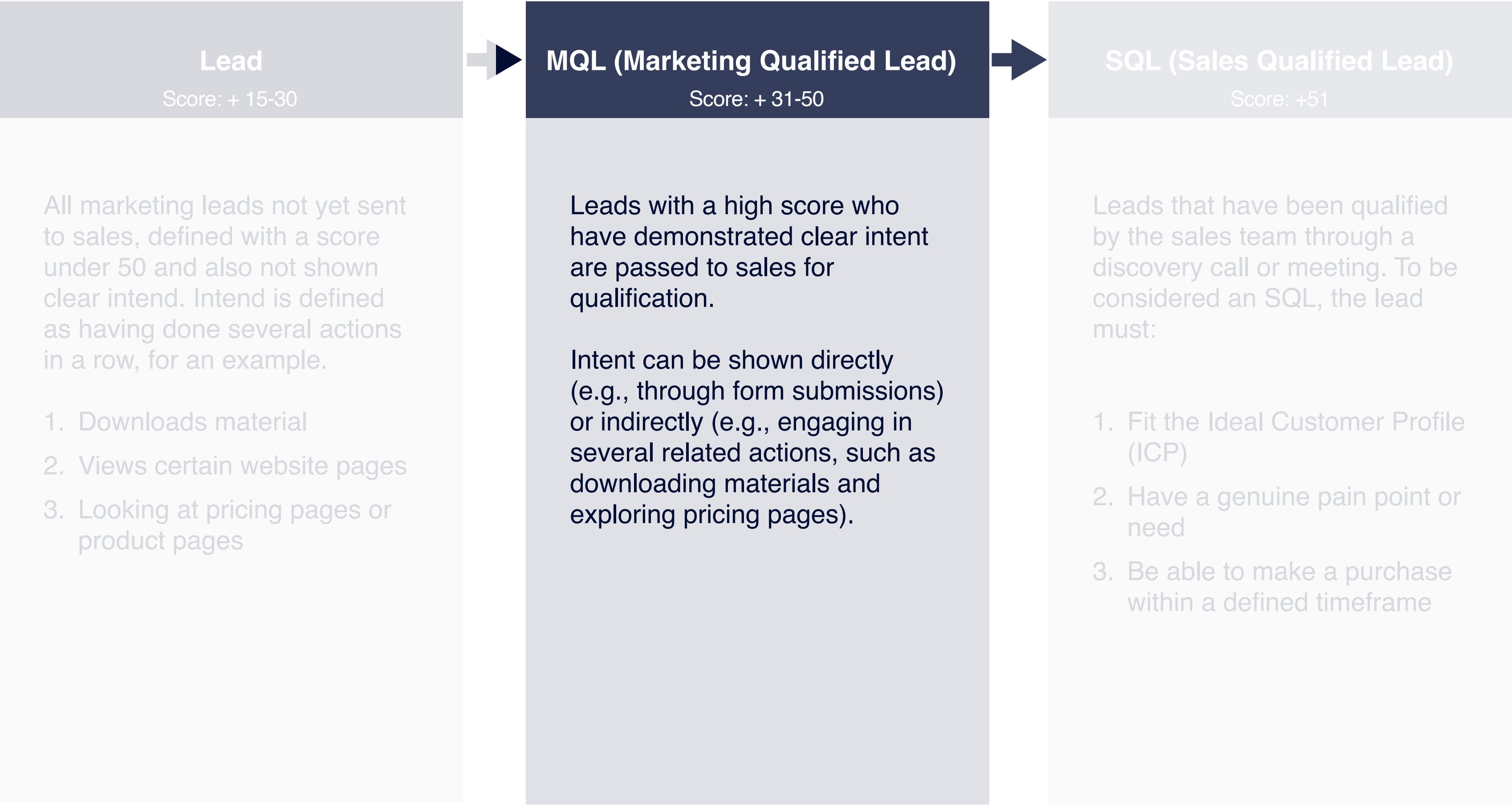


Let’s start by looking at the definition “lead” in the sales process



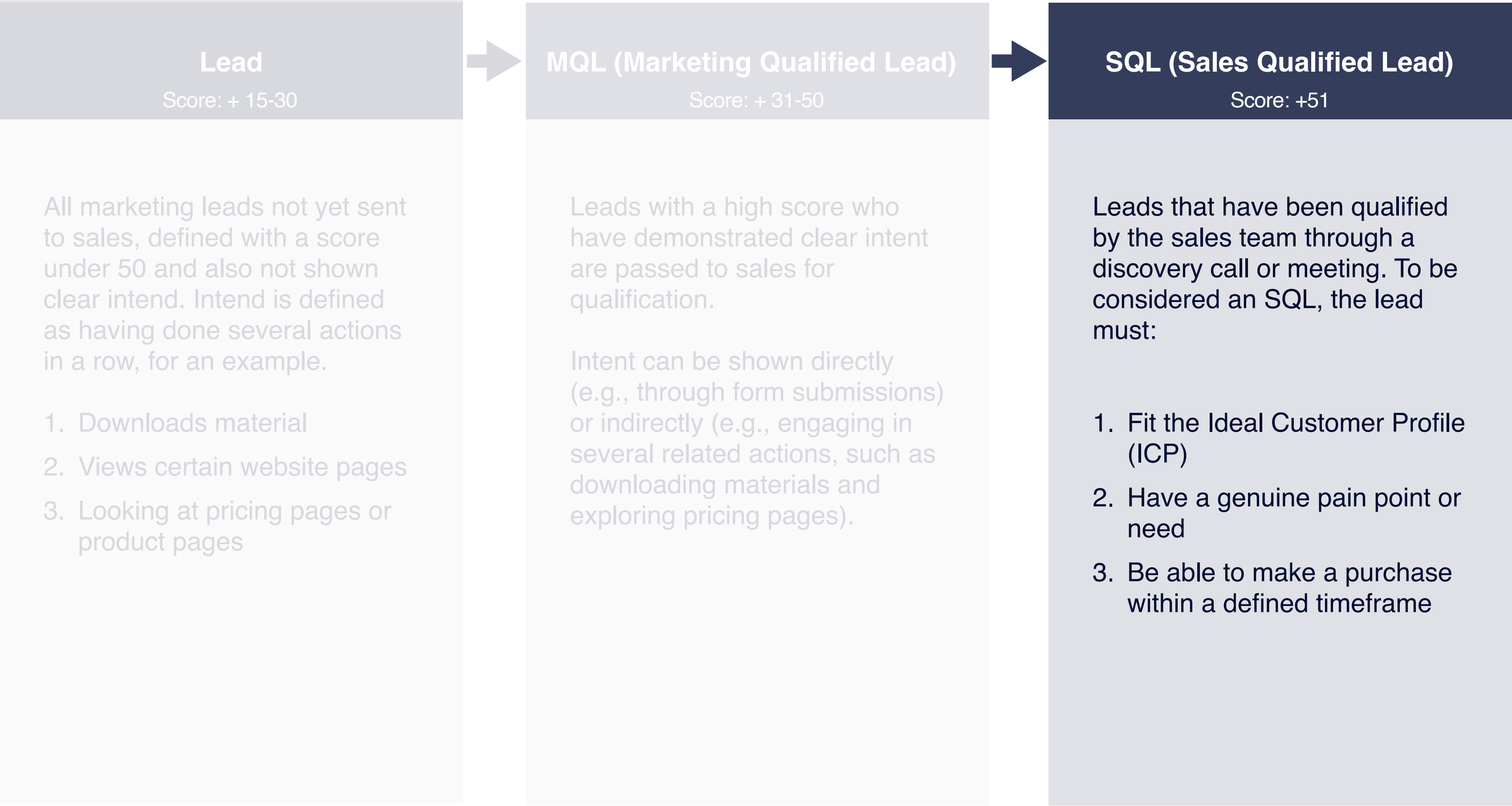


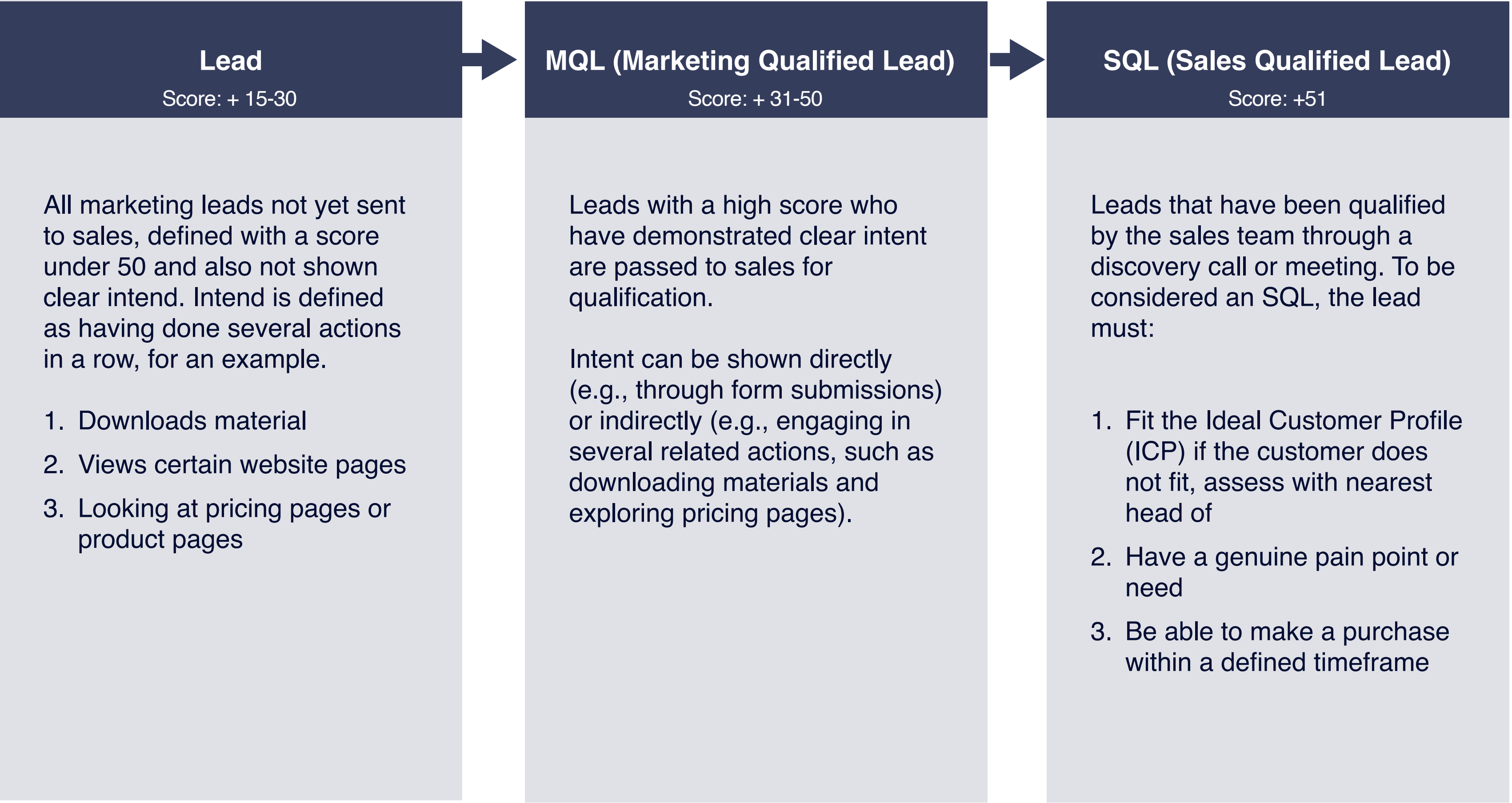
Leads demonstrating clear intent, whether through form submissions, activity patterns, or scoring between 31-50 are forwarded to the sales team for qualification.





Leads qualify as SQLs after a discovery call, meeting criteria like fitting the ICP, having a clear need, and being ready to buy within a set timeframe





Assessio Leadscore

Define intend actions the customer takes

Visited certain web pages

If a prospect visits certain pages on the website like certification booking page, product page, pricing page, reads cases etc. that should trigger a notice to someone from sales.

Participated on events, online or in person

Events is a great way of connecting with prospects and also something we can see Assessio us utilizing. We recommend having events as a intend action, especially combined with downloading material or looking at certain pages.

Downloaded material, cases or white papers

This is not the most high intend action, but it does give us a permission so we can see the prospects digital journey on our site. In combination with something else like website page visits this can show us intend for the customer.

See high intend actions here: <https://docs.google.com/spreadsheets/d/1MhJCr5WArODKMNpNcJGWHqJCq9QVnQrzfIMq8DDvdPQ/edit?usp=sharing>

Intend example

1. Prospect downloads white paper etc

After they download material from us, we will sent them into a lead nurture flow in HubSpot, trying to push them to read more about our product or sign up for events

2. Website page views

Shortly after downloading material from website or via forms. If the prospect looks at certain pages, that will be seen as showing intend

3. Prospect signs up for a webinar either pre-recorded or in person

If all these 3 actions are done in a within 30-60 days, the customer is clearly researching possible solutions and we should tag them as SQL to make sure Sales can reach out.

See intend actions

F13

	A	B	C	D
1	Country	Page description	URL	
2	International	Om platformen	https://assessio.com/	
3	International	Personlighedstest (MAP)	https://assessio.com/personality/	
4	International	Evnetest (Matrigma)	https://assessio.com/aptitude/	
5	International	Screening (MAP Essence)	https://assessio.com/screening/	
6	International	Risikoadfærd (MAP-X)	https://assessio.com/risk-behaviors/	
7	International	Værdier og kultur (MATCH-V)	https://assessio.com/values-culture/	
8	International	Pris	https://assessio.com/price/	
9	International	Book en demo	https://assessio.com/book-a-demo/	
10	Danmark	Om platformen	https://assessio.com/dk/	
11	Danmark	Personlighedstest (MAP)	https://assessio.com/dk/personlighed/	
12	Danmark	Evnetest (Matrigma)	https://assessio.com/dk/logik/	
13	Danmark	Screening (MAP Essence)	https://assessio.com/dk/screening/	
14	Danmark	Risikoadfærd (MAP-X)	https://assessio.com/dk/risikoadfaerd/	
15	Danmark	Værdier og kultur (MATCH-V)	https://assessio.com/dk/vaerdier-og-kultur/	
16	Danmark	Pris	https://assessio.com/dk/pris/	
17	Danmark	Book en demo	https://assessio.com/dk/book-en-demo/	
18	Sverige	Om plattformen	https://assessio.com/se/	
19	Sverige	Personlighetstest (MAP)	https://assessio.com/se/personlighet/	
20	Sverige	Problemløsning (Matrigma)	https://assessio.com/se/problemlosning/	
21	Sverige	Screening (MAP Essence)	https://assessio.com/se/screening/	
22	Sverige	Riskbeteenden (MAP-X)	https://assessio.com/se/riskbeteenden/	
23	Sverige	Kultur & värderingar (MATCH-V)	https://assessio.com/se/kultur-varderingar/	
24	Sverige	Pris	https://assessio.com/se/pris/	
25	Sverige	Boka demo	https://assessio.com/se/boka-demo/	
26	Norge	Om plattformen	https://assessio.com/no/	
27	Norge	Personlighetstest (MAP)	https://assessio.com/no/personlighet/	
28	Norge	Evnetest (Matrigma)	https://assessio.com/no/evne/	
29	Norge	Screening (MAP Essence)	https://assessio.com/no/screening/	
30	Norge	Risikoadferd (MAP-X)	https://assessio.com/no/risikoadferd/	
31	Norge	Kultur og motivasjon (MATCH-V)	https://assessio.com/no/kultur-motivasjon/	
32	Norge	Pris	https://assessio.com/no/pris/	
33	Norge	Book en demo	https://assessio.com/no/book-en-demo/	
34	Nederland	Over het platform	https://assessio.com/nl/	
35	Nederland	Persoonlijkheidstest (MAP)	https://assessio.com/nl/persoonlijkheid/	
36	Nederland	Capaciteitentest (Matrigma)	https://assessio.com/nl/capaciteiten/	
37	Nederland	Screening (MAP Essence)	https://assessio.com/nl/screening/	
38	Nederland	Risicogedrag (MAP-X)	https://assessio.com/nl/risicogedrag/	
39	Nederland	Drijfveren (MATCH-V)	https://assessio.com/nl/drijfveren/	
40	Nederland	Prijs	https://assessio.com/nl/prijs/	
41	Nederland	Boek een demo	https://assessio.com/nl/boek-een-demo/	
42	Danmark	Certificeringskalender	https://peopletestsystems.com/certificeringskalender/	
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Intend: web pages

Intend: downloads & events



Static Attributions	Value	Score
Role	Talent acquisition, head of HR, HR director, HR consultant, HR officer (more titles covered in next slide)	5
C-level role	CHRO or other C-level	30
	Alumni/former certified that changed job	51
	Student, intern	0
	Small	3
	Value	5
Company	Star	10
	Enterprise	15
Company type	Scaleup company with many jobs	3
	Public company	15
	Recruitment agency	10
Other	Customers and partners is withdrawn	-100
	Private emails	-50

Dynamic Attributions	Score
Seen any page expect candidate and platform page	10
Seen the certificate calendar	15
Download whitepaper, webinar	10
Participated in event	20
Downloaded test example	15
Read case	10
Filled ROI calculator	50
Email/linkedin newsletter click	3
Email/linkedin newsletter open	1
2-3 intend actions within short timeframe - download, web page visit, events	51

See all titles that we will score

Talent Acquisition Consultant, Senior Recruitment Specialist, Human Resources Director, Talent Specialist, Senior Technical Recruiter, Employee Relations Specialist, Human Resources Responsible, Corporate Recruiter, Head of Human Resources Operations, Lead Technical Recruiter, Human Resources Administrative Officer, Assistant to the Chief of Staff, Chief People Officer, Technical Recruiting Manager, Talent Acquisition Recruiter, Head of Talent Management, Human Resources Supervisor, Human Resources Staffing Manager, Vice President Talent Acquisition, Talent Acquisition Executive, Regional Human Resources Manager, Senior Manager Talent Acquisition, Talent Acquisition Lead, Recruiting Team Lead, Senior Human Resources Generalist, Senior Lead Recruiter, Senior Human Resources Partner, Senior Talent Acquisition Specialist, Senior Human Resources Specialist, Employee Relations Manager, Senior Talent Acquisition Consultant, Human Resources Lead, Regional Human Resources Business Partner, Talent Acquisition Specialist, Talent Manager, Talent Acquisition Partner, Talent Acquisition Associate, Employee Relations Advisor, Employee Relations Director, Head of Employee Relations, General Manager Human Resources, Recruitment Executive, Recruitment Officer, Director of Staffing, Vice President Human Resources, Human Resources Operations Manager, Human Resources Operations Specialist, People Manager, Talent Acquisition Manager, Talent Management Specialist, Senior Human Resources Business Partner, Recruitment Specialist, Human Resources Manager, Head of Recruitment, Human Resources Partner, Lead Recruiter, Human Resources Office Manager, Senior Human Resources Officer, Staffing Recruiter, Chief Human Resources Officer, Recruitment Manager, Human Resources Business Partner, Senior Corporate Recruiter, Human Resources Officer, Senior Executive Recruiter, Talent Director, Recruiting Manager, Head of Human Resources, Executive Recruiter, Director Talent Acquisition, Senior Human Resources Manager, Staffing Manager, Staffing Specialist, Labor Relations Manager, Business Partner, Senior Staffing Manager, Recruitment Associate, Assistant Manager Human Resources, Director of Recruiting

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Pipelines in the sales process

Overall Pipeline definitions

Pipeline definitions in a sales process typically describe the various stages that leads or potential customers go through, from initial contact to a finalized sale

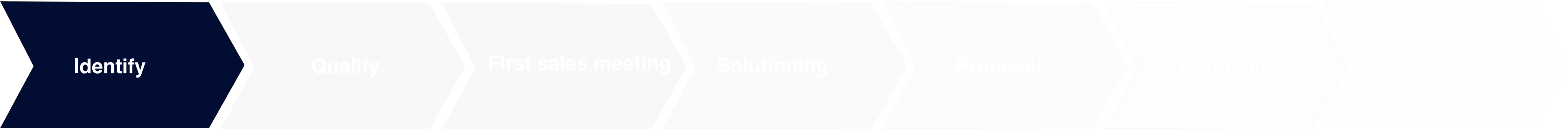


Overall Pipeline definitions

To progress to the next phase of the pipeline, all criteria must be met



Each stage will have a purpose, set of activities and exit criteria updates in the CRM



Purpose

- Provide a framework for how to think about what you need to gather from a prospect

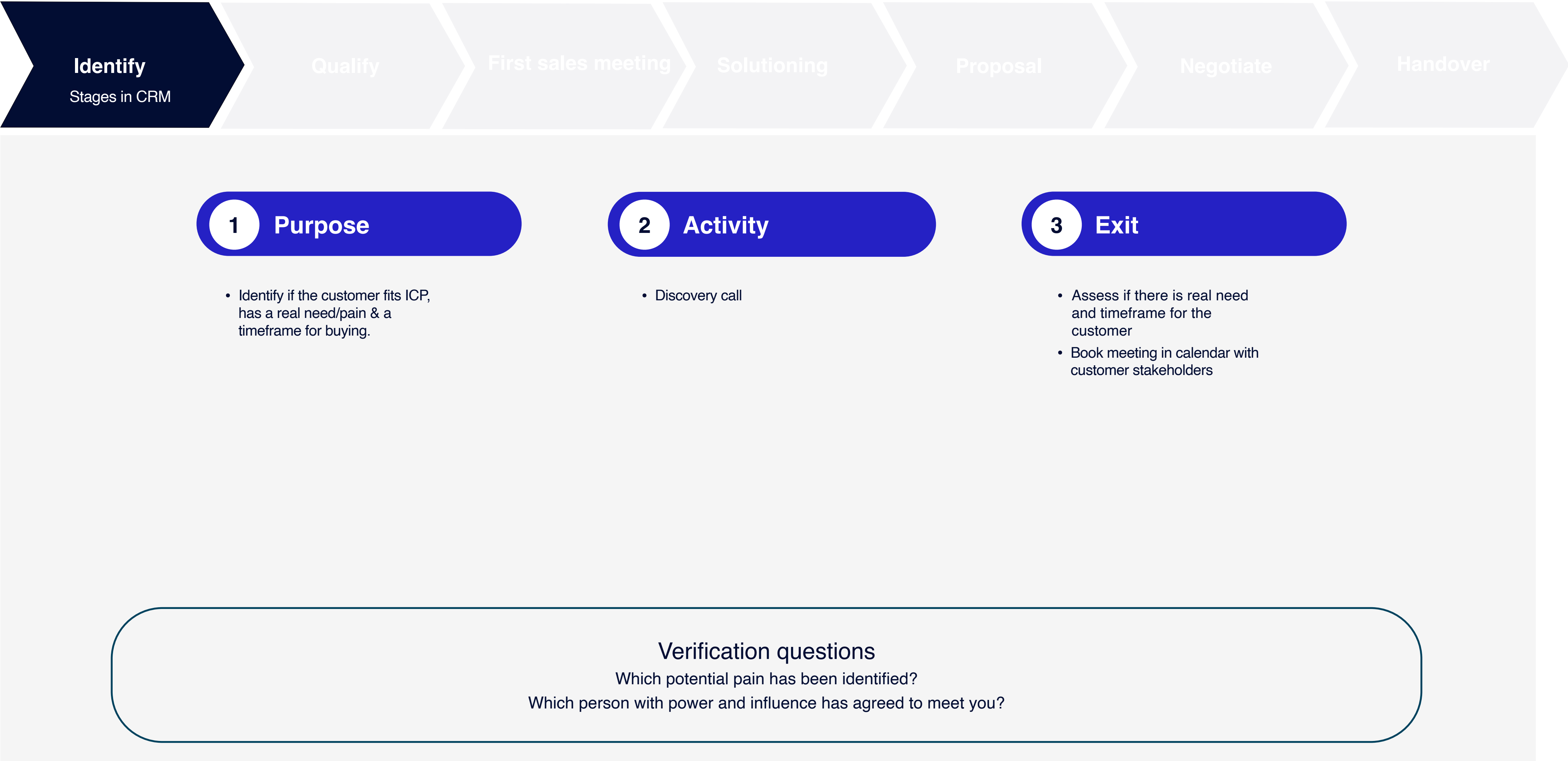
Activity

- Which activities can be done in the specific stages

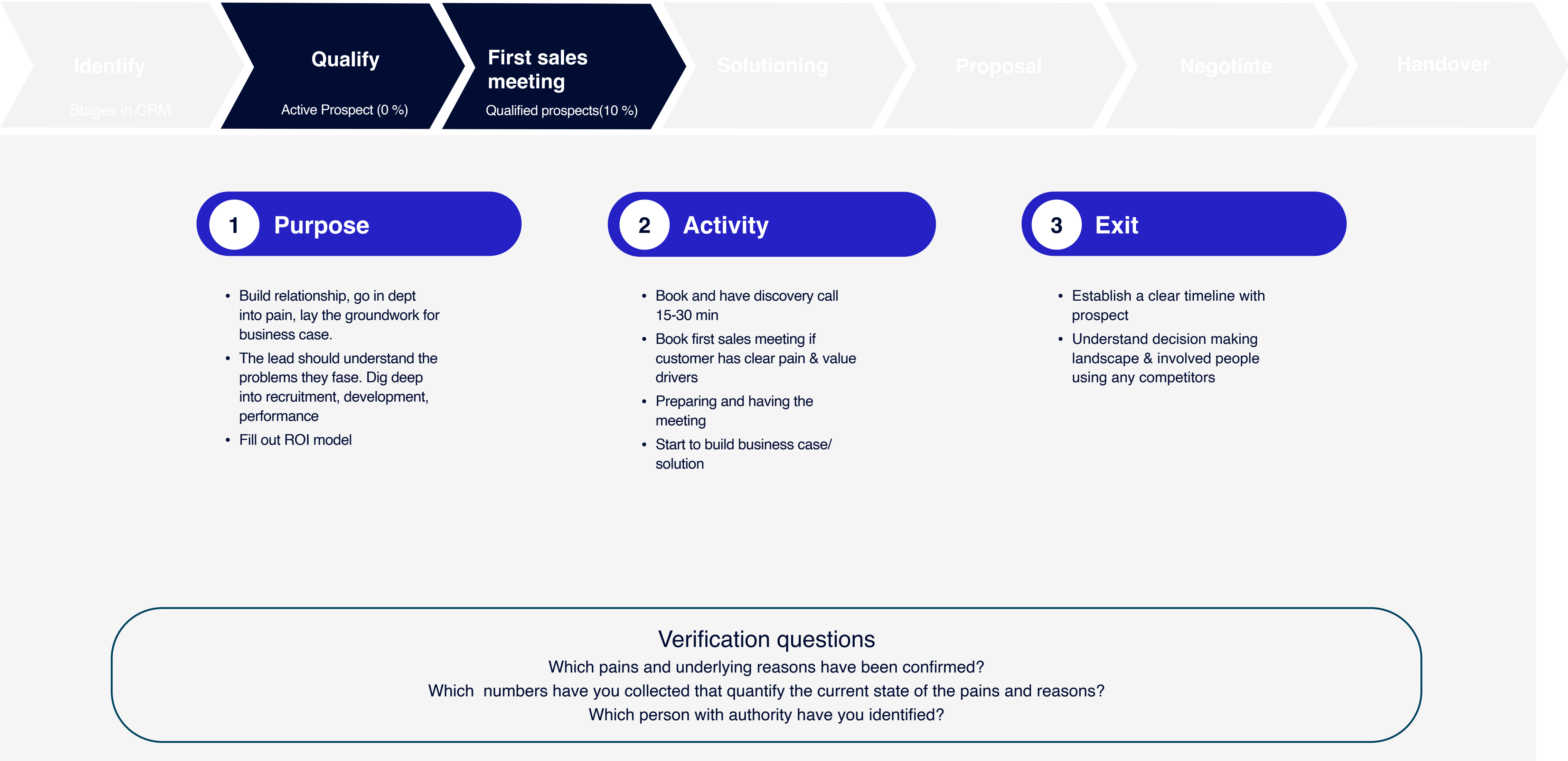
Criteria

- The outcomes needed to complete one stage and move to the next in the sales process

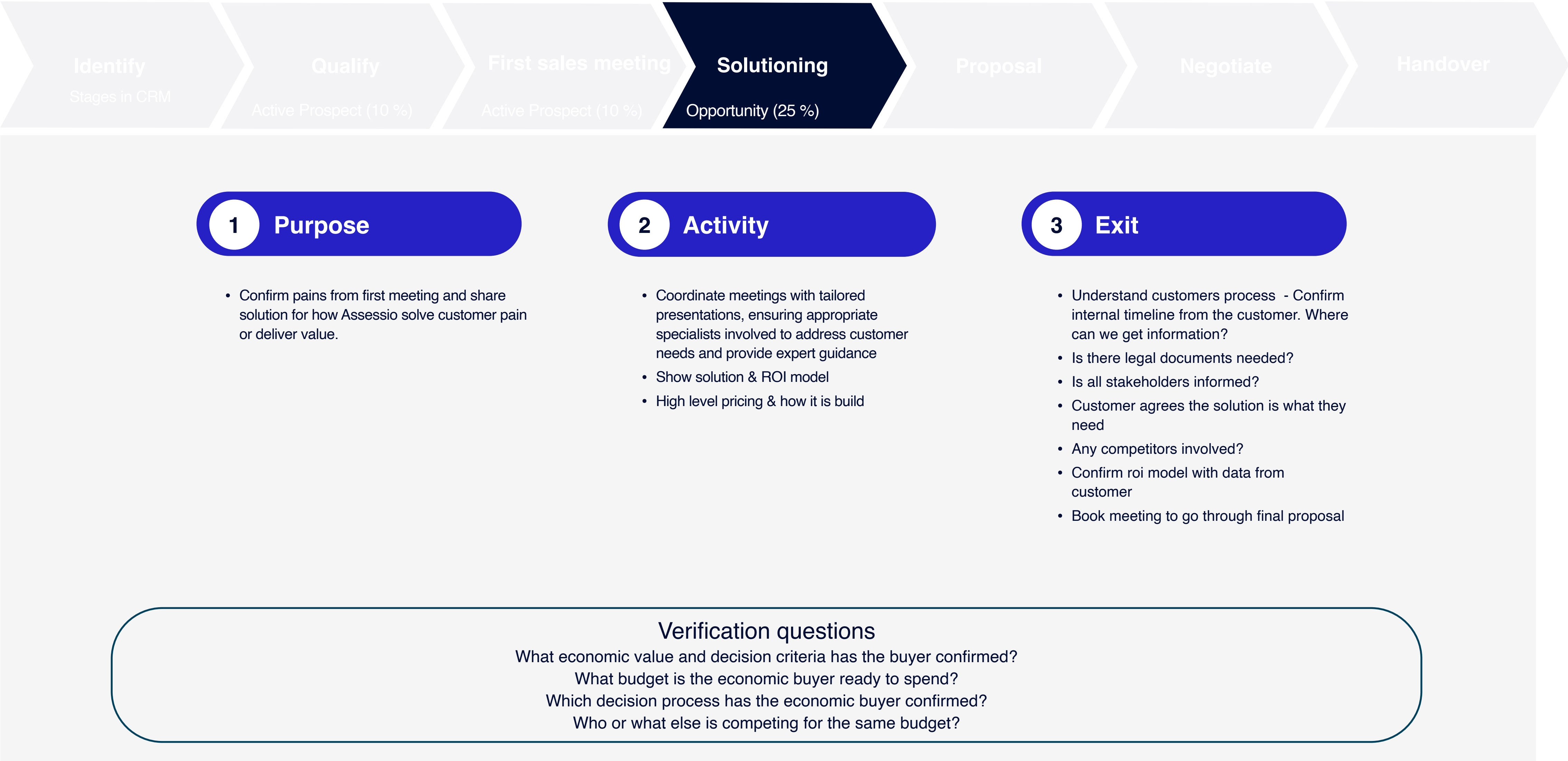
Lets start by looking at the first pipeline definition “Identity”



To qualify leads, we refer to the pipeline phase definition: "Qualify & First Sales Meeting" within the same framework



From this point, we begin developing solutions tailored to the customers' needs



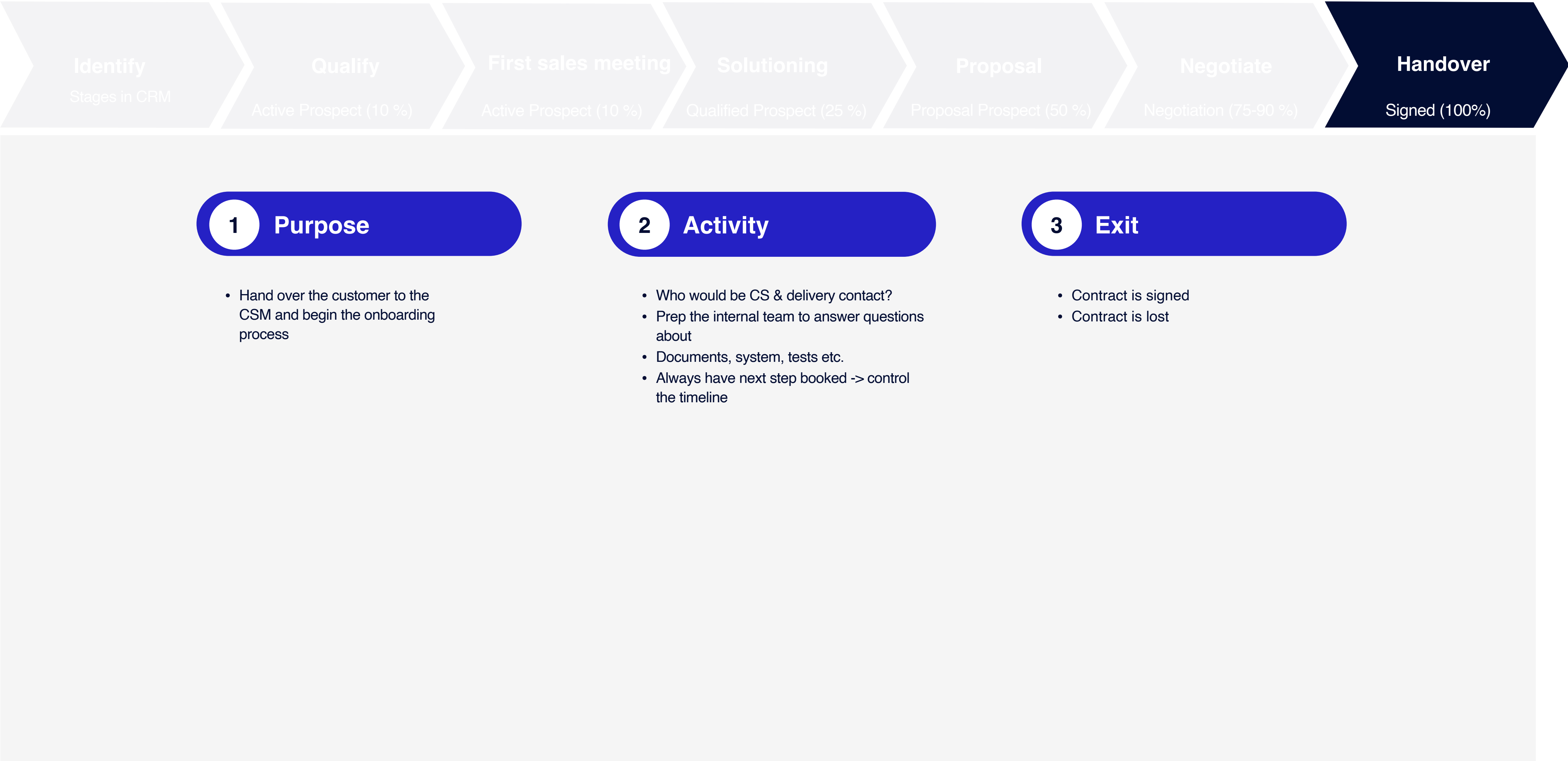
The proposal will be crafted based on the scope and depth of the solution



The next phase involves negotiating the contract before it is either signed or declined



Each stage will have a set of activities and exit criteria updates in the CRM



Overall Pipeline definitions

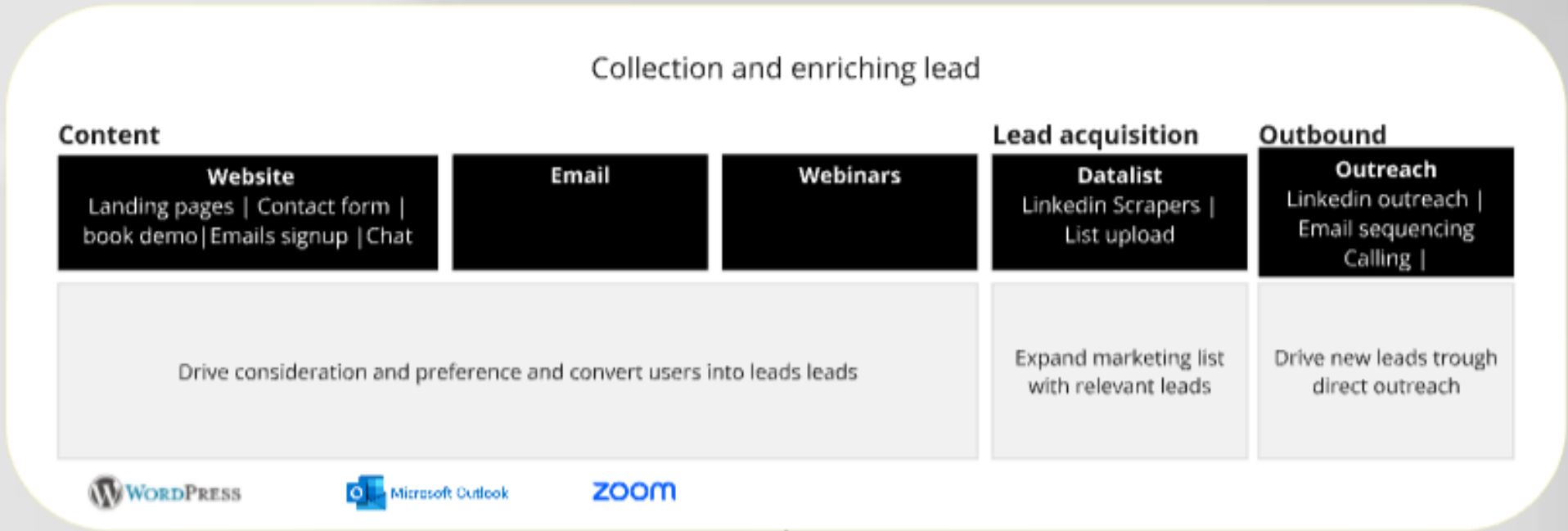
In summary, the pipeline process can be outlined as follows



Process

SYSTEM LANDSCAPE

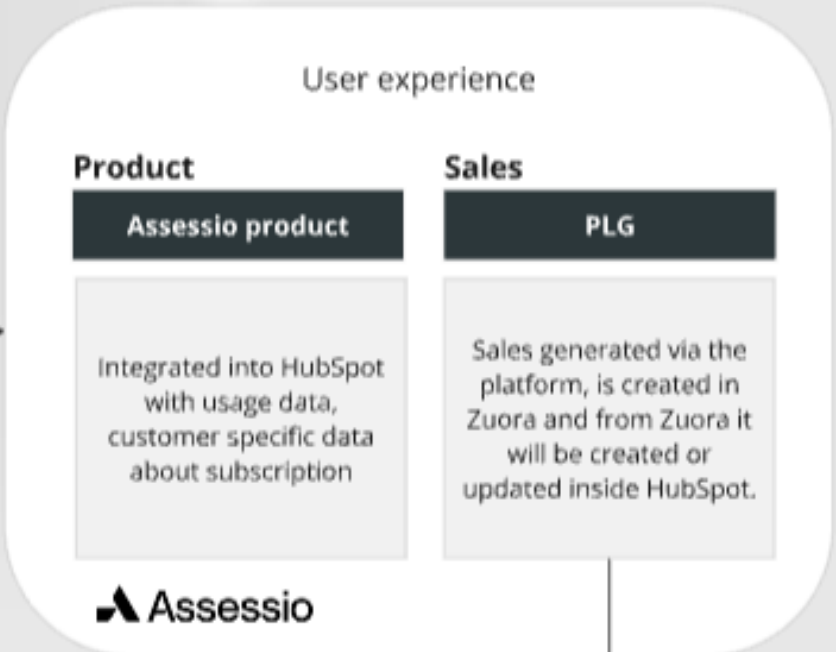
Sales & marketing channels



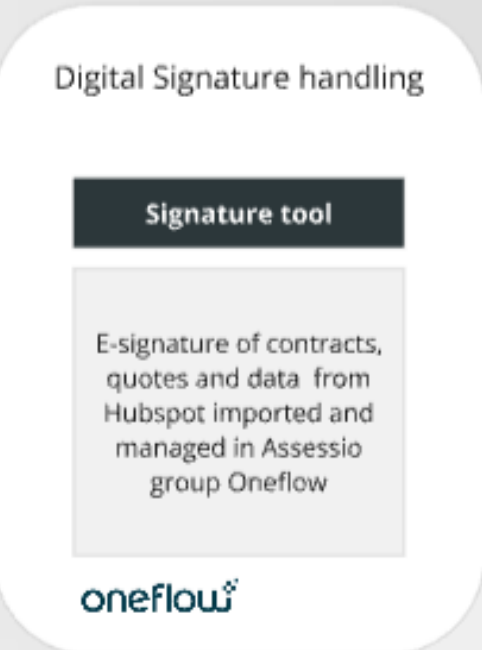
Customer handling



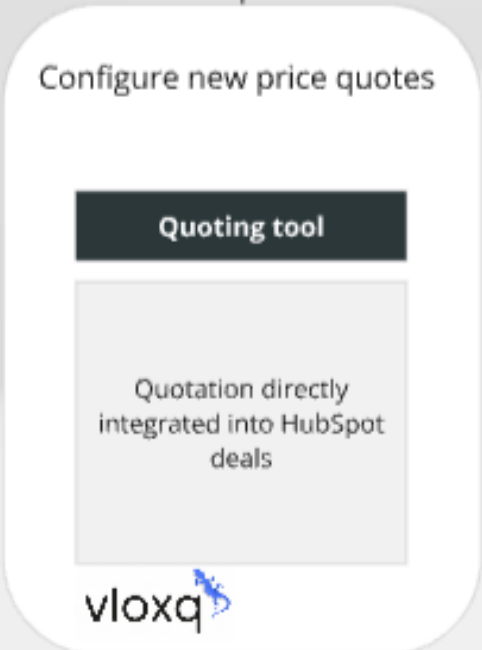
Product



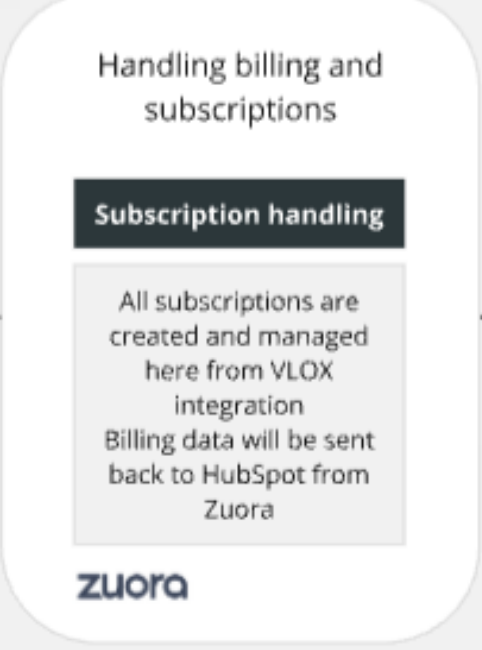
Signature



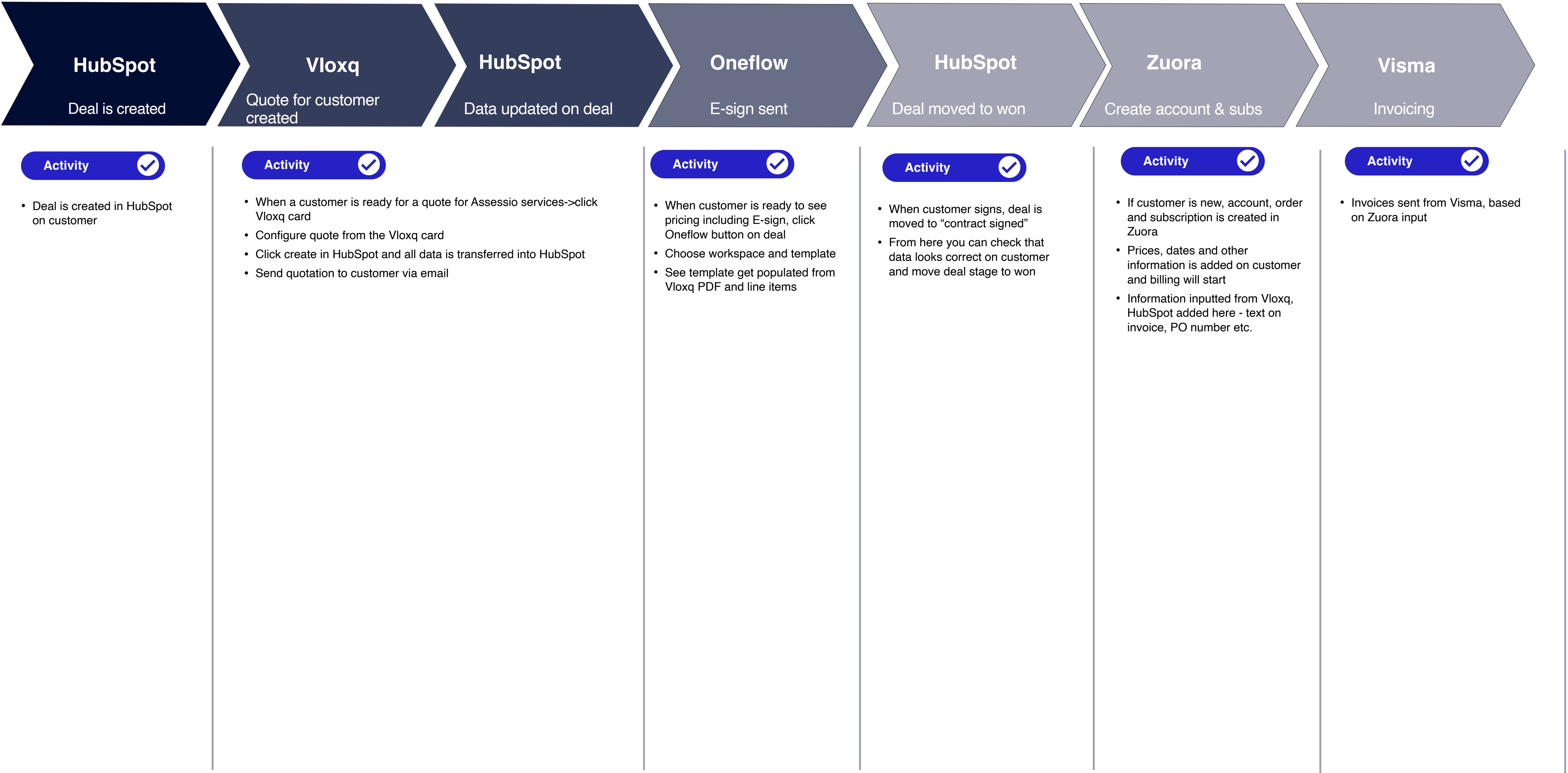
CPQ



Subscriptions

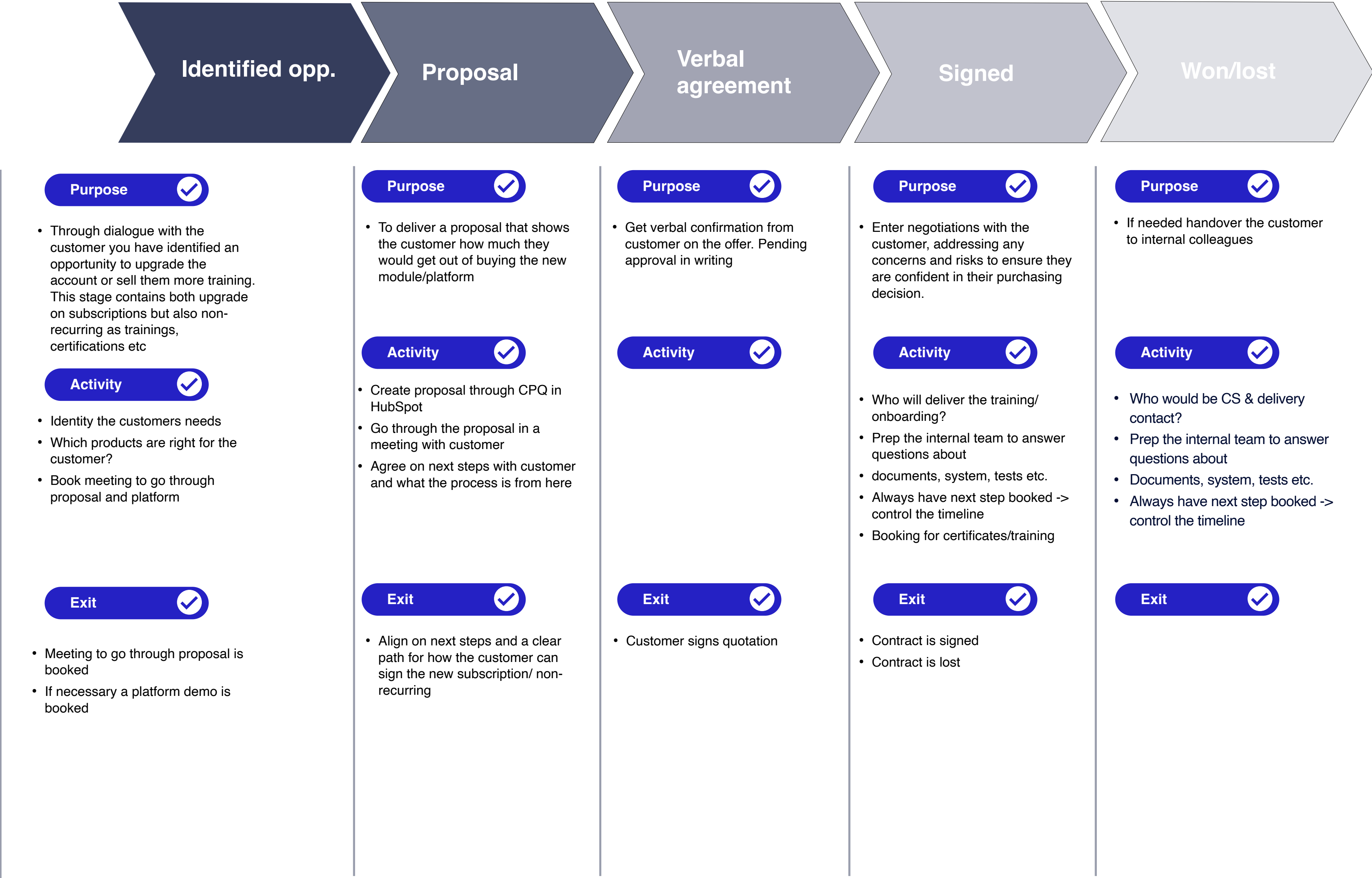


How does the flow look from HubSpot->Vloxq->Zuora etc.

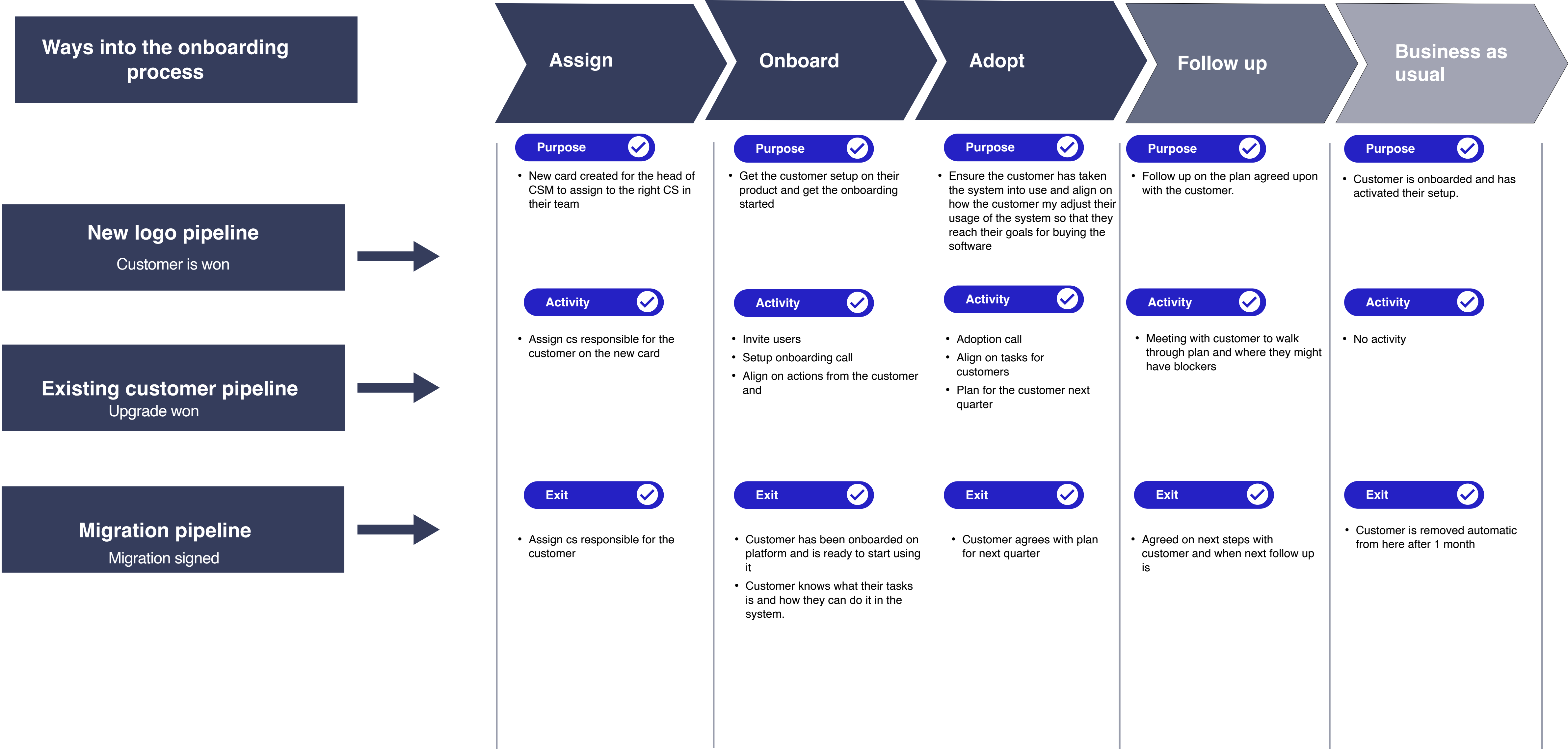


CSM structure

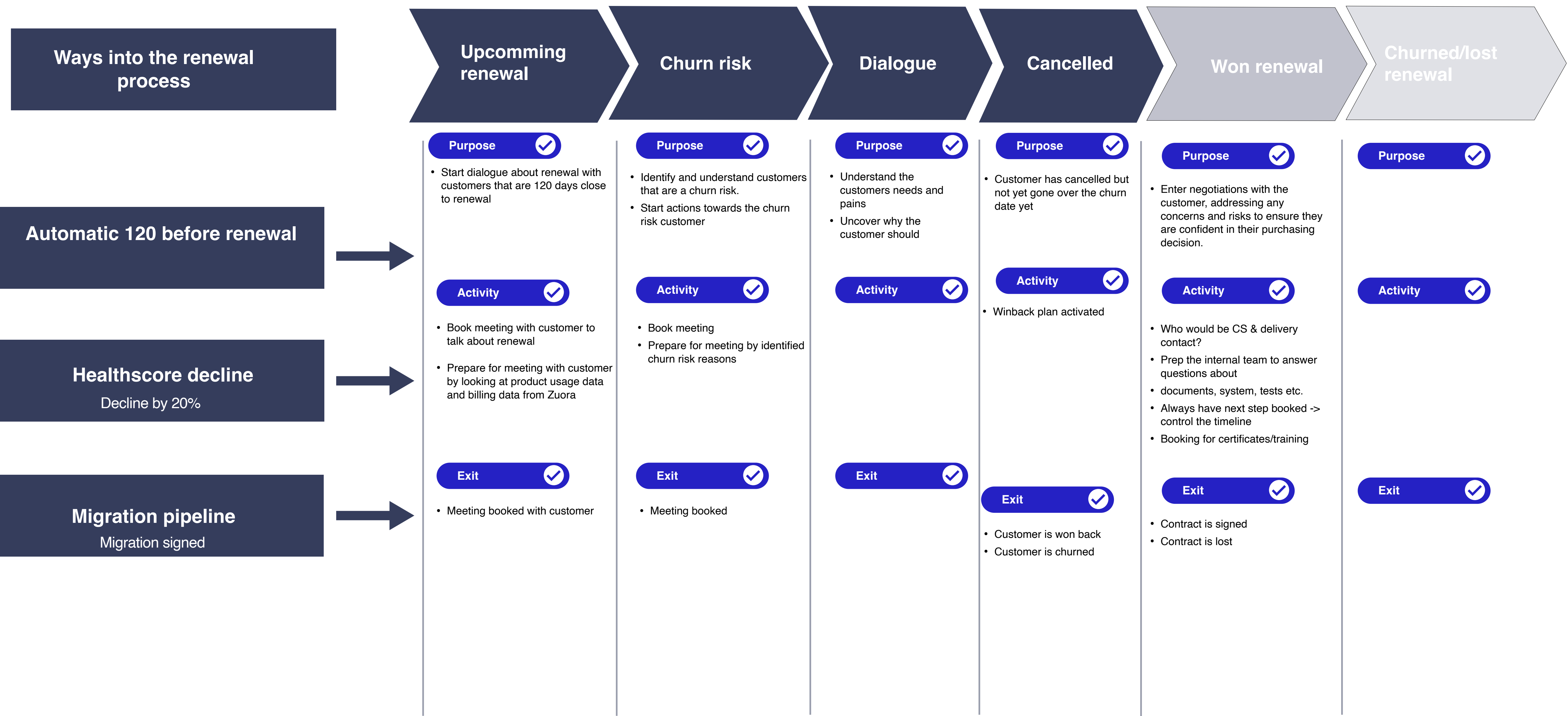
Steps in the Existing customer pipeline



Steps in the Onboarding



Steps in the Renewal process



2.0 Interim process until Zuora is ready

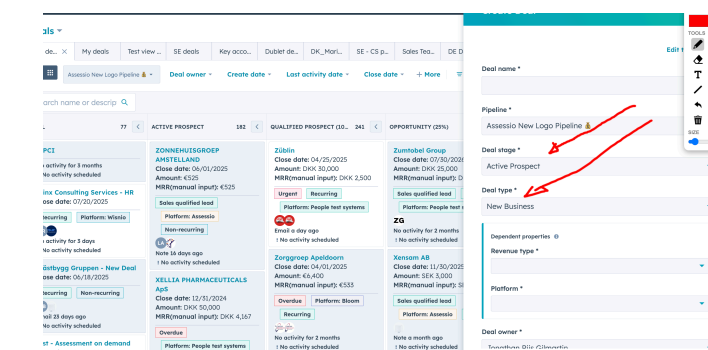
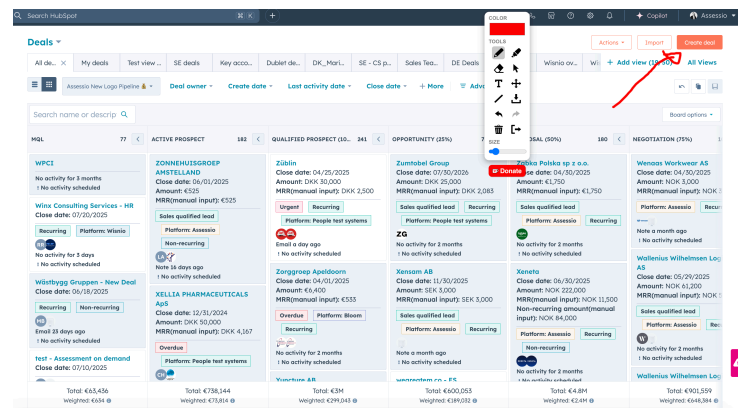
(updated 6 July 2025)

New customer



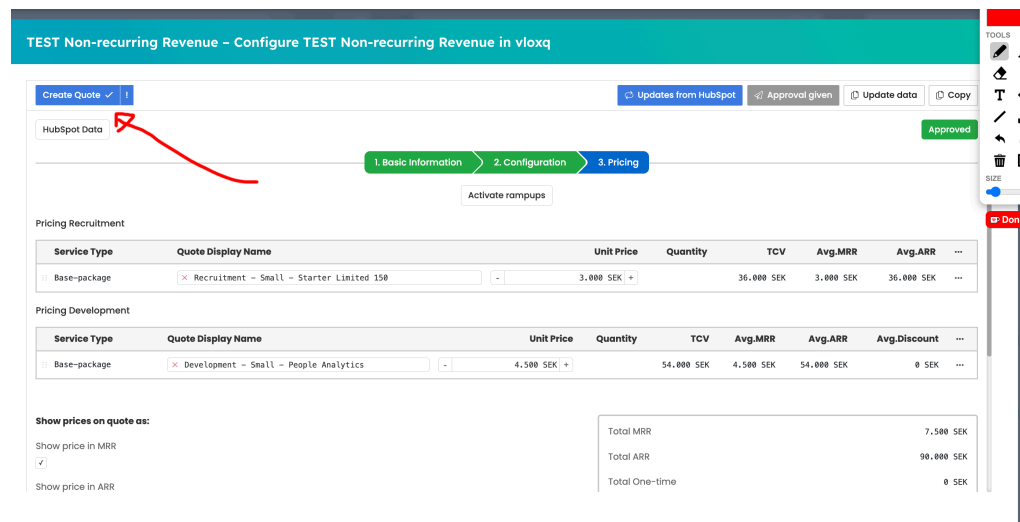
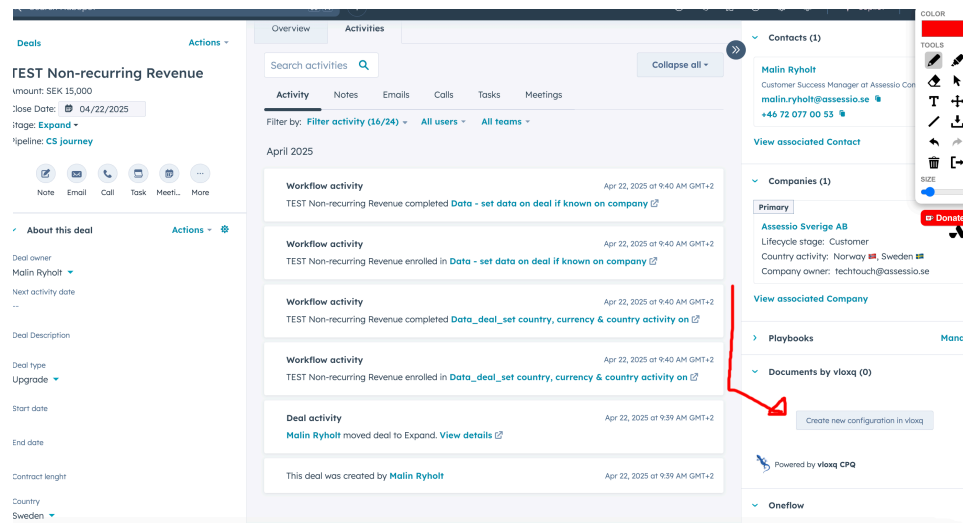
Activity

- Deal is created in HubSpot on customer



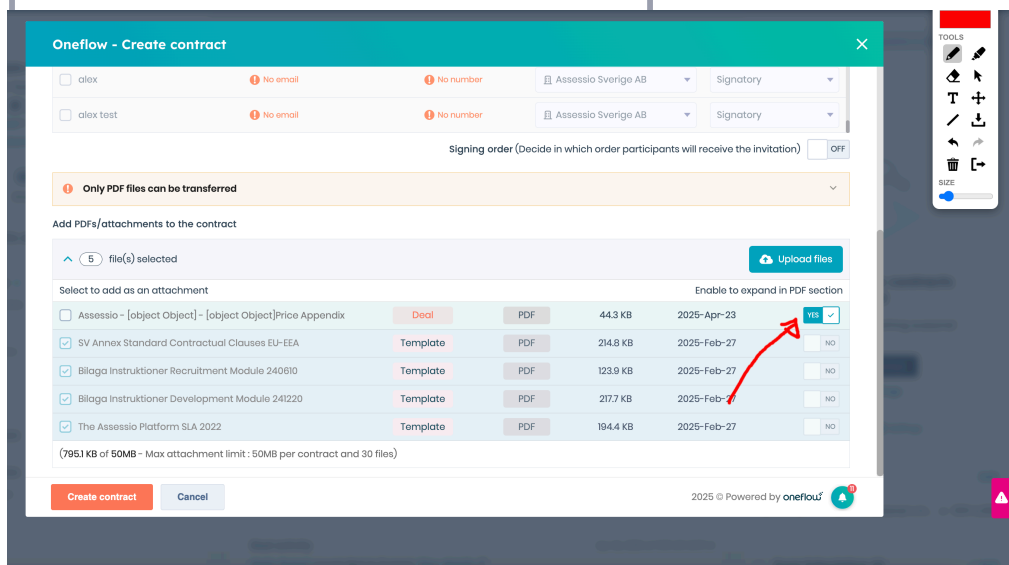
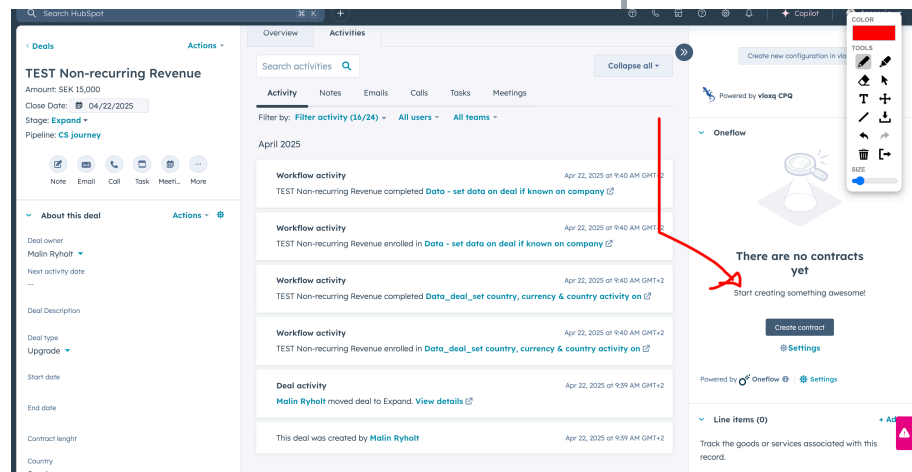
Activity

- When a customer is ready for a quote for Assessio services-> click Vloxq card on the right side of the deal
- Configure quote from the Vloxq card
- Click create in HubSpot and all data is transferred into HubSpot
- Send quotation to customer via email
- Only through Vloxq can line items be updated on the deal**



Activity

- When customer is ready to see pricing including E-sign, click Oneflow button on deal
- Choose workspace and template
- See template get populated from Vloxq PDF and line items

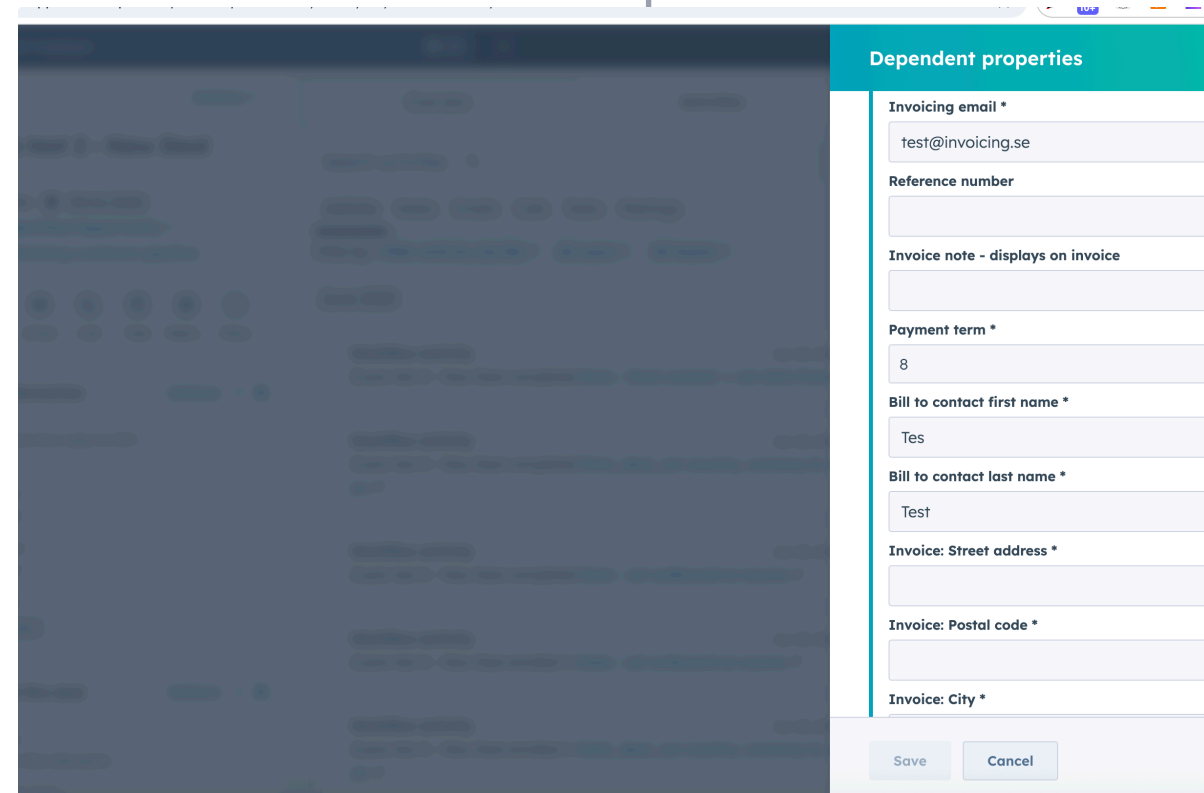


Activity

- When customer signs, deal is moved to "Verbal agreement"
- From here you can check that data looks correct on customer and move deal stage to won
- Note that as soon as customer is moved to won and all required info put on the deal, it will use that info to create subscription in Zuora**

Activity

- If customer is new, account, order and subscription is created in Zuora
- Prices, dates and other information is added on customer and billing will start
- Information inputted from Vloxq, HubSpot added here - text on invoice, PO number etc.



Activity

- Invoices sent from Visma, based on Zuora input

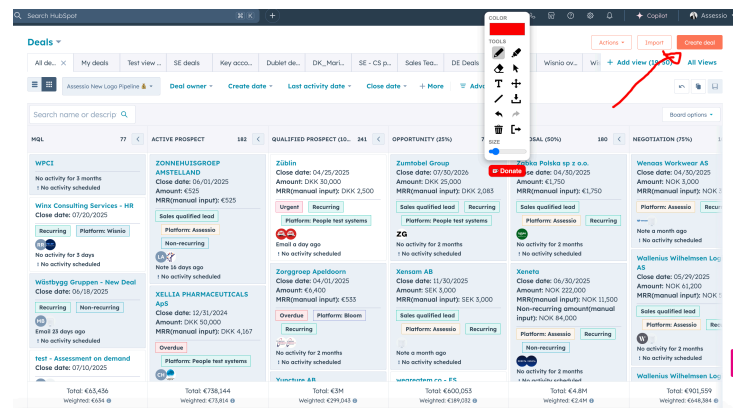
Non-recurring - new and existing customers



Activity



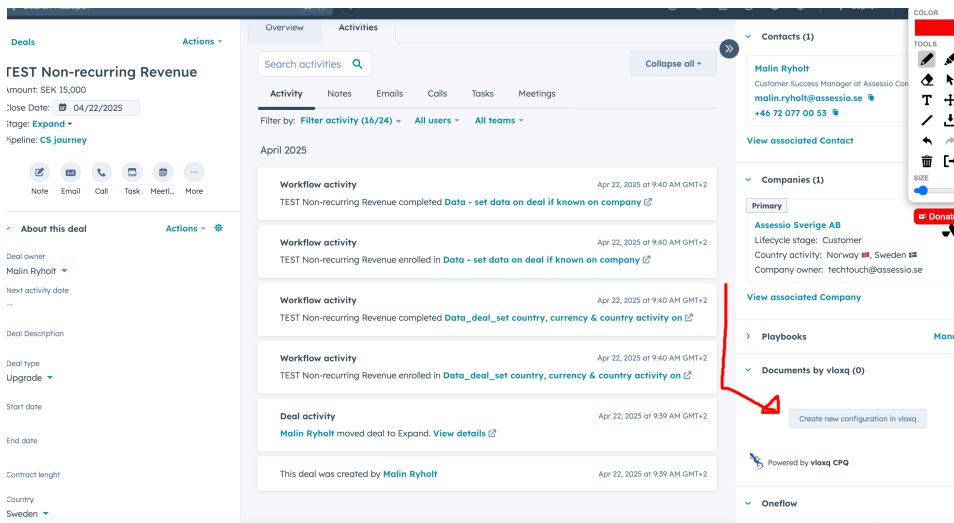
- Deal is created in HubSpot on customer
- Pick revenue type= non-recurring this affects the products you can see in Vloxq



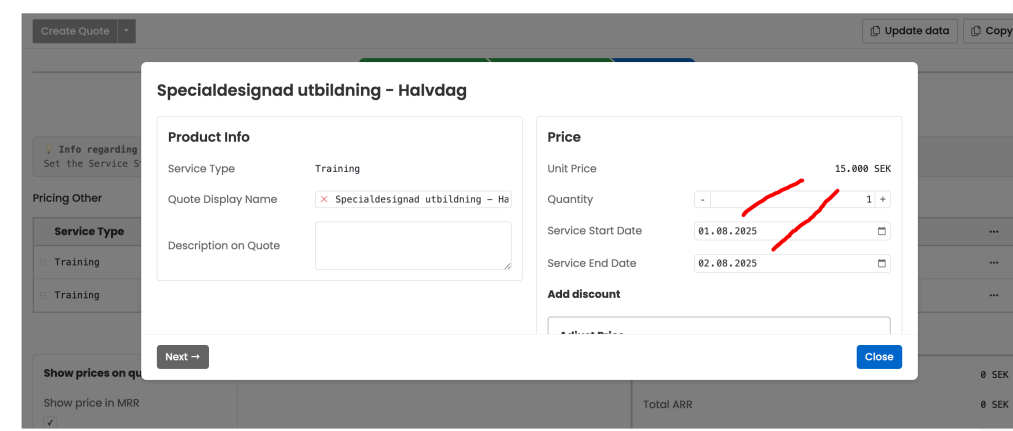
Activity



- When a customer is ready for a quote for Assessio services-> click Vloxq card on the right side of the deal
- Configure quote from the Vloxq card
- Note that you can set a bill target date, which is the date you want customer to receive invoice**
- Note you can set a start and end date of the service, training, certification**
- Click create in HubSpot and all data is transferred into HubSpot
- Send quotation to customer via email
- Only through Vloxq can line items be updated on the deal**



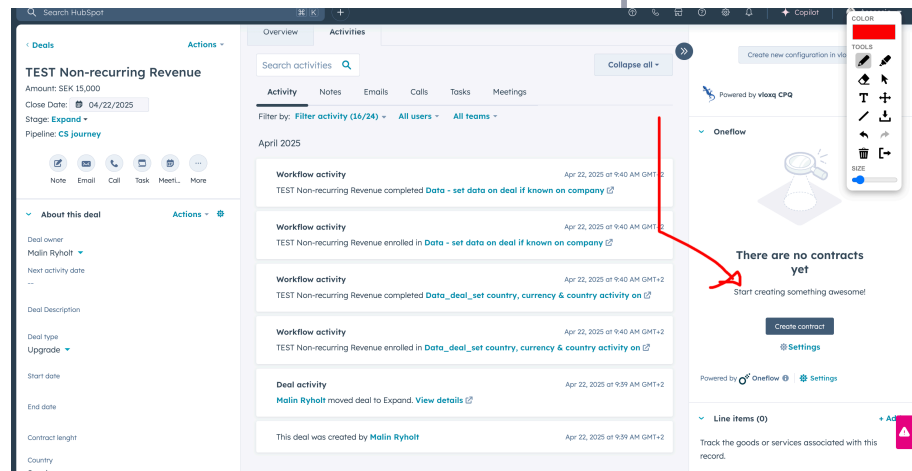
vloxq CPQ - Create new configuration in vloxq



Activity



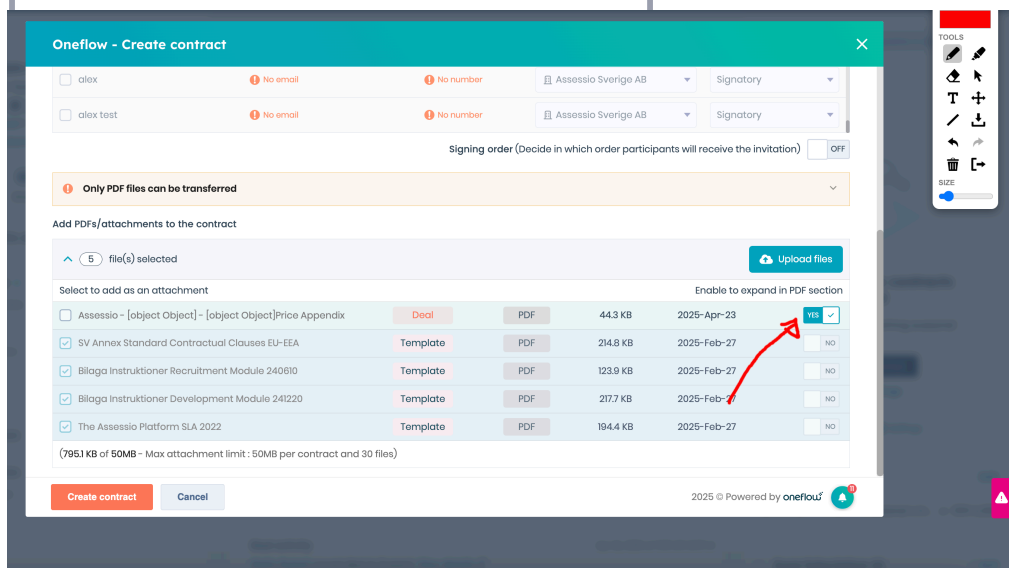
- When customer is ready to see pricing including E-sign, click Oneflow button on deal
- Choose workspace and template
- See template get populated from Vloxq PDF and line items



Activity



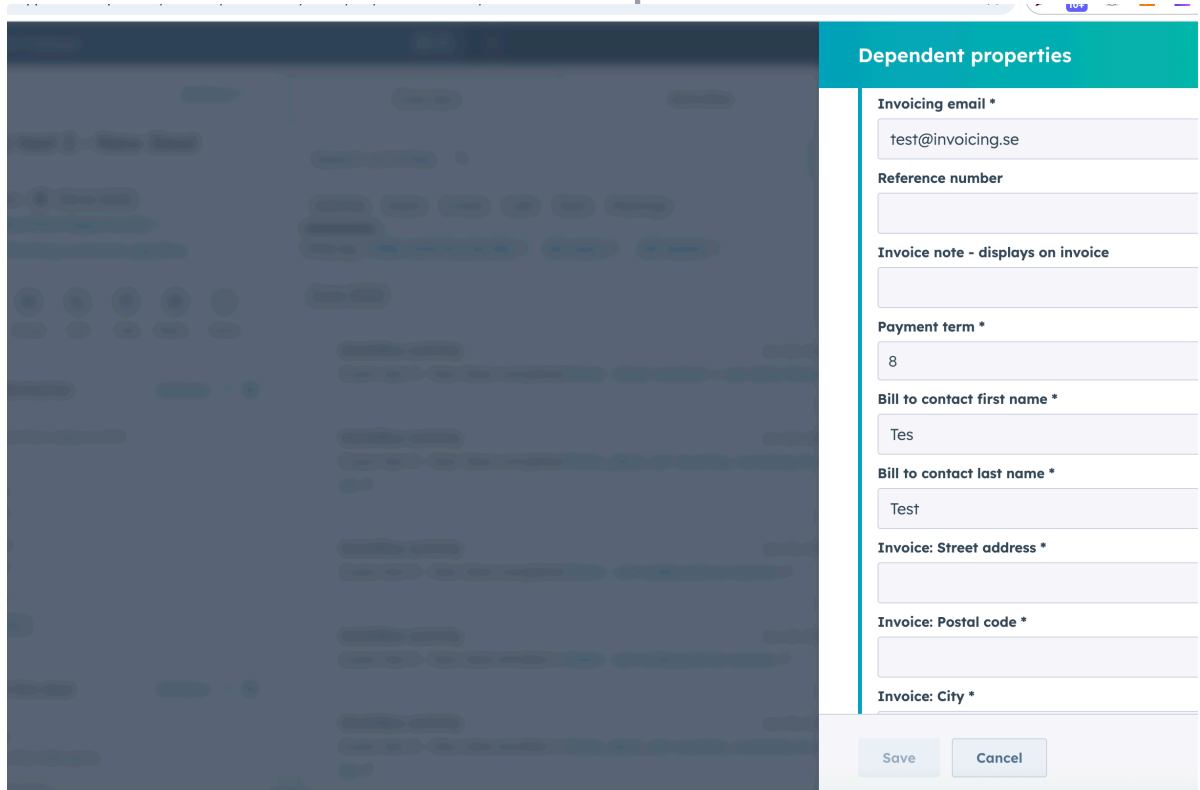
- When customer signs, deal is moved to "Verbal agreement"
- From here you can check that data looks correct on customer and move deal stage to won
- Note that as soon as customer is moved to won and all required info put on the deal, it will use that info to create subscription in Zuora**



Activity



- If customer is new, account, order and non-recurring charge is created in Zuora
- Prices, dates and other information is added on customer and billing will start
- Information inputted from Vloxq, HubSpot added here - text on invoice, PO number etc.



Activity



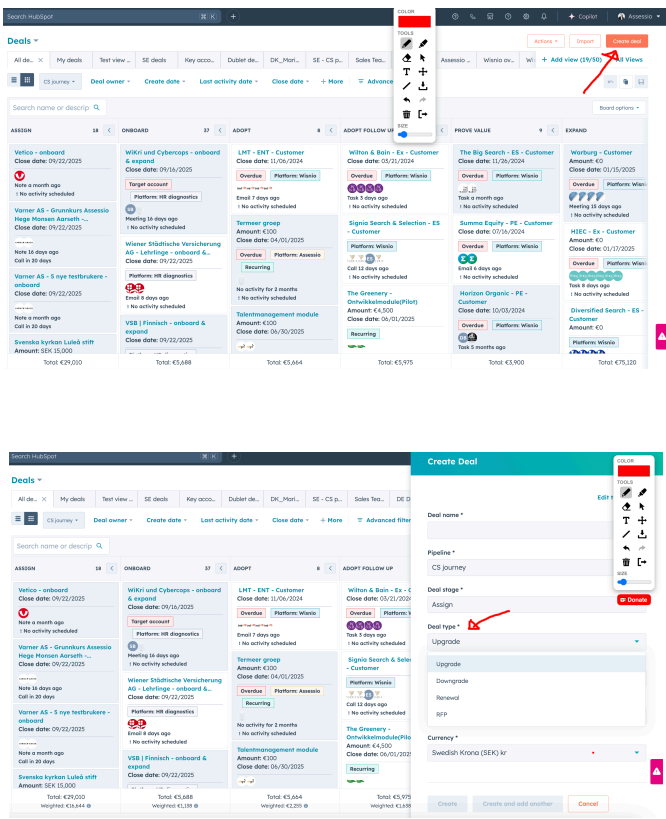
- Invoices sent from Visma, based on Zuora input

Upgrade & Downgrade/contraction



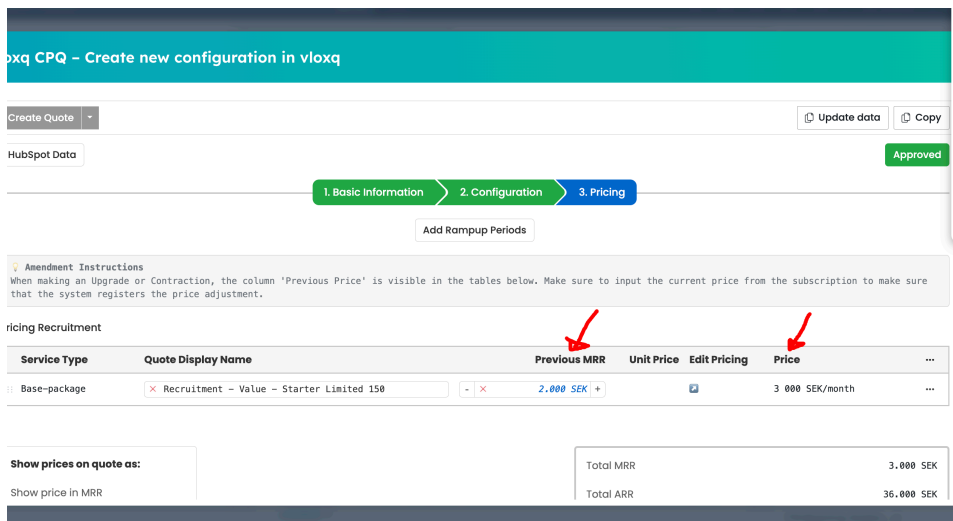
Activity

- Create deal in Existing customer pipeline and add upgrade/ downgrade as deal type



Activity

- When a customer is ready for a quote for Assessio services->click Vloxq card
- Add current product and add “Previous MRR” and also the new price. You can also add new products, but that will be counted as an upgrade.
- **Vloxq will calculate the delta based on your input on current price and new price**
- Click create in HubSpot and all data is transferred into HubSpot
- Send quotation to customer via email
- For Ramp ups only: if you are using ramps make sure to set price for each interval

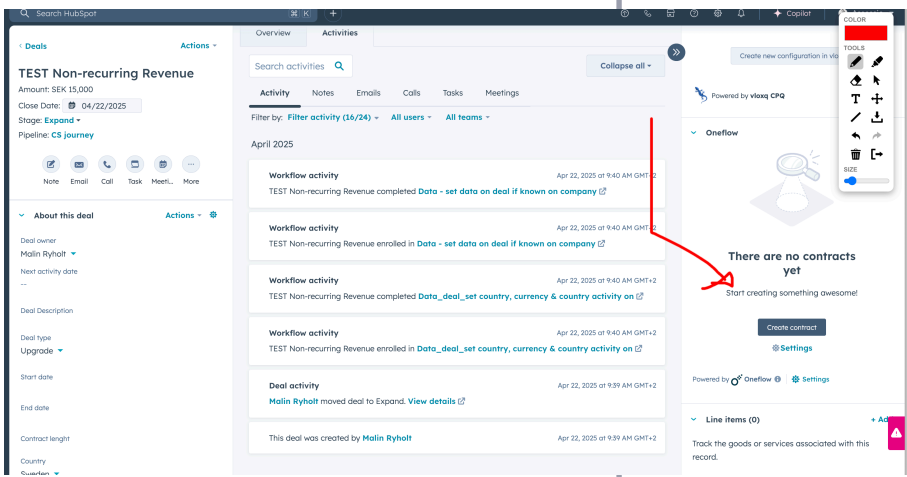


cruitment – Value – Starter Limited 150

Product Info		Price	
Service Type	Base-package	Previous MRR	De
Quote Display Name	Recruitment – Value – Starter L	2,000 SEK	1,000 €
Description on Quote	Refers to up to five (5) recruiters, ten (10) Recruitment Managers with a yearly assessment volume of 150.		
		Adjust Price	
		MRR Discount	Set MRR
		-50,00 %	3,000 SEK
		Total MRR	

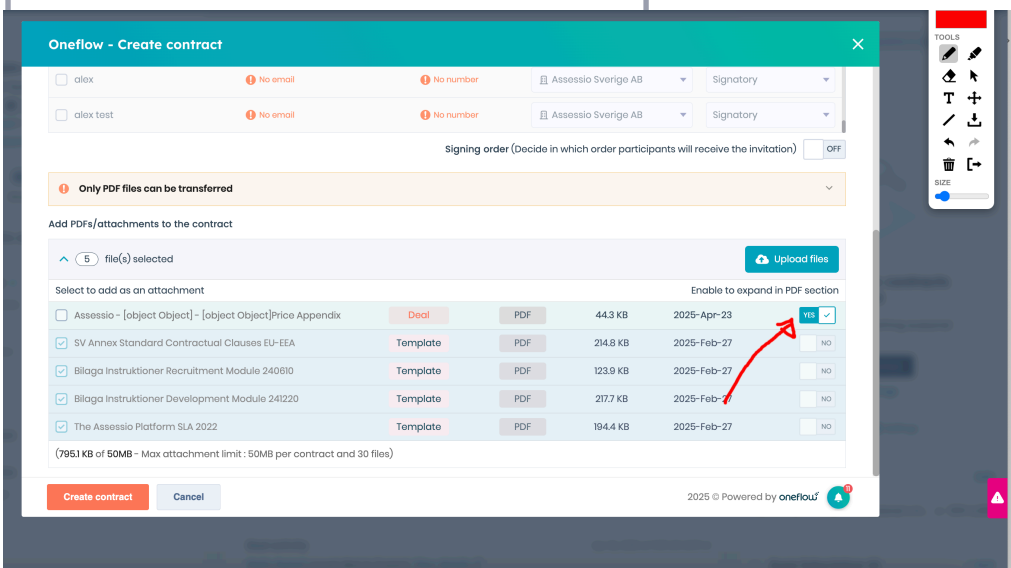
Activity

- When customer is ready to sign, click Oneflow button on deal
- Choose workspace and template
- See template get populated from Vloxq PDF and line items



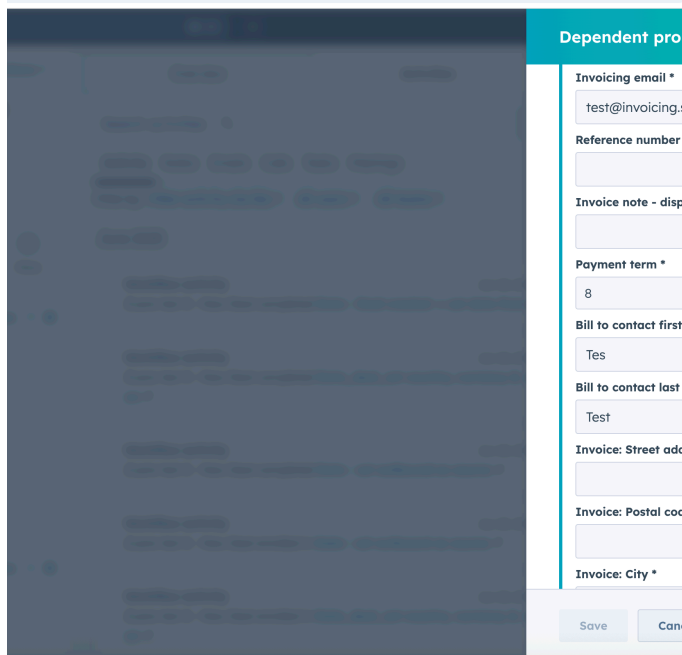
Activity

- When customer signs, deal is moved to “contract signed”
- From here you can check that data looks correct on customer and move deal stage to won



Activity

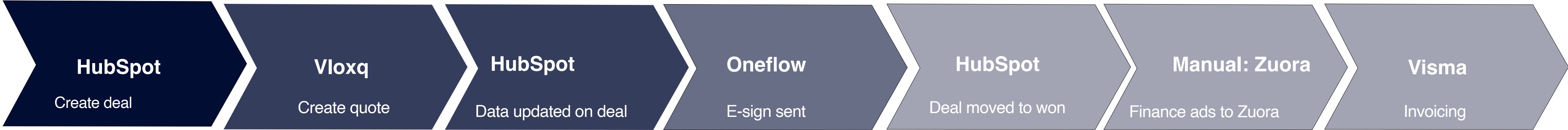
- Finance ads subscription or non-recurring manually
- Prices, dates and other information is added on customer and billing will start
- Information inputted from Vloxq, HubSpot added here - text on invoice, PO number etc.



Activity

- Invoices sent from Visma, based on Zuora input

Migration



Activity

- Create deal in Migration pipeline
- Add migration information

Activity

- When a customer is ready for a quote for Assessio services->click Vloxq card
- Configure quote from the Vloxq card by picking the new subscription customer is migrating to.
- Click create in HubSpot and all data is transferred into HubSpot
- Send quotation to customer via email

vloxq CPQ - Create new configuration in vloxq

Create Quote

HubSpot Data

1. Basic Information

2. Configuration

3. Pricing

Service Type

Quote Display Name

Recruitment - Value: 5 Extra recruiters

Recruitment - Value: Professional Limited 388

Total MRR 11.888 SEK

Total ARR 156.888 SEK

Activity

- When customer is ready to sign, click Oneflow button on deal
- Choose workspace and template
- See template get populated from Vloxq PDF and line items

Oneflow - Create contract

Assessio Sverige AB

Signature

Only PDF files can be transferred

Add PDFs/attachments to the contract

1 file(s) selected

Assessio - [object Object] - [object Object] Price Appendix

SV Annex Standard Contractual Clauses EU-EEA

Malaga Institutioner Recruitment Module 240880

Malaga Institutioner Development Module 241220

The Assessio Platform SLA 2022

Create contract

Activity

- When customer signs, deal is moved to deal stage "Signed"
- From here you can check that data looks correct on customer and move deal stage to won
- There is some specific fields for the migration, to make sure finance understands what do to with the subscriptions.

Deal Stage

Signed

Close Date * 09/22/2025

Segments * Value - 201 - 1000

Entity * Sweden

Platform * Assessio Platform

Module * Recruitment

Are all existing produ

Anything else we sho

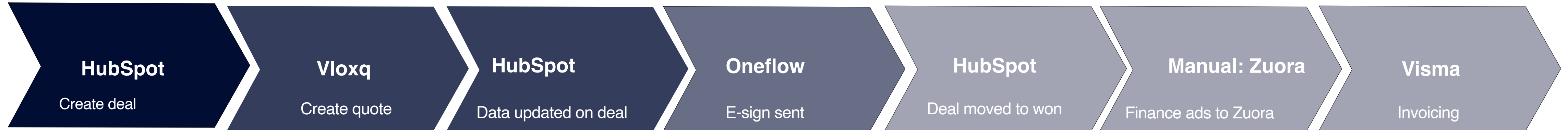
Activity

- Finance ads subscription or non-recurring manually
- Prices, dates and other information is added on customer and billing will start
- Information inputted from Vloxq, HubSpot added here - text on invoice, PO number etc.

Activity

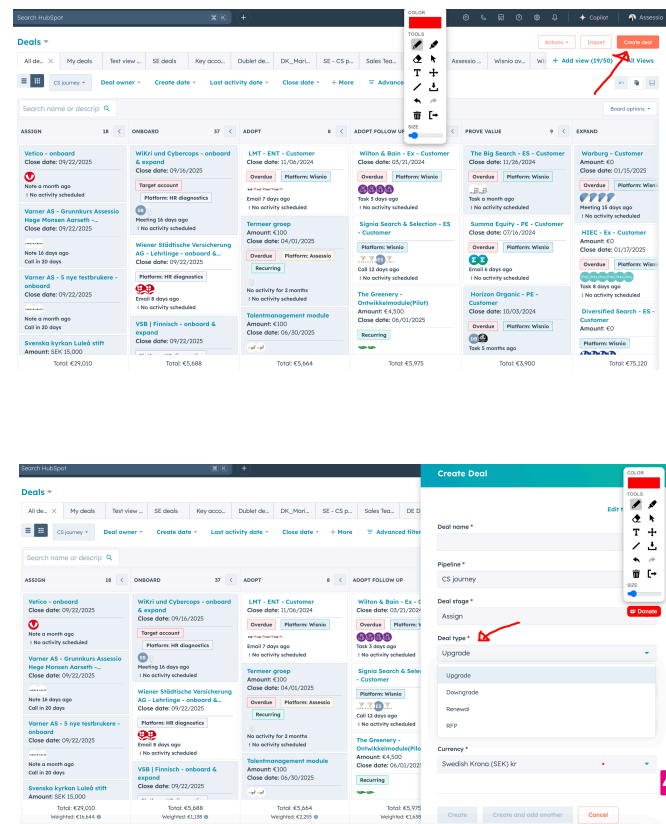
- Invoices sent from Visma, based on Zuora input

Conversion



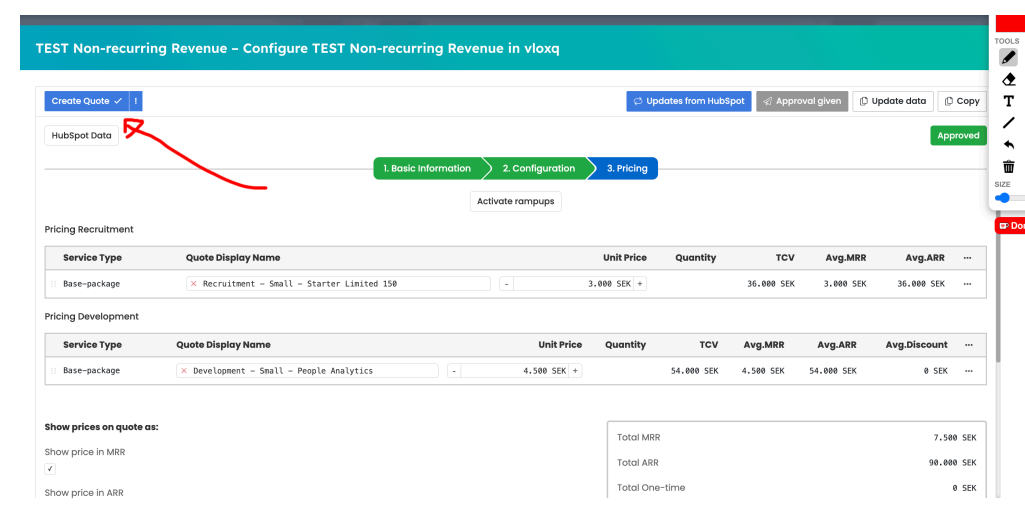
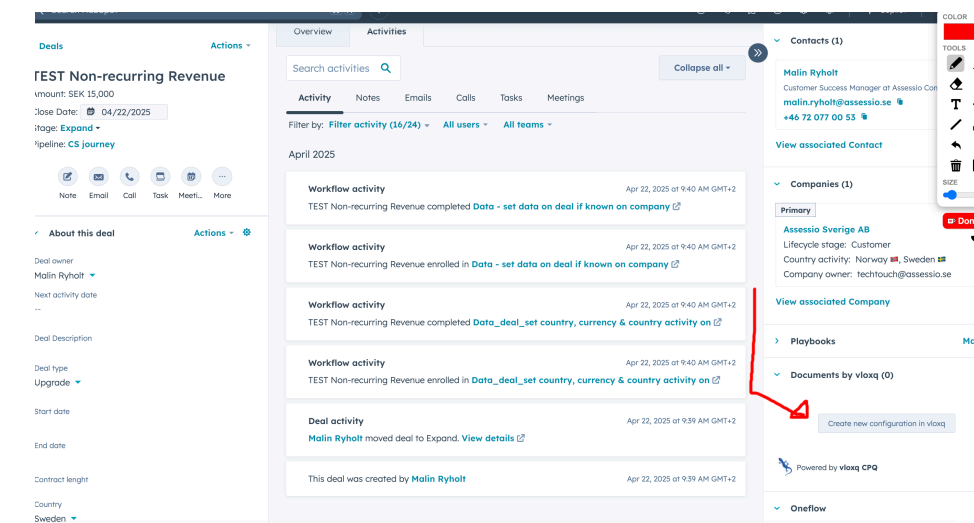
Activity

- Create deal in Existing customer pipeline and add downgrade as deal type
- Add the current downgrade amount into the MRR(manual input) field



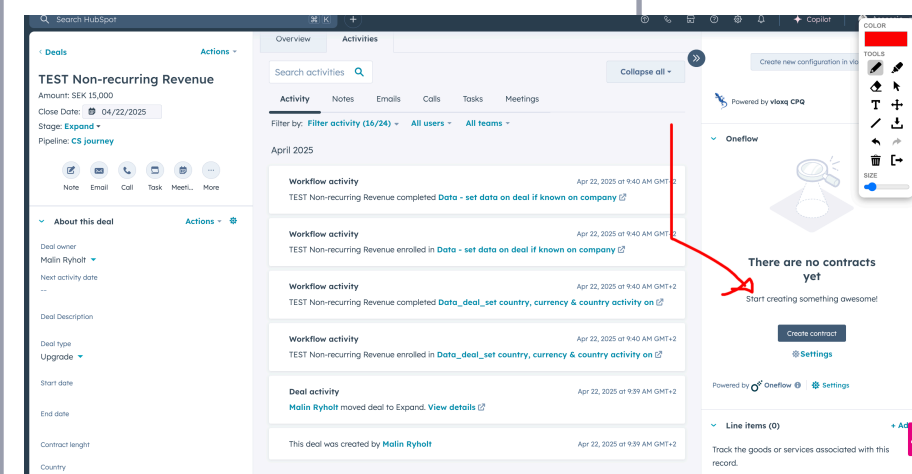
Activity

- When a customer is ready for a quote for Assessio services->click Vloqx card
- Configure quote from the Vloqx card by picking the add-on product or non-recurring product
- Click create in HubSpot and all data is transferred into HubSpot
- Send quotation to customer via email
- Vloqx will calculate the delta based on your input



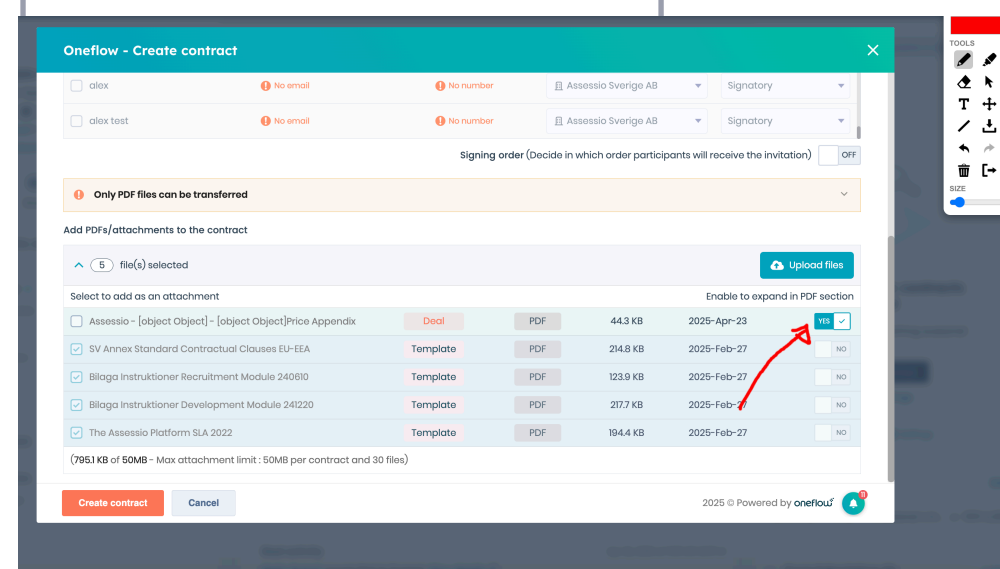
Activity

- When customer is ready to sign, click Oneflow button on deal
- Choose workspace and template
- See template get populated from Vloxx PDF and line items



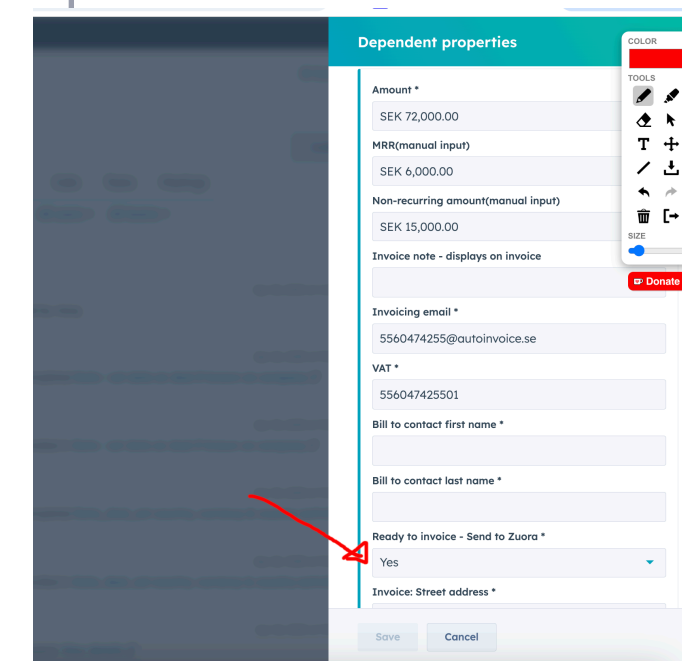
Activity

- When customer signs, deal is moved to “contract signed”
- From here you can check that data looks correct on customer and move deal stage to won



Activity

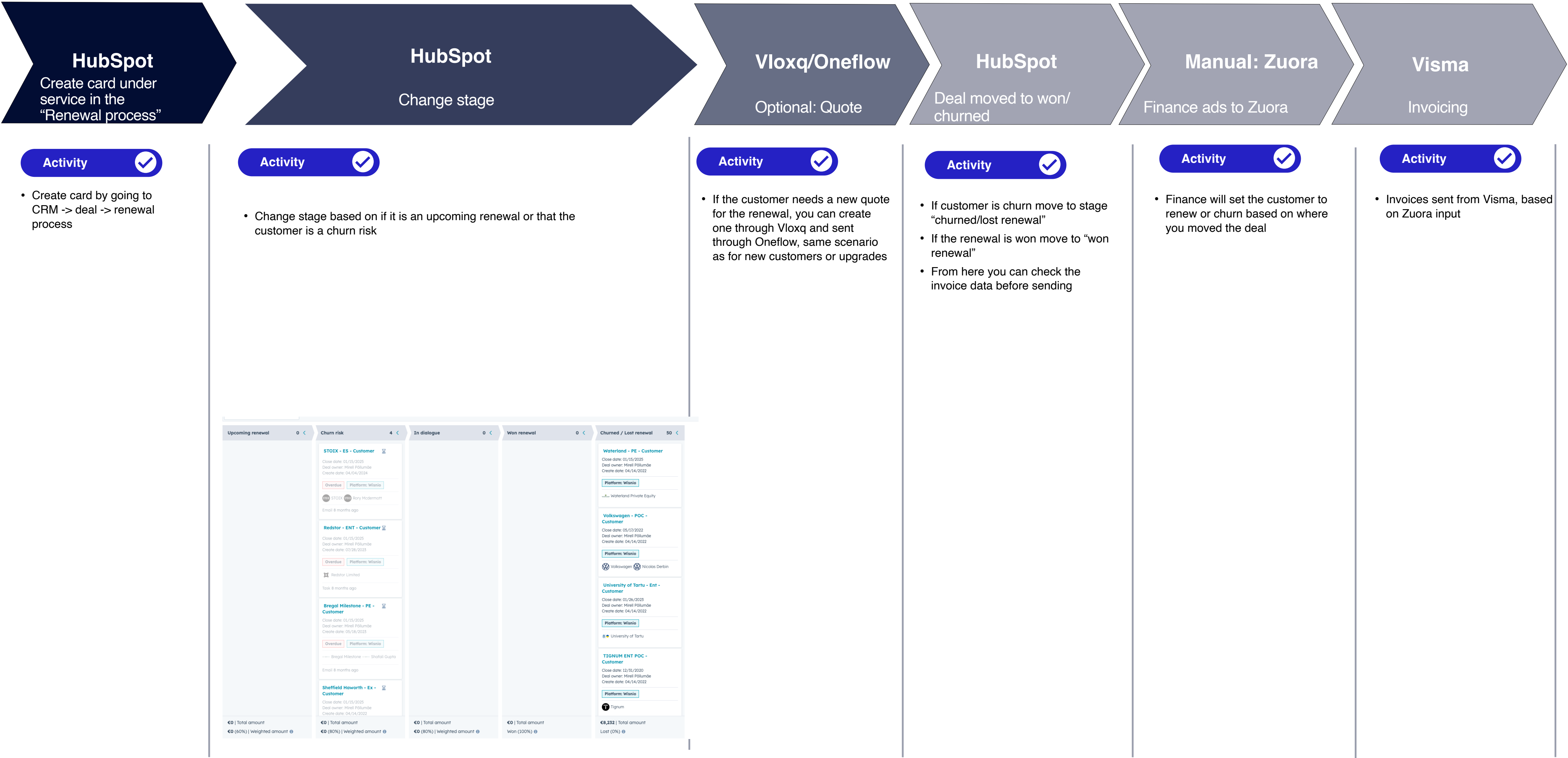
- Finance ads subscription or non-recurring manually
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- Information inputted from Vloxxq, HubSpot added here - text on invoice, PO number etc.



Activity

- Invoices sent from Visma, based on Zuora input

Renewal/Churn



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