

Jana Technology Sales Process

Client Name: _____ Sales Manager: _____

Directions: Through the sales process, the salesman is responsible for filling in the boxes (or including an organisation chart) for each checklist item. This document should be maintained to reflect the current status of the opportunity.

This document is to be used in electronic form.

It is intended that Internal Sales is responsible for executing the 'Introduction' phase, the completion of which constitutes a 'Jana Sales Lead.'

Lead Identification & Interest Generation

Objective: To identify the players in the organisation, assess the opportunity and do sufficient to generate interest in the Clients product so that there is an agreed route forward through the qualification phases.

Tools: Telephone Conversation, eDay, Case Study, Industry Expert, Analyst Report.

Profile Identification

Contact's Position & Influence

What is our contact's position and level of influence?

<Complete boxes>

Defined Project

Is there a project defined for within the next year?

Project Budget Set

Is there a budget set for the project of at least <Agreed Client Amounts>?

Does the company have spending power?

Company Profile & Business

Is the company profile right and do we understand its business and market?

Size of organisation, position within the market, turnover, number of employees.

Opportunity Identification

Decision Making

Establish how decisions are made and the approval process.

Introduction

Project Stage

Establish what stage they are at. For example, has the business strategy been decided or are they at the stage where they will chose technology, when will this happen.

Business Driver

Establish the business issue and compelling event?

Where are the areas of pain? What will happen if this project does not happen?

Client Value Proposition

Have they received the client value proposition?

Discovery

Objective: To reach a point with minimal exposure and effort to qualify whether we should engage with the full qualification and solution definition, and agree this roadmap with the customer.

Tools: Meetings, Chalking & Talking, (at most) a Business Change Demo.

Current Pain

Identify the current pain.

Why is it happening? What happens if it is removed?

Internal Champion

Find and support a internal champion who has influence.

Is he a credible player? Can he influence the decision criteria?

Cost Test

Has he taken on board an outline cost for Client products?

Identify Economic Buyer

Identify the key players, including the economic buyer and business sponsor.

Customer, SI and IBM players.

Have you got appropriate introductions?

Organisation Charts

Get the organisation chart which includes all the key players.

What are the positions and relationships of our contacts?

Who are our selling partners?

Technical Architecture

Identify the technical architecture.

Client Product Fit

Establish, and have the customer validate, a fit for the client.

What is the quantified effect of the business?

Alternatives

Identify the alternative approaches.

Obstacles

Identify the key issues facing the sales cycle.

Qualification

Work in Progress

Objective: To understand the players, process and criteria by which a client solution will be embraced, and enable the customer to quantify its business value.

Tools: Workshops, Solution Days, Executive Meetings, Technical Meetings, Demo.

Business Metric

Is there a compelling event?

What is the sense of urgency?

What is the business case?

Put together a compelling theoretical return on investment.

What is the cost of not using the client technology?

Meet Economic Buyer

Meet the economic buyer and the business sponsor.

How is each measured?

What does project success and failure mean to each?

Validate the process, criteria and outcomes (e.g. if we do the proof, what then?).

Do they understand the client value proposition?

Have they taken on board an outline cost for the clients product set?

Organisation Charts

Build detail into the organisation chart.

Decision Making Process

Understand the decision making process.

Who is involved in making the decision?

What will make them buy from us?

Have we met them?

Decision Criteria

Establish the decision criteria. Can we influence the criteria?

What are the personal & business criteria of each decision maker?

Architectural Fit

Establish if the clients product fits the current and future technical architecture.

Required Proof

Identify what needs to be proved to the customer.

Engaging with SI

Exposed Area the clients technology exposed in this sales process?

Risk Assessment

Are the risks in these gaps acceptable?

Partners' Sales Process

What is the SI's sales process?

Solution

Objective: To reach a point where the customer has agreed a solution and requires only areas of proof to be achieved to be in a position to proceed immediately.

Tools: Workshops, Solution Days, Executive Meetings, Technical Meetings, Demo.

Technical Solution

Define the technical solution.

What is the value of the client technology? What is the alternative?

Delivery Process

Define the delivery process.

How will the project be delivered? Partners?

Why will the customer use us? What does it mean if he doesn't?

Qualification

Forecast

Objective: Define and agree the closing commercial framework around proof activity, and close the deal.

Proposal

Propose the Solution

Who will deliver it? How will it be delivered? How will it be implemented?

How is the competitive strategy being covered off?

Proof Exercise

Objective: To demonstrate the level of proof which the customer needs to make the decision.

Tools: Reference, Applied Demo, Analyst Review, Training, First System Exercise, Training Demo Workshop. [Proof of Concept, Evaluation, Benchmark, Pilot.]

Define and agree objectives or a checklist against each individual proof item with the customer.