

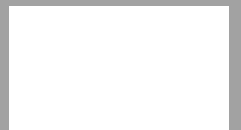
**Surviving Enterprise Evaluations:
*You Launched It, Now You Gotta Sell It!***

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What You Will Learn from this Session

- **Techniques for building stronger relationships with prospects and customers**
- **Ways to improve your chances of closing sales**
- **Techniques for handling objections**
- **Lists of questions you'll have to answer during enterprise evaluations of product architecture, security, network impact, and desktop impact**

Showing Compelling Value

- **Clearly define the problems you solve**
- **Clearly explain how your features solve those problems and the benefits the customer gains as a result**
- **Keep the difference between problems, features, and benefits razor sharp in your mind**
- **Differentiate your solution from competing alternatives**
- **Quantify and measure results**
- **Show a compelling return on investment**
- **Relentlessly return to problems solved and benefits provided at every chance throughout engagement**

Evaluation Commandments

- Know the product, the competition, and the customer
- Ask questions
- Listen
- Be honest
- If you don't know, say so
- Write everything down
- Respond promptly
- Overcommunicate
- Manage expectations
- Check, recheck, and check again
- If it's broken, it's priority one
- If you're stuck, get help
- Do everything possible to ensure success
- Deliver

Integrity is Everything

- **Consequences of acting without integrity**

- Lose customer's trust and respect
- Lose possibility of sale (or follow-on sales at existing customer)
- Sign deal, but no chance to satisfy impossible expectations
 - Customer withholds payment
- Lose chance to use customer as reference for future sales
- Lose chance for good word of mouth marketing (and get bad instead!)

- **If you can't win clean:**

- something's wrong with your product and/or your value proposition
- fix it or find a different game to play

Techniques for building trust

- **concede any product issues and move on**
- **when you don't know, say so**
- **deliver on your little promises**
- **underpromise and overdeliver**

Setting Expectations

- **Three ranges:**
 - Too Low to Win
 - Too High to Deliver
 - Just Right?

Techniques for objection handling (easiest to hardest)

- refer to authority
- name dropping
- case study
- death by PowerPoint
- blind 'em with science (white papers)
- demo
- quality time together
- simulation
- analysis and proof
- implicate others
- prove it's a fluke
- prove it irrelevant

Techniques for objection handling (cont'd)

- **focus on requirements not implementation**
- **Many Paths to Truth (already solved by other means)**
- **configure product**
- **technical walkthrough**
- **formal training**
- **postpone indefinitely, to an unspecified future release, to a specific future release, or to phase two**
- **throw hardware at it**
- **do lab certification testing**
- **pilot**
- **analyze log data**

Techniques for objection handling (cont'd)

- **customer reference**
- **have customer upgrade systems**
- **say no**
- **promise to address if needed**
- **throw services at it**
- **promise integration**
- **promise specific enhancement/bug fix**
- **give 'em a security blanket**
- **implement enhancement/bug fix and certify**
- **commit specific production results**
- **pay for performance**

Miscellaneous Notes

- **The customer's perception is your reality: if the customer thinks it might be a problem, it is**
- **Unreasonable Fears: If the customer fears vampires, flash your silver cross**
- **Never Accidentally Forget to Answer a Question**
- **RFIs/RFPs: The best way to win an RFI/RFP is to write it. Start early!**

Architectural Reviews: questions you will be asked

● Basic Architecture

- "Is your system available as licensed software and/or as a hosted solution?"
- "Provide a schematic diagram of the components of your system."
- "Describe the architecture of your servers."
- "What protocols does your system use?"

● Components

- "What open source software do you use?"
- "List all third-party software components you use."
- "What database/web server/app server vendors & versions do you support?"

● Server Support

- "What platforms/OS versions/patch versions do your servers support?"
- "What are the hardware requirements for your servers?"

Architectural Reviews: questions you will be asked (cont'd)

- **System Management**

- "What types of management interfaces are available for the system and the various components?"

- **Scalability**

- "Describe your system's scalability."
- "In what ways can your system be configured to increase scalability?"

- **Fault Tolerance**

- "How is your system configured to achieve high reliability 24x7x365?"

- **Internationalization**

- "Does your system support Latin 1 characters?"
- "Does your system comply with Unicode 3.0 or later?"
- "Does your system support two byte characters?"

Architectural Reviews: questions you will be asked (cont'd)

• Legal

- "Does your software require an ECCN number or a waiver issued by the Bureau of Export under the Department of Commerce in order to be used outside of the US?"
- "Do your products comply with current privacy requirements in the US, Canada, UK, and EU??"
- "Do you have patents on your technology?"

• Reporting

- "What reporting and measurement data can your system provide?"

• Installation

- "What's the level of effort and staff/vendor resources required to install the system?"
- "What's the level of effort and staff/vendor resources required to manage the system on an ongoing basis?"

Architectural Reviews: questions you will be asked (cont'd)

• Integration

- "How does your system integrate with my portal/Content Management/workflow/Customer Relationship Management/Enterprise Resource Planning system?"
- "What developer APIs does your system have?"
- "How can your system/UI be customized?"
- "Can your software be embedded within my own software?"
- "What third party tools are supported for use with your system?"

• Lock-in

- "What proprietary file formats/protocols/etc. does your system use?"

Security Reviews: questions you will be asked

• Viruses

- "What virus checking program do you use?"
- "How often are virus definitions updated?"
- "How do you make sure that employee desktops keep their virus definitions current?"
- "How do you make sure employee desktops keep their patch versions current?"

• User Authentication

- "What user authentication techniques do you support?"
- "Can you integrate with a directory server?"
- "What directories have you certified support of?"
- "Can you support single password?"
- "Can you support single sign on?"

Security Reviews: questions you will be asked (cont'd)

• Development Process

- "When do you perform a security review?"
- "Have you used external consultants to review your security policies and procedures?"
- "Do you have a defined process for gathering customer feedback on requested features, enhancements or requirements for future versions?"
- "During the requirements and design phase, do you use customer focus groups to gather feedback? If so, how often does this occur?"
- "Can your company identify and trace software requirements from specifications through software design documents to code?"
- "Can your company trace requirement specifications to functional testing?"
- "What is the process for reporting bugs in the product? How are fixes typically done? Are patches distributed as bugs are fixed or are fixes incorporated into future product releases?"

Security Reviews: questions you will be asked (cont'd)

- **Development Process (cont'd)**

- "How often do you make major releases?"
- "Please outline the release history of the product."
- "What major enhancements and new features are planned for your next release?"
- "What is your product roadmap beyond your next release?"

- **Screening / Training**

- "Do all candidates undergo a background check? Have all current employees undergone a background check?"
- "Have all your employees received security policy training?"
- "What formal training have you sent your employees to to learn about security?"

- **Encryption**

- "When you transmit files/data, is it encrypted?"
- "What encryption algorithm and key strength do you use?"
- "Is your development process documented?"

Security Reviews: questions you will be asked (cont'd)

• Operations

- "Do you have a documented incident response procedure? Provide a copy."
- "Has your system ever experienced a security breach? If so, how was this handled?"
- "Who is your hosting provider? Describe their security policies and procedures. Take us on a tour."
- "Are your servers protected by a firewall?"
- "What intrusion detection system do you use?"
- "What tools and techniques do you use to verify that critical files (passwords, etc.) haven't been modified without authorization?"
- "How does your operations and development team keep current about best practices and emerging threats?"

Network Reviews: questions you will be asked

● Network

- "How will your system impact each office's Internet connection?"
- "How will your system impact my WAN spokes?"
- "How will your system impact my LAN?"
- "Can your system work through firewalls and proxies?"
- "Can your system work over a home VPN connection?"
- "Can your system work over a 19/28/56k modem connection?"
- "Can your system comply with our network's Quality of Service configuration?"

● Support

- "Do you offer 24x7 support?"
- "Describe your support policy and escalation procedure."

● Services

- "What professional services do you provide?"

Desktop Image Reviews: questions you will be asked

● Client Platform Support

- "What platforms/OS versions/patch level/browser/3rd party component versions does your client support?"
- "What are the hardware requirements for your client?"
- "What is the download size of your client?"
- "How much disk space does the installed client use?"
- "What's the memory footprint of the client?"

● Installation

- Do you support silent/unattended installation?
- How can I deploy the client throughout an enterprise?
- What is the installation flow for an end user?
- My end users can't install or run your software because they don't have administrator privileges on their machines.
- My end users can't install or run your software because IT locks our desktops against changes.

Desktop Image Reviews: questions you will be asked (cont'd)

• Central Management

- Can I customize the client's user interface and preferences?
- Can I lock down the client's preferences to prevent changes by the user?
- Can I centrally manage the client's preferences after deployment?
- If I want to change client preferences after deployment, do I need to repeat the deployment?

Scaling the sales effort

Create a repository of:

- **checklists**
- **templates**
- **reusable resources**

Preparation for Server Deployment

• Questions Before Server Deployment

- "What platforms/OS versions/patch versions are your servers?"
- "What are your servers' hardware specs?"
- "What firewall do you use?"
- "What hardware load balancer do you use?"
- "What web server do you use?"
- "What antivirus software do you use?"
- "What other software besides ours will you be running on those servers?"

Preparation for Desktop Deployment

• Desktop Image

- "What are all of the exact OS / patch version / browser version combinations in use?"
- "What email software do you use?"
- "What antivirus software do you use?"
- "What other applications are they using on the desktop?"
- "How well does hardware and software on the desktop match IT's official standards?"

• Desktop Deployment

- "What software deployment system(s) do you use?"
- "Does it cover all desktops?"
- "How do you deploy software to desktops not covered by the system?"

Written Plan for Pilots/Deployments

- **who does what: vendor vs. customer responsibilities, individual responsibilities at each**
- **resources required: staff, hardware, software, \$**
- **security, user authentication, source of usernames/passwords, initialization, where usernames/passwords will be stored**
- **product customization/configuration**
- **software deployment plan**
- **schedule**
- **deadlines vendor, customer must meet to stay on schedule**
- **specific measurable agreed-upon success criteria**
- **Training for Admins, Help Desk, Power Users, and End Users**
- **Documentation**
- **Support Planning: end user, help desk, admin, escalation policy**

Hints for Surviving Pilots/Deployments

- **Rollout: Easy does it: evaluators, lab, few machines on-site, partial site, full site, multi-site, multi-country**
- **Notable gotchas**
 - Beware dependencies on customer resources!
 - Beware the end of the fiscal year!
- **Scaling the customer base**
 - document your methodology
 - have a standard deployment plan template
 - improve with each deployment

Closing Thoughts

- **Plan**
- **Document**
- **Quantify**
- **Measure**
- **Relentlessly chase down all open issues**
- **Reiterate key messages**