Industry Sales Acceleration Workshop

Mark Stuyt

About Mark:

- Founder – Chief Engagement Officer, Neural Impact Inc.
- 10 Years management consulting to global Microsoft Dynamics community
- 20 year sales professional (CA, Pivotal CRM, PeopleSoft, SAP)
- Developed Microsoft Accelerated Selling Methodology
- Developed Microsoft Industry Acceleration Content
- >100 1:1 IPP partner workshops

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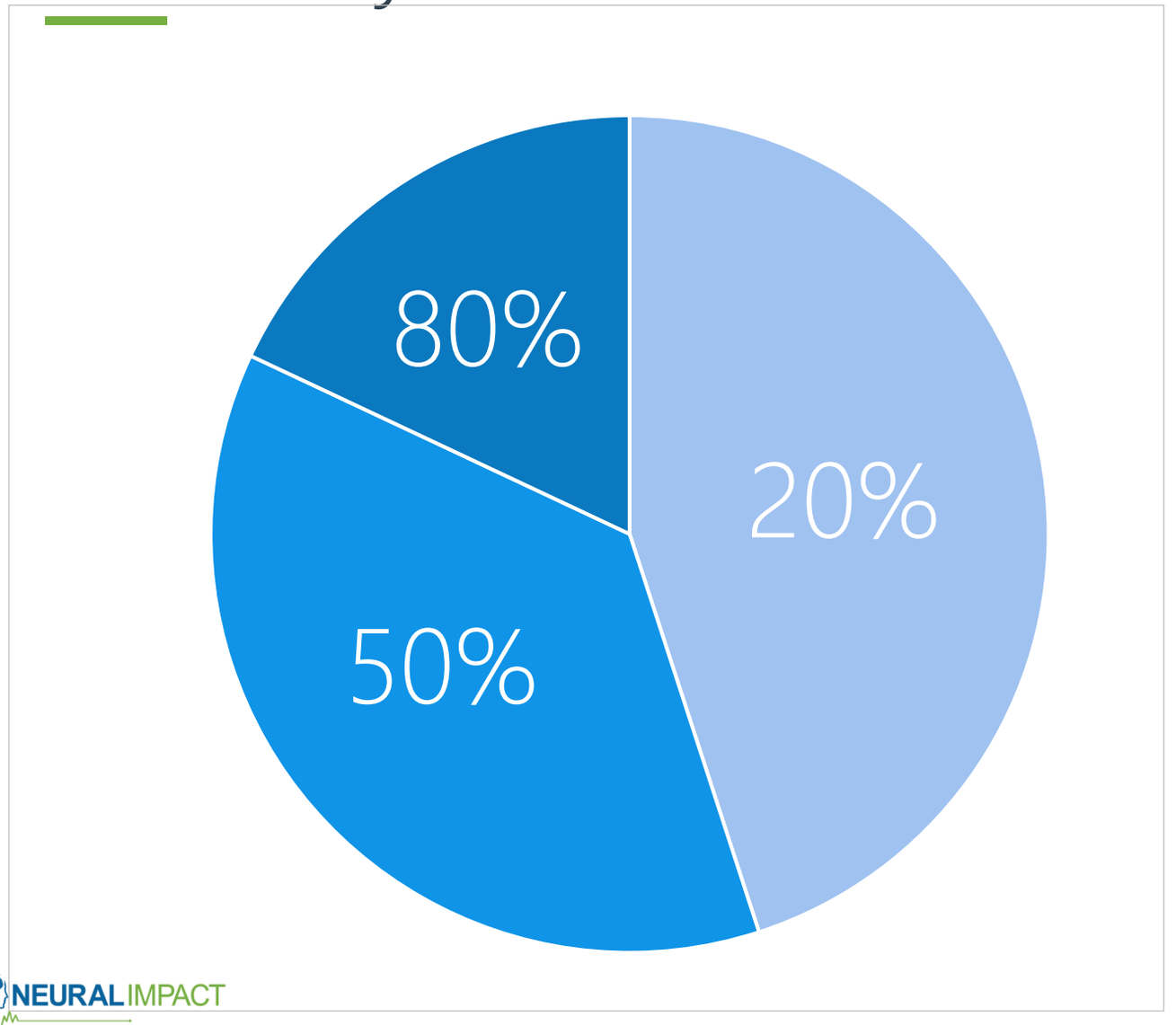
Industry Win Rates



>3 Industries (service)

1-3 Industries (teach)

1 Industry (disrupt)

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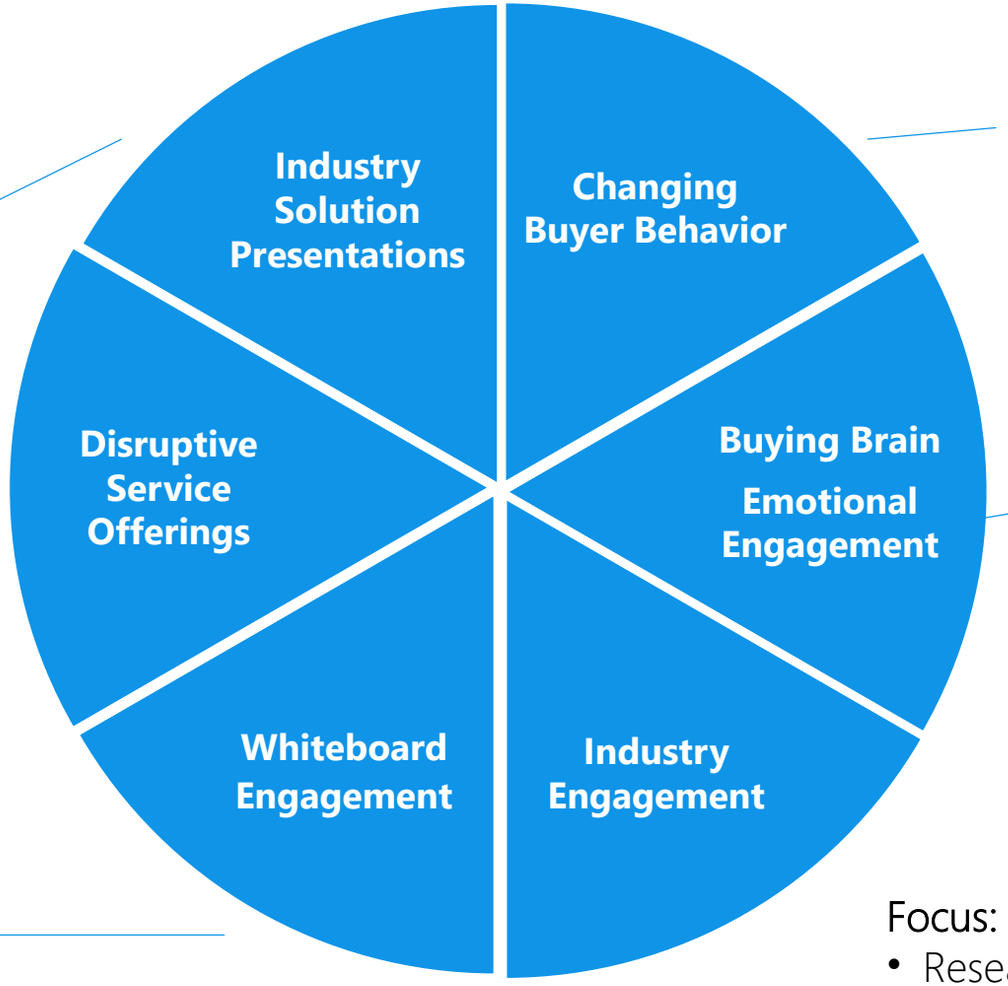
Workshop Agenda

Focus:
- Executive Engagement
- Objection Handling

Focus:
- Buyer 2.0
- 20/50/80 shift
- Industry Focus



Focus:
- Risk identification
- Packaged Offerings (BVA)

Focus:
- Buying Psychology

Focus:
- Credentialing Whiteboard

Focus:
- Research & Preparation
- Emotional Messaging Framework

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Learn by Doing

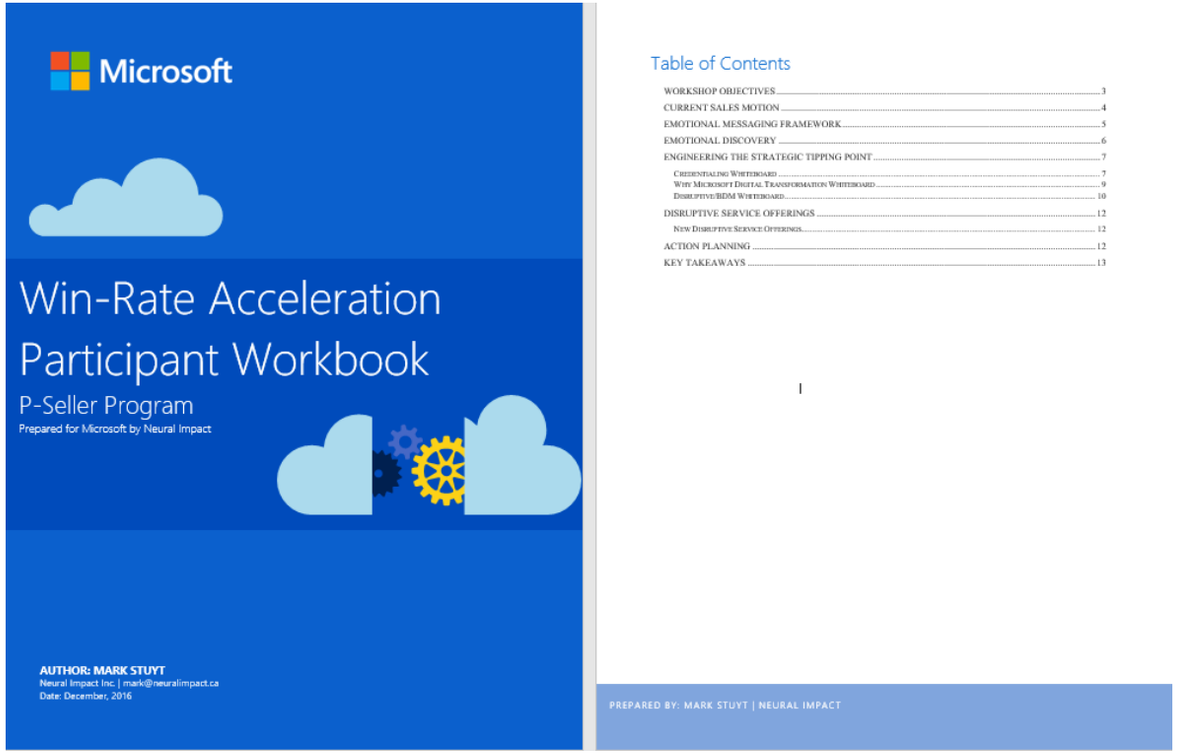
We retain ….

20% if we just hear it

50% if we hear and see it

70% if we say it

90% if we say and do it



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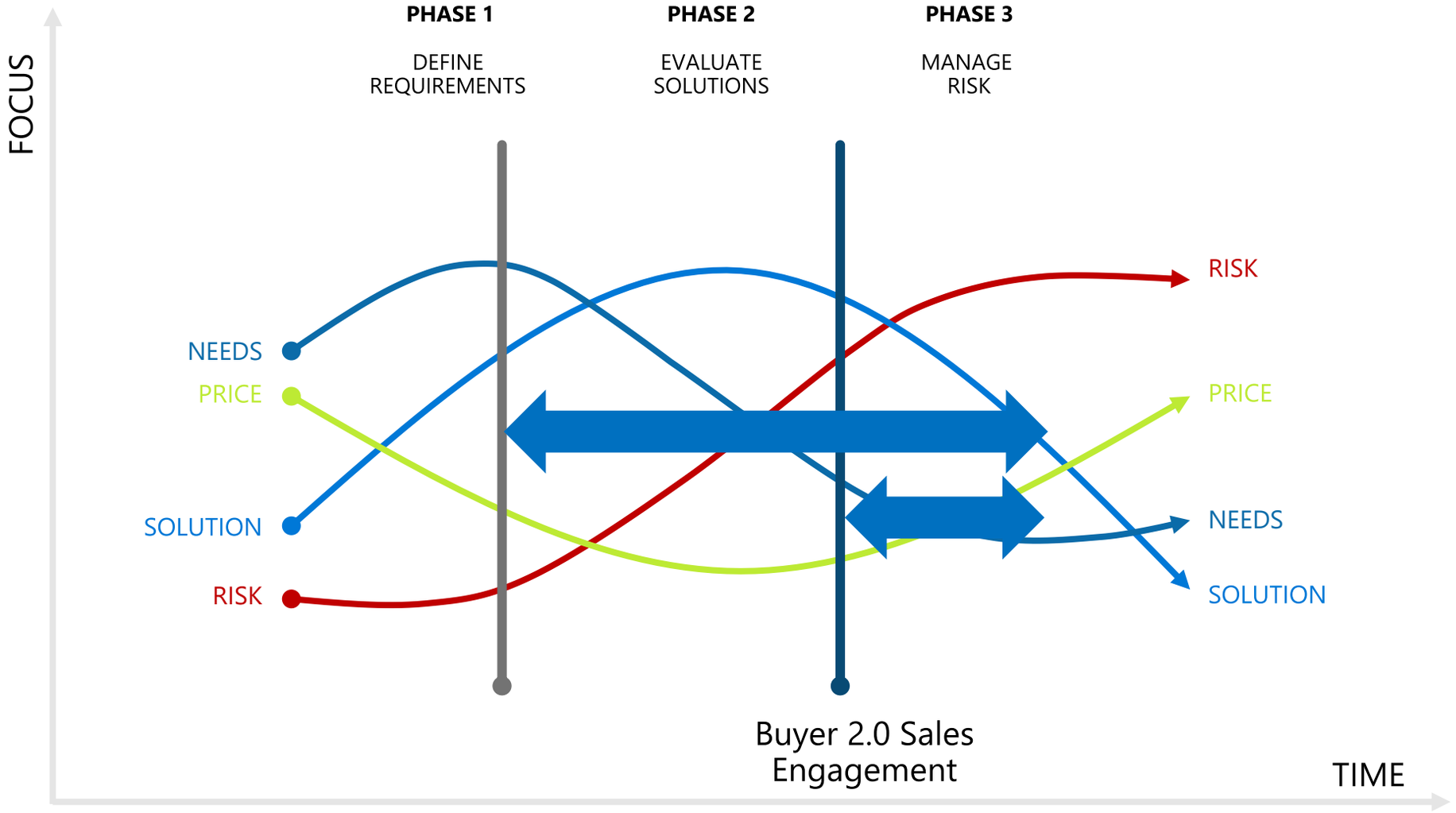
Selling to Buyer 2.0

Buyer 2.0



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Impacts

Focus

- Demand has shifted to favor vertically-specific solutions
- Traditional “services” business model under pressure
- IP becoming both a strategic differentiator and economic necessity

Marketing:

- Moving from tactical necessity to strategic growth engine
- Prospects will find you before you find them: higher volume of lower value “leads”
- Meaningful content creation becoming increasingly critical

Sales:

- Selling cycles will continue to contract
- Solution Selling far less effective
- Increasingly difficult to differentiate on product

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Buyer 2.0 Context

High implementation costs

Lack of interoperability

Extraordinary complexity

Frustrated business leaders

High cost of ownership

High switching costs

Poor end-user adoption

Hard-to-measure business results

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Value vs. Risk

VS.

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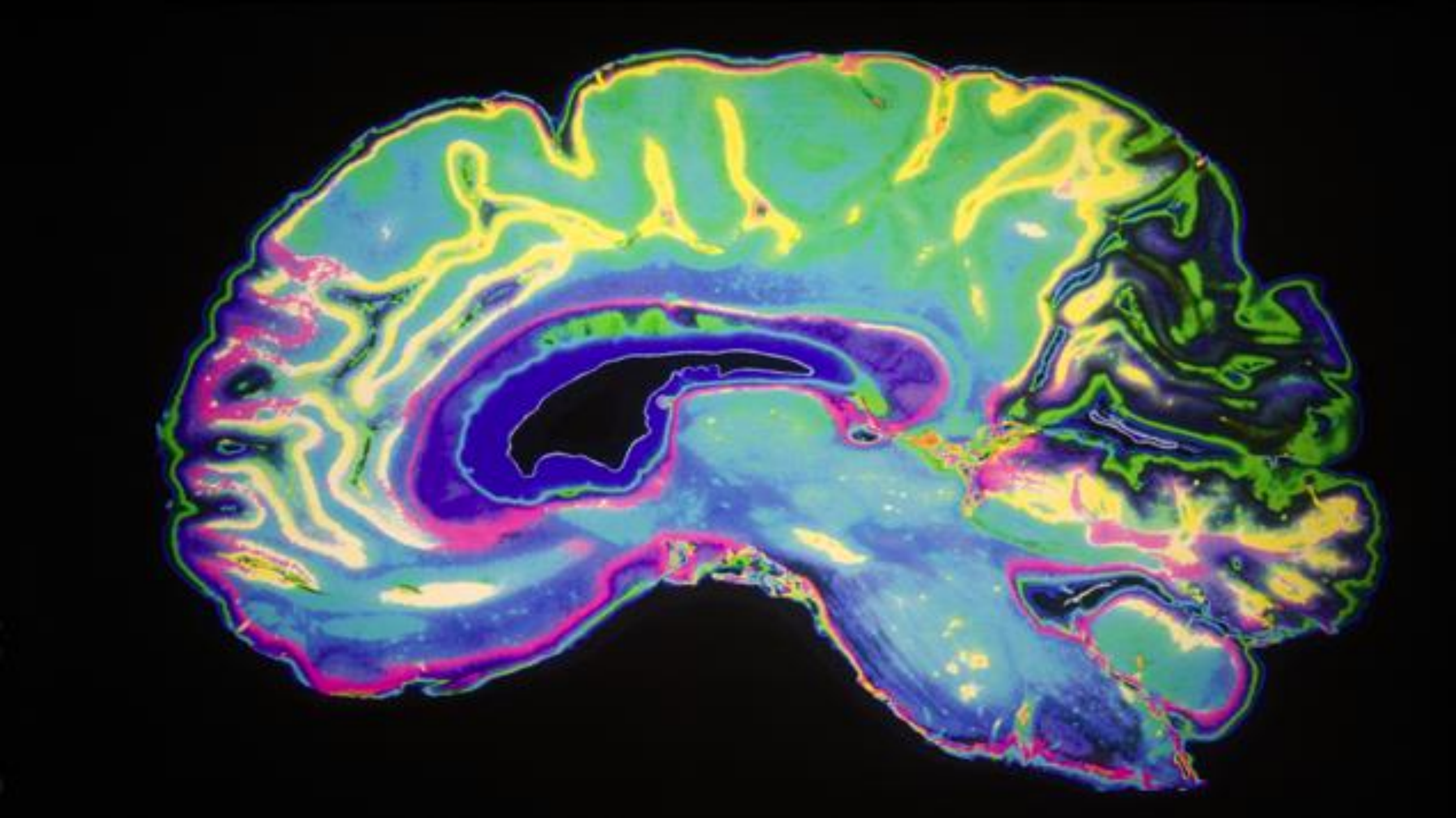
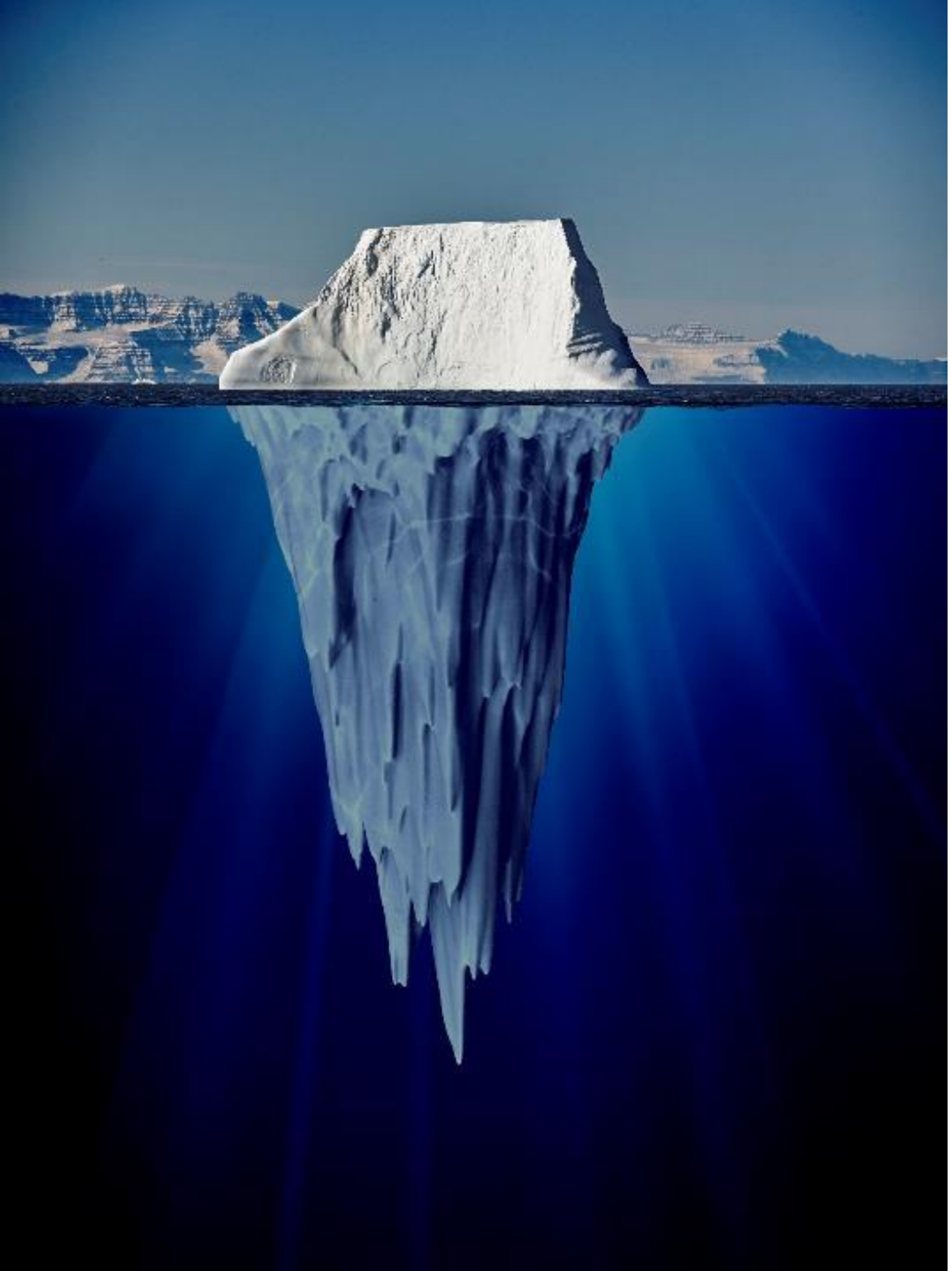
Engagement Psychology

24 X 78





5%
Conscious
Logical

Cost
Functionality
Resources

Decision Making is Nonconscious

95%
Unconscious
Intuitive

Emotions
Cognitive Biases
Engagement Experience

I cnduo't bvleiee taht I culod aulaclty uesdtannrd waht I was rdnaieg. Unisg the icndeblire pweor of the hmuan mnid, aocdcrnig to rseecrah at Cmabrigde Uinervtisy, it dseno't mttaer in waht oderr the lterets in a wrod are, the olny irpoamtnt tihng is taht the frsit and lsat ltteer be in the rhgit pclae. The rset can be a taotl mses and you can sitll raed it whoutit a pboerlm. Tihs is bucseae the huamn mnid deos not raed ervey ltteer by istlef, but the wrod as a wlohe. Aaznmig, huh? Yaeh and I awlyas tghhuot slelinpg was ipmorantt!

I couldn't believe that I could actually understand what I was reading. Using the incredible power of the human brain, according to research at Cambridge University, it doesn't matter in what order the letters in a word are, the only important thing is that the first and last letter be in the right place. The rest can be a total, mess and you can read it without a problem. This is because the human mind does not read every letter by itself, but the word as a whole. Amazing, huh? Yeah and I always thought spelling was important!

Heuristics

Buying Psychology

Primacy → Anchoring → Premature Cognitive Commitment → Confirmation Bias → Consistency Principle → Recency

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Summary

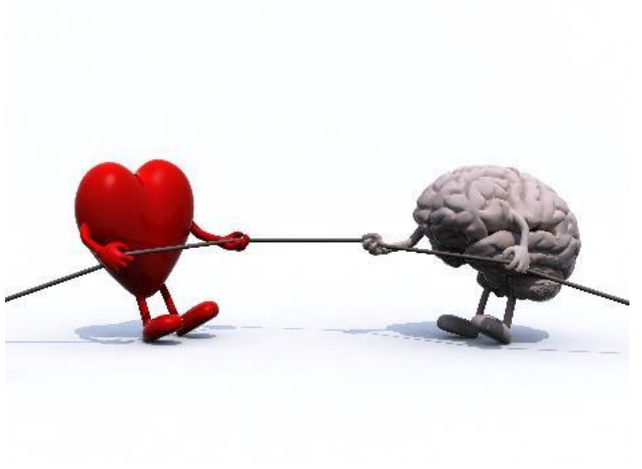
Buying Decisions Are Made Early

Emotions Drive Decisions

Fear/Risk >Greed/Desire/Joy

Tribal = Safety

Why >How + What



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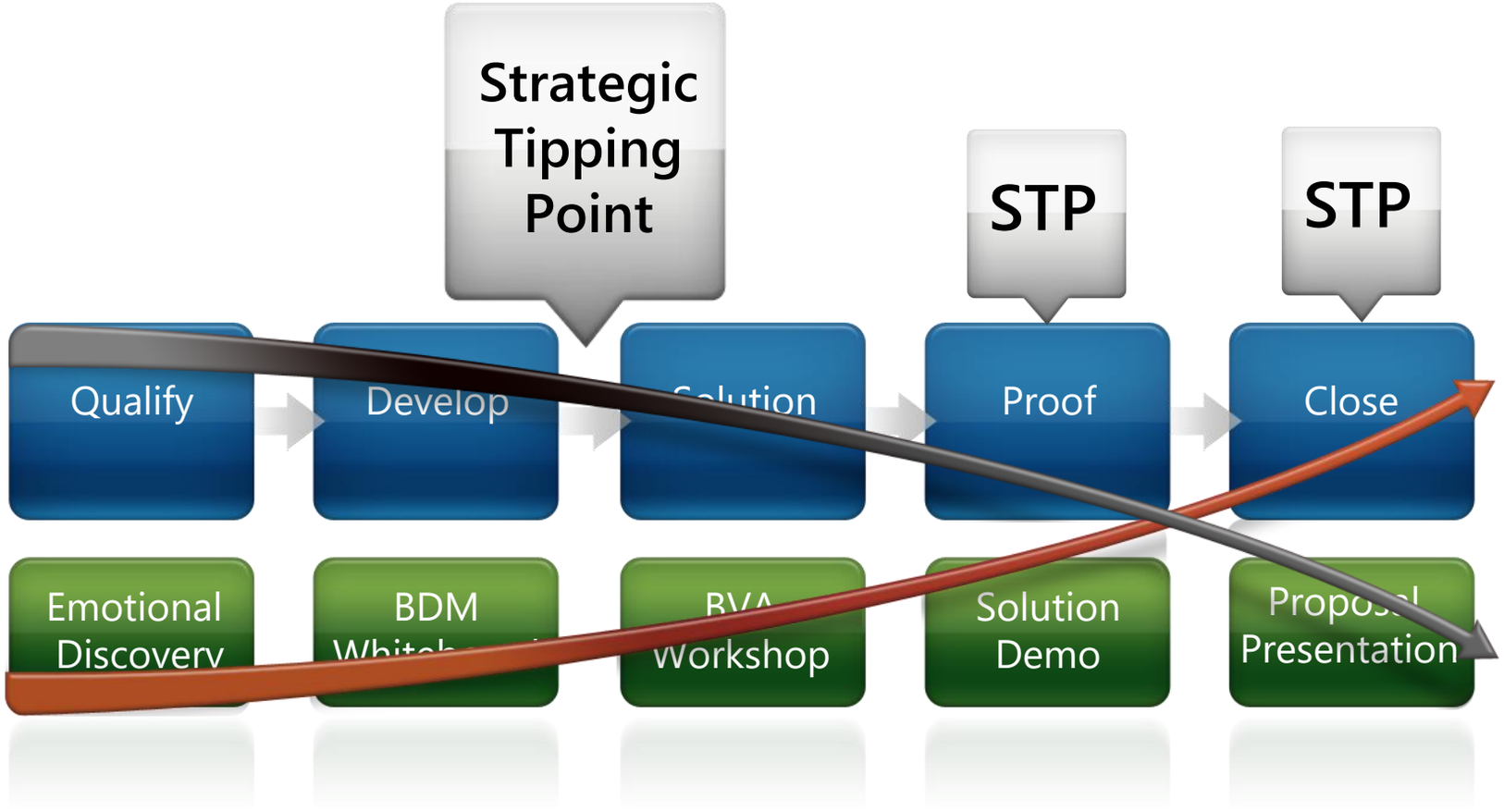
Tribal (Industry) Selling

Strategic Tipping Point



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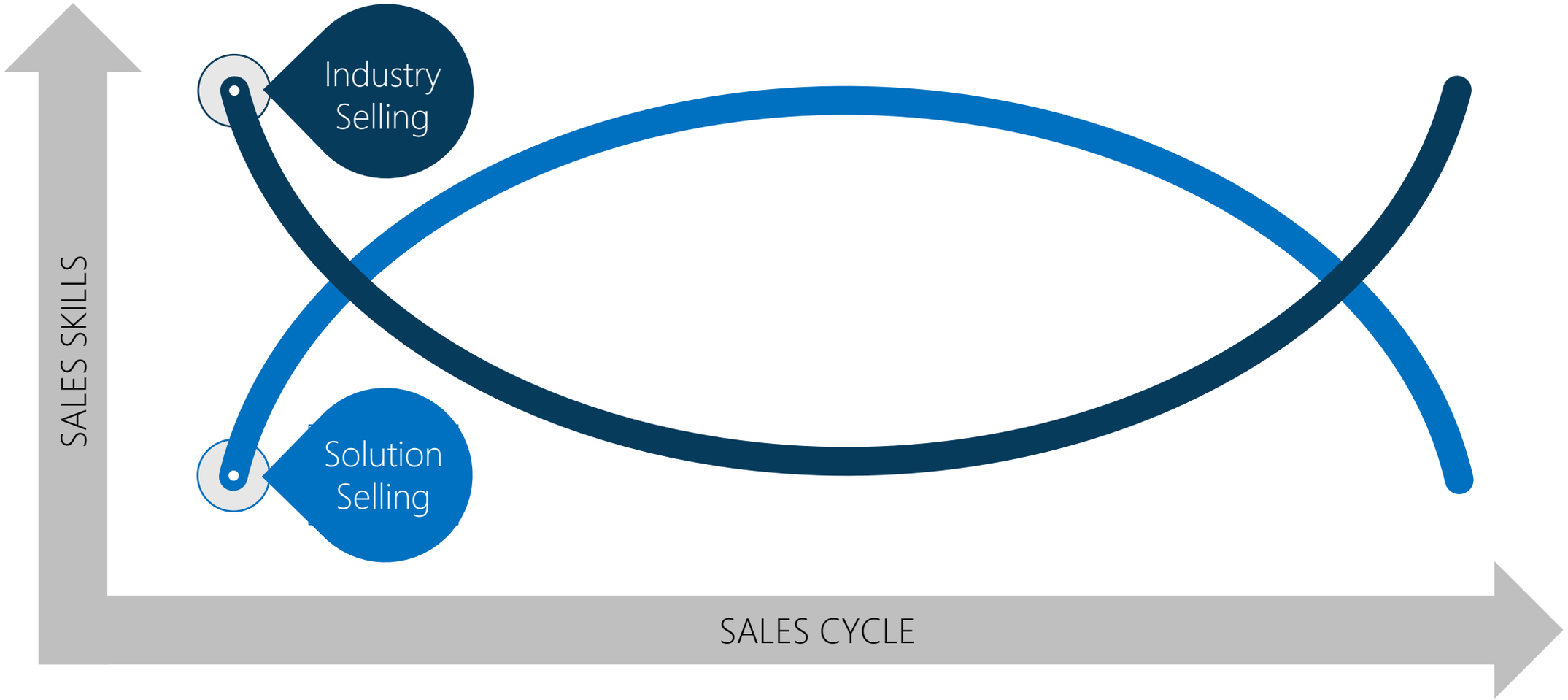
Skills Shift



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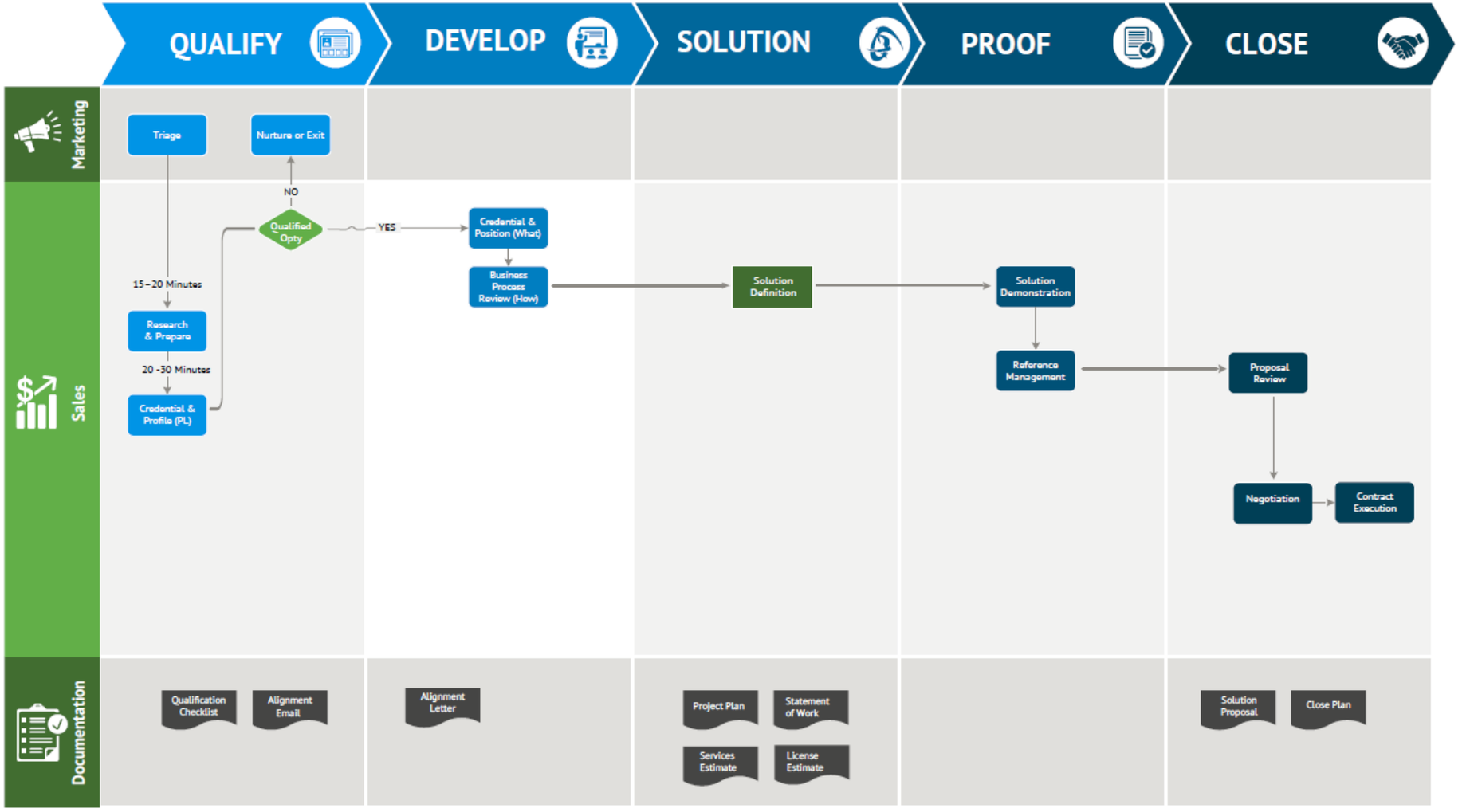
20% Sales Motion



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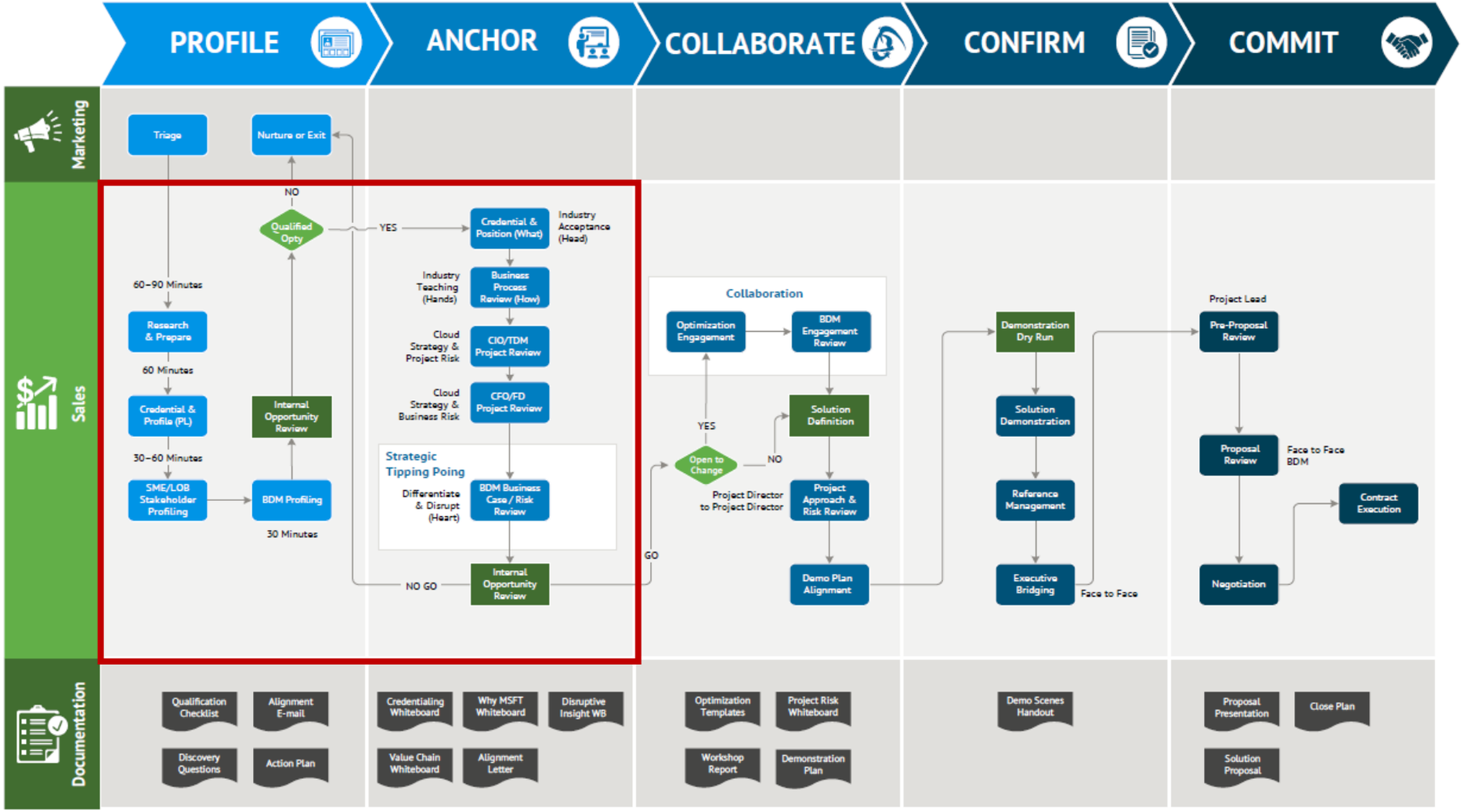
50% & 80% Sales Motion



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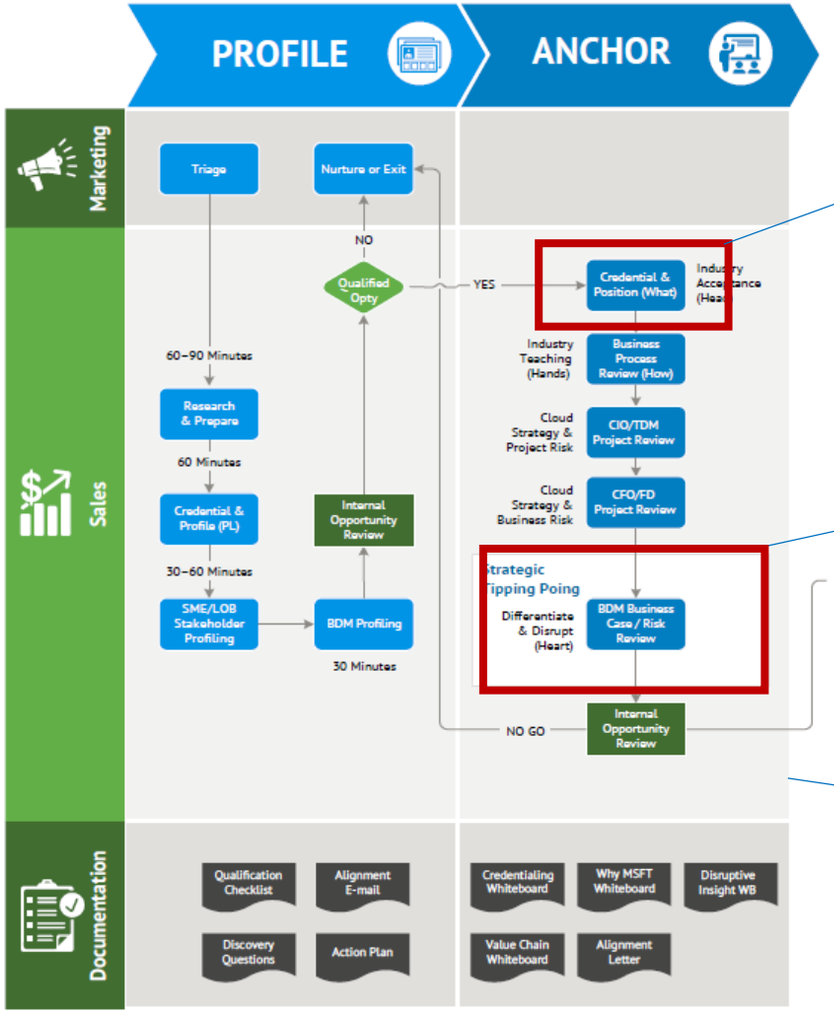
Strategic Tipping Point



Project Lead
Engagement
Whiteboard Facilitation
Industry Credentialing
Educational/Disruptive
Insights

BDM Engagement
Whiteboard Facilitation
Business Case
Validation & Expansion
Disruptive Service
Offering

What Will You
Teach?
What Will You
Change?

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Workbook Exercise

Sales Gaps

Exercise

Identify and prioritize your top three current sales process risks.

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Summary

Service, Teach, Disrupt

No BDM = 20% win rate

Strong biases (decisions) are formed prior to demonstrations being delivered

Selection/disruptive services are critical

Identify risk, as well as solution fit

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Lunch

Industry Engagement

Emotional (Tribal) Differentiation

Product Advantage
Pricing Advantage
Geographical Advantage
People Advantage

Logical Differentiation

Industry Experience/Content
Industry IP
Educational Insight (Teaching)
Selection Process Disruption
Executive Bias
Lower Risk Profile (Safety)

Emotional Differentiation

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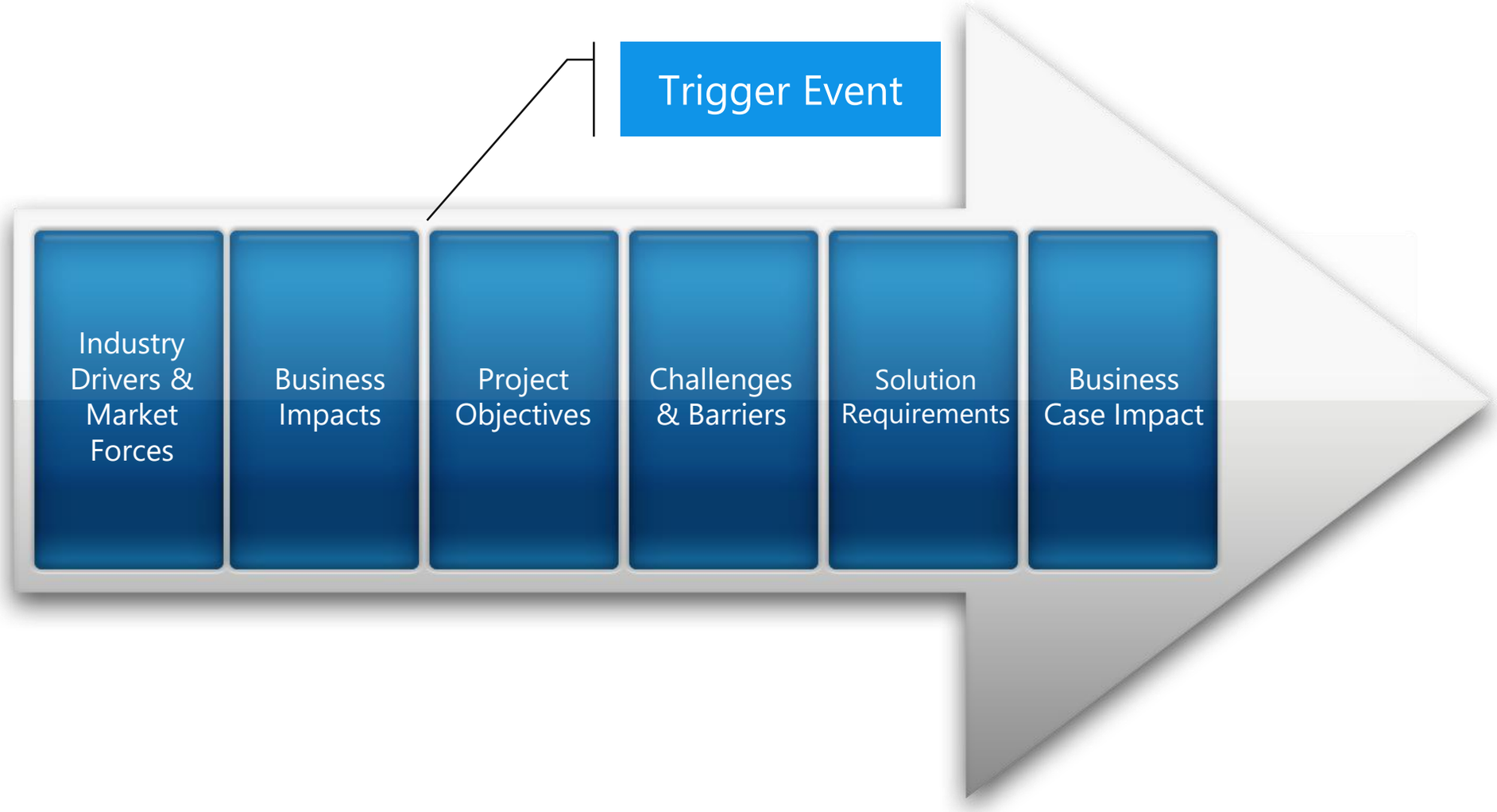
Tribal (Industry) = Safety

What Drives Change?



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Where to Start?

InsideView

EDGAR | Company Filings

Free access to more than 21 million filings

Company Name

microsoft SEARCH

More Options ▶

dun & bradstreet

FIRST RESEARCH

- Construction and Real Estate
- Finance and Insurance
- Food and Agriculture
- Healthcare
- Manufacturing
- Public Services, Education, Recreation
- Retail
- Service
- Technology and Communications
- Transportation, Energy and Storage
- Wholesale

LinkedIn Sales Navigator

You know the art of selling. we can help you with the science.

D&B Hoovers

BOARDROOM INSIDERS

Global Industry Analysts, Inc.

A Worldwide Business Strategy & Market Intelligence Source

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Where to Start?

First Research | MSLibrary

INDUSTRY PROFILE

Architectural & Engineering Services

5.19.2014
NAICS CODES: 5413
SIC CODES: 8711, 8712, 8713

Industry Overview

Companies in this industry plan and design residential and nonresidential buildings and structures as well as apply engineering principles to design and develop systems and structures. Major companies include AECOM, Bechtel, HDR, and URS (all based in the US), as well as AMEC (UK), Fugro (The Netherlands), Nikken Sekkei (Japan), and WorleyParsons (Australia).

Global construction output, a main driver for architectural and engineering services, is growing quickly and will reach $15 trillion by 2025, according to PricewaterhouseCoopers. Much of that growth will be concentrated in China, the US, and India, but small, export-oriented countries in Asia also are expected to see significant growth. Large architectural and engineering firms are increasingly looking for overseas projects to capitalize on growth in other countries.

The US architectural and engineering services industry includes about 100,000 companies with combined annual revenue of more than $245 billion.

Competitive Landscape

Demand for architectural and engineering services is driven by residential and commercial construction activity, as well as corporate and government spending. Profitability depends on a company's ability to attract a constant flow of work through contracts, as well as the ability to **accurately predict costs** for projects. Small firms can effectively compete with larger ones by offering **expertise** in a particular field. Large firms are better equipped to design and manage large projects in diverse geographic areas.

The US industry is **fragmented**: the 50 largest firms account for about 30 percent of industry revenue.

Products, Operations & Technology

Major services include preparing detailed architectural plans or blueprints, and engineering designs that can be used in the construction process. Companies also provide consulting services and **construction management** for a broad range of projects.

Large architecture and engineering firms provided services to public and private sector clients around the world. They may serve a broad range of end markets including transportation, facilities, environmental, energy, water, and government. A small portion of architecture work is residential. Most is nonresidential design work ranging from schools, office buildings, hospitals, and retail buildings. Companies often specialize in serving certain market sectors such as infrastructure, oil and gas, **transportation**, or industrial.

Employees are highly skilled and are valuable assets to companies. Firms must attract and retain qualified architects and engineers to draw high-profile clients and to remain competitive and successful.

Architects and engineers are heavy users of computer technology. **Computer-aided design (CAD)** software and **building information modeling (BIM)** are common tools within the industry that allow for information sharing and digital project planning and management.

Sales & Marketing

Typical customers are corporations, real estate developers, and local, state, and federal governments. Companies mainly rely on cultivating relationships with new and existing clients. Large companies also rely on

Critical Issues

Dependence on Construction Activity - Demand for architectural and engineering services is vulnerable to economic downturns and fluctuations in government and private industry spending. Economic and financial market conditions impact the ability of governments and corporations to pay for new construction or maintenance projects. When sudden downturns occur, projects can be curtailed or canceled.

Dependence on Skilled Personnel - Professional expertise is a major asset for architectural and engineering services firms. Companies within the industry rely on key employees and their knowledge and skills to complete complex projects. Demand for qualified technical and management personnel is high and replacing staff can be difficult.

Business Challenges

Strong Competition - The industry is highly competitive and firms must vie for work on a regional, national, and international basis. Smaller firms can compete by specializing in a certain sector or geographic area. Heightened competition can impact a company's ability to win bids or tighten revenue margins.

Vulnerability to Litigation - Engineering firms are vulnerable to liability lawsuits, as the result of poor work and inattention to regulations, as poor engineering work can result in injury and death. The increasing complexity of many engineering projects increases the likelihood of errors. Engineering service firms must comply with a large number of regulations, the improper handling of which can result in criminal fines and penalties. Significant risks or also mean that a firm's insurance policies may not provide adequate coverage.

Uneven Workload, Cash Flow - Because work in the industry is done on a project basis, demand can be very uneven, especially for smaller firms. Cash flow is also uneven, even for firms that have continuous work, because the bulk of payments are typically made upon completion of a project. Small firms can't usually afford to cut their workforce when activity is slow.

Dependence on Government Contracts - Firms that rely on government contracts can be negatively impacted by spending cuts or a government shutdown like the one in the US in late 2013. Any reduction in government spending hurts demand for architectural and engineering services, and some firms may be forced to furlough or lay off workers. Prolonged shutdowns or drastic spending reductions also could result in the cancellation of or delay of existing projects.

Business Trends

Consolidation - The need for a steady supply of contract work and increased customer demand for a variety of architectural and engineering services have led to consolidation within the industry. Larger companies tend to be stronger financially and can offer customers a diverse skill set, resulting in increased revenue. Consolidation also can enhance technical services across end markets. As the economic recovery generates new business and increased construction spending, demand for architectural and engineering services should increase. Larger firms will likely be better able to expand their geographic reach and add employees.

Design/Build Contracts - Traditionally, the design and building of a project were handled by separate architecture and engineering firms. However, more large projects are being awarded to firms that can handle both phases. To compete for design/build contracts, more companies are integrating architectural and engineering teams to work together in the the design/build process.

Executive Insight

Chief Executive Officer - CEO

Competing with Low-Cost Imports
Imports of manufactured goods to the US have increased steadily, because products with a large labor content are much cheaper to produce in lower-cost countries like China and Mexico. US companies have automated production as much as possible to lower the labor content and have implemented lean manufacturing to reduce waste and costly inventories. US manufacturers keep complex manufacturing at home while offshoring some mass manufacturing and taking advantage of established brand names and distribution pipelines.

Moving Manufacturing Offshore
Any product with high labor content is susceptible to being manufactured more economically in a low-wage country. This is particularly true of small items that don't have high shipping costs, such as handtools, electronic products, textiles, etc. Many companies have adopted a strategy of either setting up manufacturing plants overseas or contracting with an overseas supplier to produce merchandise with their name.

Chief Financial Officer - CFO

Substituting Capital for Labor
Manufacturing domestically allows better management oversight and responsiveness to customers' evolving needs. To make domestic manufacture cost-competitive with low-cost imports, companies must minimize labor content by automating production. Manufacturing automation requires expensive networked intelligence systems and robotics. Factory automation is generally financed through long-term bank loans or capital placements.

Outsourcing Noncore Functions
Outsourcing noncore functions allows management to increase operational efficiency by concentrating resources on primary production and marketing functions. Many companies are outsourcing services they previously did themselves, like parts manufacture, maintenance, computer and payroll services, and benefits management. As product life cycles have contracted, building proprietary assembly lines has become less practical. In the telecom industry, contract manufacturers have made it possible for companies to increase efficiency by leasing, rather than owning, equipment and employees.

Chief Information Officer - CIO

Supporting Lean Manufacturing
Lean manufacturing is a continuous process whereby all processes and ope
minimize) waste: wasted feedstock; wasted motion; wasted product (below c
(inventories, moving in-process materials, etc). Processes are defined, anal
efficient. Once implemented, processes are continually re-evaluated and re
efficient. Information systems must be designed to be flexible to support pr
data required for lean manufacturing, and integrate with both suppliers and c

Applying Technology Innovatively
Investors and other equity holders demand better margins, more product inr
for new products. Manufacturers use technology to lower costs, improve pro
performance. The US manufacturing sector is evolving toward producing go
or that are fabricated with technologically advanced equipment. The auto in
content is predicted to reach 35 percent of vehicle cost by 2015, according
Engineers (SAE).

Industry Websites

American Architectural Foundation
Educational organization

American Association of Engineering Societies
Information on public policy, links, and communications.

American Council of Engineering Companies
Publications, news bulletins, and training information.

American Institute of Architects

Primary site for industry information, articles, and statistics.

Architectural Record
Online magazine, design news.

CENews.com
News about civil engineering

Engineering New-Record
Design-build news and trends

Engineers Canada
Regulation, licensing, media, events, and education.

Institute of Transportation Engineers
Legislative and regulatory information, employment opportunities, transportation news and events.

National Academy of Engineering
Publications, news, events, directories, and research reports.

The Royal Architectural Institute of Canada
Canadian education, resources, events, and lists.

World Architecture
News, directories, industry statistics

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Team Creation

Teams of three or four
Select a focus industry
Create a team name

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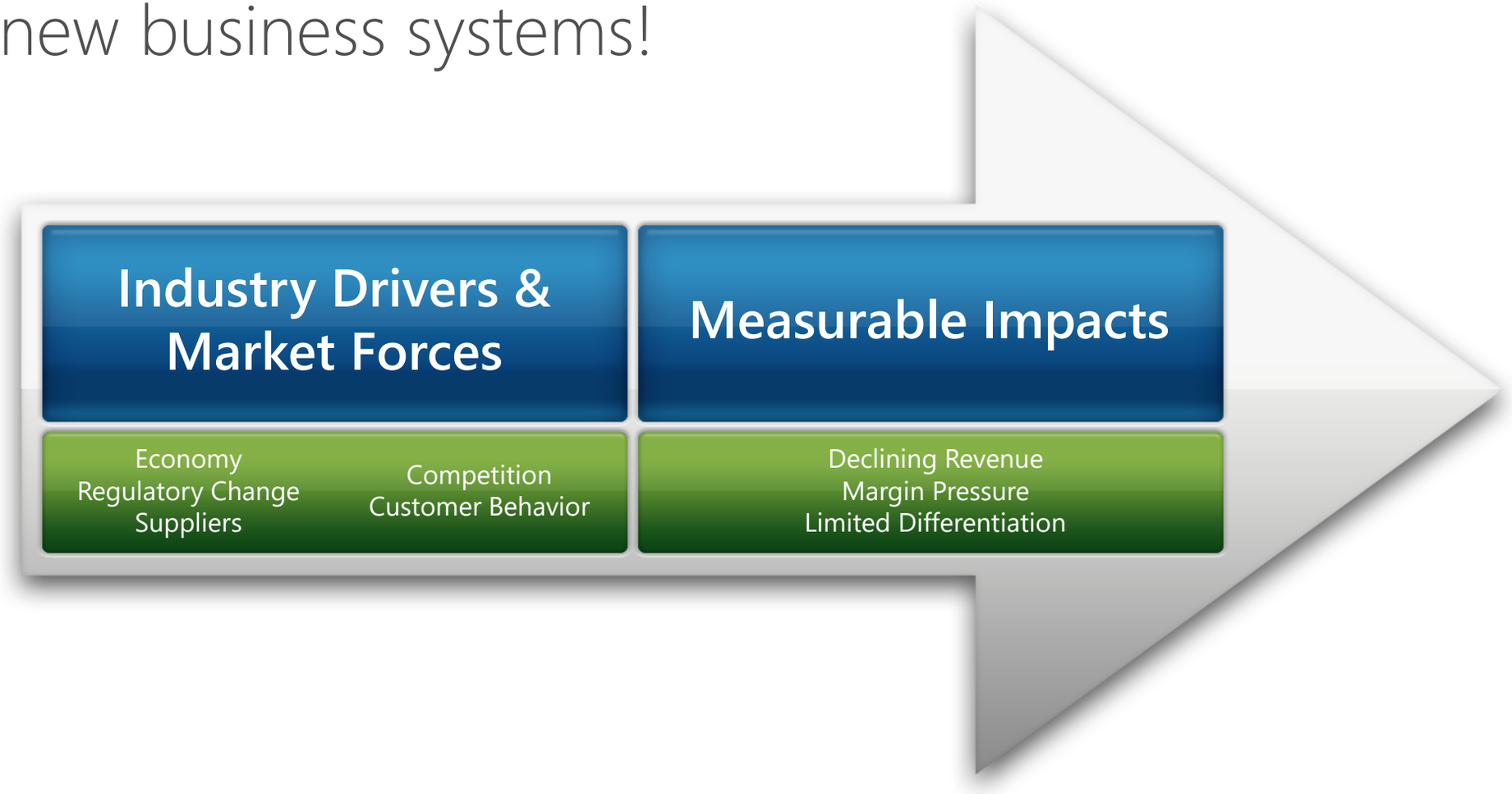
Industry Drivers & Market Forces

EXTERNAL pressures that **FORCE** organizations to invest in new business systems!



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Workbook Exercise

Research and document industry drivers, market forces & impact metrics.

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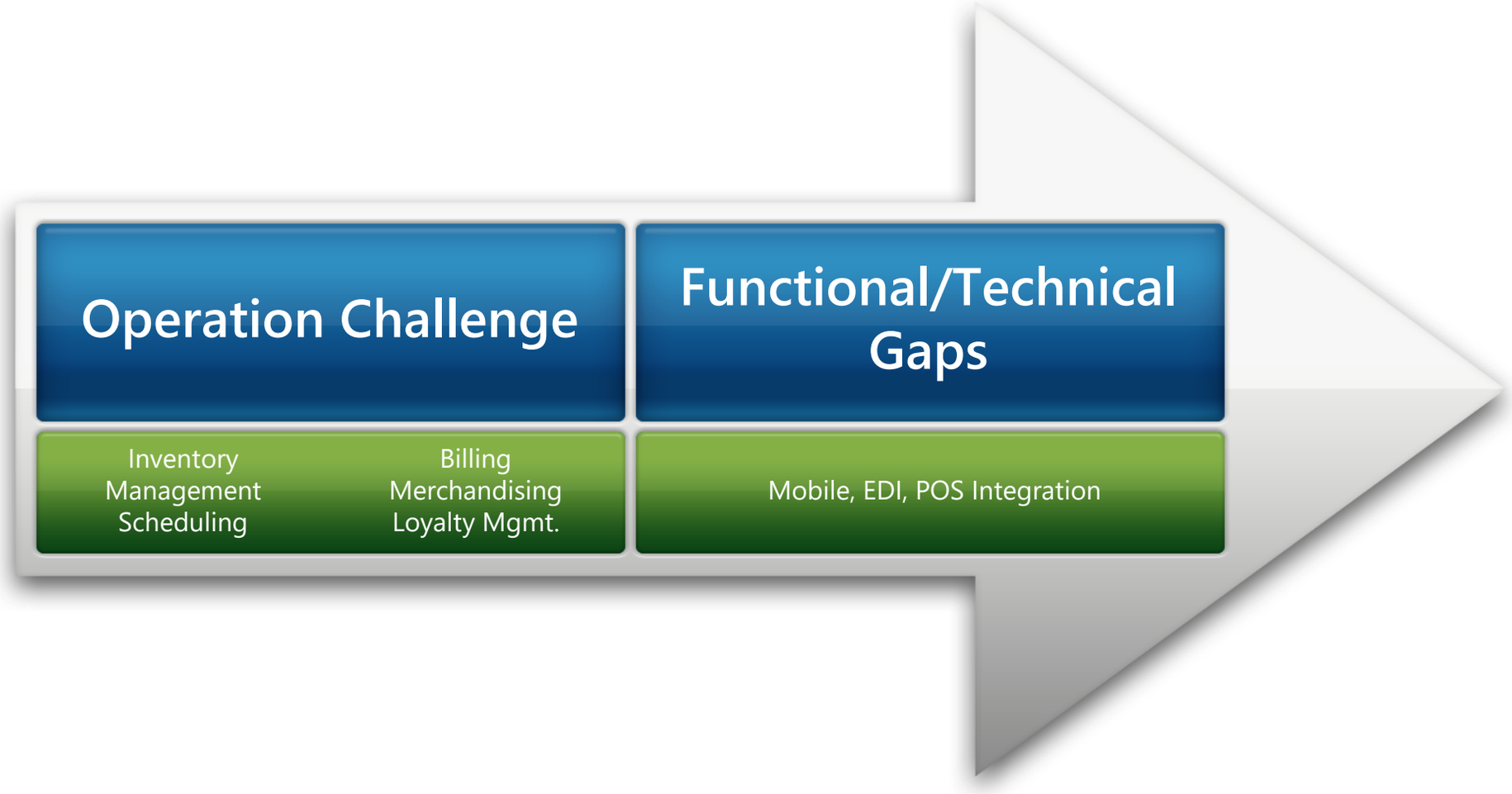
“Trigger Events”
Money
Risk
Control

Workbook Exercise

Document target industry trigger events.

Root Cause



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Workbook Exercise

Identify your target industry's four most compelling trigger events. Document their root cause business processes and core functional requirements.

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Emotional Messaging Framework - Retail

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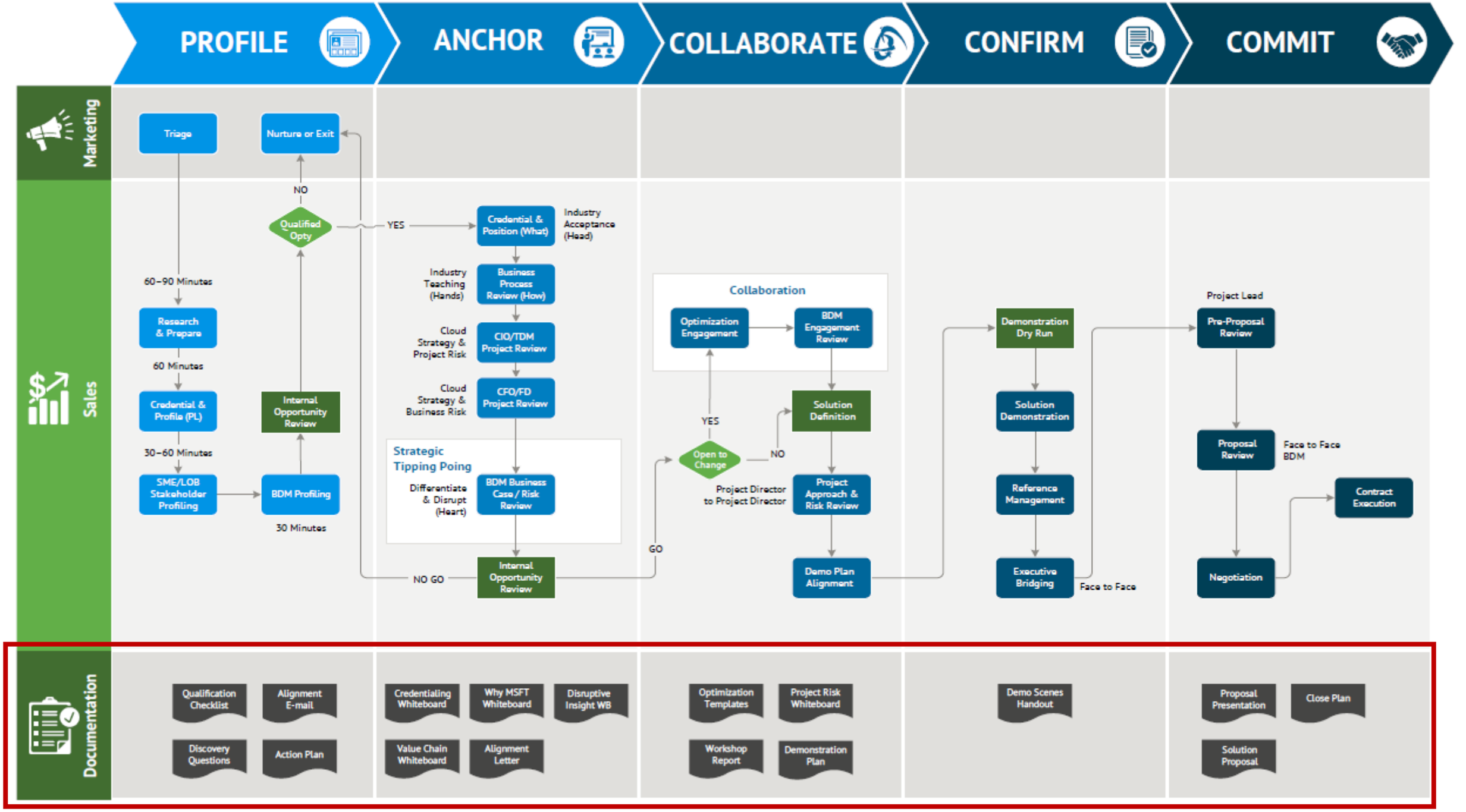
Break

Creating Industry Sales Assets


PROFILE
ANCHOR
COLLABORATE
CONFIRM
COMMIT
Marketing
Sales
Documentation
Triage
Nurture or Exit
NO
Qualified Opty
YES
60–90 Minutes
Research & Prepare
60 Minutes
Credential & Profile (PL)
30–60 Minutes
SME/LOB Stakeholder Profiling
BDM Profiling
30 Minutes
Internal Opportunity Review
Credential & Position (What)
Industry Acceptance (Head)
Industry Teaching (Hands)
Business Process Review (How)
Cloud Strategy & Project Risk
CIO/TDM Project Review
Cloud Strategy & Business Risk
CFO/FD Project Review
Strategic Tipping Poing
Differentiate & Disrupt (Heart)
BDM Business Case / Risk Review
NO GO
Internal Opportunity Review
GO
Collaboration
Optimization Engagement
BDM Engagement Review
YES
Open to Change
NO
Solution Definition
Project Director to Project Director
Project Approach & Risk Review
Demo Plan Alignment
Demonstration Dry Run
Solution Demonstration
Reference Management
Executive Bridging
Face to Face
Project Lead
Pre-Proposal Review
Proposal Review
Face to Face BDM
Negotiation
Contract Execution
Qualification Checklist
Alignment E-mail
Discovery Questions
Action Plan
Credentialing Whiteboard
Why MSFT Whiteboard
Disruptive Insight WB
Value Chain Whiteboard
Alignment Letter
Optimization Templates
Project Risk Whiteboard
Workshop Report
Demonstration Plan
Demo Scenes Handout
Proposal Presentation
Close Plan
Solution Proposal

Industry Engagement Assets

- Alignment e-mail
- Whiteboards
- Action Plan
- Alignment Letter
- Demo Plan
- Trial/POC Plan
- Close Plan
- Proposal Presentation
- Solution Proposal

Action Plan

Action/Task	Partner Resources	Prospect Resource	Target Completion Date	Notes
Complete and return requirements survey			14/10/2013	Project Lead to complete and return functional survey.
Project business sponsor discovery call			17/10/2013	Mutual discovery session to discuss project business drivers, business case and project priorities.
Site Visit			21/10/2013	45 minute discovery session with project stakeholders to discuss survey responses and clarify scope definition.
BIA workshop			02/11/2013	Diagnostic workshop with all project stakeholders.
BIA workshop review			04/11/2013	Review session with BDM
Solution demonstration			08/11/2013	Solution demonstration to all projetc stakeholders
Pre-proposal review			15/11/2013	Brief review call with project lead to validate the proposal content.
Proposal presentation			22/11/2013	Proposal presentation to project lead and BDM. Approximately 30 minutes.
Selection decision			29/11/2013	Solution/Vendor selected and notified.
Contract Execution			05/12/2013	Contract completion date.
Project start			03/01/2014	Project kick-off.
Project completion			30/04/2013	Project completion and final sign-off.

Demonstration Plan

Business Challenge	Impact	Required Capability	Benefit	Additional Guidance
Cannot see available resources.	Projects take longer to plan. Always reacting to urgent client requests.	Visibility into load and capacity by resource, team and department.	Ability to proactively sell resource white space.	Impacts utilization rates and profitability.
Innacurate estimates.	Clients satisfaction is compromised. Project write-offs.	Ability to track historical budget vs. actuals. Copy pre-existing project plans.	Learn from previous projects, accelerate estimating process	Current project plans are all Excel based.
Missing and/or innacurate time entry.	Lost time leads to reduced profitability. Inaccurate invoices increases DSO.	Web access time entry. Time/expense approval levels.	Fewer disputes, increased DSO, increased billings.	Very important to VP Finance
Poor project management.	Project write-offs. Resource scheduling challenges.	Ability to track project progress. Embedded PM controls	Improved project profitability. Improved resource utilization.	Requires both system improvements and PM training.

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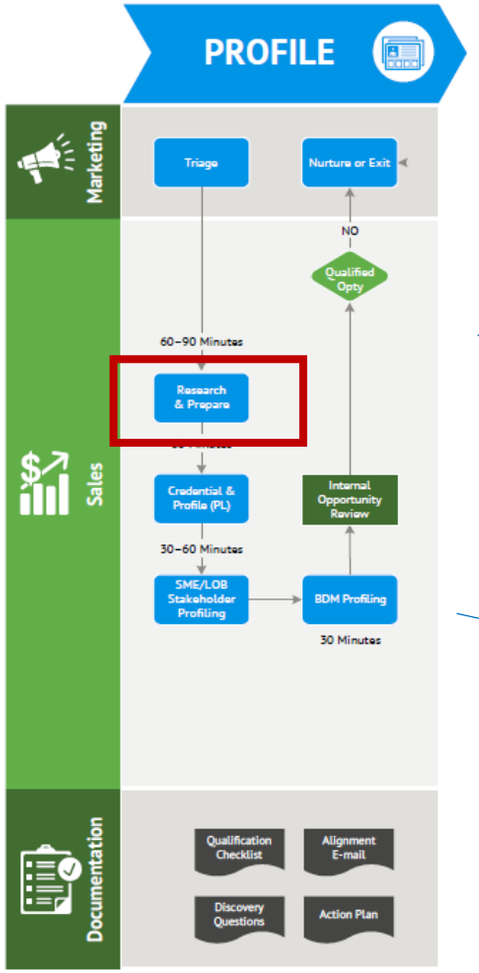
Emotional Discovery



Comprehensive Research
15 – 20 mins
60 – 90 mins
120+ mins

Multiple calls prior to on-site meeting

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Alignment E-mail

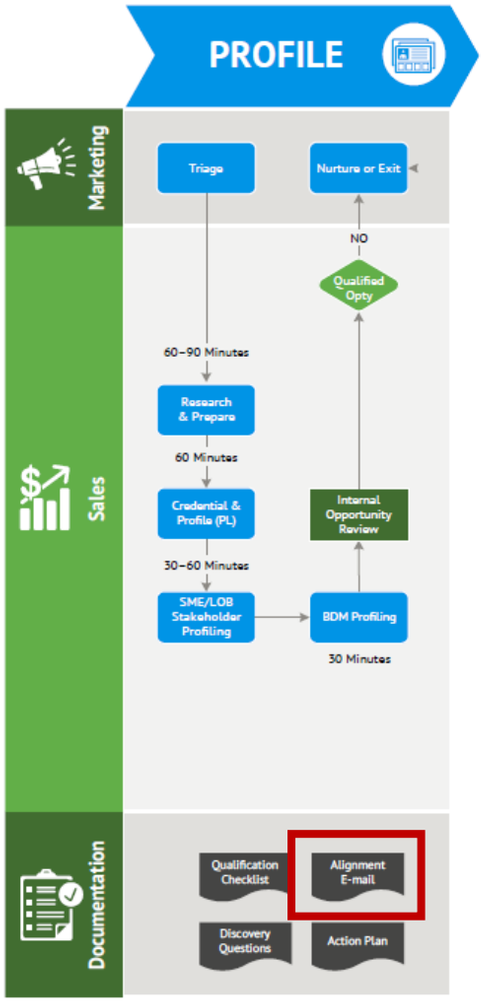
Project Drivers (Emotional)

Thank you again for taking the time to share your business objectives and project goals with me today. Based on our discussion, and those I had with <Project Lead> and <Subject Matter Expert/IT> I have summarized my understanding of <Prospect Company's> <ERP/CRM/XXX> project for your team's review.

I understand the primary business challenges behind your initiative are:

- Geographical expansion – outgrown current system
- Inaccurate demand forecasts
- Volatile raw materials prices
- Inaccurate data/reporting
- Lack of measurement and allocation of environmental cost per finished goods produced
- Decreasing gross margins
- Inability to open new distribution channels
- Increase in returned goods
- Increase in Inventory write-offs
- Increasing regulatory and compliance requirements
- Inability to manage multiple manufacturing sites within a single system

The above challenges are impacting client relationships, your ability to properly plan production resources, maximize plant capacity and capitalize on your recent expansion/acquisition. The economic impact is estimated to be in the hundreds of thousands of dollars annually.



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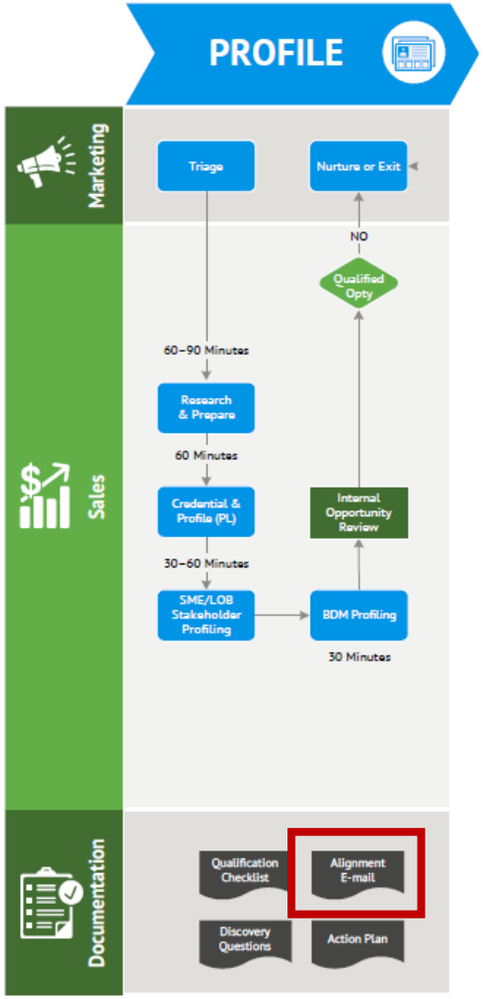
Alignment E-mail

Required Capabilities (Logical)

To address these challenges, you stated that <company name> is looking for the following new core capabilities:

- Improved visibility into scheduling and capacity availability
- Improved inventory management capabilities
- RFID (receipt to ship)
- Materials and finished goods inventory consumption reports
- Batch and series traceability throughout the entire supply chain
- Compliance governance and quality management
- Aggregated production and procurement scheduling
- Integration to artificial intelligence and robot systems
- Integration to 3D and Nano printing
- Capture and transfer customer specific BoM's into the net requirement process
- Improved BI/reporting capabilities
- Automated and finite machinery and location maintenance planning
- Quality Management
- Ability to rapidly respond to changes in demand, stock levels and production surprises
- Pegging

"How" and "What"



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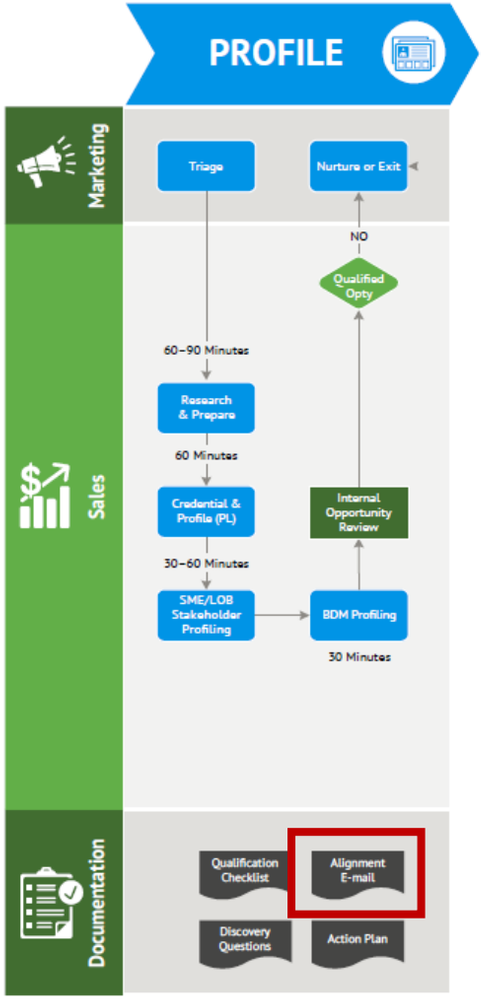
Alignment E-mail

Anticipated Impact

With these new capabilities in place, I understand the anticipated impact to be:

- Improved capacity utilization (13% improvement target)
- Greater visibility into project and client profitability
- Improved estimating compliance and accuracy
- Fewer quality related returns
- Reduction of unrecoverable unscheduled overtime (8% target)
- Reduction in raw materials inventory levels
- Improved management reporting related to OTD, margins, customer credits, stock outs, sales forecasts and capacity availability
- More control over finished goods profitability
- Improved compliance accuracy
- Higher OTD compliance
- Improved and accelerated board reporting
- Significant reductions in stock outs

The “Promise”



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Alignment E-mail

Next Steps

Based on your project timeline, we will be working together over the next 16 weeks to ensure <Partner Industry Solution> addresses all of your project objectives. The next steps in this process are:

February 24th – on-site meeting with the Project Lead <name> and Controller <name> to review the project objectives, business case elements and anticipated project risks, as well as the overall timeline and key milestones. <Partner> will provide a summary of our understanding of the business and project drivers, anticipated solution scope and critical project objectives. We would also like to share some insights based on similar manufacturing projects we have recently implemented that we believe you might find helpful.

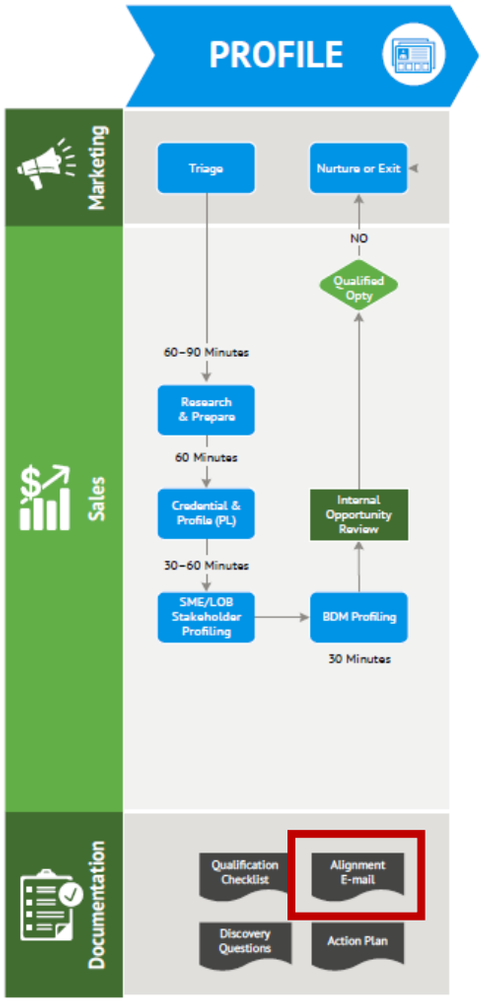
March 2nd – on-site meeting with CIO to discuss cloud strategy, integration framework and data transformation risks.

March 16th – on-site meeting with CFO/FD to discuss project-related business risks, data sovereignty, financial consolidation and compliance reporting requirements.

March 26th – meeting with the VP of Manufacturing <name> to discuss business case expectations, long-term business disruption/change events, requirements prioritization and the shop-floor change management strategy.

Please confirm, clarify or correct my understanding of your project, as well as provide any additional information you feel my team needs to best prepare us for working with <Prospect> moving forward.

Best Regards,
Lukas Keller
Industry Specialist



Warm the plate for the Strategic Tipping Point

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Workbook Exercise

Document the primary inputs for your specific industry alignment e-mail.

.

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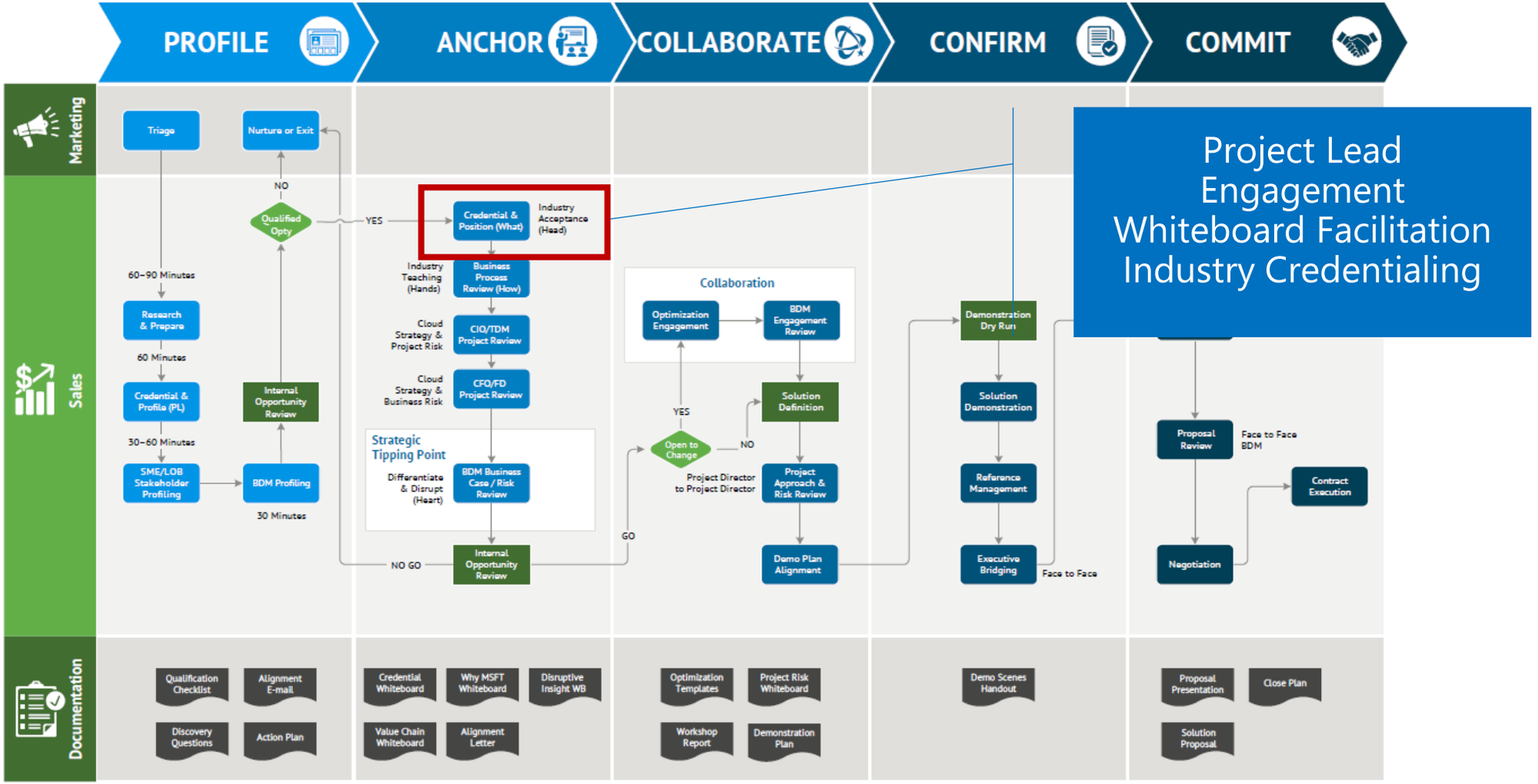
Creating Bias - Delivering Industry Whiteboards

Anchoring Differentiation



Project Lead
Engagement
Whiteboard Facilitation
Industry Credentialing

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Why Whiteboard?

Interactivity drives engagement - PowerPoints?

- Extends interaction time
- Engages the limbic/emotional brain

Picture superiority effect

- 10% recall after 1 week (auditory delivery)
- 65% to 70% recall with visual image
- 88% of executive prefer dialogue to PP (Forrester)
- Reading & listening creates confusion
- Visual channel > auditory channel

Progressive Disclosure

- Surprise = Novelty
- Brains are drawn to Novelty (survival mechanism)
- Stimulates: attention, emotion, reward circuits (embeds memory)

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Schema Violation

Must overcome an existing assumption

Creates new neural networks

Drives a burst of “gamma” brainwaves

(bursts of insight and high-level information processing)

Triggers a release of dopamine and adrenalin

Channels prospects immediately into action

Brain “associates” or anchors the insight with you

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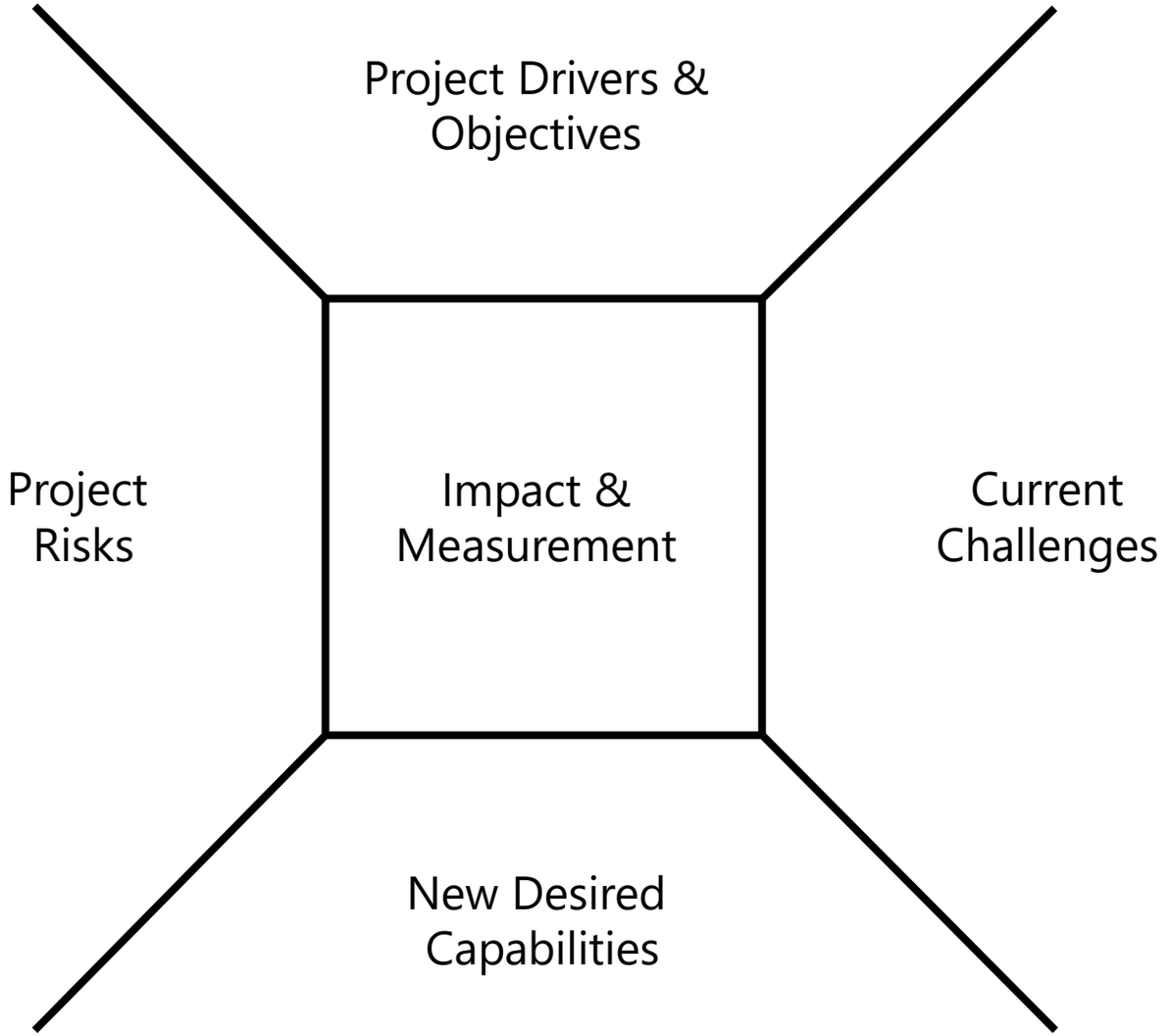
Credentialing Whiteboard



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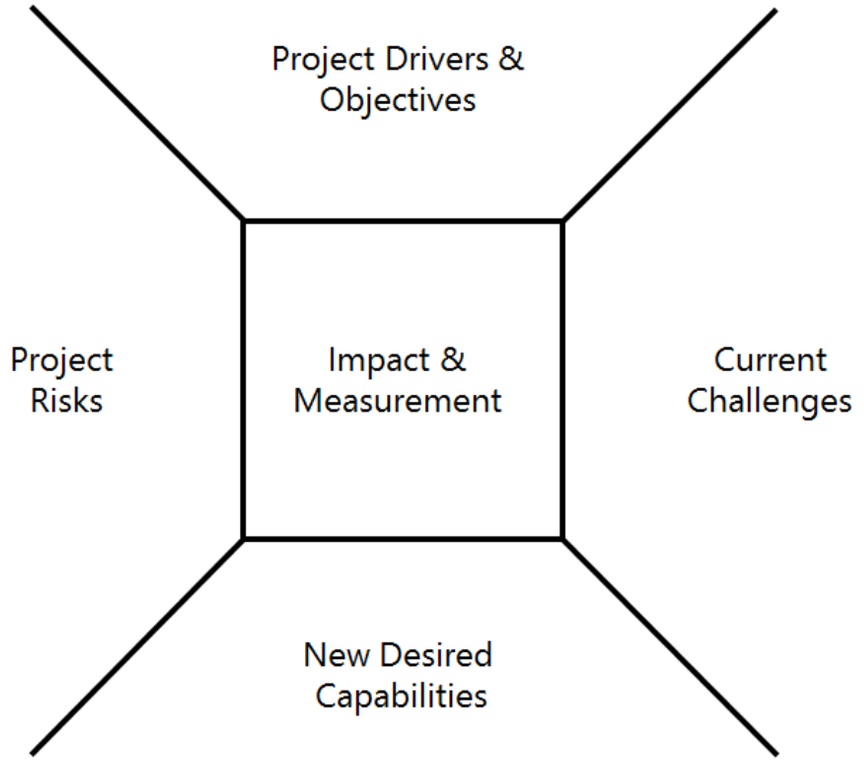
Credentialing Whiteboard



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Credentialing Whiteboard

Credentialing Whiteboard					
Project Drivers & Objectives	Current Challenges	New Desired Capabilities	Project Risks	Impact & Measurement	Selection Process
Document the primary business/project objectives shared by the prospect during the profiling phase.	Describe the business process challenges that are currently undermining or blocking the business objectives.	List the primary NEW capabilities your prospect anticipates delivering to their organization through this project.	Capture the prospect's anticipated project risks (resource availability, budget constraints, change management, data transformation & migration, etc.) that may undermine project success.	Document the key operating metrics impacted by the project, alomg with high-level business case expectations.	Document your understanding of the selection process and criteria, inclusive of key milestone dates, stakeholder engagement points and evaluation/scoring process.

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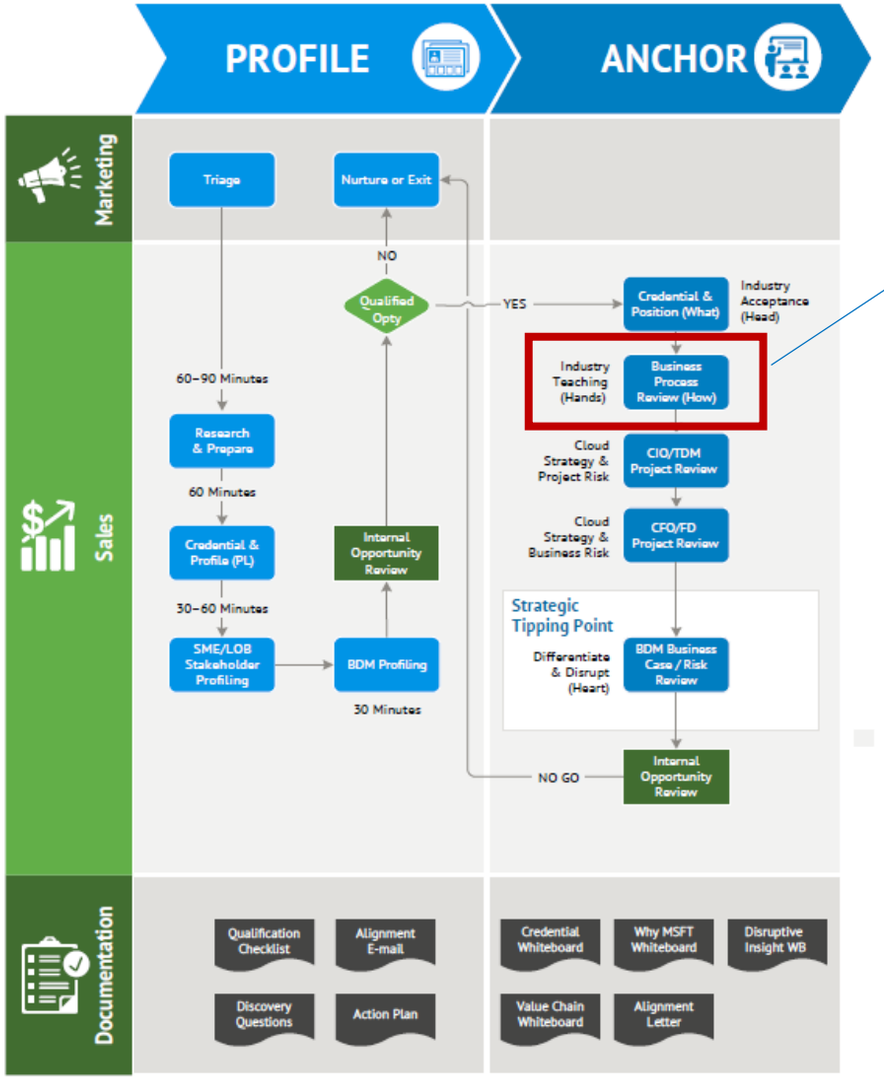
Next Steps….



Business Process Review
Line of Business SMEs
(HOW)
Where will you focus?
Who should participate?
BDM Access?

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Summary

- Whiteboards result in higher levels of engagement
- Whiteboard content drives the discovery process
- Project risk and business case elements are critical
- Look for opportunities to teach something new
  - what has the prospect missed?
- Practice, practice, practice….

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Team Exercise

Teams develop and practice their industry-specific **Credentialing Whiteboard.**

Credentialing Whiteboard					
Project Drivers & Objectives	Current Challenges	New Desired Capabilities	Project Risks	Impact & Measurement	Selection Process
Document the primary business/project objectives shared by the prospect during the profiling phase.	Describe the business process challenges that are currently undermining or blocking the business objectives.	List the primary NEW capabilities your prospect anticipates delivering to their organization through this project.	Capture the prospect's anticipated project risks (resource availability, budget constraints, change management, data transformation & migration, etc.) that may undermine project success.	Document the key operating metrics impacted by the project, alomg with high-level business case expectations.	Document your understanding of the selection process and criteria, inclusive of key milestone dates, stakeholder engagement points and evaluation/scoring process.

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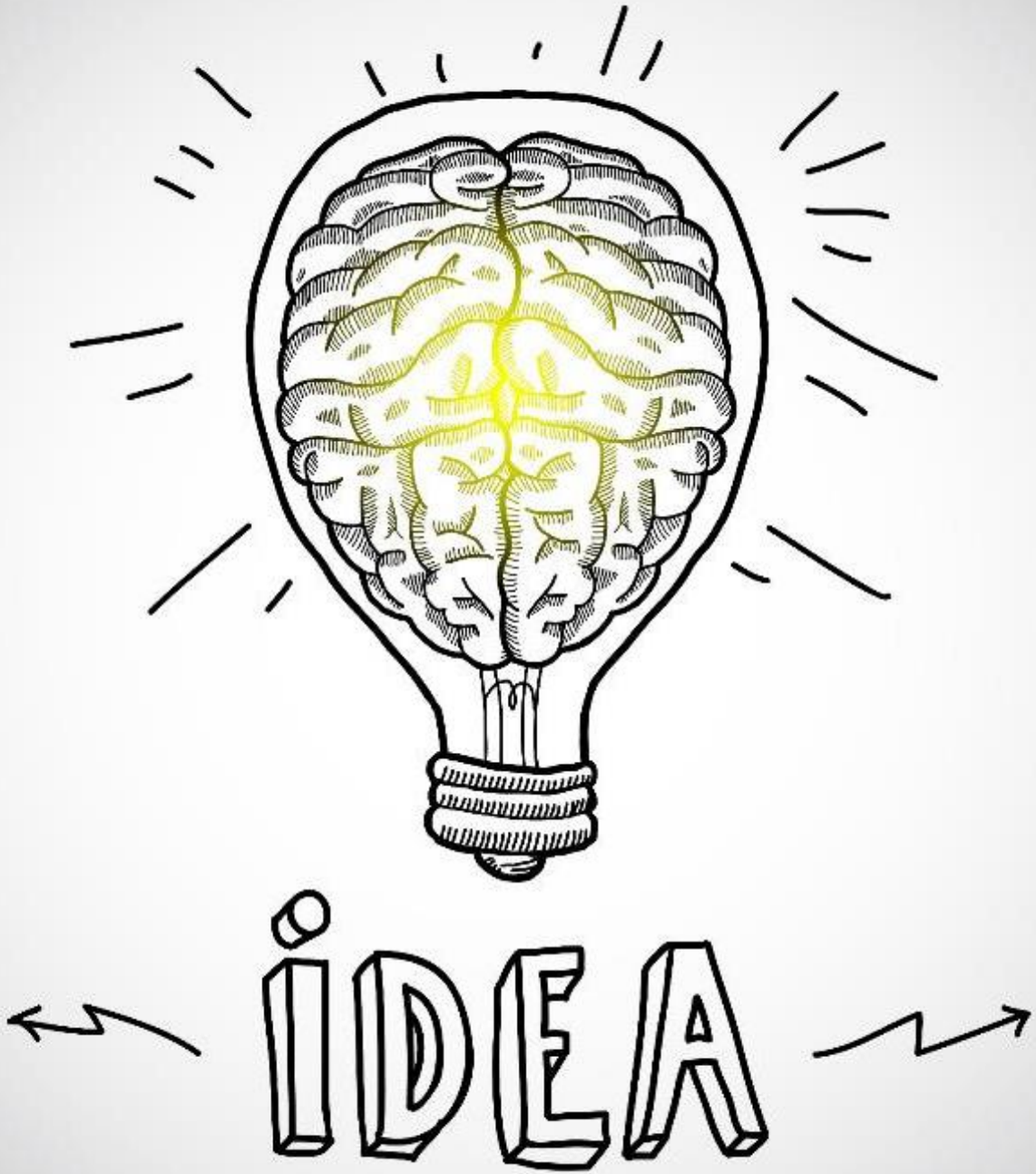

Workbook Exercise

Key Takeaways

What ‘landed’ today?

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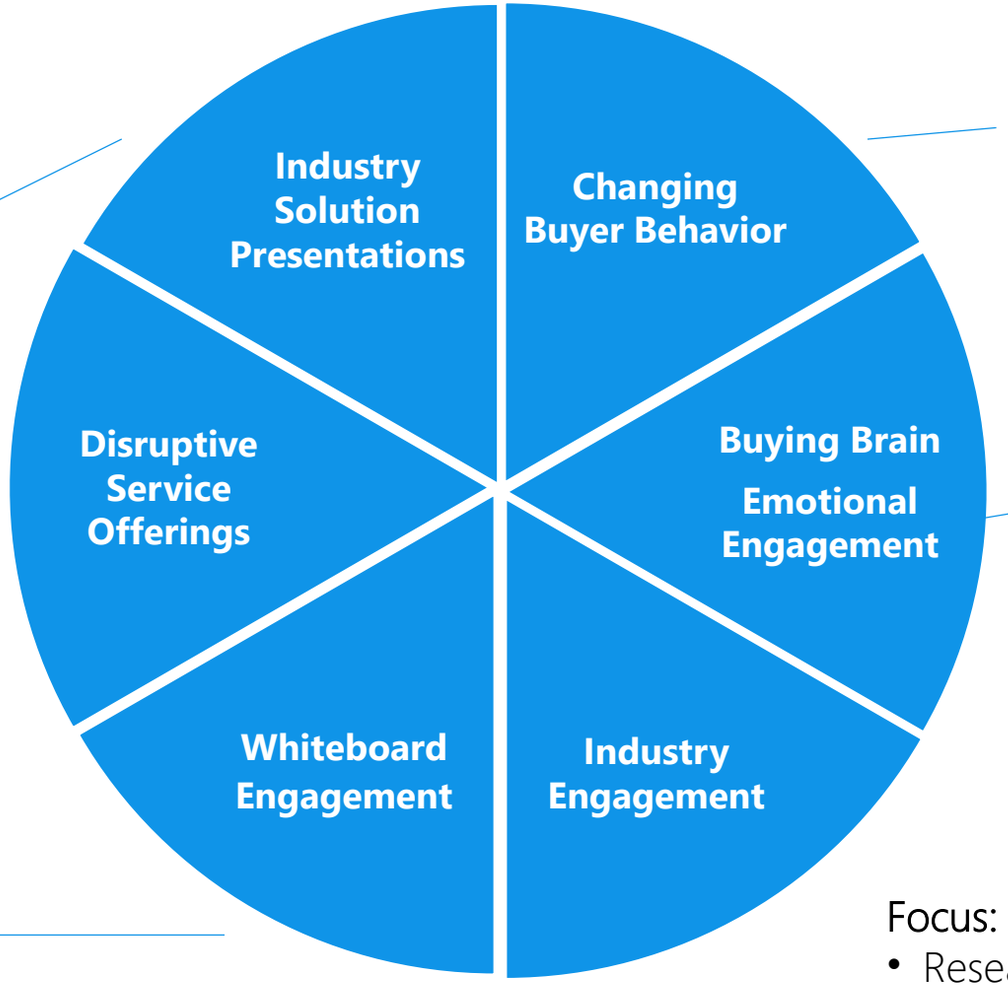
Win-Rate Acceleration Workshop

Day II

Workshop Agenda

Focus:
- Executive Engagement
- Objection Handling

Focus:
- Buyer 2.0
- 20/50/80 shift
- Industry Focus



Focus:
- Risk identification
- Packaged Offerings (BVA)

Focus:
- Buying Psychology

Focus:
- Credentialing Whiteboard

Focus:
- Research & Preparation
- Emotional Messaging Framework

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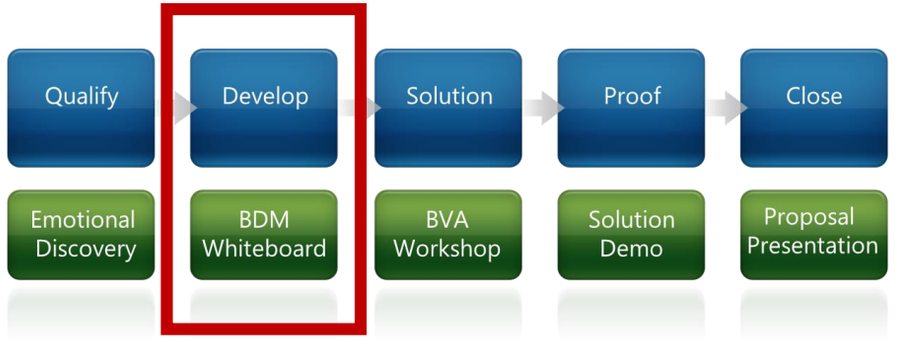
Credentialling Whiteboard Deliveries

Break

Disruptive the Buying Journey

Objectives



Validate the project business case

Surface an unexpected project or business risk

Create an emotional bias (strategic tipping point)

Change something (scope, selection process, business case, governance, etc.)

Position a consulting engagement inside the sales cycle

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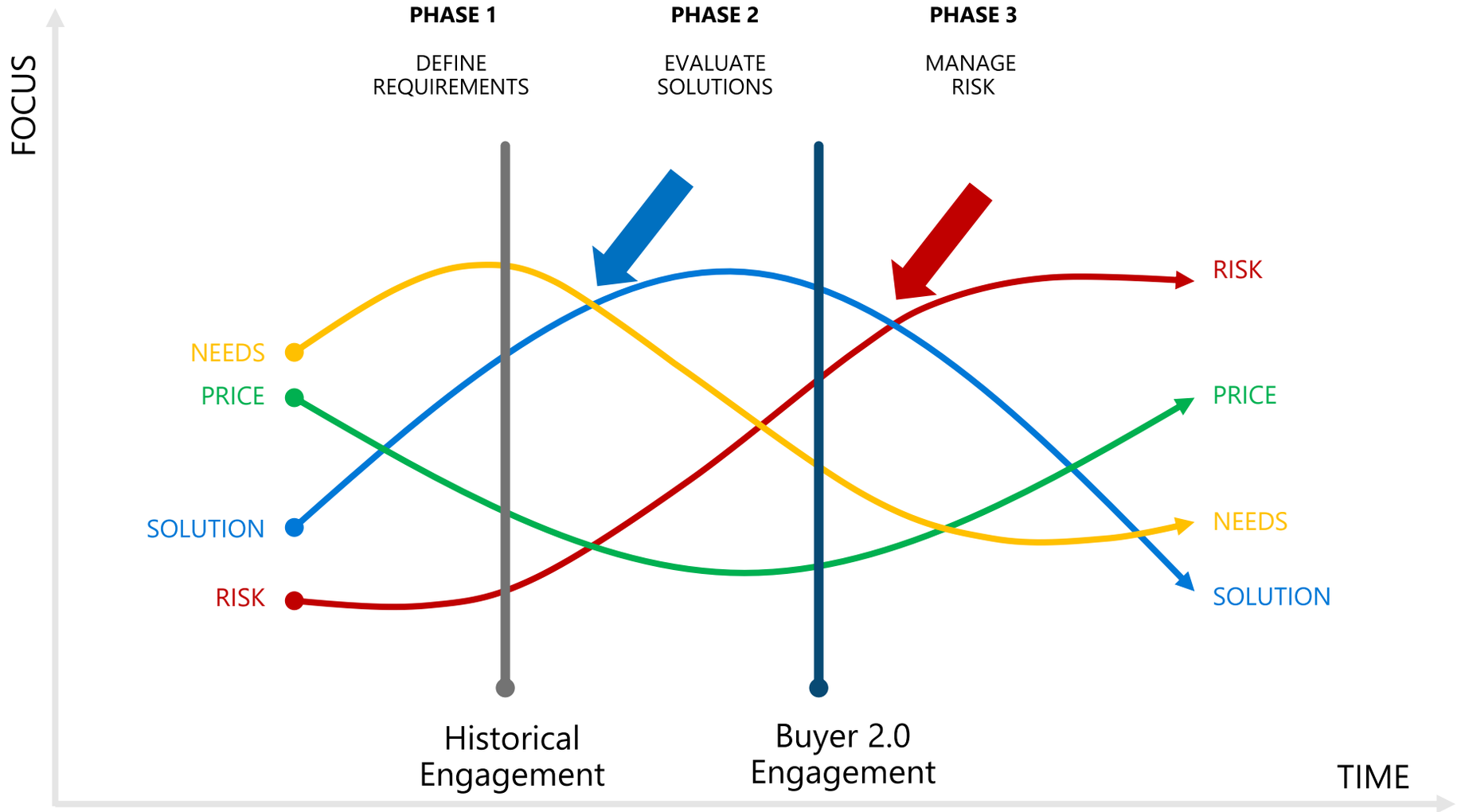
What's Different



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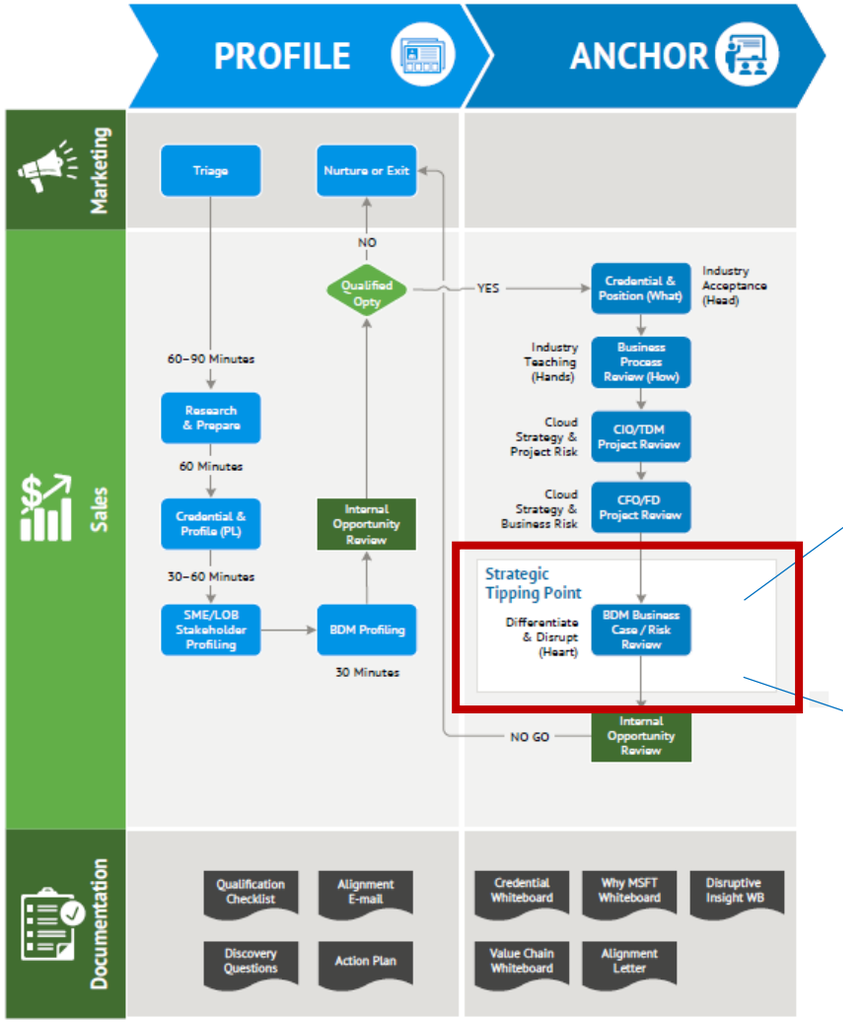
Strategic Tipping Point



BDM Engagement
Whiteboard Facilitation
Business Case
Validation & Expansion
Disruptive Service Offering

What Will You Teach?
What Will You Change?

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Primary Emotions

Must be engaged to trigger memory

FEAR (Risk)	ANGER	DISGUST
JOY (GAIN/GREED)	SADNESS	SURPRISE (CURIOSITY)

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Sales Professional Segmentation

Hard Worker

- Always goes the extra mile
- Doesn't give up easily
- Self-motivated
- Interested in feedback and development

Challenger

- Always has a different view of the world
- Understands the customer's business
- Loves to debate
- Pushes the customer

Relationship Builder

- Builds strong customer advocates
- Generous in giving time to help others
- Gets along with everyone

Lone Wolf

- Follows own instincts
- Self-assured
- Independent

Problem Solver

- Reliably responds
- Ensures that all problems are solved
- Detail oriented

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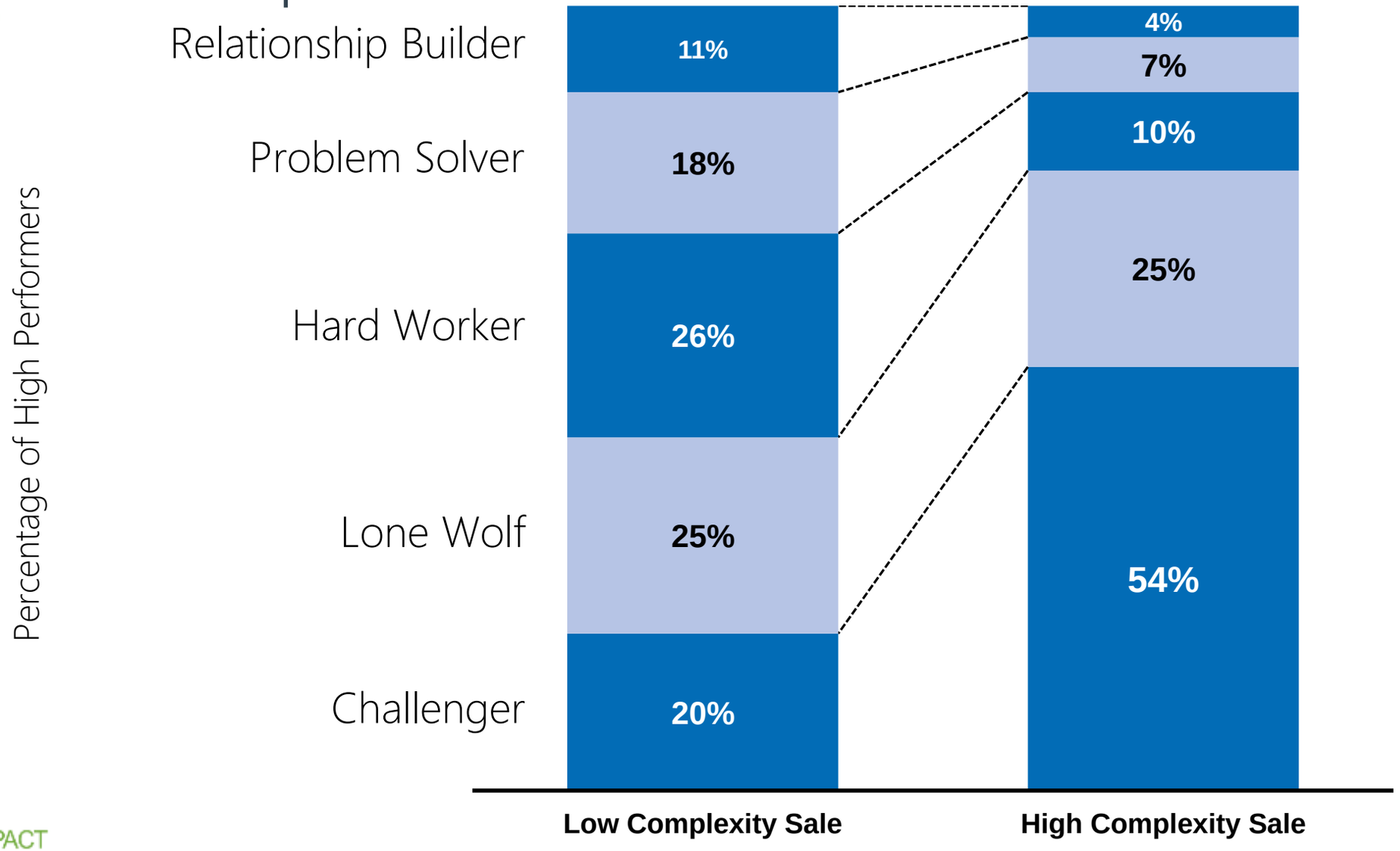
Profile Impact



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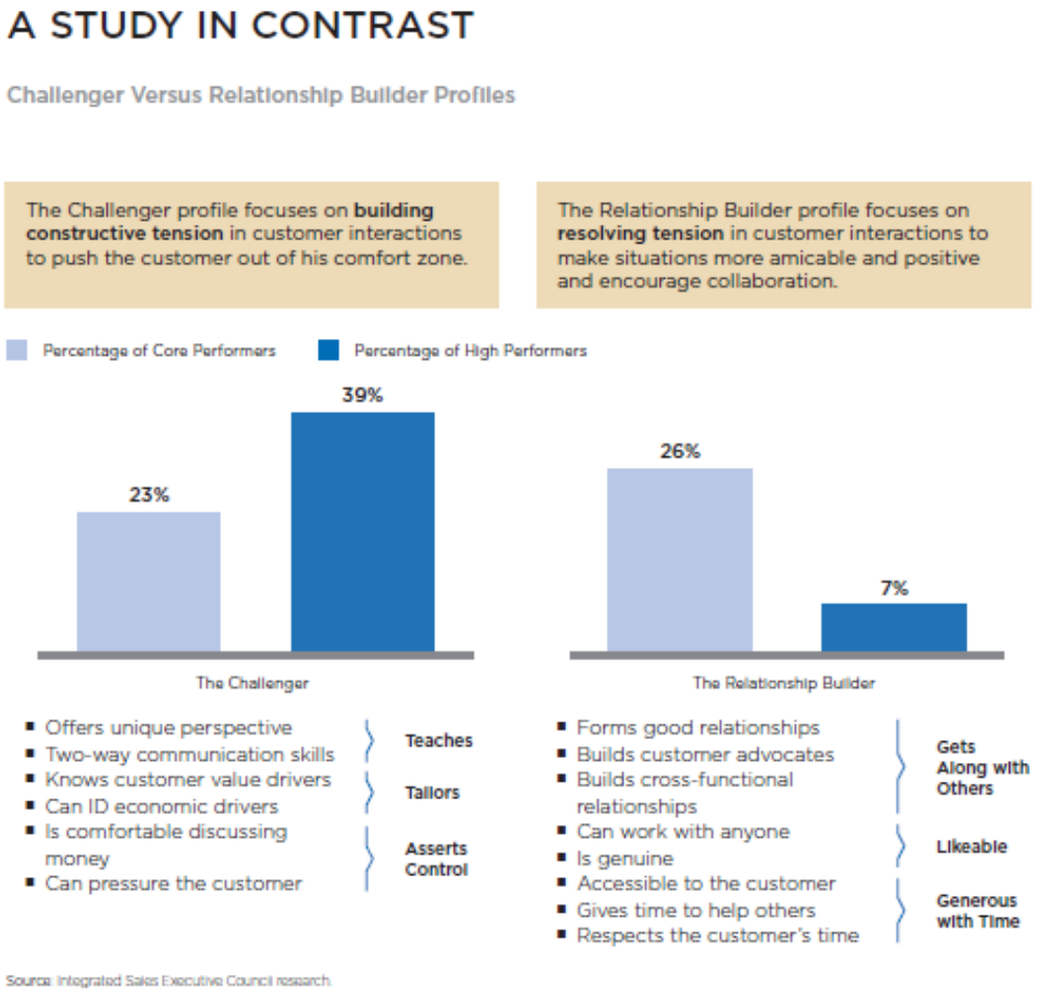
Challenge vs. Relationship



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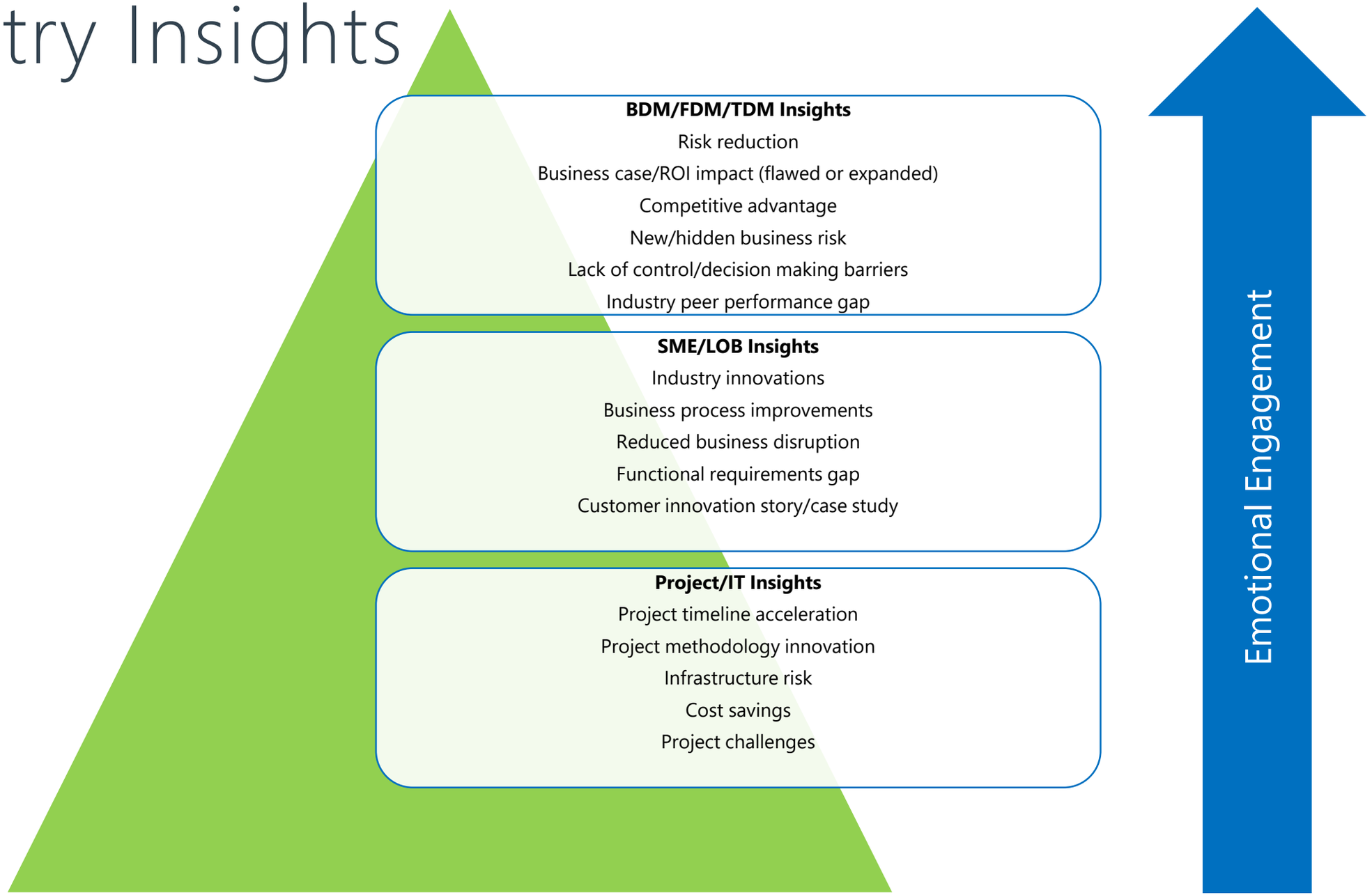
Industry Insights



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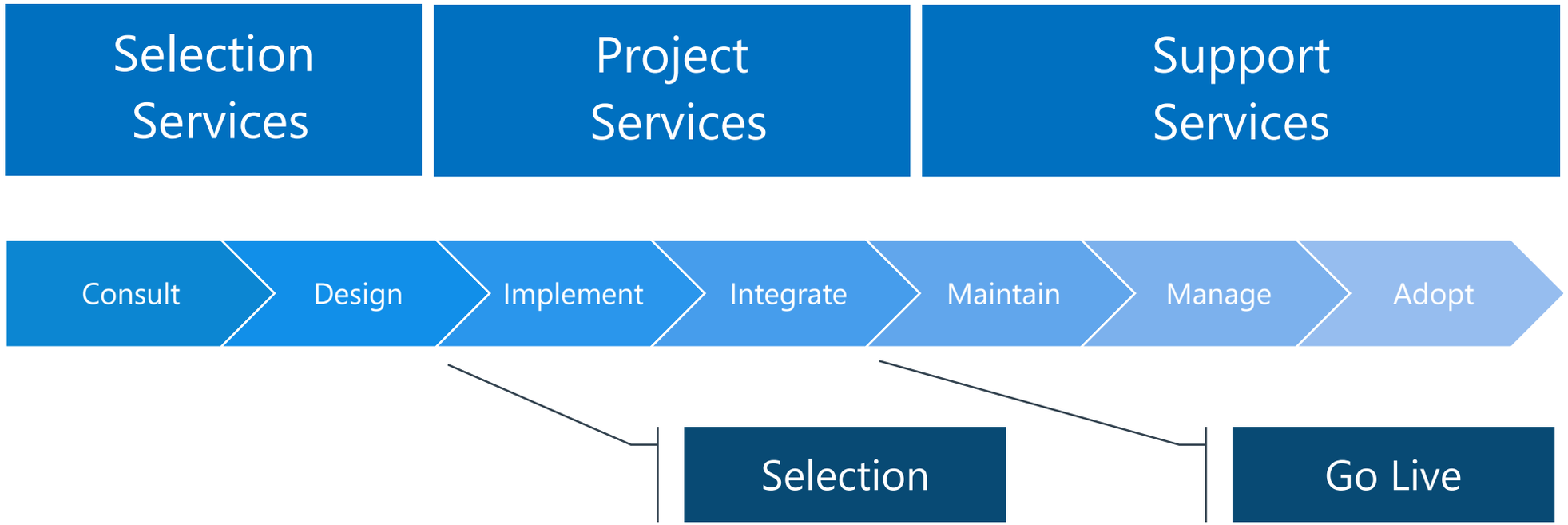
Partner Services Portfolio



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Selection Risks

Demonstration focus
Proof of concept/prototype
RFI/RFP
IT driven project
3rd party/external consultant
Us vs. them approach
Limited business participation

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Business/Project Risks

Underwhelming business case
Unrealistic timeline
Missing industry capabilities
No clear scope element prioritization
Compliance gaps
No governance model
“Current-state” focus

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Selection Service Offerings

Business Value Assessment

Business Alignment Workshop

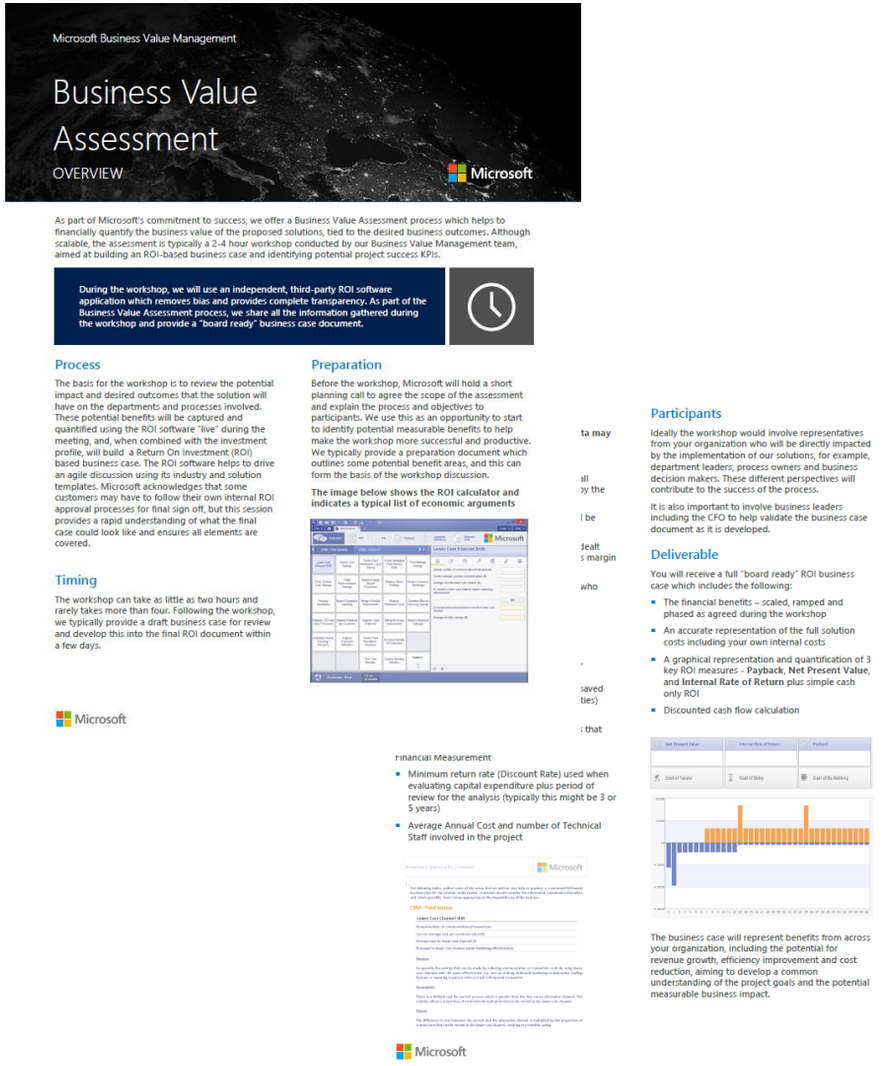
Business Impact Assessment

Vision and Scope Definition

Business Case Expansion/Validation

Business/Project Risk Assessment

Cloud Readiness Assessment



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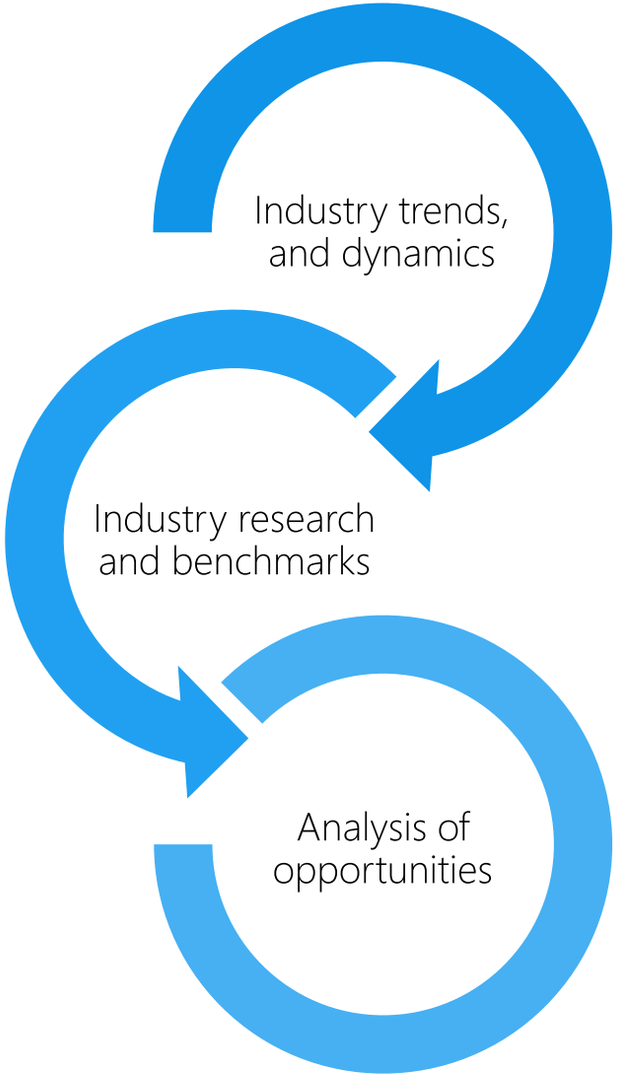
WHY, HOW & WHAT Options

Educational Service Offering - Enlighten



Industry and customer-specific KPIs
Product development perspective
Microsoft's experiential point of view

Industry challenges and best practices
Microsoft-observed benefits
Anecdotes and customer references

Open discussion on opportunities to improve business outcomes
Outcome quantification in financial terms

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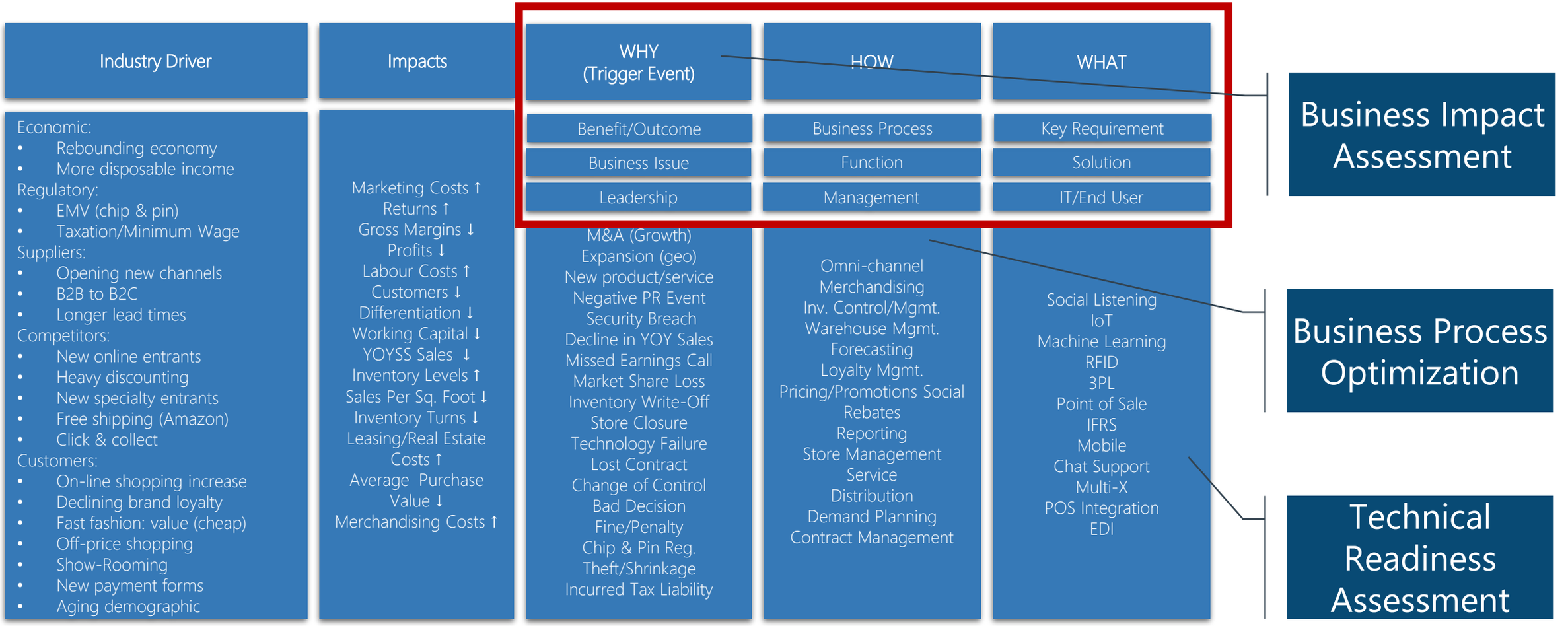
Selection Service Offer Alignment



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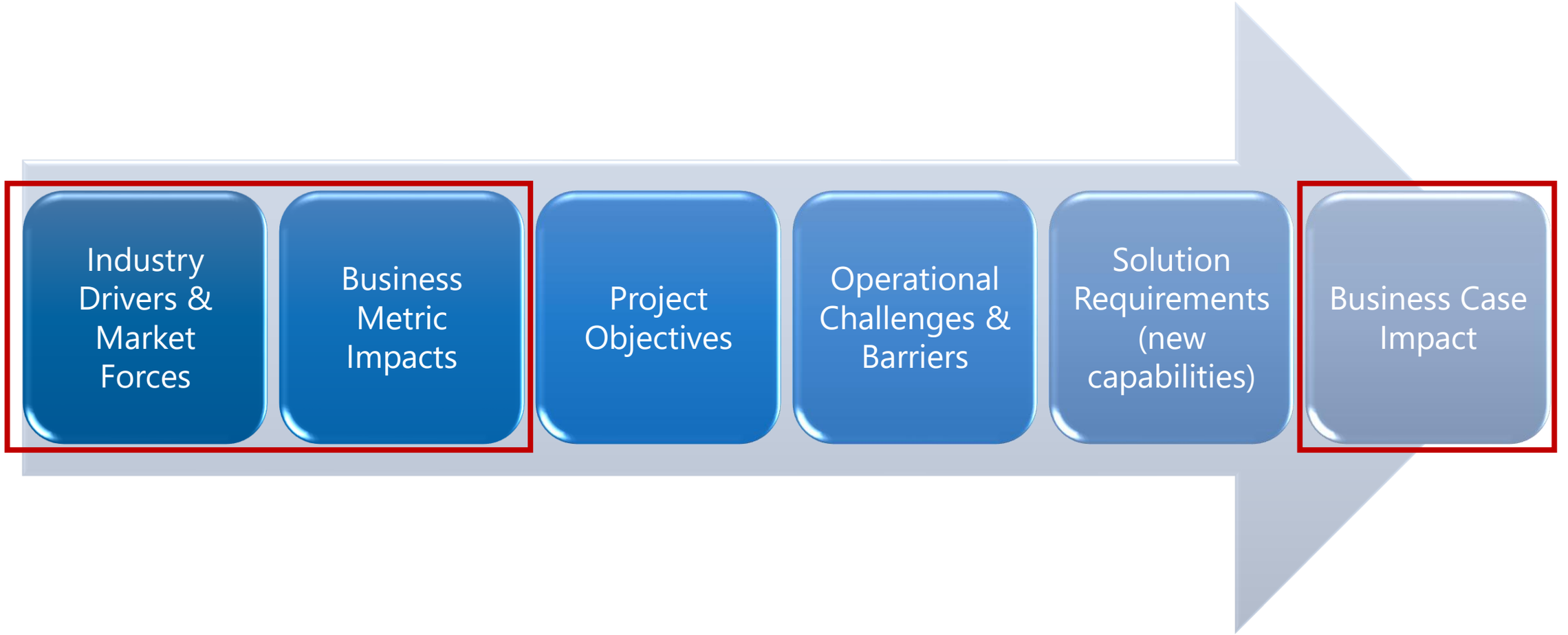
Business Alignment Workshop



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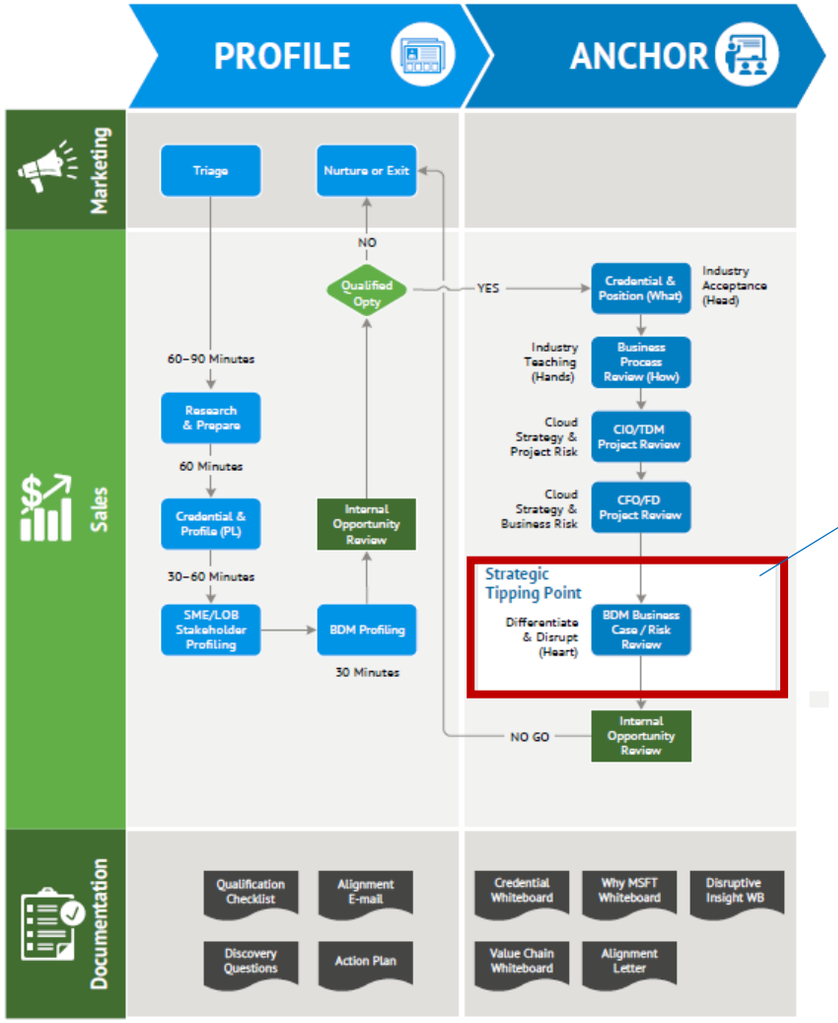
Strategic Tipping Point Moment



Where is the risk?
Can you expand the business case?
Why will the project fail?
Why will it lose funding to competing internal projects?
Is the project aligned with strategic growth initiatives?
What can you CHANGE?

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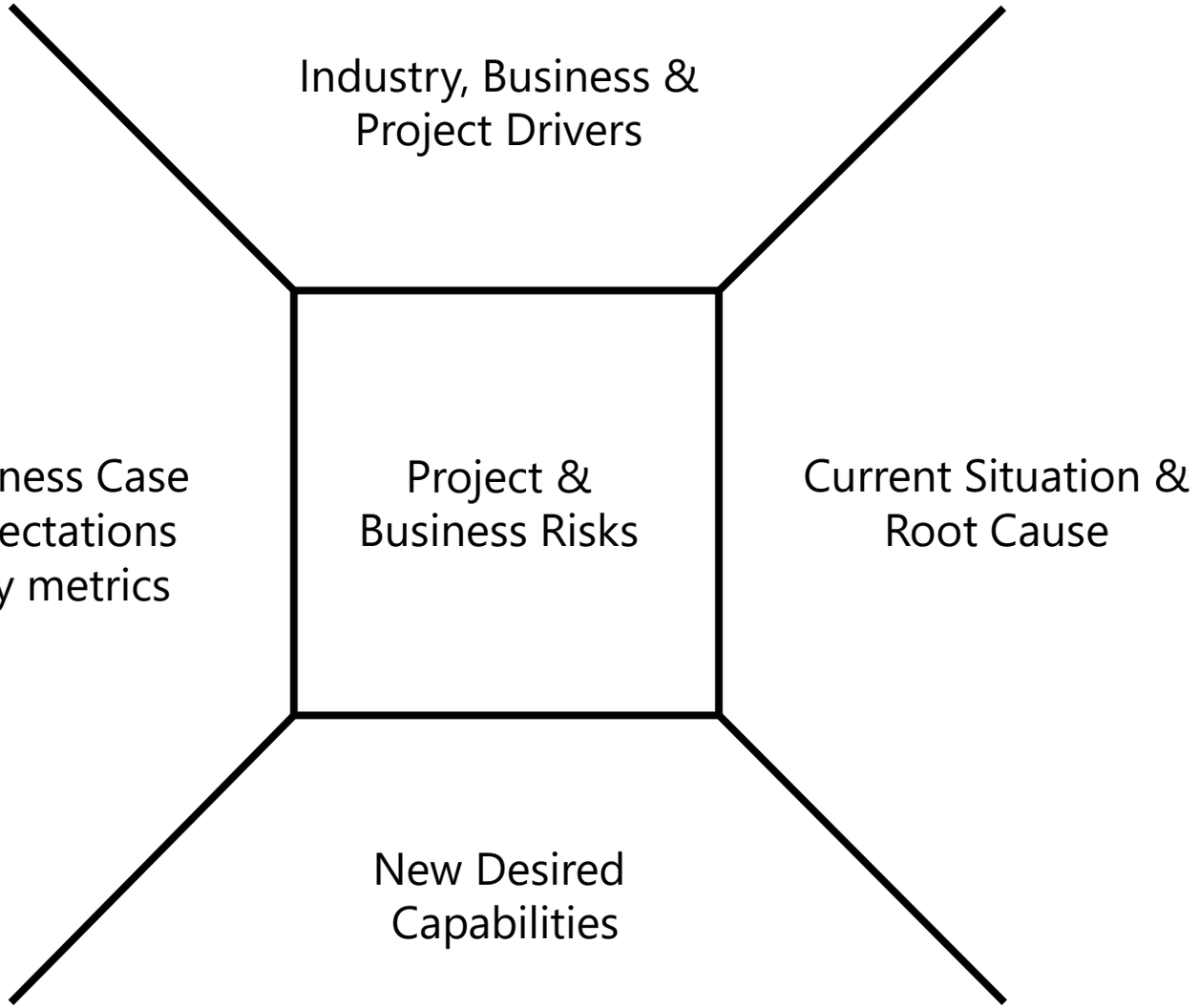
BDM Credibility Whiteboard



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Disruptive Service Positioning

Where is the risk?

Why will the project fail?

Why will it lose funding?

Who will be impacted?

What is missing?

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Selection Service Offerings

Business Value Assessment

Business Alignment Workshop

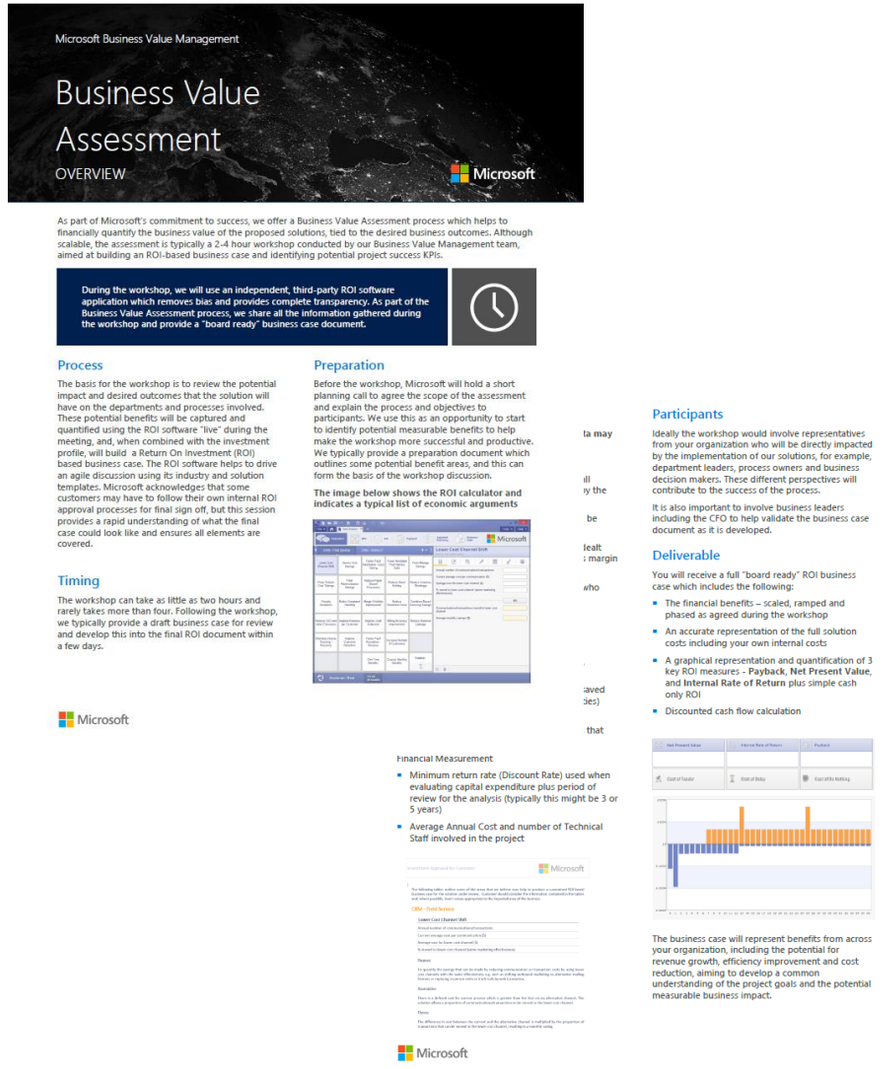
Business Impact Assessment

Vision and Scope Definition

Business Case Expansion/Validation

Business/Project Risk Assessment

Digital Transformation Acceleration Workshop



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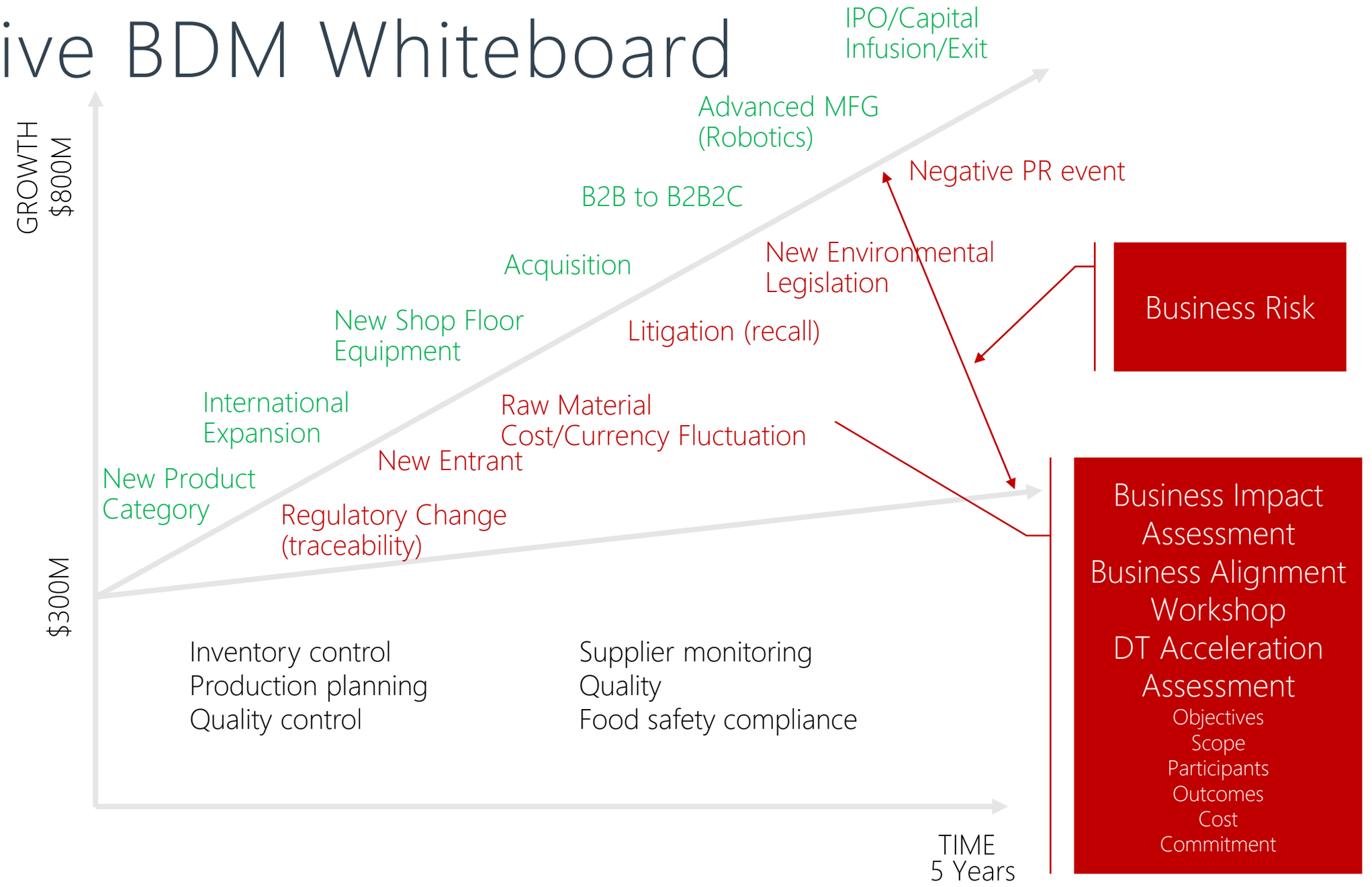
WHY, HOW & WHAT Options

Disruptive BDM Whiteboard



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Common Objections

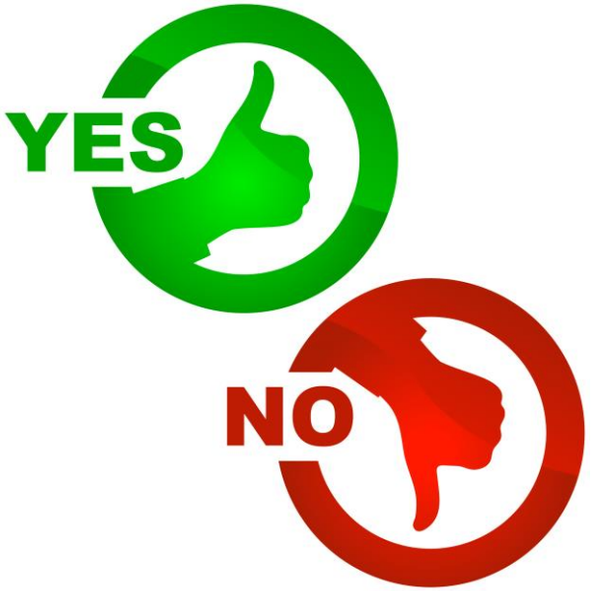
You're biased

You're not qualified

We'll do the work ourselves

We'll hire a 3rd party consulting firm

We won't pay for the engagement



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Summary

- Search for why projects will fail
- Develop and package disruptive selection services
  - Value expansion or risk reduction
- “Surprise” the business sponsor with new information
  - Teaching leads to differentiation (and curiosity)
- Focus on solving “why” problems
  - $, risk, control

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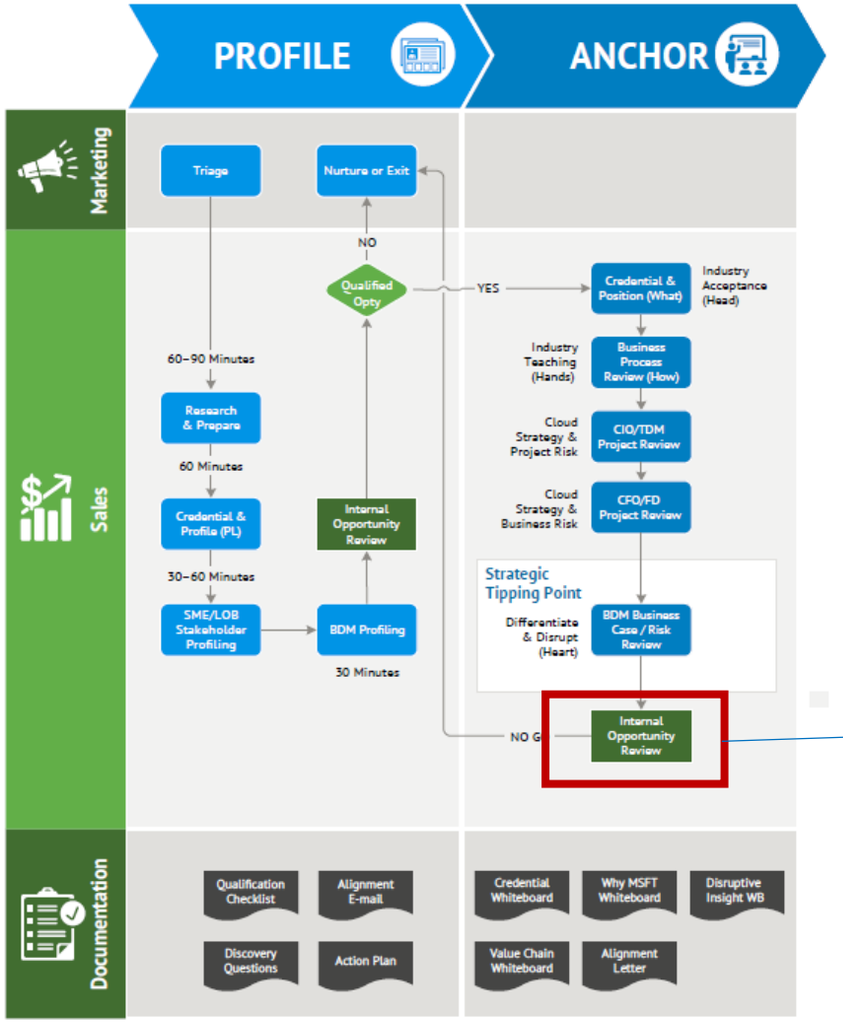
Go/No Go?



What Have You Taught?
What Have You Changed?
Do You Disengage?

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Exercise

Develop three (tactical, operational, strategic) field disruptive service offerings. Consider scope, cost and outcomes.

Canadian Pacific Railway

NEURALIMPACT

Lunch

Disruptive Whiteboard Deliveries

Exercise

Teams develop their industry-specific BDM Disruption Whiteboards.

Disruptive/BDM Whiteboard						
Industry, Business & Project Drivers	Current Situation & Root Cause	New Capabilities - Executive Priorities	Business Case Expectations & Key Metrics	Project & Business Risks	Disruptive Service Offering	Anticipated Benefits (Story)
Connection	Dissatisfaction	Desire	Desire	Dissatisfaction Layering	Breakthrough	Hope
Document the primary business drivers and project objectives.	Describe the operational (business process) challenges that are the root of the "current state" pain.	Document the new capabilities or functionality that you feel are most emotionally important to the BDM.	Document your understanding of the business case expectations and current underperforming key operating metrics.	Based on the current project scope and selection process, document the primary project and business risk. Pivot to 2nd WB (Digital Transformation Gap) to explain the business risk.	Describe the packaged service offering that will address the project and business risks.	Share an example of a similar organization that participated in a DSO and the surprise outcome.

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Exercise

Facilitate **BDM Disruptive Whiteboards** in a role play environment to the buying team.

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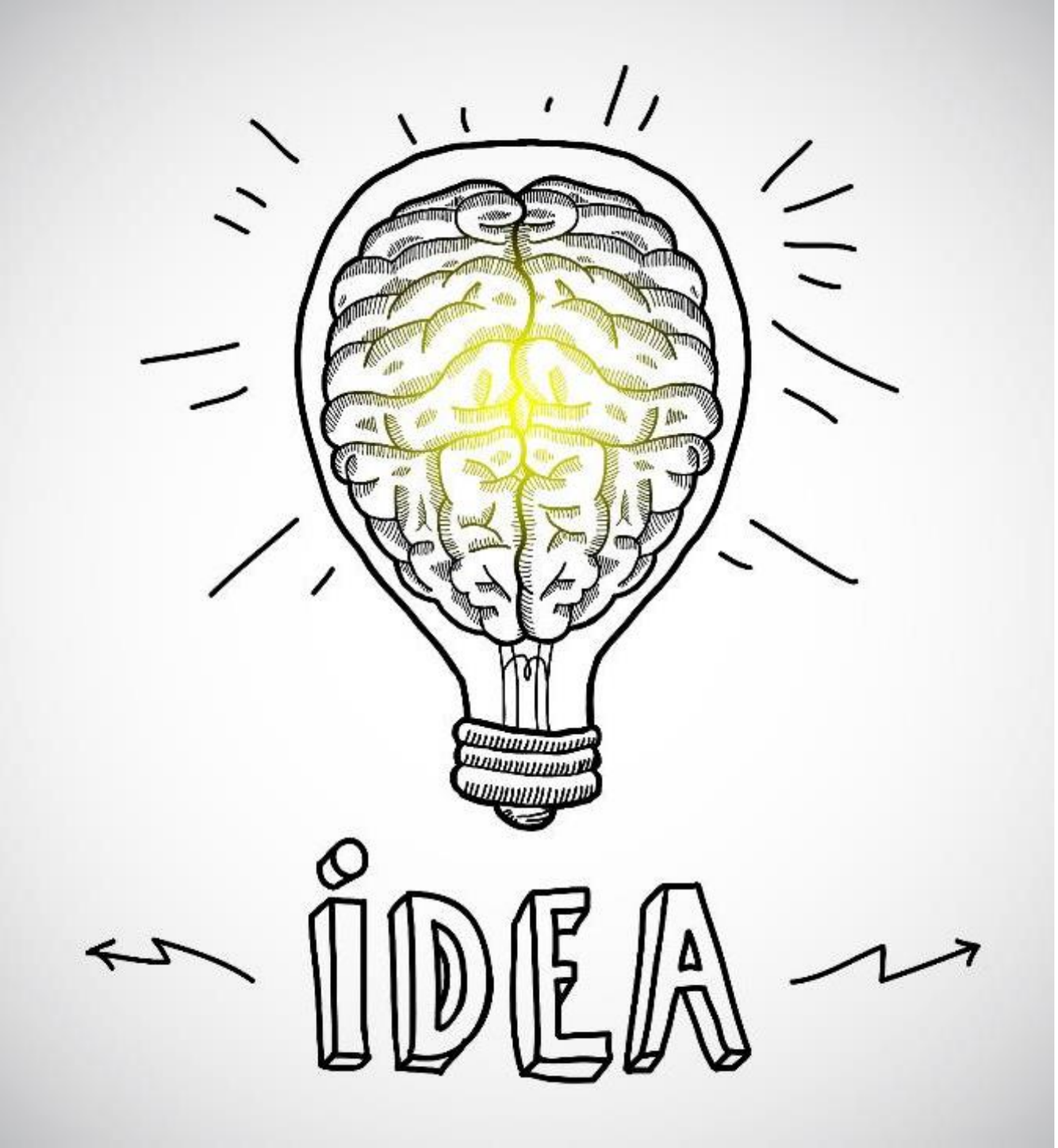

Workbook Exercise

Key Takeaways

What ‘landed’ today?

Closing Industry Deals

Proposal Presentation

NEVER e-mail proposals

Create constructive tension

Flush out hidden objections

Anchors “structured” bias

Ask for a commitment

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Decision Theory

- Cognitive Dissonance
  - Result of having two conflicting objectives
  - Brain defaults to “Present Bias”
  - Ends in “no decision”
- Remind prospects of their pain
- Decision Paralysis
  - The more confusing the information, the greater the reliance on the limbic and reptilian systems.
- No decision = safety

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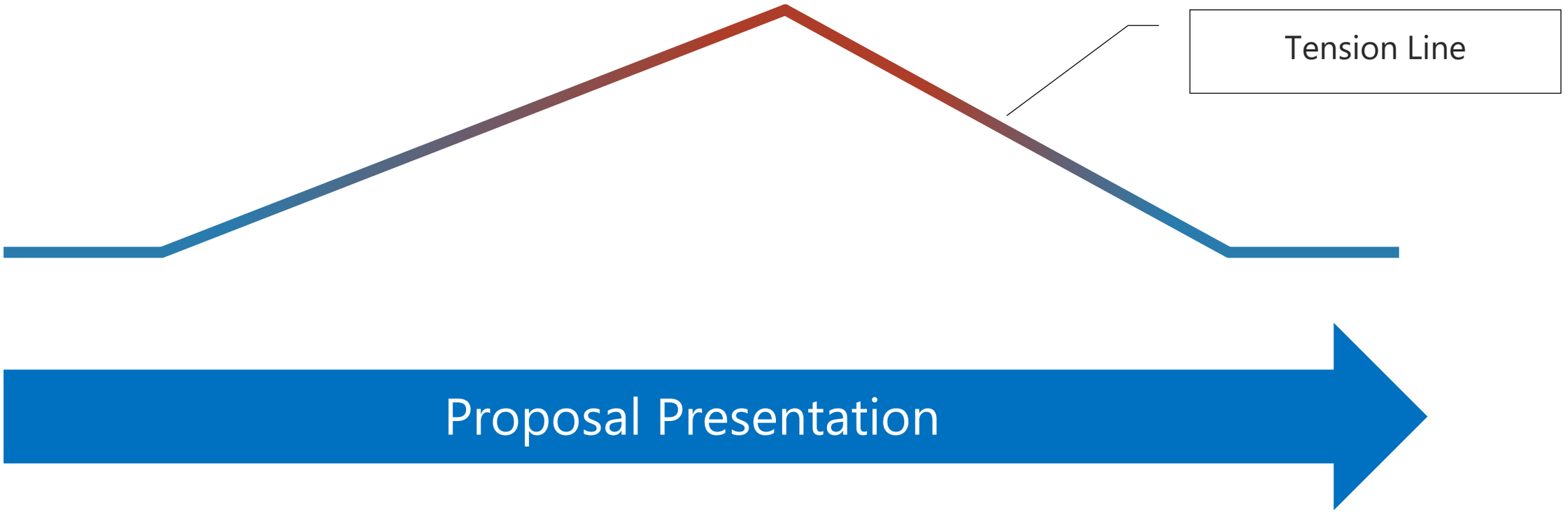
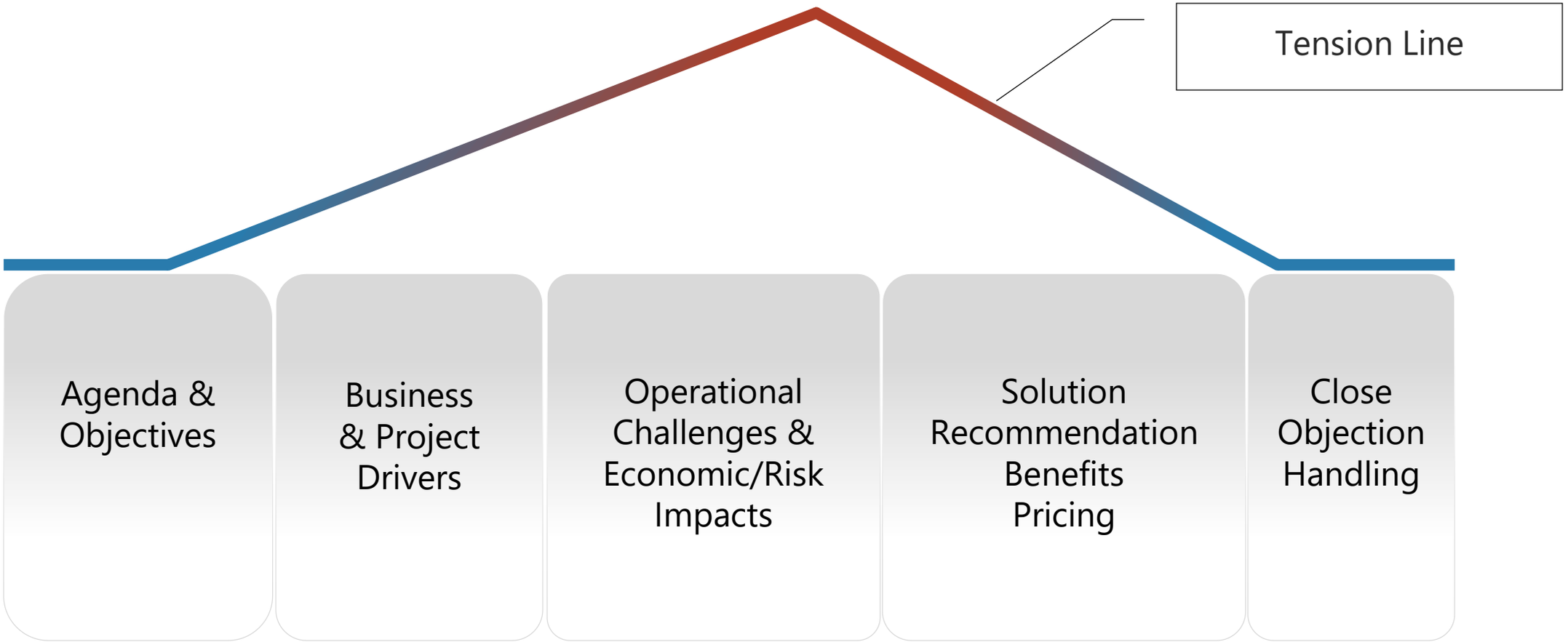

Tension Line
Proposal Presentation


Tension Line
Agenda & Objectives
Business & Project Drivers
Operational Challenges & Economic/Risk Impacts
Solution Recommendation Benefits Pricing
Close Objection Handling

Agenda

Project Drivers

Operational Challenges

Current State Impacts

Solution Recommendation

Implementation Approach

Anticipated Benefits

Investment Options

Next Steps

Transition Questions

Have we missed any significant business drivers or objectives?

Which of these operational impacts do you feel is the most critical to address immediately?

What other business case elements have we missed?

Are the economic impacts accurate?

What would you add to this list now that you are at the end of your discovery process?

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Project Drivers

Emotionally charged ("WHY")

- Growth
- Profitability
- Risk
- Control

Grow Revenue

Current system cannot support growth/expansion

Average deal size is declining

Improve Profitability

Complex estimating process resulting in scoping errors

Increasingly complex and unpredictable IT costs

Reduce Risk

Accelerating pace of regulatory change

Increasing customer satisfaction issues

Growing dependence upon external consultants

Increase in AV/malware incidents

Increase Control

Limited visibility into project profitability

Limited visibility into resource availability

Inaccurate sales forecasts

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Operational Challenges

Use prospect language ("HOW")

Project Profitability

Project documentation is hard to locate and manage (multiple versions circulating)

Onboarding new consultants takes 5-7 days

Undisciplined time entry – weekly at best

Over servicing clients

Estimating

Inaccurate RFP responses and client estimates/quotes are being sent to clients (unstructured approval process)

Disparate estimate development team

Cycle-to-Cash

Unstructured change order process

Invoicing disputes delaying payments

Long billing cycle

Management Reporting

Current system does not support multi-company/currency

Delays & inaccuracies due to non-integrated systems

Overly dependent on Excel

Limited regulatory compliance reporting

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Current State Impacts

Project Profitability

Project write-off/write downs

$1600 lost billable time/consultant/year

Estimating

Low “new business” win rate (27%)

High project schedule & cost variance

Missing project milestones

Cycle-to-Cash

8 days to close month end

DSO is 74 days

Management Reporting

69% utilization

45% forecast accuracy

Building code compliance violation & penalty

Impacts must come from directly the prospect.

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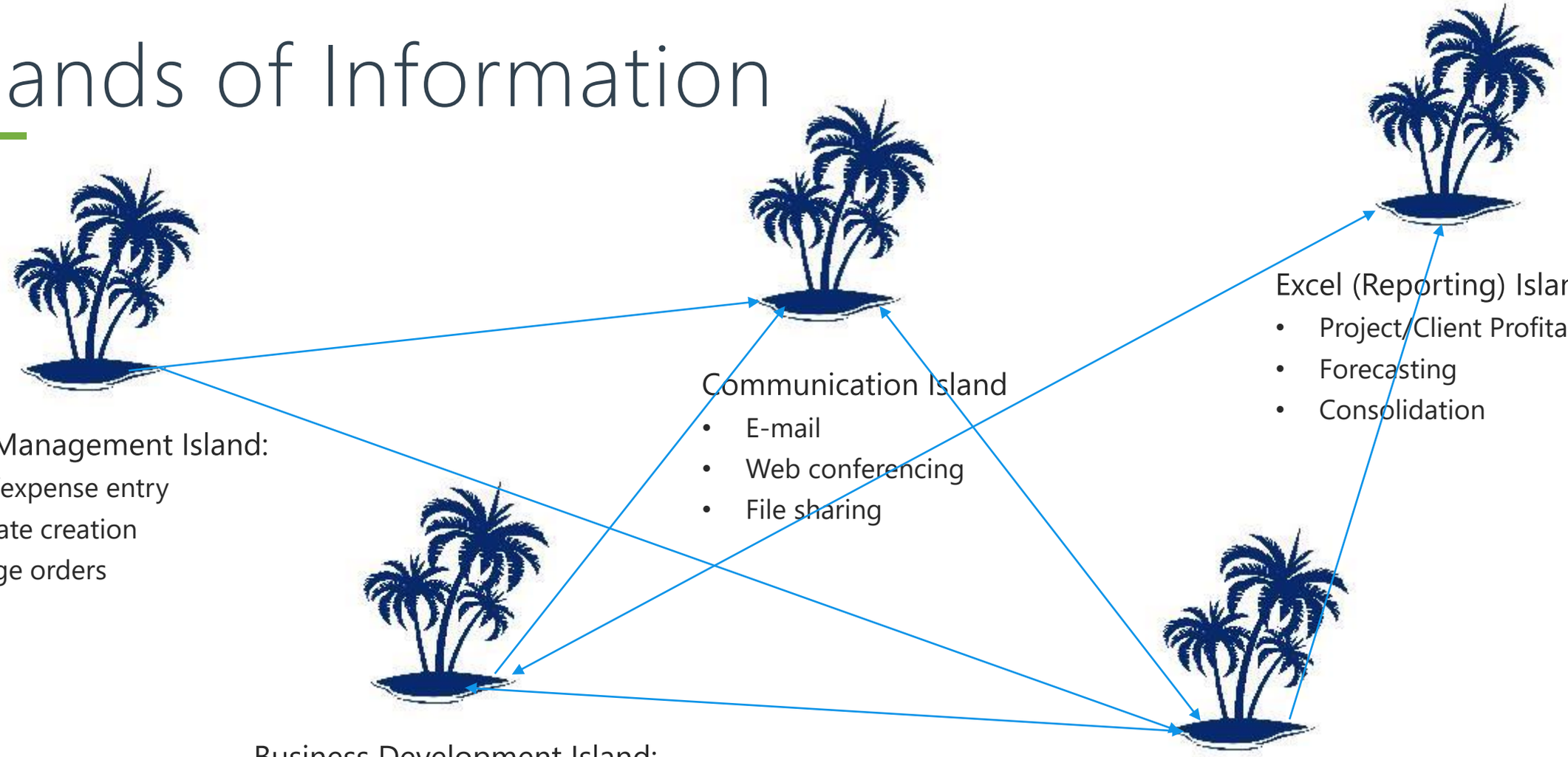
Islands of Information



Project Management Island:
- Time/expense entry
- Estimate creation
- Change orders

Communication Island
- E-mail
- Web conferencing
- File sharing

Excel (Reporting) Island:
- Project/Client Profitability
- Forecasting
- Consolidation

Business Development Island:
- Bid management
- Client management
- Customer acquisition

Accounting Island:
- Invoicing
- Collections
- Payables

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Single Integrated System

Single Integrated Business System:

Project Accounting

Project Team Collaboration

Visual Scheduling

Receivables & Payables Mgmt.

Mobile/Web-Based Time Entry

Opportunity Mgmt.

Approvals Workflow

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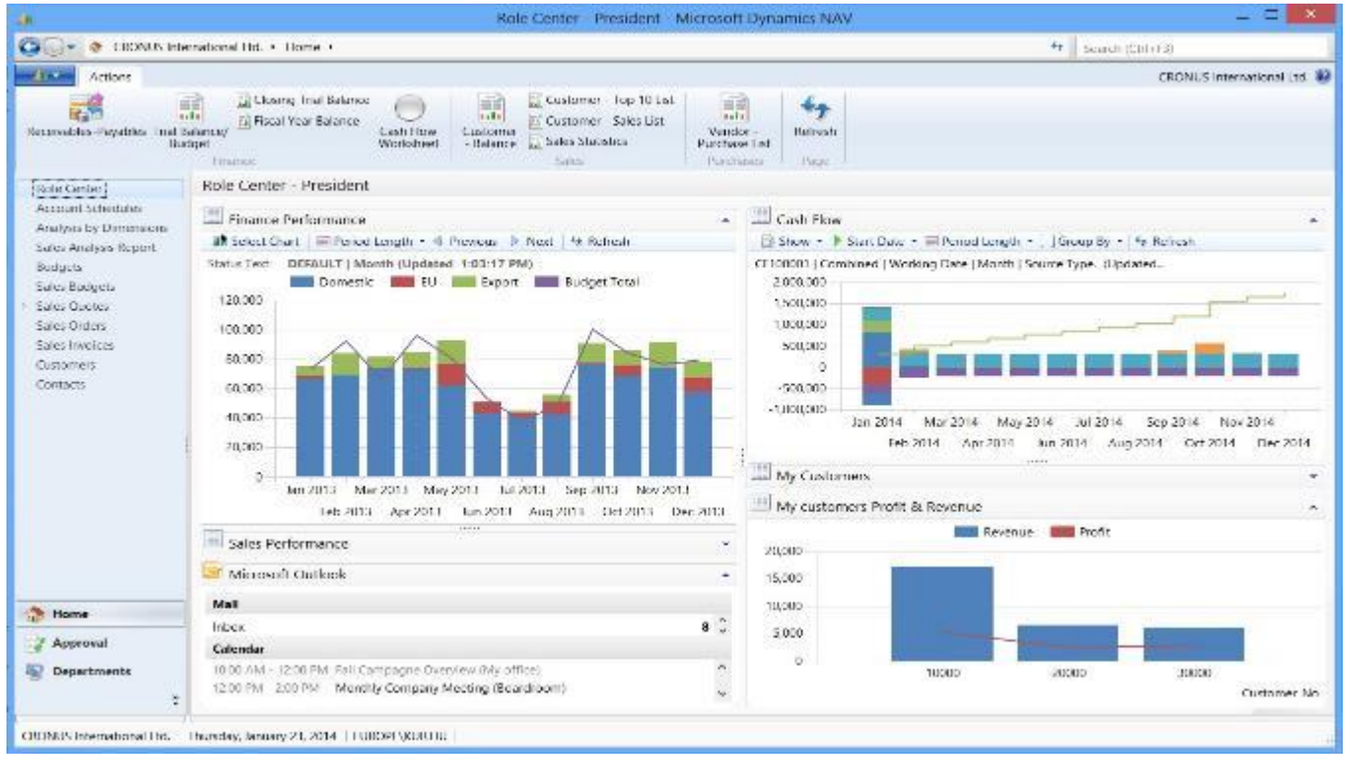
Leadership Dashboard

Project/Client Profitability
WIP Reporting

- aging
- write-off
- analysis

Resource Forecasting
Utilization Calculator
Working Capital Mgmt.
Sales Forecasting



Accelerated Time-to-Benefit

Rapid Implementation Approach

Focus on low risk, minimal disruption to business and speed to benefit.

Traditional deployment

PROJECT LEAD-TIME

- Test
- Data
- Application configuration
- System configuration
- Software
- Hardware

QuickStart PSO

- METHODOLOGY
- AUTOMATE BEST PRACTICES
- ELIMINATE STEPS

PROJECT LEAD-TIME

Anticipated Benefits

Impacts must come from directly the prospect.

Improved Project Estimation

Improved project profitability

Reduction in project write-offs/downs

Reduce DSO by 12 days

Improved Resource Scheduling

Increase billed time by 6%

Web-based time entry (weekly)

Improve time capture by 1.5%

Capital Preservation

No initial hardware or license investment required

Improved Sales Effectiveness

Improved forecast accuracy

Increase close ratio by 10%

Increased Utilization

Accelerated consultant onboarding

Reduce bid/estimate development time by 15%

Reduced business risk

Regulatory compliance

Business grade archiving/retrieval

99.9% uptime SLA

Fewer invoice disputes

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Investment Options

No more than two options.

Proposal Element	On Premise	Cloud
Microsoft Dynamics for Professional Services		
Partner IP		
QuickStart Implementation		
PSO Best Practices Training		
Office 365 E3		
Hardware		
Annual Maintenance & Support		
Total		

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Next Steps

Go-live date

Proposed start date

Prospect resource requirements

Preparation activities

Considerations

Ask for a commitment!

Signed letter of engagement

Respectfully ask for a commitment to proceed. Wait patiently for the prospect to respond.

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Team Exercise

Teams prepare proposal presentations for delivery to a ‘live’ prospect (30 minutes max)

90 minutes to prepare…..

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Next Steps…

Change Is Hard

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Workbook Exercise

Opportunity Review

Exercise

Determine which existing opportunities are at risk and the next steps required to correct

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Workbook Exercise

Action Plan

Exercise

Document next steps/action plan and target completion dates.

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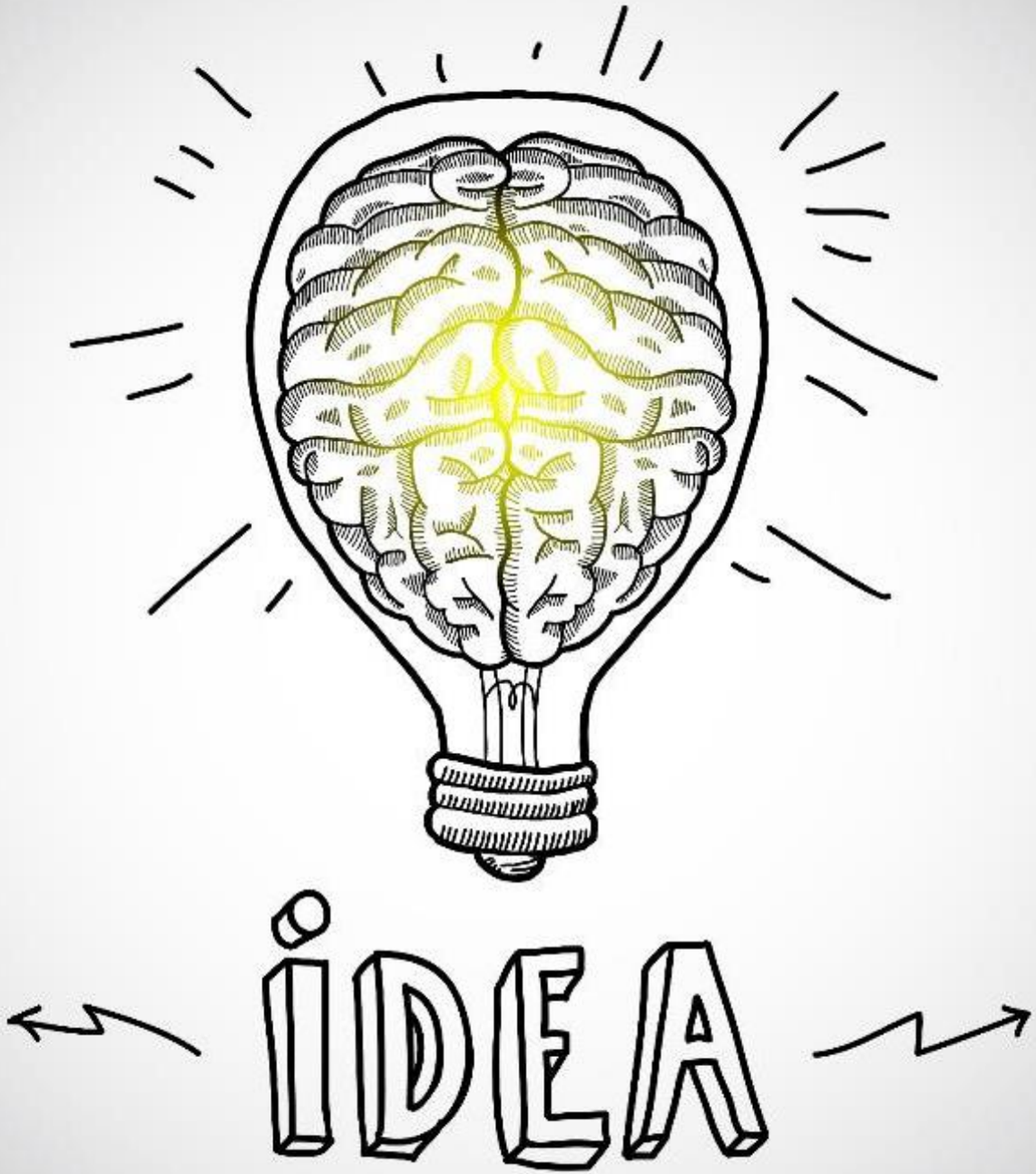

Workbook Exercise

Key Takeaways

What ‘landed’ today?

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