

Account Engagement

Develops, maintains, and executes account strategies to establish the right relationships, strategically position <Company>, and maximize revenue within the account based on knowledge about and effective navigation of customer organizations.

Stage 1 - Occasional account interactions, usually by phone, always leave a positive impression of <Company> and help move the sales motion forward through their friendly, professional demeanour.

- Calls into customers for a specific purpose and in a limited capacity
- Always maintains a calm, positive and professional demeanour when interacting with customer contacts
- Effectively relays account information to <Company> account leads when necessary and/or appropriate
- Demonstrates excellent phone communication skills

Stage 2 - Develops close working relationships with their sales leads to align on account strategy and understand the role they will play in each account. Uses superior phone selling techniques to quickly learn their key contacts and counterparts within each account and develop strong, trustful working relationships that result in sales.

- Speaks with lead salesperson(s) multiple times each day (clarify who and why)
- Effectively prioritizes their time between accounts with a bias toward the larger, more qualified opportunities
- Always presents a personable, competent and confident demeanour in front of the customer
- Gets the message across the first time – does not repeat the same presentation to the same customer contacts
- Maintains a high win/loss ratio
- Is revenue-focused and sales-savvy

Stage 3 - Establishes a strong understanding of the account, including the position of partners and competitors, and leverages initial or existing relationships to obtain access to and meetings with decision makers.

- Obtains organization charts from existing contacts
- Effectively adjusts their style and engagement approach to the company and individual(s) they are targeting
- Works with existing contacts to arrange meetings with senior level executives
- Establishes relationships at all levels of customer organizations
- Networks with IT Director, Architecture Manager, and technicians to develop relational support.
- Networks into key accounts on a regular basis to develop relationships with end users creating product dependency
- Work with the partners to understand their focus and sales activities

Stage 4 - Develops a documented account plan, including organizational charts and strategic and tactical goals, develops and leverages strong sponsors/advocates to expand presence and relationships with key IT and line-of-business decision makers across the organization.

- Identifies and targets all IT and line-of-business influencers and decision makers
- Commands an executive-like presence in front of the customer – with big-picture perspective and a sense that they can make things happen
- Documents complete organization chart of customers
- Quickly establishes deep and broad relationships throughout customer organization
- Uses the Account Expansion Roadmap to identify expansion targets and leverages current foothold to network into those targets.
- Visits key accounts on a regular basis to develop relationships with end users creating product dependency
- Utilizes business development rep to help influence application choice
- Coordinates plans with others sales team members (Consulting, SE's, Inside Sales) to leverage account calls and present a common strategy
- Frequently visits the customer in-person

Stage 5 - Develops advisor and business partner relationships with at least one senior (C-level) executive within each account, regularly engaging in the customer's business planning processes to strategically position <Company>, and continually seeking to develop additional sponsors/advocates.

- Is viewed by the customer as part of their core IT strategy team
- Leads team meeting with the CIO and project managers at a strategic account before the end of the fiscal year to budget for application opportunities for next year
- Develops strategic relationships with multiple senior IT and business executives
- Positions <Company> solutions strategically
- Leverages a documented account plan which includes other sales team members (Consulting, SE's, Inside Sales)
- Displays "insider" information with access to a number of senior level exec as part of his/her strategic plans and goals

Competitive Selling

Leverages customer, partner, industry, internal and competing product knowledge to position and sell <Company> solutions.

Stage 1 - Leverages broad understanding of how <Company> solutions address customer/partner issues relative to the competition.

- Demonstrates a basic understanding of <Company> solutions
- Articulates industry-specific value propositions to the customer/partner
- Understands customer/partner technical questions and engages appropriate team members to help address the questions
- Keeps current on industry, market, competitor, and product information; and identifies relevance in customer/partner conversation
- Effectively uses sales tools (e.g., whiteboard, competitive sales guides, etc.) to facilitate customer/partner conversations and drive the buying process forward

Stage 2 - Can differentiate <Company> solutions from competitor solutions when addressing defined, short-term/tactical projects or specific tactical needs.

- Demonstrates a detailed understanding of <Company> solutions
- Understands and articulates how <Company> solutions match up against the strengths and weakness of competing solutions
- Proactively works to avoid traps set by competition
- Spends time reading industry collaterals to better understand customer/partner issues and incorporates the findings into opportunity plan
- Doesn't panic and avoids feature/function comparisons of <Company> versus competing products and elevates conversations to discussions of value

Stage 3 - Clearly differentiates both <Company> and its solutions from the competition and positions <Company> strategically within the account/partner.

- Elevates discussions of competitive strengths and weaknesses to a strategic level
- Effectively positions the end-to-end value of <Company> solutions from point-product competitors
- Establishes <Company> solutions as IT standards with the customer/partner organization
- Establishes competitive traps early in the customer's buying process
- Performs research to be able to provide specific insight to the executive and establishes self as an industry-domain expert
- Masters the content in key sales tools (whiteboard, competitive guides, etc.) and seamlessly incorporates key points and messages into a variety of scenarios and conversations

Stage 4 - Anticipates competitive situations and prepares other team members to successfully position and differentiate <Company> solutions.

- Anticipates competitive situations and works with account manager/partner sales teams to proactively develop and execute strategies to avoid competitive bake-offs
- Proactively positions the technical strengths and business value of <Company> solutions with a variety of customer and/or partner audiences
- Trains and prepares other account team members and/or partner sales team how to avoid inappropriate conversations and focus on the appropriate competitive discussions with customers

Stage 5 - Builds up sales teams and/or channel partners that are known in their industry and territory as the team to beat in any competitive selling situation. Their selling teams carry a reputation for competitive tenacity and competence that intimidates competitors and consistently results in wins over competitors.

- Attracts, hires, and develops individuals known to be competitive in nature
- Despite their competitive edge, maintains positive relationships with and is respected by the competitors as someone who plays fairly. Seeks out and creates a strong presence for <Company> in critical industry showcases and events in their sales region

Consultative Selling

Leverages business acumen to strategically position <Company> solutions to the customer and/or position <Company> as a strategic partner to the channel. Understands the customer and/or partner's implicit and explicit needs, provides advice and consultation regarding the best approach to addressing them, and positions <Company> as the ideal solution.

Stage 1 - Has been exposed to different approaches to the selling cycle, including the basics of consultative selling. Understands and can speak about the basic IT problems that <Company> products solve and/or the basic advantages of being a <Company> Partner.

- Shows the ability to think from a more customer/partner-oriented viewpoint vs. <Company> oriented.
- Develops basic questioning and listening skills
- Can show how each product fits into the larger <Company> solution set.
- Responds appropriately to customer/partner questions and requests – knowing when to answer and when to take the question as an action item for follow up

Stage 2 - Knows when to speak and when to listen to the customer/partner. Is adept at learning the customer/partner's language. Their sales pitch starts with the <Company> solution set or and/or <Company> channel programs and shows how it can help the customer/partner's unique and specific challenges.

- Typically asks probing open ended questions on the customer/partner's specific challenges before jumping into a sales pitch.
- Understands customers/partner's language – even beyond the vertical nature.
- Convinces the prospect of the value of additional ease of use and quality in terms of increased productivity and the end-user satisfaction.
- Knows how to work with the customer/partner to structure success criteria for a compelling POC

Stage 3 - Understands industry (i.e. customer/partner/SI) dynamics and quickly learns their specific strategies, priorities and challenges. Starts with the customer/partner point of view and fits the <Company> solution/advantage into that picture.

- Asks questions to understand the prospect's budget, decision timeframe and urgency
- Initial probing questions typically seek to determine the customer/partner's decision criteria and strategy in addition to their specific needs
- Uses probing questions to understand the desired state and features required for the solution
- Recognizes when the customer/partner problem is better solved by a larger/different solution or product than the one they were brought in to present

Stage 4 - Engages with customers, partners, and/or SI partners to develop strong qualitative and quantitative business cases for <Company> solutions or channel partnership. Effectively probes to understand their needs and underlying drivers. Recommends a variety of approaches to solving their challenges.

- Validates needs and suggests various options, but recommends a „best choice“ based on the customer and/or partner's business needs
- Proposes multiple options to solve the customer/partner's business challenges and reiterates pain solution statement for idea adoption
- Uses the CIO Whiteboard message to tie the solution benefits to strategic business objectives
- Articulates and presents to a wide variety of customer/partner stakeholders how <Company> solutions address specific needs and priorities to create real business value
- Works with the customer/partner to create compelling quantitative business cases

Stage 5 - Collaborates with customers and/or partners during their business, IT, and financial planning cycles to incorporate <Company> solutions into future plans. Able to lead and influence the customer/partner's perception of their needs and decision criteria.

- Works collaboratively with Partner to understand the customers' business opportunities and helps them develop implementation strategies using <Company> software
- Works with the customer/partner on a complete enterprise wide solution citing ROI and Value Proposition statements

Opportunity Management

Develops and executes plans to pursue and win opportunities by understanding and proactively leading the customer buying process.

Stage 1 - Provides assistance with distinct activities within the sales process as directed by another sales rep or manager.

- Effectively relays information about opportunities to <Company> account leads when necessary, using appropriate tools and communication pathways
- Completes their assigned tasks in a timely and quality manner
- Can effectively answer questions within their distinct domain of responsibility, and quickly follows up with the appropriate referral/research when they cannot

Stage 2 - Demonstrates a basic understanding of customer buying process and <Company> sales methodology when working with sales teams to pursue opportunities.

- Understands and is mindful of the sales opportunity when engaging with customers
- Appropriately balances the value of technical features/functions with business value when engaging with customers
- Avoids going into unnecessary technical deep dives with customers

Stage 3 - Applies their understanding of customer buying process and develops; documents; and executes opportunity plans for volume, low complexity deals.

- Aligns opportunity plans with customer buying process
- Develops opportunity plans in SalesForce.com
- Provides accurate and timely forecasts
- Anticipates and proactively addresses customer questions/concerns

Stage 4 - Applies a thorough understanding of customer's unique buying process and leads a small team of resources to develop and execute an opportunity plan for mid-size, medium complexity deals.

- Works with the account team to ensure technical evaluations are conducted in a timely manner
- Maintains or increases velocity of the opportunity through the sales cycle – looks for ways to decrease sales cycle times

Stage 5 - Applies a detailed understanding of customer's unique buying process and leads a team of resources to develop and execute an opportunity plan for large and/or complex deals.

- Establishes detailed opportunity plans, including relationship, competitive, and solution strategies
- Consults with other relevant resources (e.g., managers, SEs, consultants, executive leadership, SI's, partners, etc.) and includes them in the opportunity strategy
- Maintains opportunity plan and makes adjustments as needed
- Leverages a team of resources to anticipate and proactively address customer questions/concerns
- Leads regular team meetings to discuss the status of, next steps in, and necessary modifications to the opportunity plan

Orchestrating Resources

Develops collaborative, engaged, customer-focused teams of <Company> and Partner resources in support of delivering high-quality solutions and services to the customer.

Stage 1 - Eagerly adjusts their focus to follow the priorities set by their managers and cross-functional leads. Is good at multi-tasking and demonstrates willingness to ask for assistance when priorities & assignments conflict.

- Knows how to ask for help
- Views time as the primary resource at their disposal
- Raises red flags in a constructive, proactive manner when assigned priorities compete
- Is seen as a team player

Stage 2 - Recognizes and capitalizes on opportunities to engage specialty resources, partner resources and/or cross-functional support to help close sales deals. Recognizes they do not have to do it all themselves.

- Knows when to escalate to and request direction/input from their manager
- Has the ability to establish working relationships with partners, product management, consulting, order management, and/or other cross-functional specialists and peers.
- Knows when to delegate and when to perform a task themselves
- Frequently asks for feedback from specialist resources and partners

Stage 3 - Persistently leads, influences, and choreographs cross-functional and partner selling teams to ensure that customer deadlines, expectations and agreements are met or exceeded.

- Understands how <Company> product, sales, services, other corporate functions, and partners work together to deliver value
- Understands the unique roles that each <Company> and/or Partner resource can play in a sale.
- Regularly engages their manager for guidance and direction on challenging execution matters
- Able to clearly articulate relevant information to key contributors including both strategic and tactical considerations, in a way that resonates with a diverse audience up and down the organization

Stage 4 - Employs creative team-building and resourcing concepts to build strong cross-functional teams within <Company> and with Partners, keeping them engaged without micromanaging the tactical work.

- Proactively engages manager as a planning resource
- Thinks outside the box in bringing <Company> resources to bear on an opportunity, including engagement of consulting, overlay resources, partners, and executive leadership as appropriate
- Sets a tone of collaboration and tenacity, supported by a vision grounded in customer/partner value and high-quality solutions
- Effectively “sells” customer/partner needs to internal constituents and leadership
- Determines and communicates the strategic, typically delegates & coordinates the tactical

Stage 5 - Provides organizational leverage to get the right resources to the right opportunities even in the face of the most complicated challenges.

- Looks at business from a macro standpoint and helps salespeople, partners and cross-functional team members with the difficult choices they make about where to invest their time
- Builds and motivates multiple selling teams, remaining positive and calm even in the most emotionally-charged situations
- Consistently works with <Company> senior leadership, cross-functional departments, and partners in an effective manner to clear roadblocks and difficult challenges
- Views themselves as a business manager in addition to a sales person / relationship manager
- Manages all <Company> tech resources involved with an account/partner

Partner and System Integrator Leverage

Establishes strong value-driven relationships with partners / System Integrators and leverages the partner/SI's relationships with customer accounts to successfully identify and win opportunities and develop and pursue broader account strategies.

Stage 1 - Understands <Company> channel strategy and is familiar with the primary partners / SI's relevant to their sales region.

- Understands the whole channel system not just strategy
- Basic understanding of 2-tier model and how partners go to market
- Understands what partners capable of accomplishing
- Familiar with the verticals SI/partners are targeting

Stage 2 - Reactively but effectively leverages channel partners in pursuing opportunities.

- Assists channel partners when appropriate in developing and conducting demos, proof-of-concepts, pilots, etc.
- Identifies which and when channel partners can add value to a given opportunity
- Meets with channel partners when requested to do so

Stage 3 - Maintains and proactively leverages existing channel partner / SI relationships to pursue opportunities.

- Establishes regular communications with channel partners / SI's
- Understands the partners' business model
- Navigate competitive products within the partners' portfolio
- Proactively involves partner at appropriate time in sales process
- Understands and assists partner-led opportunities

Stage 4 - Strengthens existing partner / SI relationships by creating a productive cadence of interaction with them around current and future sales opportunities

- Develops strong relationships with technical peers in channel partners / SI's , resulting in positive feedback from the partner
- Effectively works with channel partners / SIs on <Company> led opportunities, ensuring the partner / SI understands and agrees to their role
- Leads and coordinates partners throughout the sales process to maximize value add to the customer

Stage 5 - Creates new strategic partner relationships and innovative approaches to market penetration by engaging on a regular basis with partners and SIs as part of ongoing strategic planning efforts. Turns broken (or non-existent) partner relationships into healthy ones

- Engages and obtains appropriate input from SIs and channel partners to develop account / territory strategy
- Meets with SIs and partners on regular basis
- Clearly leverages partners / SIs to achieve account strategy
- Assumes leadership role over how and when to leverage channel partner during the sales / buying process

Partner and System Integrator Management

Develops, maintains, and executes business strategies to establish the right relationships within the partner, strategically position <Company> with the partner, and maximize revenue with the partner based on knowledge about and effective navigation of partner organizations.

Stage 1 - Partner interactions always leave a positive impression of <Company> and help move the sales motion forward through their friendly, professional demeanour.

- Understands <Company> channel strategy and is familiar with the primary partners
- Calls into partners for a specific purpose and in a limited capacity
- Always maintains a calm, positive and professional demeanour when interacting with partner contacts.
- Effectively relays account information to <Company> account leads when necessary and/or appropriate

Stage 2 - Develops close working relationships with their Partner leads to align on business strategy and understand the role they will play in each account. Is able to quickly learn their key contacts and counterparts within each partner and develop strong, trustful working relationships that result in sales.

- Understands <Company> Channel levels and benefits for each level. Effectively manages the partner tools to track Channel data
- Is in frequent contact (phone and in-person) with partner executives and sales teams.
- Effectively prioritizes their time between partners with a bias toward the larger, more qualified opportunities
- Always presents a personable, competent and confident demeanour in front of the partner
- Gets the message across the first time – does not repeat the same presentation to the same partner contacts
- Maintains a high win/loss ratio
- Is revenue-focused and sales-savvy

Stage 3 - Establishes a strong understanding of the partner's business, including their products offerings, competitors, and how they make money. Leverages initial or existing relationships to obtain access to and meetings with functional decision makers.

- Manages partner tools to effectively track Channel data. Develops tools and means for improvements
- Obtains organization charts from existing contacts
- Effectively adjusts their style and engagement approach to the company and individual(s) they are targeting
- Works with existing contacts to arrange meetings with senior level executives
- Establishes relationships at all levels of partner organizations Work with the partners to understand their focus and sales activities

Stage 4 - Develops a documented business plan, including organizational charts and strategic and tactical goals. Develops and leverages strong sponsors/advocates to expand presence and relationships with key line-of-business decision makers across the partner organization.

- Identifies and targets all influencers and decision makers
- Commands an executive-like presence in front of the partner – with big-picture perspective a sense that they can make things happen
- Documents complete organization chart of partners
- Quickly establishes deep and broad relationships throughout partner organization
- Visits key partners on a regular basis to develop relationships with end users creating product dependency
- Utilizes business development rep to help influence application choice
- Coordinates plans with sales team members (Consulting, SE's, and Inside Sales) to leverage partner calls and present a common strategy
- Participates in or leads strategic decisions around the futures of partner management

Stage 5 - Develops advisor and business partner relationships with the senior executives within each platinum partner, regularly engaging in the partner's business planning processes to strategically position <Company>, and continually seeking to develop additional sponsors/advocates.

- Leverages a documented business plan which includes sales team members (Consulting, SE's, Inside Sales)
- Develops strategic relationships with multiple senior business executives
- Positions <Company> solutions strategically
- Displays "insider" information with access to a number of senior level exec as part of his/her strategic plans and

Product Knowledge

Leverages <Company> product knowledge to position and sell <Company> solutions.

- Stage 1** - Basic understanding of the positioning and business value of their assigned area of focus within the <Company> portfolio of products.
- Understands and can articulate the high-level <Company> Delivery Center messaging
 - Properly position and describe each <Company> product within their assigned focus
 - Articulate the business value for each <Company> product within their assigned focus with examples
 - Effectively present standard slides on the <Company> products in the assigned focus area
 - Basic understanding of relevant foundation and partner products (i.e. MSFT)
- Stage 2** - Detailed understanding of the positioning and business value of their assign area of focus within the <Company> portfolio of products.
- Detailed understanding of the assigned subset of products as well as a basic understanding of the remaining <Company> products
 - Describe the aggregate positioning of all the <Company> products within their assigned focus
 - Articulate the combined business value for the <Company> products within their assigned focus with examples
 - Effectively assemble and present custom slides on the <Company> products in the assigned focus area based on the requirements of the presentation
- Stage 3** - Detailed understanding of the positioning and business value of the entire <Company> portfolio of products.
- Properly position and describe each <Company> product
 - Articulate the business value areas with examples for each <Company> product
 - Detailed understanding of relevant foundation and partner products (i.e. MSFT) for their assigned focus of <Company> products
 - Describe the aggregate positioning of all <Company> products
 - Articulate the combined business value for all <Company> products with examples
 - Effectively assemble and present custom slides on the <Company> products based on the requirements of the presentation
 - Perform a basic technical whiteboard describing the architecture of the <Company> products in the assigned area of focus
 - Recognizes a potential new business opportunity as it pertains to expanding the product portfolio and knows how and when to properly hand it over to the appropriate team
- Stage 4** - Detailed understanding of all <Company> products with an advanced technical product expertise in their assigned area of focus.
- Perform an advanced technical whiteboard describing the architecture of the <Company> products in the assigned area of focus
 - Completed the necessary course work and pass <Company> Certified Administrator (CCA) exam for one <Company> product in their assign area of focus
 - Detailed understanding of relevant foundation and partner products (i.e. MSFT) for their assign focus of <Company> products
 - Perform a detailed technical whiteboard describing the aggregate architecture of the <Company> products in the assigned area of focus
 - Works to develop and recognizes potential new business opportunities as it pertains to expanding the product portfolio and knows how and when to properly hand it over to the appropriate team
- Stage 5** - Advanced technical expertise for all <Company> products.
- Detailed understand of each product in the <Company> portfolio
 - Fully understands how each product in the <Company> portfolio works together
 - Perform the necessary course work and pass <Company> Certified Administrator (CCA) exam for additional <Company> product areas
 - Perform a detailed technical whiteboard describing the aggregate architecture for all of the <Company> products

Technical Selling and Positioning

Develops and executes plans to win opportunities by understanding and proactively leading the customer through the technical buying process.

Stage 1 - Demonstrates a basic understanding of the technical sales process for <Company> products.

- Understands the overall positioning of the <Company> solutions by obtaining CCSP Certification
- Prepares for installation of <Company> products by following the best practice for each product
- Handles the general topics which arise during the discussion of <Company> product installation
- Performs the basic configurations steps in conjunction with the installation and integration for each <Company> product
- Successfully performs the basic navigation (in an unscripted manner) of the <Company> products

Stage 2 - Demonstrates the basic ability to participate in customer product discussions and <Company> product demonstrations.

- Delivers standard Sales-based presentations of the <Company> solutions to a customer or partner
- Handles the general objection handling which arises during the presentation and discussion of <Company> solutions
- Handles the <Company> product specific topics which arise during the discussion of <Company> product installation
- Delivers a high-level (Scripted) <Company> product demonstration which illustrates the business value of the <Company> product

Stage 3 - Demonstrates advanced ability to participate in customer product discussions and <Company> product demonstrations and product installation and configuration.

- Successfully performs the Enterprise Buyer Conversation White board with a Partner or customer
- Successfully performs the Network, Desktop or Infrastructure Buyer Conversation White board with a Partner or customer
- Handles the troubleshooting of issues which arise during the installation and configuration of <Company> product installation
- Sets proper expectations with the partner/customer on the troubleshooting of issues when they occur during the installation of <Company> products
- Performs the advanced configurations steps in conjunction with the installation and integration for each <Company> product
- Delivers a feature specific (Scripted) <Company> product demonstration which illustrates the business value of the <Company> product
- Defines success criteria with the customer or partner to best enable a successful technical proof of each <Company> product
- Sets proper expectations with the partner/customer on the technical proof of each <Company> product
- Prepares for installation of <Company> products by following the best practice for each product with the customer or partner
- Executes the successful installation of <Company> products by following the best practice for each product with the customer or partner

Stage 4 - Leads the <Company> technical sales activities as a part of the overall sales process including presentations, custom <Company> product demonstration and technical proof (through controlled product installation).

- Handles the advanced objection handling which arises during the presentation and discussion of <Company> solutions
- Handles the objections which arise during the presentation and discussion of <Company> solutions which derive based on information from a product competitor FUD (fear uncertainty and doubt)
- Delivers an opportunity specific (custom script based on the customer or partners requirements) <Company> product demonstration which illustrates the business value of the <Company> product. Performs the configurations steps in conjunction with the installation and integration for each <Company> product to support the technical proof of the <Company> products.
- Review results of the technical proof of the <Company> product and the achievement of the success criteria with the customer or partner
- Document the validate success criteria from the technical proof of the <Company> product

Stage 5 - Navigates through and creatively overcomes obstacles experienced in the positioning and technical proof of <Company> solutions.

- Responds to customer or partner objections through <Company> product demonstration (ad hoc based on the specific objection)
- Manage the timeframe and scope in conjunction with the installation and integration for each <Company> product to support the technical proof of the <Company> products based on the defined success criteria
- Create a documented business case to specifically address the business requirements (and the associated demonstrated <Company> solution) to create a compelling justification for the purchase of <Company> products
- Present the findings within the business case to specifically address the business requirements (and the associated demonstrated <Company> solution) to create a compelling justification for the purchase of <Company> products the decision makers at the customer or partner