



CLOUD SURESTEP ACCELERATED SALES PROCESS GUIDE



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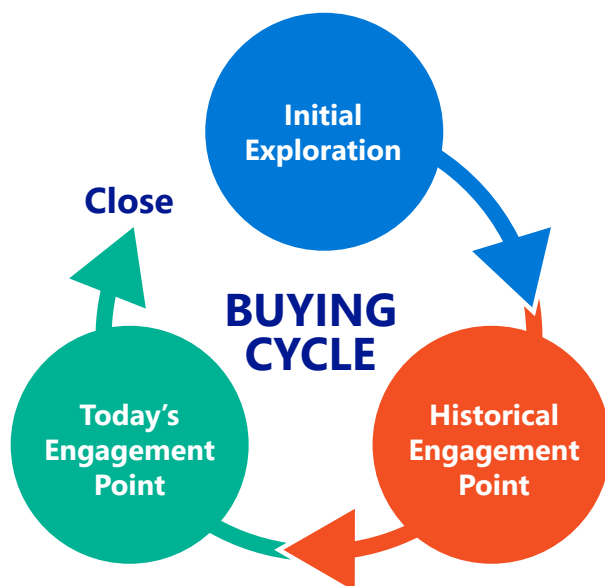
From Solution to Prescriptive Selling

Buying behavior has significantly changed from just a few short years ago.

Prospects now consistently complete the majority of their initial exploration research and validation online, then reach out to sales professionals near the end of their buying cycle for confirmation. This change leaves sales professionals with a very limited window to influence their prospects before they make a final buying decision.



TRANSITION OF BUYING ENGAGEMENT



Each and every funded business project (ERP, CRM or BI) contains a single Strategic Tipping Point (STP); a point at which a prospect decides to buy from a specific vendor. Historically this Strategic Tipping Point occurred at the end of the buying process, often during the product demonstration and proposal review processes. Due to the long sales cycle and frequent prospect engagements, sales professionals were able to develop relationships and establish solution differentiation during close in the old model.

With SMB business application solutions becoming more robust and affordable, it has become much harder for SMB buyers to differentiate one vendor from the next based solely on product functionality and price. Solution parity, coupled with the buying community's preference for rapid implementation and subscription licensing, has radically changed traditional selection criteria.

Today's SMB buyers want immediate value, limited risk and low cost. Traditional "tell me what you want and we'll build it for you" selling strategies no longer resonate with prospects that expect on-demand, industry specific business applications.

The Cloud SureStep Accelerated Sales Process is built around the needs of the modern buyer and endeavors to trigger an emotional, experience-driven Strategic Tipping Point early in the selling process. This prescriptive selling process is specifically designed to counter the traditional resource intensive, "demo-oriented" solution sales approach that typically leads to highly customized product demonstrations, complex sales cycles and long implementation projects.

THE CLOUD SURESTEP ACCELERATED SALES PROCESS DRIVES:



Shorter sales cycles



Scope clarity



Lower sales costs



Enhanced executive access

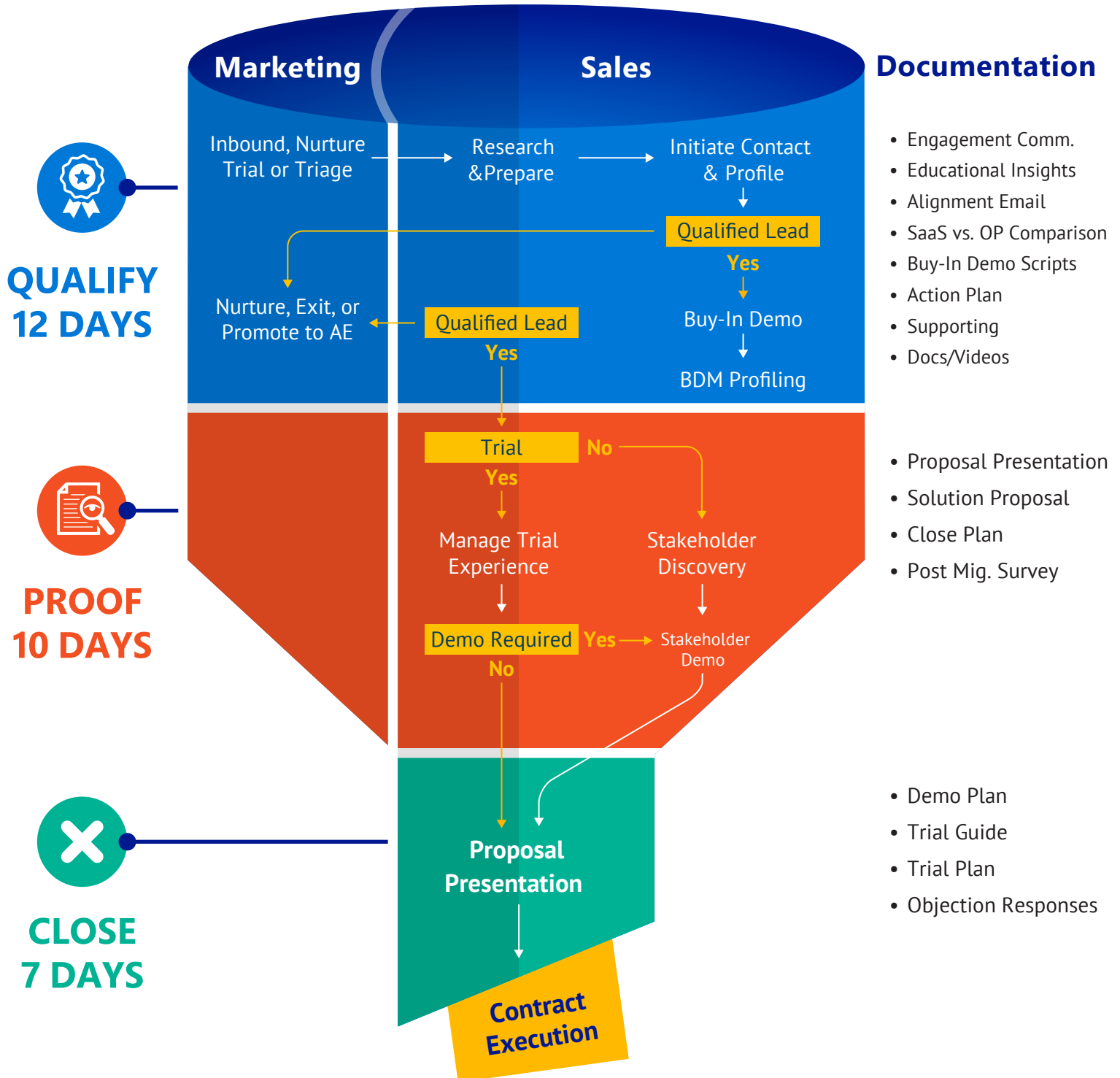
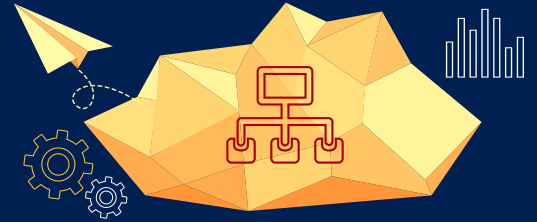


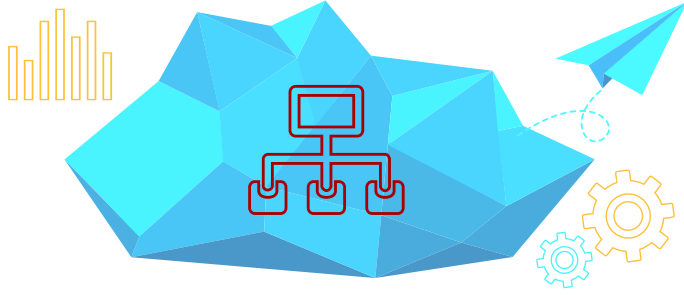
Reduced project risk (for both partner and prospect)



Defined go/no go decision points

Cloud SureStep Accelerated Sales Process Guide





This Cloud SureStep Accelerated Sales Guide outlines the primary objectives and key activities required to consistently close highly profitable projects. The approach is comprised of three phases:



PHASE I – QUALIFY

The Qualify phase effectively compresses the first three phases of most traditional solution selling models into a single body of work. The primary Qualify activities are:

- Surfacing the prospect's business case, primary project drivers, and core requirements.
- Securing an understanding of the selection process and selection criteria.
- Delivering a 5-10 minute, high-impact buy-in (anchor) demonstration to the project lead (PL).
- Aligning the buying and selling motions.
- Securing access to and engaging the business decision maker (BDM).
- Documenting the prospect's proof activities and requirements.
- Sending an alignment e-mail & recommended action plan to the PL & BDM.



PHASE II – PROOF

The Proof phase focuses on providing prospects with the comfort and confidence they need to proceed with contracting. This phase also focuses on surfacing and handling all outstanding objections. The primary Proof activities are:

- Facilitating a remote discovery/scope validation session.
- Satisfying all outstanding cloud or technical concerns.
- Providing a 60-minute solution demonstration to the broader stakeholder group.
- Managing the prospect's trial process (if applicable).
- Identifying and addressing outstanding objections.



PHASE III – CLOSE

The Close phase focuses on developing a solution proposal, presenting a proposal presentation and handling all outstanding (hidden) objections. The primary Close activities are:

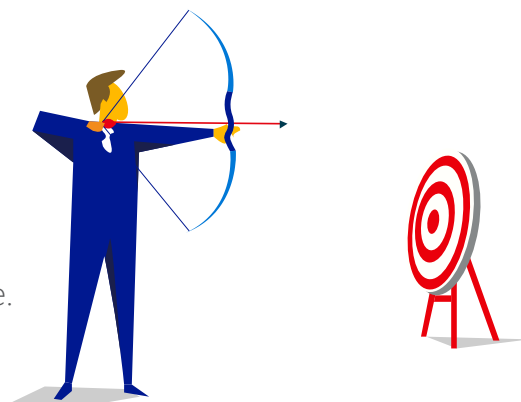
- Configuring the solution proposal.
- Configuring the proposal presentation.
- Remotely delivering the proposal presentation to the BDM and PL.
- Surfacing and addressing all outstanding objections.
- Completing all contracts and agreements.

PHASE I - QUALIFY



The primary objective of the Qualify phase is to teach the prospect something new; which often creates a “Strategic Tipping Point” and leads to a strong prospect bias. To do this sales professionals must:

- ✓ Establish selection process and criteria alignment.
- ✓ Teach the prospect something new.
- ✓ Credential and differentiate the partner organization.
- ✓ Visually “anchor” a key solution element.
- ✓ Secure BDM access.
- ✓ Secure a high-level understanding of the project business case.
- ✓ Secure a commitment to a mutual alignment/action plan.
- ✓ Identify the proof steps required to close the transaction.



Qualify Phase Key Activities, Objectives, and Actions

In this section, you will find the four primary activities of the Qualify Phase and the key objectives and action steps for each that are required to successfully qualify prospects.

RESEARCH & PREPARE

OBJECTIVES

- ✓ Identify and research the prospect leadership team as well as potential relationship links through tools like LinkedIn.
- ✓ Create a compelling reason for the prospect to engage with you.

ACTION STEPS

- ✓ Review profiling information from LinkedIn (or other similar sources), prospect websites and any relevant publicly available financial information to define the contact and first call strategy and objectives.
- ✓ Formulate at least 10 open-ended questions (four what, how, why strings) that drive prospect engagement, curiosity & disclosure.
- ✓ Identify the most likely executive stakeholders and probable business challenges.
- ✓ Reference the Cloud SureStep EMF Whitepaper for further guidance on how to identify trigger events and priority business processes.

INITIATE CONTACT & PROFILE

OBJECTIVES

- ✓ Validate the prospect meets basic qualification criteria.
- ✓ Identify the primary project and business drivers.
- ✓ Provide the prospect with an educational insight or information that they would not have uncovered during their on-line research.
- ✓ Credential your organization relative to the prospect's industry and your ability to impact their business and project drivers.
- ✓ Identify the prospect's selection process and criteria.
- ✓ Secure a BDM profiling call.

ACTION STEPS

- ✓ Configure and send an introduction e-mail, engagement voicemail, value e-mail, risk voicemail, and closure e-mail until prospect engages. If no engagement after 10 days return to marketing for nurture.
- ✓ Prepare to discuss 1-2 "educational insights" based on your prospect research.
- ✓ Reference the Cloud SureStep Engagement Communications Guide, Cloud SureStep Emotional Discovery Guide, Cloud SureStep Educational Insight Guide and Cloud SureStep Industry Pain Blueprint Guide for further guidance.

BUY-IN DEMONSTRATION

OBJECTIVES

- ✓ Anchor your solution's unique industry capabilities and differentiation early in the sales cycle.
- ✓ Create a visual link between your solution's strengths and the prospect's business challenges.
- ✓ Differentiate yourself as a sales professional by transitioning from discovery to demonstration without bringing in a delivery resource.
- ✓ Validate that your solution meets the primary selection criteria.
- ✓ Collect information to populate the demo plan.

ACTION STEPS

- ✓ Identify and validate the 2-3 key requirements the prospect suggested were critical to project success
- ✓ Focus the prospect on the unique industry-specific elements that differentiate your solution from competitive offerings.
- ✓ Demonstrate one (1) differentiating "capability" that aligns with a key challenge the prospect shared. This buy-in demonstration should be between 7-10 minutes.
- ✓ Reference the Cloud SureStep Buy-In Demonstration Guide for examples.

BDM PROFILING

OBJECTIVES

- ✓ Differentiate your organization (and its approach) in the eyes of the BDM.
- ✓ Secure a deeper understanding of the prospect's business challenges, project drivers and anticipated benefits.
- ✓ Determine the primary business challenge driving the project (growth, reduced operational costs, new market expansion, integration of an acquired company, etc.)
- ✓ Determine if the project has a measurable business case, and if so, which operating metrics are likely impacted.
- ✓ Introduce incremental business value elements that other prospects (now customers) have realized.

ACTION STEPS

- ✓ Prepare business & risk related discovery questions.
- ✓ Validate the operational challenges were shared by the project lead.
- ✓ Confirm your understanding of the BDM's vision and desired capabilities.
- ✓ Facilitate "Cloud vs. on-premise" and/or "subscription vs. perpetual licensing" conversations to determine the economic and risk drivers behind the project.
- ✓ Deliver an executive Buy-In Demonstration (dashboard) ONLY if it addresses a stated business challenge.
- ✓ Draft & send an alignment e-mail & action plan.
- ✓ Reference the Cloud SureStep Emotional Discovery Guide, Cloud SureStep Alignment E-mail Guide and Cloud SureStep Action Plan Guide for additional guidance.



Tips for Effective Qualifying

Business Executives will grant time to sales professionals who:

- Understand their core business drivers and business initiatives.
- Convey how they can deliver value to the prospect's company.
- Have the power to make decisions.
- Listen more than they speak (ask intelligent, relevant questions).
- Speak in terms of measurable benefits and risk mitigation.
- Teach them something new.

Gatekeepers will seldom provide access to BDMs unless they perceive a significant advantage (to either themselves or the project) or a significant risk in not doing so. Arguing that BDM access is a benefit to you will not produce positive results.

BDM's often have a shorter attention span when it comes to product demonstrations. BDM buy-in demos should be short (2-5 minutes), focused on high-impact capabilities, and MUST be aligned with the business challenges the BDM has stated are important.

Send an alignment e-mail to the prospect within 60 minutes of your profiling call confirming your understanding of their business drivers, project challenges and anticipated benefits. This communication may include an overview of your organization's capabilities, relevant industry qualifications and next steps. NOTE: Do not send software or solution information at this time. This communication needs to be a value add activity! Only include relevant content (industry report, SaaS vs. OP analysis, etc.) if it is directly related to the conversation with the BDM.

PHASE II - PROOF



The primary objective of the Proof phase is to eliminate any perceived risk related to your solution or organization. To do this sales professionals must:

- ✓ Complete the profiling process; collect remaining technical and functional gaps that were not identified during the initial profiling calls.
- ✓ Validate that the prospect's core business processes and associated functional requirements align with your organization's repeatable solution capabilities.
- ✓ Engage with all remaining stakeholders participating in the selection process.
- ✓ Secure a deeper understanding of the project objectives and anticipated risks from the remaining business stakeholders (if applicable).
- ✓ Manage the prospect's trial experience (if applicable).
- ✓ Surface and handle all solution related objections.



Proof Phase Key Activities, Objectives, and Actions

In this section, you will find the three primary activities of the Proof Phase and the key objectives and action steps for each that are required to successfully deliver proof to prospects.

STAKEHOLDER DISCOVERY

OBJECTIVES

- ✓ Credential your organization (now introducing a consultant or pre-sales engineer) as an industry insider.
- ✓ Develop a clear understanding of your prospect's business and operational challenges as well as their required capabilities. To avoid discussing a feature/function wish-list, it is critical to focus this conversation on your prospect's desired business outcomes and existing dysfunctional business processes.
- ✓ Identify all anticipated demonstration elements and required capabilities that are critical to the decision making process.
- ✓ Identify any specific concerns and/or objections the selection team has with your solution.

ACTION STEPS

- ✓ Review prospect survey responses to determine potential business and functional challenges and probable alignment with solution capabilities. Document questions for the discovery session.
- ✓ Coordinate a discovery session (conference call) with all newly identified project stakeholders. Include the BDM if required.
- ✓ Prepare the consultant/pre-sales engineer for the secondary discovery call.
- ✓ Facilitate the secondary discovery call.
- ✓ Document the prospect's primary functional requirements in a Demonstration Plan and validate it with the project lead and BDM.
- ✓ Reference the Cloud SureStep Demonstration Plan Guide for further guidance.

MANAGE TRIAL EXPERIENCE (IF REQUIRED)

OBJECTIVES

- ✓ Minimize the risks associated with a frustrating trial experience.
- ✓ Limit the influence of the trial experience on the decision making process.
- ✓ Influence the prioritization of the trial focus.
- ✓ Minimize the effort required to support the trial evaluation.

ACTION STEPS

- ✓ Schedule a review session at the end of the trial evaluation period.
- ✓ Schedule an orientation session with the trial lead if required.
- ✓ Identify and forward the most appropriate business process scenarios (trial guide).
- ✓ Reconnect with the trial lead at the conclusion of the trial evaluation to resolve any outstanding questions or concerns.
- ✓ Reference the Cloud SureStep Trial Plan Guide for further guidance.

STAKEHOLDER DEMONSTRATION

OBJECTIVES

- ✓ Visually demonstrate your solution's ability to improve the suboptimal/dysfunctional business processes that were identified during discovery.
- ✓ Create a clear linkage between your solution and the prospect's project driver, business challenges and operational pains.
- ✓ Surface and handle all solution and project related objections.

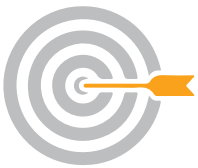
ACTION STEPS

- ✓ Limit introduction to 1 slide (2 minutes), validation of project elements to 2 slides (5 minutes) and total presentation to 45 minutes. Leave 20 minutes (minimum) for Q&A.
- ✓ Validate your understanding of the business challenges, project objectives and critical functionality.
- ✓ Draft 8–10 open-ended questions that will force prospect engagement (i.e. "How do you see the capabilities we just reviewed impacting your sales organization?").
- ✓ Reference the Cloud SureStep Objection Handling Guide for additional guidance.

PHASE III - CLOSE

The primary objective of the Proof phase is to eliminate any perceived risk related to your solution or organization. To do this sales professionals must:

- ✓ Complete the profiling process; collect remaining technical and functional gaps that were not identified during the initial profiling calls.
- ✓ Validate that the prospect's core business processes and associated functional requirements align with your organization's repeatable solution capabilities.
- ✓ Engage with all remaining stakeholders participating in the selection process.
- ✓ Secure a deeper understanding of the project objectives and anticipated risks from the remaining business stakeholders (if applicable).
- ✓ Manage the prospect's trial experience (if applicable).
- ✓ Surface and handle all solution related objections.



Close Phase Key Activities, Objectives, and Actions

In this section, you will find the two primary activities of the Close Phase and the key objectives and action steps for each that are required to successfully lead a prospect to close.

PROPOSAL PRESENTATION

OBJECTIVES

- ✓ Clearly communicate your understanding of the business drivers and measurable project objectives driving the initiative.
- ✓ Clearly communicate your understanding of the project's anticipated business benefits. (While it is not always possible to uncover the measurable financial benefits of each project, your organization's industry solution will likely be designed to address very specific industry business challenges.)
- ✓ Identify and overcome all remaining stakeholder objections.
- ✓ Secure BDM agreement to a contract completion date.

ACTION STEPS

- ✓ Modify your industry Proposal Presentation to align with this prospect's unique business challenges and functional requirements.
- ✓ Schedule and facilitate a 30-45 minute Proposal Presentation session with the BDM and PL (remote).
- ✓ Modify your standard Solution Proposal to reflect any project specific requirements.
- ✓ Revise (if required) and forward Proposal Presentation PDF and Solution Proposal at the conclusion of the presentation.
- ✓ Reference the Cloud SureStep Proposal Presentation Guide and the Cloud SureStep Solution Proposal Guide for further guidance.

CONTRACT EXECUTION

OBJECTIVES

- ✓ Complete the contracting process (all documents executed).

ACTION STEPS

- ✓ Review legal documents with BDM and negotiate terms (if applicable).
- ✓ Schedule a post migration review with the BDM and PL.



Tips for Effective Qualifying

ASK DIRECTLY FOR A COMMITMENT

"Based on everything that we have discussed and reviewed with you today do you feel comfortable moving forward with our organization?"

CONCLUSION

Modern buyers want to work with sales professionals that recognize and honor the fact that they have already completed a significant amount of research. They will engage with vendors that understand their industry challenges and requirements, bring additional insights and ideas that reduce project risk and simplify the buying experience. Today's prospects want to buy; they do not want to be sold.

To engineer this experience sales professionals must develop a working understanding of their target industry, conversational competence at both the project lead and business decision maker level, and then execute a prescriptive, structured sales process. Configuring the Cloud SureStep Accelerated Sales Process assets that are referenced in this guide will help develop (or validate) the industry knowledge required to drive a high level of prospect engagement and, more importantly, a predictable and compelling win rate.



For more information on building your cloud practice visit [http:// aka.ms/cloud-surestep](http://aka.ms/cloud-surestep).