

Assessio Sales & marketing key document

Assessio Jun 2024



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

LEAD

Score: + 15-30

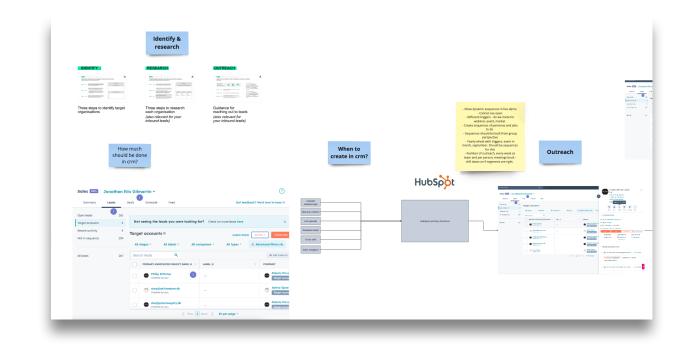
MARKETING QUALIFIED LEAD

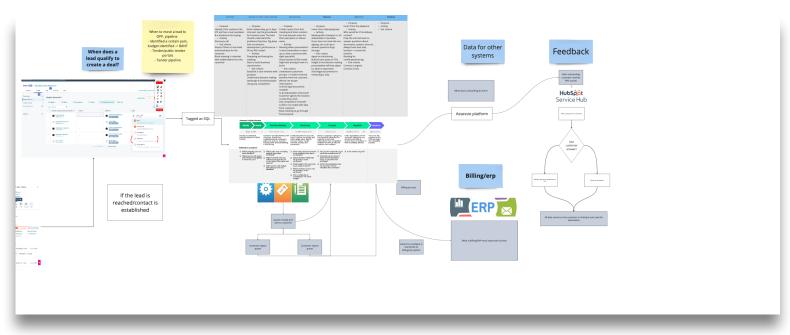
Score: + 31-50

SALES QUALIFIED LEAD

Score: +51

Sunrise X Assessio workshop







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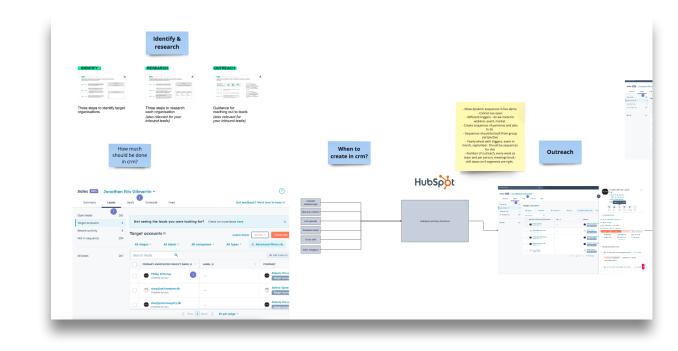
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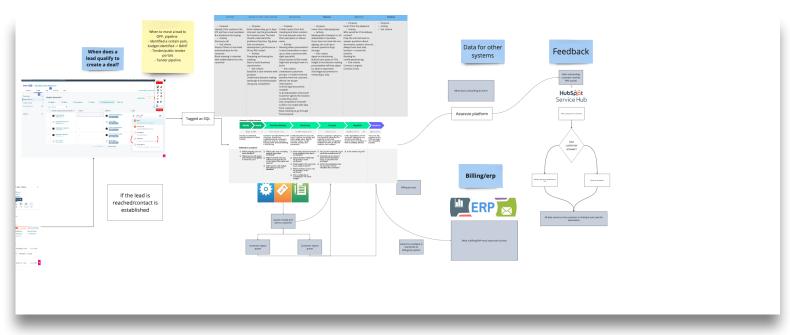
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Sunrise X Assessio workshop





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

Lead

Score: + 15-30

All marketing leads not yet sent to sales, defined with a score under 50 and also not shown clear intend. Intend is defined as having done several actions in a row, for an example.

- 1. Downloads material
- 2. Views certain website pages
- 3. Looking at pricing pages or product pages

MQL (Marketing Qualified Lead)

Score: + 31-50

Leads with a high score who have demonstrated clear intent are passed to sales for qualification.

Intent can be shown directly (e.g., through form submissions) or indirectly (e.g., engaging in several related actions, such as downloading materials and exploring pricing pages).

SQL (Sales Qualified Lead)

Score: +51

Leads that have been qualified by the sales team through a discovery call or meeting. To be considered an SQL, the lead must:

- Fit the Ideal Customer Profile (ICP)
- 2. Have a genuine pain point or need
- 3. Be able to make a purchase within a defined timeframe



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

MQL (Marketing Qualified Lead) Lead Score: + 31-50 All marketing leads not yet sent Leads with a high score who Leads that have been qualified have demonstrated clear intent to sales, defined with a score by the sales team through a discovery call or meeting. To be under 50 and also not shown are passed to sales for considered an SQL, the lead clear intend. Intend is defined qualification. as having done several actions must: in a row, for an example. Intent can be shown directly (e.g., through form submissions) 1. Downloads material or indirectly (e.g., engaging in 1. Fit the Ideal Customer Profile several related actions, such as (ICP) 2. Views certain website pages downloading materials and 2. Have a genuine pain point or 3. Looking at pricing pages or exploring pricing pages). need product pages 3. Be able to make a purchase within a defined timeframe



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

Lead

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Clear Definitions of MQL, SQL, and the Sales Process



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SQL (Sales Qualified Lead)

Score: +51

Leads that have been qualified by the sales team through a discovery call or meeting. To be considered an SQL, the lead must:

- Fit the Ideal Customer Profile (ICP) if the customer does not fit, assess with nearest head of
- 2. Have a genuine pain point or need
- 3. Be able to make a purchase within a defined timeframe



Assessio Leadscore

Assessio Dec 2024

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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/
<a href="https://docs.google.com/spreadshe



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 prerecorded 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.

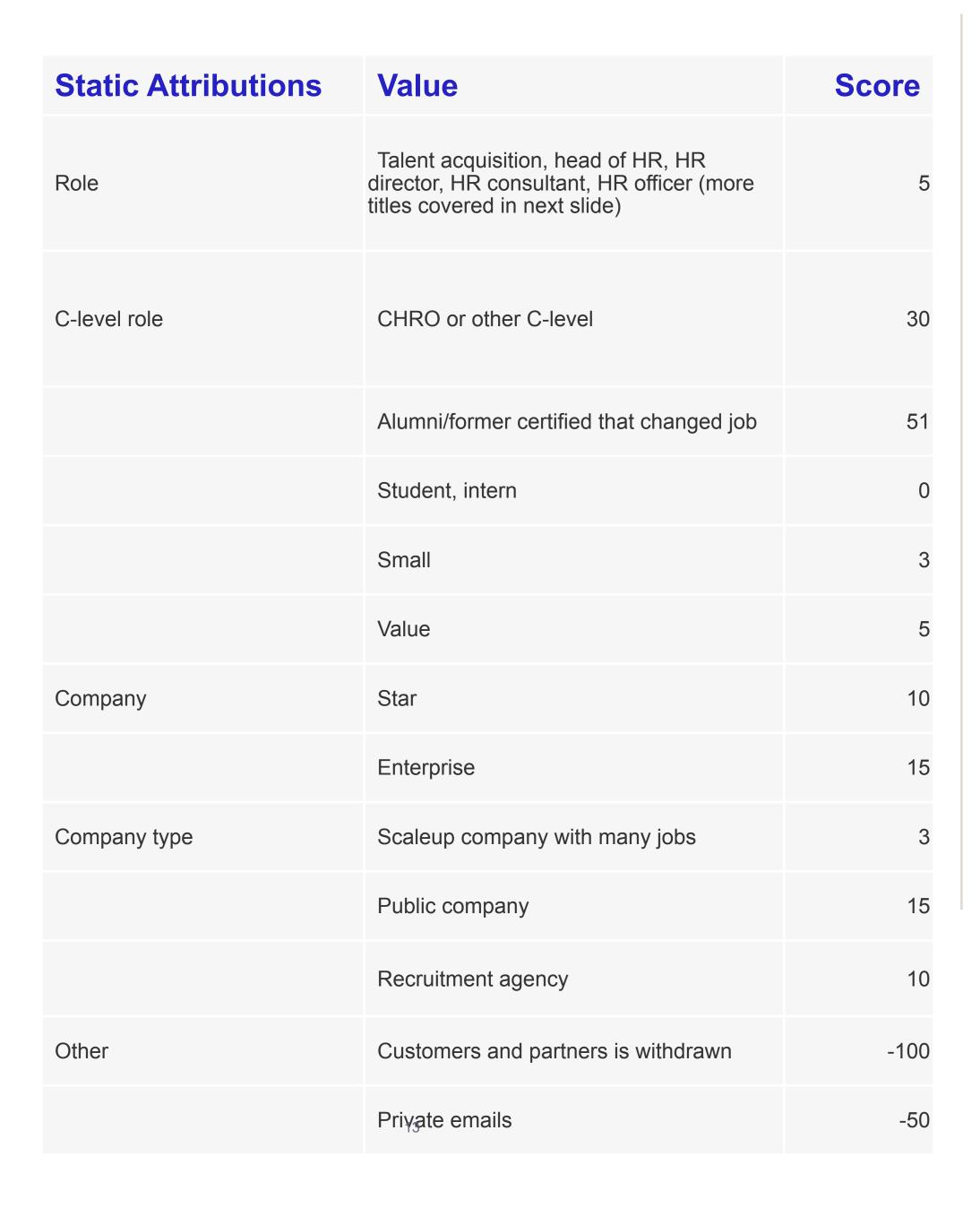
surise

See intend actions

12

	A	В	C	D
	Country	Page description	URL	
	International	Om platformen	https://assessio.com/	
	International	Personlighedstest (MAP)	https://assessio.com/personality/	
	International	Evnetest (Matrigma)	https://assessio.com/aptitude/	
	International	Screening (MAP Essence)	https://assessio.com/screening/	
	International	Risikoadfærd (MAP-X)	https://assessio.com/risk-behaviors/	
	International	Værdier og kultur (MATCH-V)	https://assessio.com/values-culture/	
	International	Pris	https://assessio.com/price/	
	International	Book en demo	https://assessio.com/book-a-demo/	
)	Danmark	Om platformen	https://assessio.com/dk/	
1	Danmark	Personlighedstest (MAP)	https://assessio.com/dk/personlighed/	
2	Danmark	Evnetest (Matrigma)	https://assessio.com/dk/logik/	
3	Danmark	Screening (MAP Essence)	https://assessio.com/dk/screening/	
4	Danmark	Risikoadfærd (MAP-X)	https://assessio.com/dk/risikoadfaerd/	
5	Danmark	Værdier og kultur (MATCH-V)	https://assessio.com/dk/vaerdier-og-kultur/	
6	Danmark	Pris	https://assessio.com/dk/pris/	
7	Danmark	Book en demo	https://assessio.com/dk/book-en-demo/	
В	Sverige	Om plattformen	https://assessio.com/se/	
9	Sverige	Personlighetstest (MAP)	https://assessio.com/se/personlighet/	
0	Sverige	Problemlösning (Matrigma)	https://assessio.com/se/problemlosning/	
1	Sverige	Screening (MAP Essence)	https://assessio.com/se/screening/	
2	Sverige	Riskbeteenden (MAP-X)	https://assessio.com/se/riskbeteenden/	
3	Sverige	Kultur & värderingar (MATCH-V)	https://assessio.com/se/kultur-varderingar/	
4	_	Pris		
5	Sverige		https://assessio.com/se/pris/	
	Sverige	Boka demo	https://assessio.com/se/boka-demo/	
6	Norge	Om plattformen	https://assessio.com/no/	
7	Norge	Personlighetstest (MAP)	https://assessio.com/no/personlighet/	
8	Norge	Evnetest (Matrigma)	https://assessio.com/no/evne/	
9	Norge	Screening (MAP Essence)	https://assessio.com/no/screening/	
0	Norge	Risikoadferd (MAP-X)	https://assessio.com/no/risikoadferd/	
1	Norge	Kultur og motivasjon (MATCH-V)	https://assessio.com/no/kultur-motivasjon/	
2	Norge	Pris	https://assessio.com/no/pris/	
3	Norge	Book en demo	https://assessio.com/no/book-en-demo/	
4	Nederland	Over het platform	https://assessio.com/nl/	
5	Nederland	Persoonlijkheidstest (MAP)	https://assessio.com/nl/persoonlijkheid/	
6	Nederland	Capaciteitentest (Matrigma)	https://assessio.com/nl/capaciteiten/	
7	Nederland	Screening (MAP Essence)	https://assessio.com/nl/screening/	
8	Nederland	Risicogedrag (MAP-X)	https://assessio.com/nl/risicogedrag/	
9	Nederland	Drijfveren (MATCH-V)	https://assessio.com/nl/drijfveren/	
0	Nederland	Prijs	https://assessio.com/nl/prijs/	
1	Nederland	Boek een demo	https://assessio.com/nl/boek-een-demo/	
2	Danmark	Certificeringskalender	https://peopletestsystems.com/certificeringskalender/	
3				
4				
5				
6				
7				

https://docs.google.com/spreadsheets/d/1MhJCr5WArODKMNpNcJGWHqJCq9QVNQrzfIMq8DDvdPQ/edit?usp=sharing





Dynamic Attributions	Score
Coop any page expect condidate and platform page	10
Seen any page expect candidate and platform page Seen the certificate calendar	10 15
	10
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

surise

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



Pipelines in the sales process

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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

Identify Qualify First sales meeting Solutioning Proposal Napolate

Purpose

Propose

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

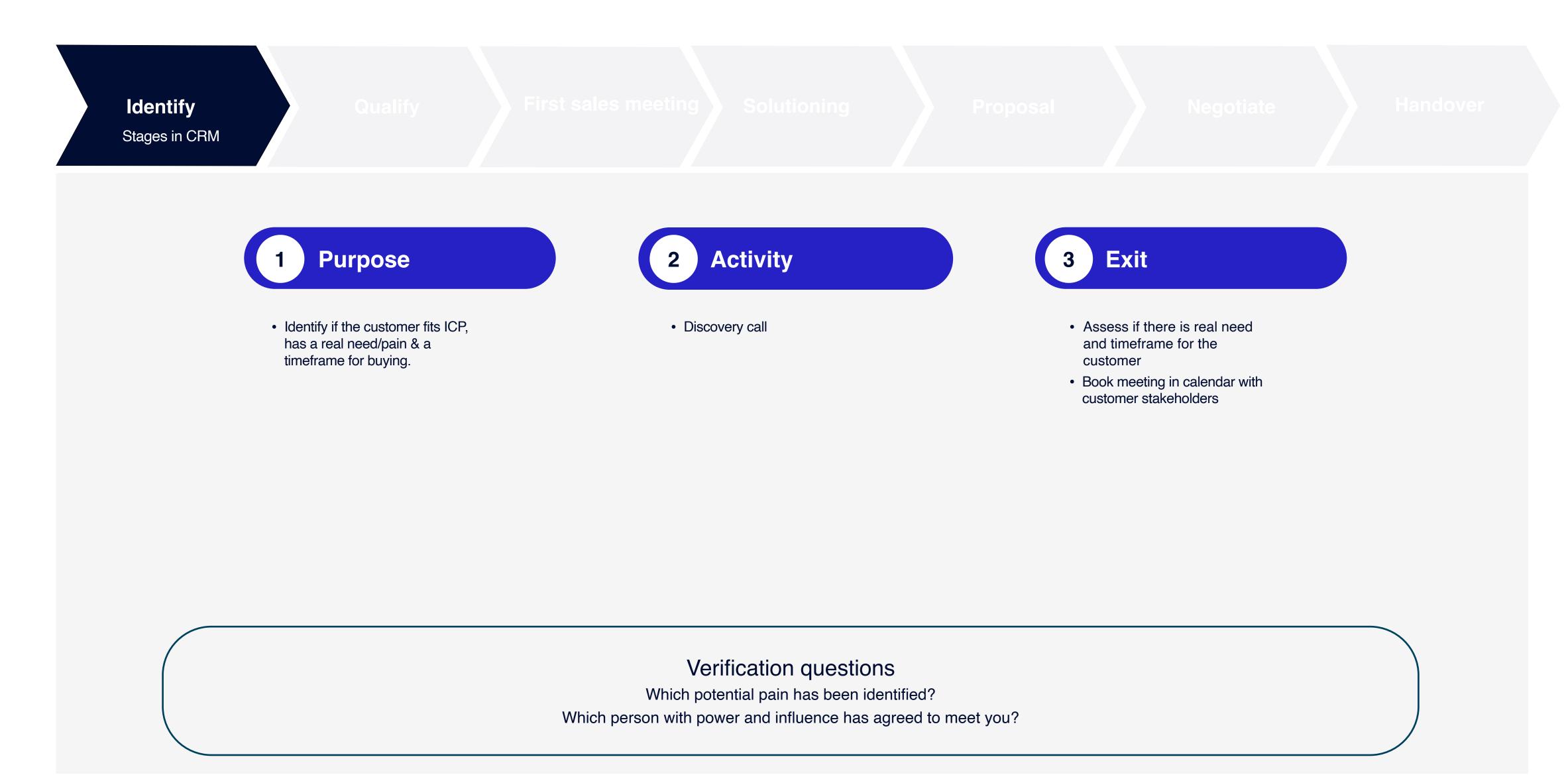
Activity

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"



Pipeline definitions

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

Identify
Stages in CRM

Qualify
First sales meeting
Qualified prospects(10 %)

Solutioning
Proposal
Negotiate
Handover
Qualified prospects(10 %)



- Build relationship, go in dept into pain, lay the groundwork for business case.
- The lead should understand the problems they fase. Dig deep into recruitment, development, performance
- Fill out ROI model

2 Activity

- Book and have discovery call 15-30 min
- Book first sales meeting if customer has clear pain & value drivers
- Preparing and having the meeting
- Start to build business case/ solution

3 Exit

- Establish a clear timeline with prospect
- Understand decision making landscape & involved people using any competitors

Verification questions

Which pains and underlying reasons have been confirmed?
Which numbers have you collected that quantify the current state of the pains and reasons?
Which person with authority have you identified?

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

Identify Stages in CRM

Oualify Active Prospect (10 %)

Active Prospect (10 %)

Proposal

Negotiate

Handover

Opportunity (25 %)

Proposal

Negotiate

Handover

Active Prospect (10 %)

Active Prospect (10 %)

Activity

Activity

3 Exit

 Confirm pains from first meeting and share solution for how Assessio solve customer pain or deliver value.

- Coordinate meetings with tailored presentations, ensuring appropriate specialists involved to address customer needs and provide expert guidance
- Show solution & ROI model
- High level pricing & how it is build

- Understand customers process Confirm internal timeline from the customer. Where can we get information?
- Is there legal documents needed?
- Is all stakeholders informed?
- Customer agrees the solution is what they need
- Any competitors involved?
- Confirm roi model with data from customer
- Book meeting to go through final proposal

Verification questions

What economic value and decision criteria has the buyer confirmed?

What budget is the economic buyer ready to spend?

Which decision process has the economic buyer confirmed?

Who or what else is competing for the same budget?

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

Identify
Stages in CRM

Qualify
Active Prospect (10 %)

First sales meeting
Solutioning
Proposal
Proposal
Proposal Prospect (50 %)

Proposal Prospect (50 %)

1 Purpose

 Deliver a proposal, highlighting how Assessio adresses the customers pains and differentiates from the competition. Address the conversation to help the customer feel confident

- 2 Activity
 - Meeting with champion or all stakeholders if possible
 - If you have not meet the one signing, set a call up to answer questions & go through

3 Exit

- Agree on solutioning
- Build & sent quote in CPQ
- Insight in the decision making process(what will they object to, what is important)
- Send legal documents for review (Dpa, SLA)

Verification questions

Who has the economic buyer confirmed a preference to?
What plan do you have in place with the economic buyer to complete their purchase
Which documentation does the customer need to complete complete the purchase

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

Negotiate Negotiation (75-90 %) Activity **Exit Purpose** • Enter negotiations with the • Who would be CS & delivery contact? Contract is signed customer, addressing any Contract is lost • Prep the internal team to answer questions concerns and risks to ensure about they are confident in their • Documents, system, tests etc. purchasing decisions. Always have next step booked -> control the timeline Verification questions Is the contract signed?

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

Identify
Stages in CRM

Outlify
Active Prospect (10 %)

Active Prospect (10 %)

Active Prospect (10 %)

Outlified Prospect (25 %)

Proposal Prospect (50 %)

Negotiate
Negotiate
Negotiate
Negotiate
(100%)

Signed (100%)

1 Purpose

• Who would be CS & delivery contact?
• Prep the internal team to answer questions about

• Documents, system, tests etc.

the timeline

Always have next step booked -> control

In summary, the pipeline process can be outlined as follows

First sales meeting **Identify** Qualify Solutioning Negotiate **Proposal** Handover Proposal Prospect (50 %) Negotiation (75-90 $\overline{\%}$) Active Prospect (0 %) Qualified prospects (10%) Opportunity (25 %) Lead created Purpose **Purpose Purpose** Purpose Purpose Purpose · Hand over the customer to the Identify if the customer fits Confirm pains from first meeting Deliver a proposal, highlighting Enter negotiations with the • Build relationship, go in dept into pain, lay the groundwork for CSM and begin the onboarding ICP, has a real need/pain & and share solution for how how Assessio addresses the customer, addressing any process customer's pains and concerns and risks to ensure they a timeframe for buying. Assessio solve customer pain or • The lead should understand the problems they fase. Dig deep into differentiates from competition. deliver value. are confident in their purchasing recruitment, development, performance & fill out ROI model Address concerns to help the decision. customer feel confident. **Activity Activity** Activity Activity **Activity** Activity Book discovery call & qualify prospect Who would be CS & delivery Who would be CS & delivery Coordinate meetings with tailored Meeting with champion or all To identify and get in • Book first sales meeting, if prospect has clear pain & value drivers stakeholders if possible contact? presentations, ensuring contact? contact with potential leads can be identified appropriate specialists involved to If you have not meet the one Prep the internal team to answer Prep the internal team to answer Preparing and having the meeting address customer needs and signing, set a call up to answer questions about questions about Start to build business case/solution provide expert guidance questions & go through documents, system, tests etc. · Documents, system, tests etc. Reponsible: BDR Show solution & ROI model Always have next step booked -> Always have next step booked -> High level pricing & how it is build control the timeline control the timeline Responsible: AE Booking for certificates/training $\langle \vee \rangle$ Exit Exit Exit Exit Exit Exit Establish a clear timeline with prospect Understand customers process & Agree on solutioning Contract is signed Contract is signed Assess if there is real need Confirm internal timeline from the • Understand decision making landscape & involved people Build & sent quote in CPQ Contract is lost and timeframe for the Contract is lost customer. Where can we get customer Using any competitors Insight in the decision making information? process(what will they object to, Book meeting in calendar • Is there legal documents needed? what is important) with customer stakeholders • Is all stakeholders informed? • Send legal documents for review • Customer agrees the solution is (Dpa, SLA) what they need Any competitors involved?

Confirm roi model with data from

Book meeting to go through final

customer

proposal

Process

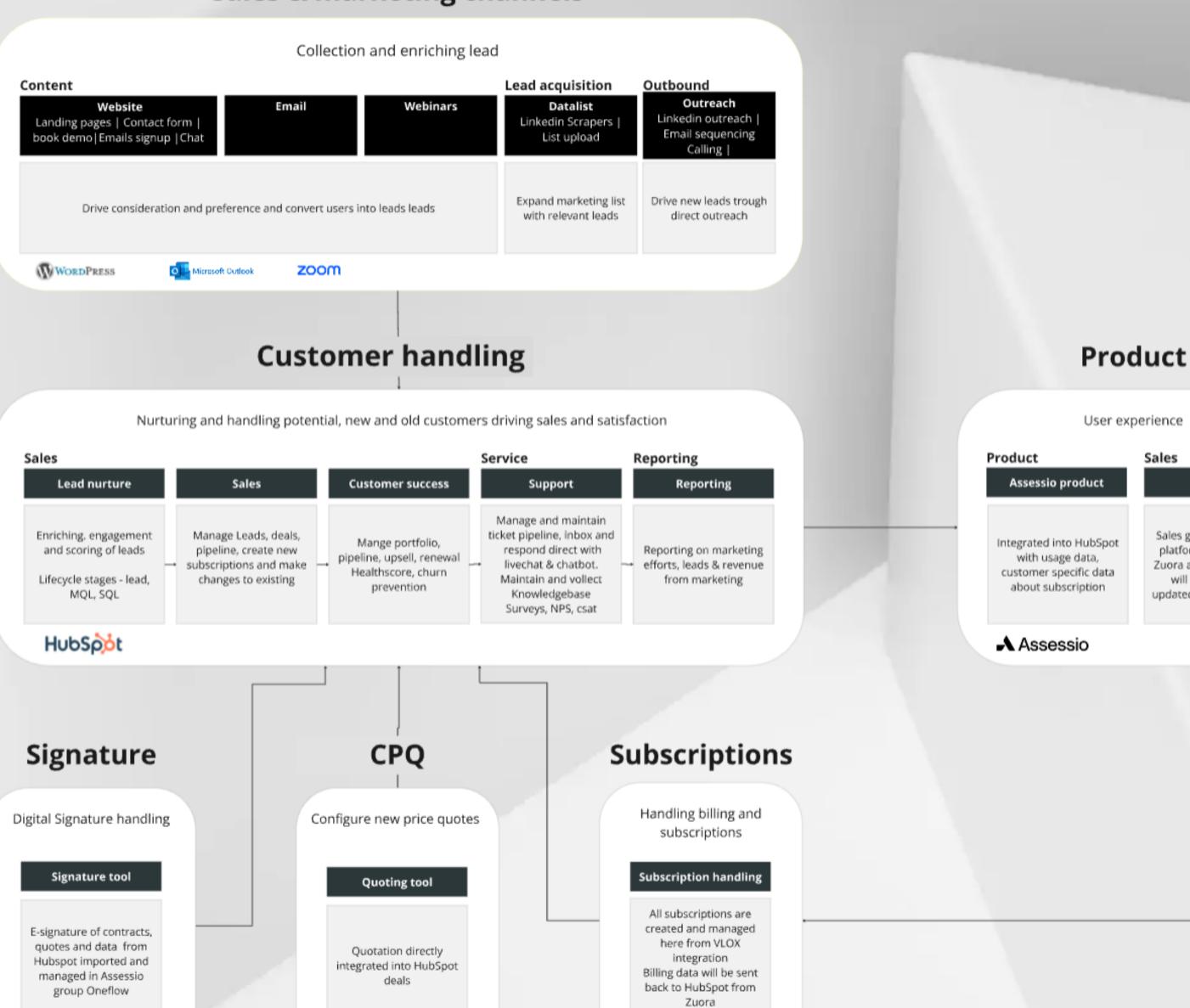
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SYSTEM LANDSCAPE

Sales & marketing channels

vloxq

oneflour



zuora

Sales

PLG

Sales generated via the

platform, is created in

Zuora and from Zuora it

will be created or

updated inside HubSpot.

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



Activity

• Deal is created in HubSpot on customer

Activity

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

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 "contract signed"
- From here you can check that data looks correct on customer and move deal stage to won



- 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.

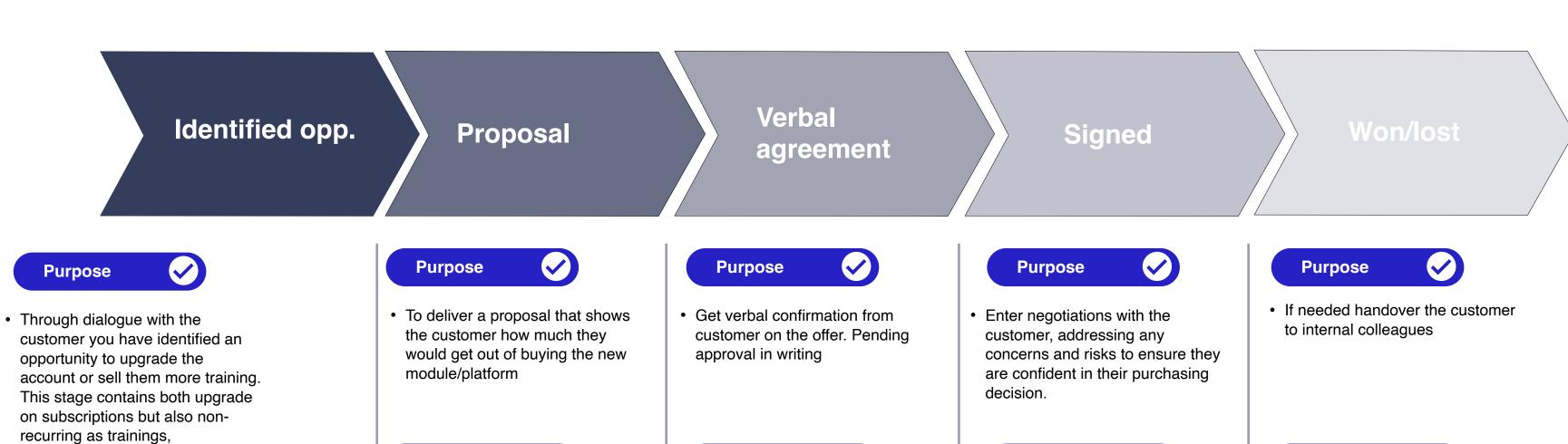


 Invoices sent from Visma, based on Zuora input

CSM structure

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Steps in the Existing customer pipeline



• Identity the customers needs

certifications etc

Activity

- Which products are right for the customer?
- Book meeting to go through proposal and platform
 - Exit
- Meeting to go through proposal is booked
- If necessary a platform demo is booked

Create proposal through CPQ in HubSpot
Go through the proposal in a meeting with customer
Agree on next steps with customer and what the process is from here

Activity

 Align on next steps and a clear path for how the customer can sign the new subscription/ non-

recurring

Activity

Exit

• Contract is signed

Contract is lost

Activity

onboarding?

questions about

control the timeline

Who will deliver the training/

· Prep the internal team to answer

Always have next step booked ->

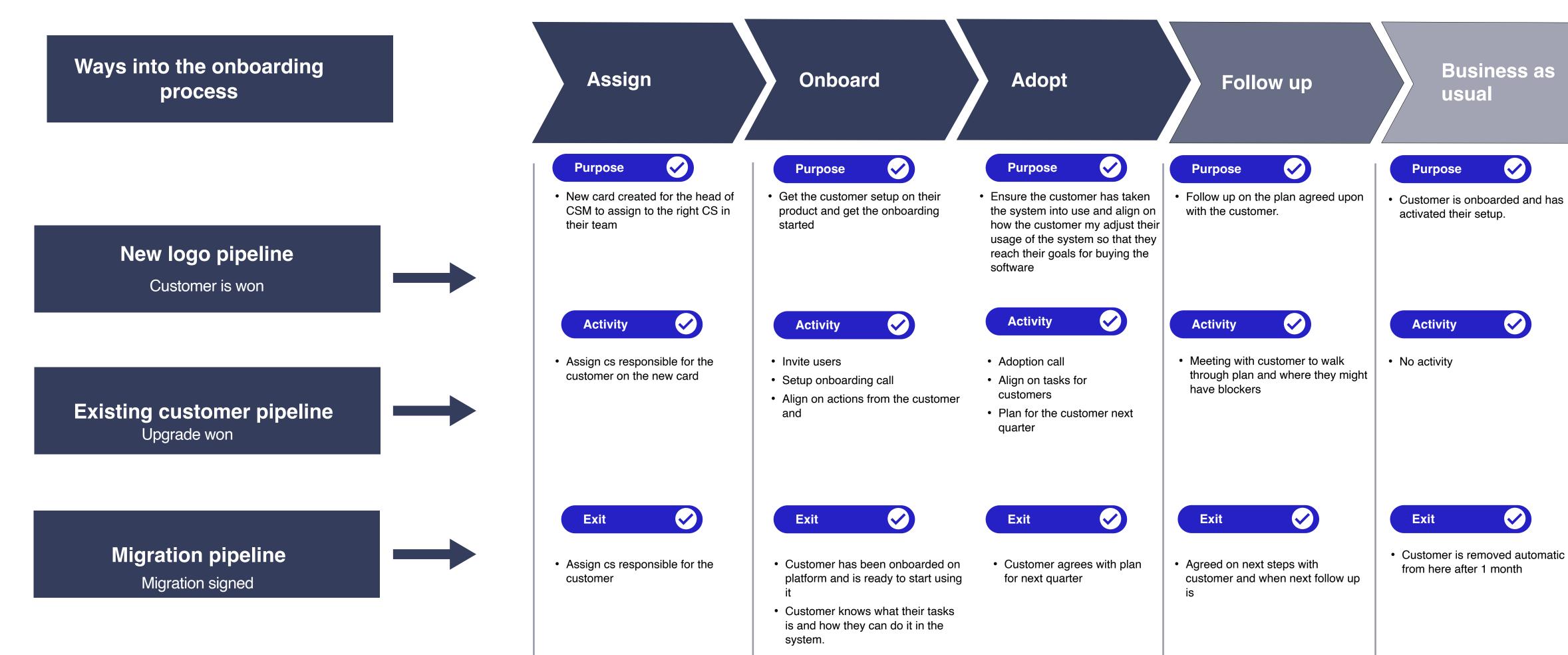
• documents, system, tests etc.

• Booking for certificates/training

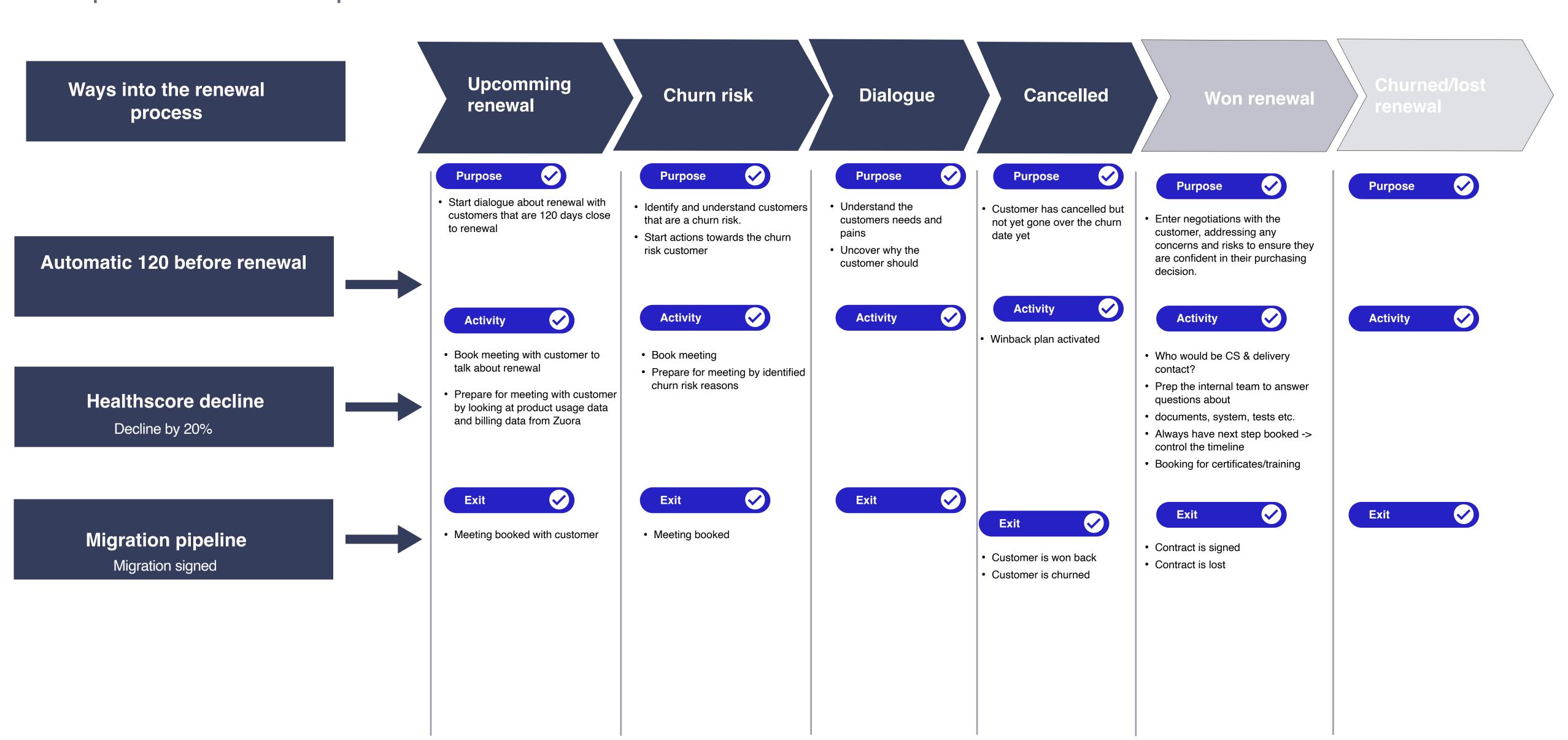
Activity
Who would be CS & delivery contact?
Prep the internal team to answer questions about
Documents, system, tests etc.
Always have next step booked -> control the timeline

Exit

Steps in the Onboarding



Steps in the Renewal process





2.0 Interim process until Zuora is ready

(updated 6 July 2025)

New customer

HubSpot

Deal is created

Vloxq

Quote for customer created

HubSpot

Data updated on deal

Oneflow

E-sign sent

HubSpot

Deal moved to won

Zuora

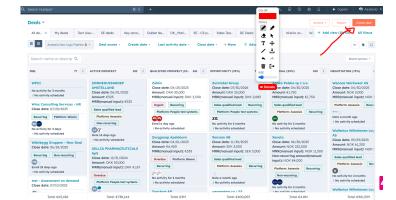
Customer is automatically added

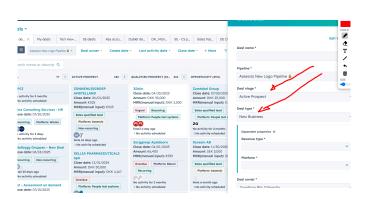
Visma

Invoicing

Activity

• Deal is created in HubSpot on customer

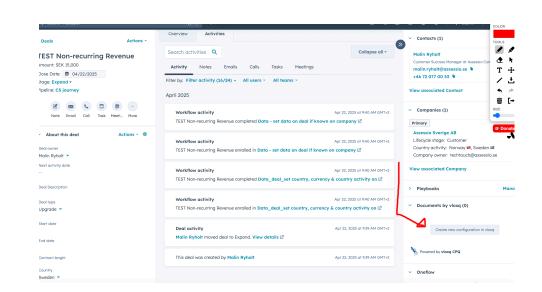


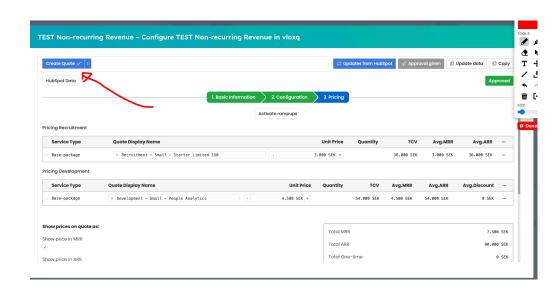


Activity



- 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

Note Email Call Task MeetL

Create contract Cancel



 Template
 PDF
 2l4.8 KB
 2025-Feb-27

 Template
 PDF
 123.9 KB
 2025-Feb-27

 Template
 PDF
 217.7 KB
 2025-Feb-3

2025 © Powered by oneflow (

- 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

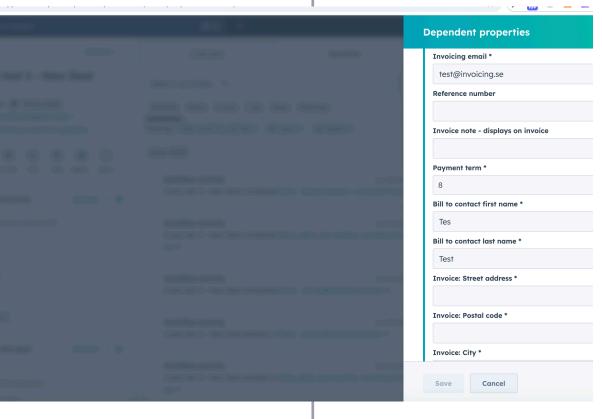


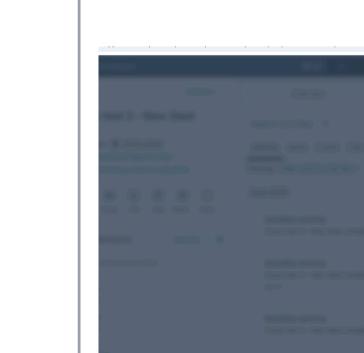
- If customer is new, account, order and subscription is created in Zuora
- Prices, dates and other information is added on customer and billing will start
- Information inputted from Vloxq, HubSpot added here - text on invoice, PO number etc.

Activity



 Invoices sent from Visma, based on Zuora input





Non-recurring - new and existing customers

HubSpot

Deal is created

Vloxq

Quote for customer created

HubSpot

Data updated on deal

Oneflow

E-sign sent

HubSpot

Deal moved to won

Zuora

Customer is automatically added

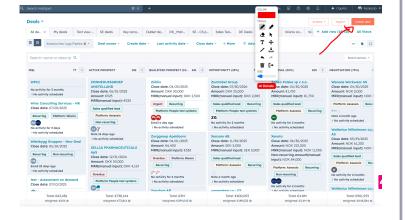
Visma

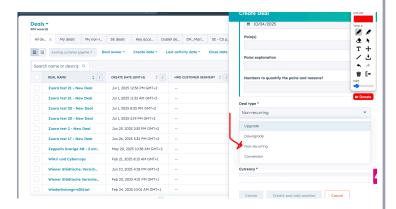
Invoicing

Activity



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

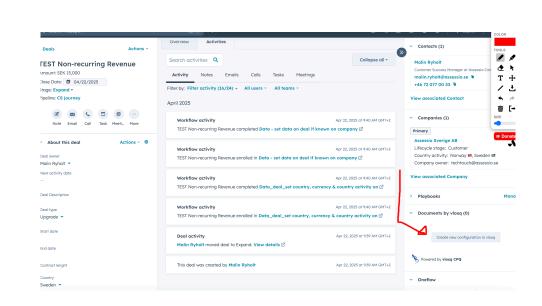


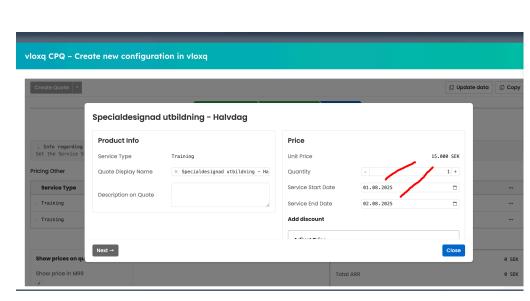


Activity



- 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 Vloxg 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





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

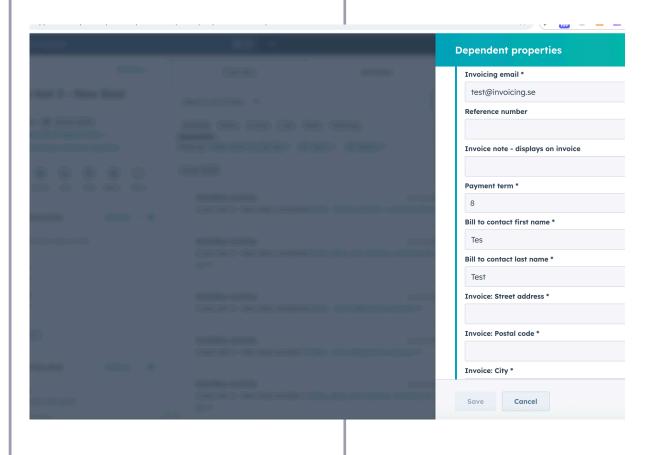


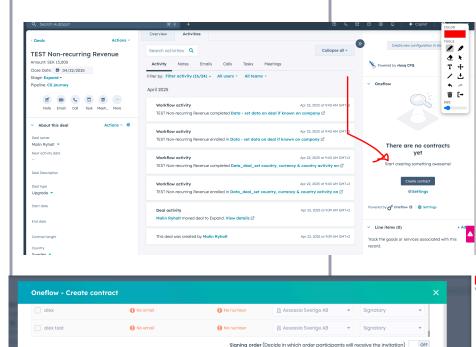
- If customer is new, account, order and non-recurring charge is created in Zuora
- Prices, dates and other information is added on customer and billing will start
- Information inputted from Vloxq, HubSpot added here - text on invoice, PO number etc.

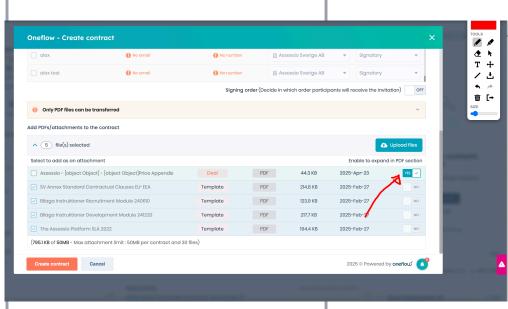
Activity



 Invoices sent from Visma, based on Zuora input







Upgrade & Downgrade/contraction

HubSpot
Create deal

Vloxq

Create quote

HubSpot

Data updated on deal

Oneflow

E-sign sent

HubSpot

Deal moved to won

Manual: Zuora

Finance ads to Zuora

Visma

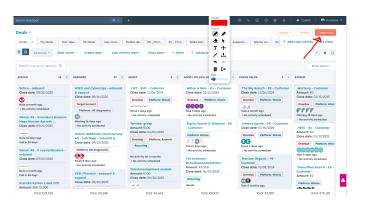
Invoicing

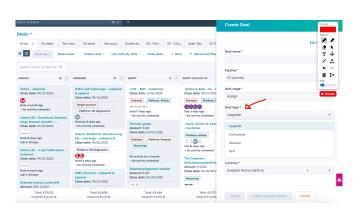
Activity

Activity

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

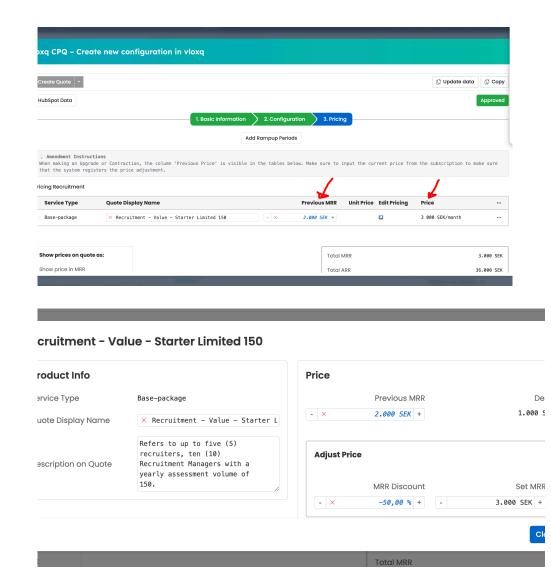
•







- 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





- 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

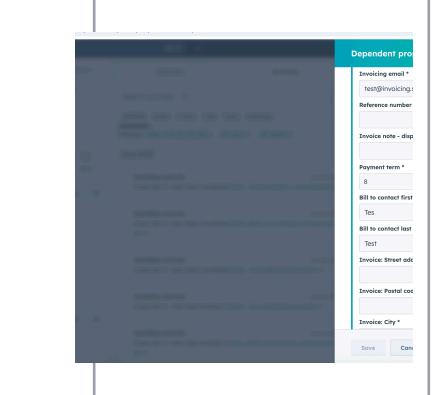
Activity

recurring manually

- Finance ads subscription or non-
- 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.



 Invoices sent from Visma, based on Zuora input



Migration

HubSpot

Create deal

Vloxq

Create quote

HubSpot

Data updated on deal

Oneflow

E-sign sent

HubSpot

Deal moved to won

Manual: Zuora

Finance ads to Zuora

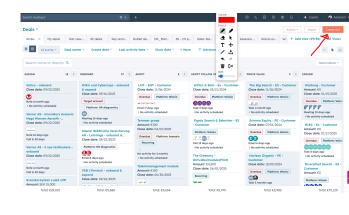
Visma

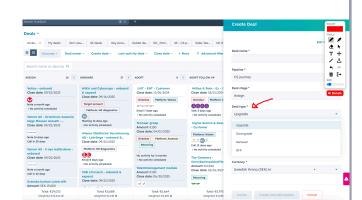
Invoicing

Activity

Activity

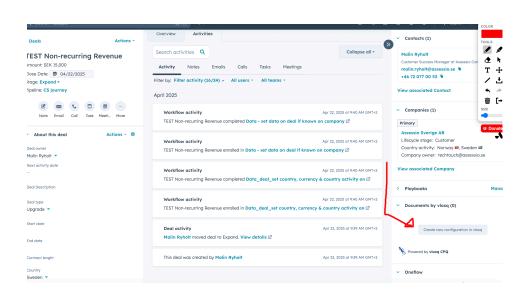
- Create deal in Migration pipeline
- Add migration information

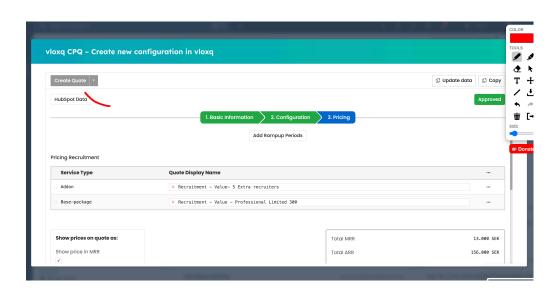




Activity

- 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



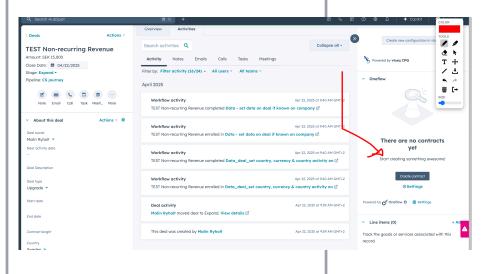


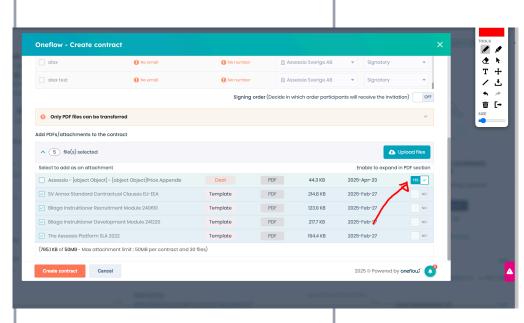
Activity

- 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 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.





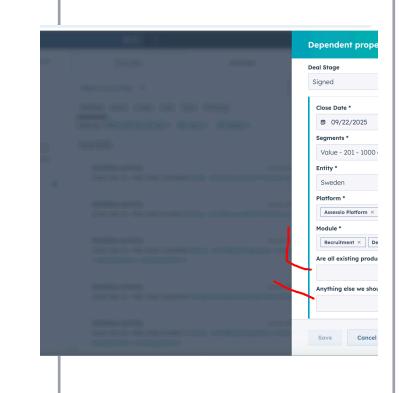
Activity



- 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.



 Invoices sent from Visma, based on Zuora input



Conversion

HubSpot

Create deal

Vloxq

Create quote

HubSpot

Data updated on deal

Oneflow

E-sign sent

HubSpot

Deal moved to won

Manual: Zuora

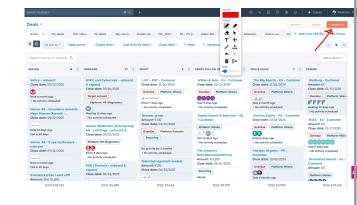
Finance ads to Zuora

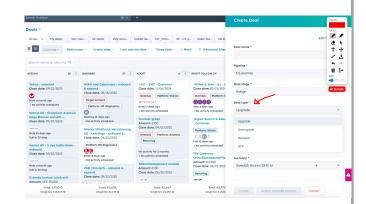
Visma

Invoicing

Activity

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

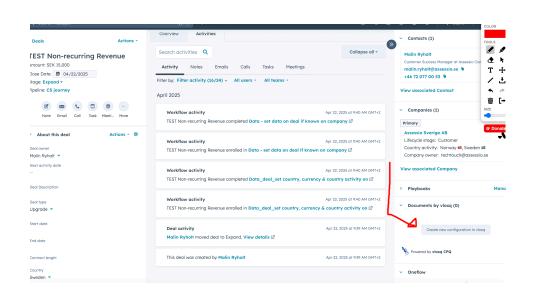


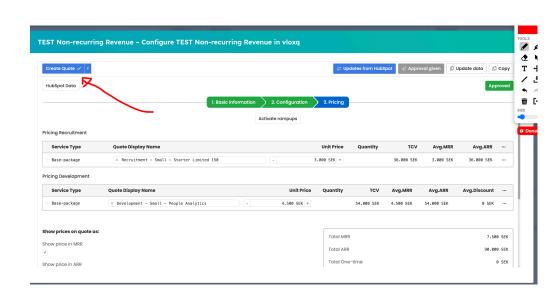


Activity



- When a customer is ready for a quote for Assessio services->click Vloxq card
- Configure quote from the Vloxq 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
- Vloxq will calculate the delta based on your input



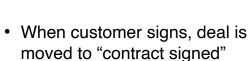


Activity

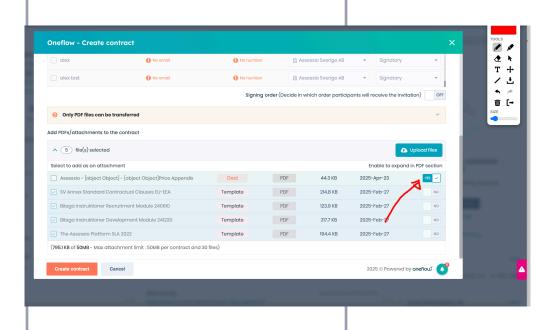


- When customer is ready to sign, click Oneflow button on deal
- Choose workspace and template
- See template get populated from Vloxq PDF and line items

Activity



• From here you can check that data looks correct on customer and move deal stage to won



Activity

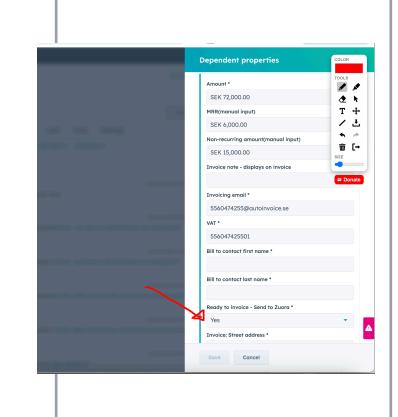


- Finance ads subscription or nonrecurring manually
- Prices, dates and other information is added on customer and billing will start
- Information inputted from Vloxq, HubSpot added here - text on invoice, PO number etc.

Activity



 Invoices sent from Visma, based on Zuora input



Renewal/Churn

HubSpot

Create card under service in the "Renewal process"

Activity

• Create card by going to CRM -> deal -> renewal process

HubSpot

Change stage

• Change stage based on if it is an upcoming renewal or that the

Activity

€0 (60%) | Weighted amount ®

customer is a churn risk

Upcoming renewal 0 < Churn risk 0 < Churned / Lost renewal 50 < STOIX - ES - Customer 🗵 Close date: 01/15/2025 Deal owner: Mirell Põllumäe Create date: 04/14/2022 Overdue Platform: Wisnio STOIX STOIX Rory Mcdermo Email 8 months ago Volkswagen - POC -Customer Redstor - ENT - Customer Ξ Close date: 05/17/2022 Deal owner: Mirell Põllumäe Create date: 04/14/2022 Platform: Wisnio Overdue Platform: Wisnio W Volkswagen W Nicolas Derbin Redstor Limited University of Tartu - Ent -Customer Close date: 01/26/2023 Deal owner: Mirell Põllumäe Create date: 04/14/2022 Bregal Milestone - PE - 🐰 Customer Platform: Wisnio Oniversity of Tartu Overdue Platform: Wisnio TIGNUM ENT POC -Close date: 12/31/2020 Deal owner: Mirell Põllumäe Create date: 04/14/2022 Sheffield Haworth - Ex - 🗵 Customer Platform: Wisnio Close date: 01/15/2025 Deal owner: Mirell Pöllumäe Create date: 04/14/2022

Lost (0%) 1

Vloxq/Oneflow

Optional: Quote

HubSpot

Deal moved to won/ churned

Manual: Zuora

Finance ads to Zuora

Visma

Invoicing

Activity

• If the customer needs a new quote for the renewal, you can create one through Vloxq and sent through Oneflow, same scenario as for new customers or upgrades

Activity

- If customer is churn move to stage "churned/lost renewal"
- If the renewal is won move to "won renewal"
- From here you can check the invoice data before sending

Activity



• Finance will set the customer to renew or churn based on where you moved the deal

Activity



 Invoices sent from Visma, based on Zuora input

