# Sales Process Playbook

Stage 1
Customer Recognizes Needs

Sales Process Steps

# Stage 1: Customer Recognizes Needs

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| | |
|---|---|
| **Definition** | Potential buyer identifies, describes and begins to quantify the impact and challenges relevant to their business problem or need |
| **First Step** | Inspect Leads using BANT |
| **2** | Research Company and Contacts |
| **3** | Conduct Internal Opportunity Planning |
| **4** | Hold Introductory Meeting (MI#1) |
| **5** | Leverage Field Marketing Support |
| **6** | Determine Channel Strategy |
| **7** | Use a Challenger Sales Approach (conditional) |
| **8** | Conduct a Visioning Event (conditional) |
| **9** | Identify Needs with potential buyer (MI#2) |
| **Final Step** | Review Validation e-mail with the potential buyer (MI#3) |
| **Exit Criteria** | Potential buyer comments on the Validation Email or RETURN TO NURTURE |

# Step 1: Inspect Leads using BANT

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|---|---|
| Sophisticated | Required |
| Simplified | Required |
| Run Rate | Not Required |

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**Purpose** Determine whether SQLs (from the rep or the LDR) are ‘valid’ and therefore are qualified to be an Opportunity

**Condition** N/A

**Sales Aid** BANT Qualifications Checklist

## Roles and Responsibilities

**Rep**

- Use the BANT Sales Aid to validate whether a Lead has become an Opportunity
- Leads are qualified when the Authority, Need and Timing criteria are met (the Budget criterion is optional)
- This step applies BOTH to Sales Qualified Leads (SQLs) coming from the LDR as well as Leads that a rep is working on their own
- If you believe an LDR-provided SQL is not qualified according to BANT, you must contact the LDR immediately and discuss with them what areas you believe are missing or incomplete
- Use BANT criteria to ensure you are obtaining the right information in your prospecting efforts
- Answers to some of the BANT question can be obtained through online Progressive Profiling and other times through interaction with the potential buyer
- If the opportunity was generated by a partner, ensure that the project remains with the same partner
- If working with a partner, discuss BANT prior to engagement

**Sales Mgr.**

- Use the BANT Checklist to inspect rep prospecting efforts
- If the rep is working on a Lead at an existing customer or a new logo customer and the Lead has met the qualification criteria, ensure the rep opens a new $0 Opportunity in SFDC
- By monitoring rep prospecting activity you can help them to avoid wasting time
- Ensure the rep has created a Lead record or updated status on the Contact record to MQL/SQL
- If an rep is frequently disagreeing with an LDR on BANT qualification status, meet with the LDR Manager and decide if there is an issue with the rep or the LDR’s interpretation of the criteria

# Step 1: Inspect Leads using BANT (cont'd)



## Roles and Responsibilities

CM

- If working with a partner, discuss BANT prior to engagement
- Coordinate activity with partner and rep, as necessary
- If the opportunity was developed and provided by a partner, then ensure that the rep works with the same partner
- Ensure the Partner registers the deal with corporate

CP

- Discuss opportunity with the rep/Channel Manager
- Provide corporate with description of the opportunity including BANT criteria and supporting evidence of validation.
- Register the deal with corporate through the partner deal registration process. Enter all relevant information into PRM SFDC, including key contacts

# Step 2: Research Company and Contacts

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| Sophisticated | Required |
| Simplified | Required |
| Run Rate | Not Required |

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**Purpose** Gain insights into all relevant people in the account and obtain insight into the company and the customers of the company so as to prepare for a high impact first meeting

**Condition** N/A

**Sales Aids** Use SFDC Contact/Account records, Personas, external reference sites (Google, LinkedIn, Facebook), company website, Glassdoor, and internal data sources (e.g. InsideView, Contact Babel, OneSource)

## Roles and Responsibilities

Rep

- Research customer news and documents for financial facts and industry comparison
- Review Buyer Personas to refresh your knowledge of this role and to develop future Call Plans
- Review annual report and earnings transcripts for info on revenue, cost-saving, growth and acquisition plans, etc.
- Understand their strategic goals and key initiatives that drive projects and purchases
- Visit their corporate website to see what they say about themselves and to record any unique terminology to help customize your sales message
- Understand their company dynamics/business drivers (size, age, geos, history, etc.)
- Research their industry (hiring/downsizing trends, merger and acquisition activities)
- Find closest matches that corporate has in current customers and/or the prospect base including subsidiaries, parent or sister organizations
- Document key insights regarding the Sponsor and Coach in the SFDC Contact record gained from research
- Document key insights related to the company in the SFDC account for the company

# Step 2: Research Company and Contacts (cont'd)



## Roles and Responsibilities

SE

- Conduct prospect research in preparation for deal engagement and Visioning Events

CM

- Coordinate activity with partner and rep, as necessary

CP

- Provide any relevant information to corporate account team including key initiatives, strategic goals, insight into corporate culture, and procurement process.

# Step 3: Conduct Internal Opportunity Planning

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| Sophisticated | Required |
| Simplified | Required |
| Run Rate | Not Required |

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**Purpose** Work internally to develop account-specific and deal-specific strategies that result in a well-defined Problem statement related to the customer's need. Identify best path to achieve the exit criteria.

**Condition** N/A

**Sales Aid** Opportunity Assessment

## Roles and Responsibilities

**Rep**

- Download a blank Opportunity Assessment spreadsheet from SFDC
- Enter/update the information in the Opportunity Assessment and upload it back to the Opportunity record in SFDC
- Review the 'No' answers with your Sales Manager during a planning/coaching session, particularly those that are in Stage 1
- Continue updating this tool throughout the sales cycle, usually before a Major Interaction
- Ensure that you regularly review the Contact records for the Opportunity to see what their online activity has been and reflect that in your deal strategy. Online activity will be captured by the LDR during the Lead Management stage

**Sales Mgr.**

- Review the questions in the Opportunity Assessment associated with stage 1 and discuss with the rep during a planning/coaching session
- Use as the PRIMARY tool for deal strategy and planning and coaching
- Your key job is to bring to the rep specific ideas on how they can move the 'No' answers to 'Yes'

# Step 3: Conduct Internal Opportunity Planning (cont'd)

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## Roles and Responsibilities

CM

- Coordinate activity with partner and rep, as necessary

CP

- Participate in Opportunity calls with account team as needed

# Step 4: Hold Introductory Meeting (MI#1)

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|---|---|
| Sophisticated | Required |
| Simplified | Required |
| Run Rate | Not Required |

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**Purpose** Get the potential buyer to share information about their current state, capabilities they are seeking, and the details of their problem(s), other stakeholders impacted by these problem(s)

**Condition** N/A

**Sales Aids** Call Plan
MI #1 Company Overview

**Major Interaction**

## Roles and Responsibilities

Rep

- Before the meeting, use the Call Plan to develop a set of Situational questions that establish the depth and impact of the problem and the capabilities the potential buyer wants to obtain
- To determine the scope of the problem use open-ended questions that reflect your knowledge of their situation as revealed by the research you have done
- Try to link primary business goals  to the specific problem
- Avoid the desire to do too much in one meeting
- You may have to conduct this meeting multiple different times for individual stakeholders to the Opportunity
- If the potential buyer has little to no knowledge of our Acme company, consider using the “Introduction to Acme” presentation
- Ensure the meeting does not expand into a full discovery event

Sales Mgr.

- Attend this meeting for all new logo customer Opportunities where reps are new to Acme or inexperienced
- Ensure the rep practices Active Listening and brings value to the potential buyer – not just a list of questions
- Review the Call Plan with the rep prior to the meeting

# Step 4: Hold Introductory Meeting (MI#1) (cont'd)



## Roles and Responsibilities

CM

- Coordinate activity with partner and rep, as necessary

CP

- Invite Acme rep to participate in meeting with potential buyer
- Agree on a Call Plan with Acme rep in advance of the meeting including any educational content around Acme as a company and/or solutions

# Step 5: Leverage Field Marketing Support

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| Sophisticated | Required |
| Simplified | Required |
| Run Rate | Not Required |

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**Purpose** Ensure that the sales team leverages all field marketing efforts, content, personnel, campaigns, and events to help educate the potential buyer

**Condition** N/A

**Sales Aids** Marketing Campaign Guidance (typically located in the Sales Info Center on Acme intranet)
Events (e.g. G-force, EBC Visits, Lunch and Learns)

## Roles and Responsibilities

**Rep**

- Engage Field Marketing Support where available and applicable
- Not all regions have same level of support so familiarize yourself with all local field marketing capabilities
- Decide which content, personnel, campaigns, and events can help the buyer better understand and define their problem
- Visit the internal Sales Info Center on the marketing intranet site to find all material specific to all marketing campaigns that may have relevance to the potential buyer's problem(s)
- Prior to sending marketing materials to the buyer, check the opportunity record in SFDC to ensure that the LDR hasn't previously sent the same marketing materials

**Sales Mgr.**

- Maintain a calendar of all local and corporate driven field marketing events
- Build justification to sponsor field marketing events that can accelerate deals and help reps spark interest and insight in early stage deals

# Step 5: Leverage Field Marketing Support (cont'd)



## Roles and Responsibilities

SE

- Be prepared to participate in any field marketing events with the rep

CM

- Coordinate activity with partner and rep, as necessary

CP

- Leverage resources from xChange and Channel Marketing to support opportunity
- [Conditional] – In consultation with Acme rep, conduct Lunch and Learn or Event in a Box for buyer constituents

# Step 6: Determine Channel Strategy

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| Sophisticated | Required |
| Simplified | Not Required |
| Run Rate | Not Required |

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**Purpose** Determine whether or not a channel partner should be used for the engagement based on the value a partner will bring to the potential buyer.

**Condition** N/A

**Sales Aid** Channel Engagement Decision Guide
Channel Partner Selection Guide

## Roles and Responsibilities

**Rep**

- Complete the Channel Engagement Decision Guide
- Think through how you want to engage the partner and what roles and responsibilities will be covered by each party
- If the decision is to engage a partner, contact the Channel Manager and determine if now is the appropriate time to select which partner is the best fit
- Work with Channel Manager to complete the Channel Partner Selection Guide

**Sales Mgr.**

- Review the completed Channel Engagement Decision Guide  and provide additional comment if required
- Advise the rep on best partner approach (sell-with or sell-thru partner). Review rep with completing the Channel Partner Selection Guide if necessary
- Participate with the rep in any initial discussions with the Channel Manager

**CM**

- Participate in a discussion with  rep and sales manager to discuss the potential channel opportunity
- Assist the rep with completion of both the Channel Engagement Decision Guide and Channel Partner Selection Guide or review
- Assist in the determination of appropriate partner and completion of Decision Guide

# Step 7: Use Challenger Sales Approach

| | |
|---|---|
| Sophisticated | Conditional |
| Simplified | Not Required |
| Run Rate | Not Required |

**Conditional**

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**Purpose** Decide if a Challenger Sale approach is appropriate to the deal and will advance the Opportunity

**Condition** All Sophisticated Deals and all new logo deals. Challenger Sales should be used throughout the sales cycle and not as a one-time occurrence

**Sales Aid** Challenger Overview Guide
Challenger Selling Decision Assessment

## Roles and Responsibilities

**Rep**

- Use Challenger Sale sales aids to determine how well are we pursing a Challenger approach on Sophisticated and new logo opportunities
- Recognize that this approach is most effective on deals where an rep can differentiate themselves with the potential buyer by sharing business and industry insights.
- Use the Challenger Selling Decision Assessment to validate the strength of the Challenger approach for your Opportunity
- If Challenger is applicable, ensure that your future efforts on this deal, especially in Stages 1-3 exhibit the following: teach for differentiation, tailor for resonance, take control of the sale, and insight generation

**Sales Mgr.**

- Review deal with rep and determine if a Challenger Sale approach will help to advance the deal and be advantageous
- Review future rep correspondence for its bias towards Challenger traits

# Step 7: Use Challenger Sales Approach (cont'd)



## Roles and Responsibilities

CM

- Facilitate and participate as appropriate

CP

- Be open to suggestions from Acme rep on using Challenger Sales approach
- Account Control will dictate responsibilities
  - If Partner, they will drive and coordinate
  - If Acme, Acme will drive.
  - Principles of Engagement will apply

# Step 8: Conduct a Visioning Event

| | |
|---|---|
| Sophisticated | Conditional |
| Simplified | Not Required |
| Run Rate | Not Required |

**Conditional**

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**Purpose** Leverage some type of interactive demonstration that addresses the potential buyer's question of "how can you solve this problem…show me?" The purpose is NOT to present product features but to stimulate thought and provoke interest

**Condition** This step is performed if the potential buyer needs some form of visual or auditory queues to better understand their problem and its impact

**Sales Aid** Online video, mystery shopping presentation, etc.

## Roles and Responsibilities

**Rep**

- Work with marketing to create a custom Visioning Event that uniquely speaks to the needs and requirements of the potential buyer
- Develop the Visioning Event with the help of Sales Support and ensure that it speaks to the needs and interests of the potential buyer
- Use this event to heighten the customer's appetite for more  and help them visualize a future state where their problem no longer exists

**SE**

- Help create a Visioning Event/demo. YouTube videos can serve as the Visioning Event or been incorporated into a custom presentation
- Present this event with the rep, if required
- Ensure the Visioning Event applies to the customer situation as much as is possible

# Step 8: Conduct a Visioning Event (cont'd)



## Roles and Responsibilities

CM

- Facilitate and participate as appropriate

CP

- Work with Acme rep and Acme Marketing to create a custom Visioning Event that uniquely speaks to the needs and requirements of the potential buyer
- Develop joint value proposition that highlights the strength of 1+1 = 3 approach including the unique Partner value-add to Acme platform
- Account Control will dictate responsibilities
  - If Partner, they will drive and coordinate
  - If Acme, Acme will drive.
  - Principles of Engagement will apply

# Step 9: Identify Needs with potential buyer (MI#2)

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|---|---|
| Sophisticated | Required |
| Simplified | Required |
| Run Rate | Not Required |

**Major Interaction**

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**Purpose** Explore the problem in as much depth as is possible with as many stakeholders as is possible

**Condition** For Simplified Deals, the rep may combine the Needs Identification Meeting with the Initial Discovery Meeting

**Sales Aid** Call Plan
Needs Analysis Questionnaire

## Roles and Responsibilities

Rep

- Convince the potential buyer to introduce you to other personas and other company stakeholders to the problem
- Hold as many meetings as you need to fully explore the problem(s) and their impact
- Go beyond just the Expressed Need of the potential buyer to include implicit need
- Use the Call Plan to ensure each interaction advances the deal towards the exit criteria
- Offer ideas on possible root causes to the problem but avoid any effort at suggesting solutions
- Get the potential buyer to estimate the scope and impact of the problem or of the lack of having a new capability

Sales Mgr.

- Review the Call Plan to ensure that the sales team has a complete and workable plan.
- Review the set of questions the rep intends to ask to ensure they get to good problem investigation
- Conduct a mock meeting with the rep and have them ask you some of their planned questions
- Consider attending one or more of these meetings so that the rep can get to a comprehensive problem summary as soon as is possible

# Step 9: Identify Needs with potential buyer (MI#2) (cont'd)



## Roles and Responsibilities

SE

- Provide ideas to the rep on how to outline the broad technical aspect of the problem
- Assist rep with the major interaction and be prepared to participate in the meeting
- Leverage the fact that your role is less intimidating to the potential buyer and they may be more receptive to your inquiries

CM

- Facilitate and participate as appropriate

CP

- Provide regular updates to the Acme rep on meetings with potential buyer and other company stakeholders
- Update PRM SFDC records with meeting notes and description of scope problem being addressed
- Leverage Acme rep to move up organizationally if needed
- Account Control will dictate responsibilities
  - If Partner, they will drive and coordinate
  - If Acme, Acme will drive.
  - Principles of Engagement will apply

# Step 10: Review Validation Email with potential buyer (MI#3)

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|---|---|
| Sophisticated | Required |
| Simplified | Required |
| Run Rate | Required |

**Major Interaction**

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**Purpose** Get the potential buyer to comment on the written description of their problem(s) and desired new capabilities. Through this comment, the potential buyer should begin to feel a sense of urgency to solve this problem

**Condition** N/A

**Sales Aid** Validation Email

## Roles and Responsibilities

**Rep**

- Review and follow the guidance in the Validation e-mail Sales Aid
- Ensure the e-mail is written well, in the active voice, has no spelling or syntax errors, uses customer (not Acme) terminology, and takes the Customer View of the problem
- Use judgment to adjust the depth of content based on the complexity of the problems
- Be concise – only record what the potential buyer has told you, not what we wish they told us
- Send the Validation Email to the potential buyer and ask them to note any omissions /errors and provide comment. Note – do not ask them to agree with it, simply to provide comment
- Contact the potential buyer in person or on the phone if they do not provide an e-mail response

**Sales Mgr.**

- Review the Validation Email to ensure that it effectively communicates Acme' understanding of the problem and advances the customer's awareness of the severity of the problem
- Maintain a 'warehouse' of the best Validation e-mails and share these with your reps so you can leverage best practice in your region

**SE**

- Provide the rep with input related to any technical aspects that are root cause of the problem
- Review the Validation Email for accuracy

# Step 10: Review Validation Email with potential buyer (MI#3) (cont'd)



## Roles and Responsibilities

**CM**

- Facilitate and participate as appropriate

**CP**

- Provide regular updates to the Acme rep on meetings with potential buyer and other company stakeholders
- Update PRM SFDC records with meeting notes and description of scope problem being addressed
- Leverage Acme rep to move up organizationally if needed
- Account Control will dictate responsibilities
  - If Partner, they will drive and coordinate
  - If Acme, Acme will drive.
  - Principles of Engagement will apply