B2B Cross-sales

Characteristics	Description
Purpose	Making cross-sales based on closed deals and the product catalog (B2B sales)
	Maintaining additional and related products in the product catalog
	Nurturing the customer needs for additional and related products
Area	Opportunity management
Creatio compatibility	Sales Creatio, enterprise or team editions 7.10+
Required system objects	Base sections:
	• Contacts
	• Accounts
	• Opportunities
	• Leads
	• Products

List of process participant roles

Role	Responsibilities
Sales manager	Client sales.
	BANT determination for a cross-sale.

Process description
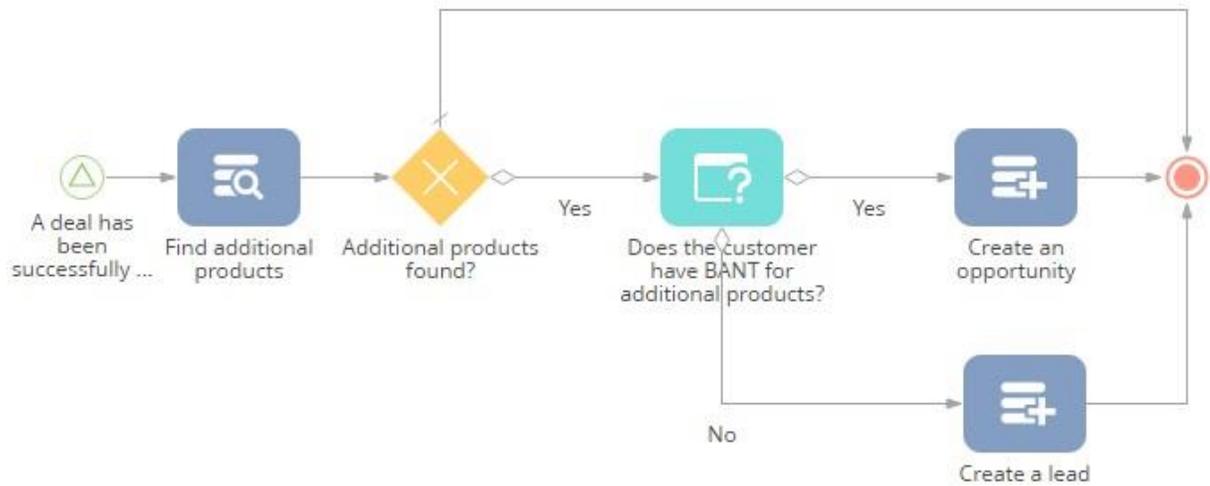
Process step	Executed by	Step description
A deal has been successfully closed	Sales manager	Sales manager closes the deal (stage of the opportunity is "Closed won").
Find additional products	Creatio	The system checks if additional and/or related products are available for the products in the closed deal.
Additional products found?	Creatio	If at least one additional product found, Sales manager is asked to evaluate customer's BANT for additional products.
Does the customer have BANT for additional products?	Sales manager	Sales manager evaluates the customer's interest in additional products according to the BANT criteria.
Create an opportunity	Creatio	If the customer is interested in additional products, the system automatically creates a new opportunity with the additional products.
Create a lead	Creatio	If the customer need requires nurturing, the system automatically creates a lead with additional products.

Implementation guidelines

1. Install packages using the [Installed applications] functionality in [System designer] (please, install packages in the following order: 1. BpmProducts; 2. BpmCrossSales).

2. Specify additional products on the [Proposed products] detail with selected [Cross] checkbox in the product catalog.