

Customer Driven Sales Methodology

**Understand, Validate,
Qualify**

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June 2013

Objectives

After completing this module, you should be able to:

- List the stages of the Customer Driven Sales Methodology (CDSM)
- Describe the activities related to the first CDSM stage, Understand Customer
- Describe the processes related to the second CDSM stage, Validate Opportunity
- Describe the process related to the third CDSM stage, Qualify Opportunity

CDSM framework



Understand the customer

Understand
Customer

Map
industry and
client
research to
opportunities

Develop an
opportunity
profile

Target
specific
people or
positions

Hold a Deal
Creation
Workshop

Prepare and
practice
client calls

Make the
initial
calls

Capture information

Understand
Customer

Online sites such as internal communications materials, websites, blogs

Annual reports, investment analyst reports, market research reports

Consumer and industry regulator reports

Government papers (white, policy, and so on)

Press releases and media coverage

Existing relationship, our partners, and other suppliers

Advertising

HP Market Vision and industry intelligence

Understand
Customer

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Actions Dec 05, 2011 | Other: Primary Market Research | 3 MB

HP Retail Publishing Systems (RPS) Marketing Assessment & Messaging Prioritization Study
IPG's Retail Publishing Systems business (RPS) has been tasked to drive expansion of the photo creative category ("photo creative products" or "photo merchandise") which includes photo cards, photo books, posters, calendars, etc.
Actions Dec 05, 2011 | Parametric Marketing: Primary Market Research | 7 MB

Project Ink Advantage Qualitative In Egypt Sep11
Report from focus groups with Consumer & Businesses in Egypt to understand their attitudes to printing and assess their reaction to the Ink Advantage products.
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Delivering on HP's Graphics Growth Strategy
The Graphic Solutions Business of HP's Imaging and Printing Group (IPG) played a central role in the firm's September declaration that HP is staking new territories with a new HP Wall Art Software-as-a-Service offering that enables print service providers to diversify their portfolios to include...
Actions Dec 05, 2011 | Lyra Research: Hard Copy Observer | 55 KB

HP Ends Fiscal Year on Downbeat with Grim Financials, CEO Shuffle
HP had a very tough fourth quarter, with revenue down slightly and profits down dramatically, thanks mainly to huge costs associated

Announcements

- **Access the Gartner Bulletin Board - Documents Available to All Employees**
Nov 10, 2011
- **Access the Latest from IDC!**
Nov 08, 2011
- **UPDATE: FORRESTER RESEARCH**
May 17, 2011
- **Analyst Reports from Thomson Reuters now available**
Apr 12, 2011


Mar 29, 2011
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Online research vendors

Understand
Customer

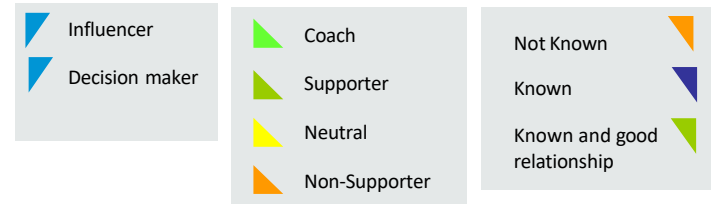
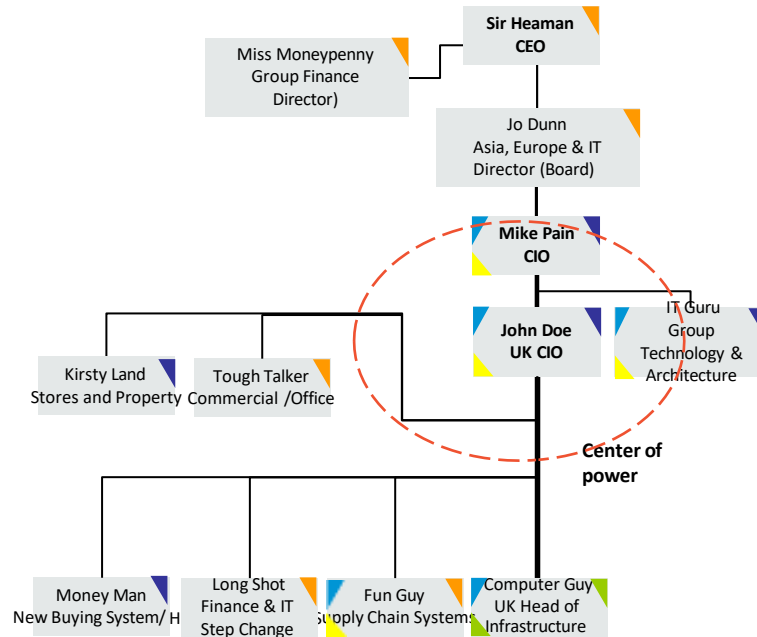
Research Vendors	
Vendor	Availability
APQC	All of HP
BoardEx	All of HP
Computer Economics	Enterprise Services Exclusive
Everest	All of HP
FinListics	Enterprise Services Exclusive
Forrester	All of HP
Gartner	Enterprise Services Exclusive (HP employees, contact your MarketVision business sponsor)
Hoover's	All of HP
IDC Worldwide Services Contracts Database	All of HP
iProfile	Enterprise Services and Enterprise Marketing
NelsonHall	All of HP
PAC Online	All of HP
ProQuest	All of HP
Technology Business Research (TBR)	All of HP

Online Research Vendors

Relationship chart

Opportunity Planning Tool stored in SFDC

Understand Customer



The most common relationship mistakes:

- Over-investing in the wrong people
- Under-investing in the right people
- Missing some of the key people altogether

You must have relationships at various levels within the organization

Deal Creation Workshop (DCW)

Understand
Customer

Identify and
develop
early-stage
opportunities

Establish the “field
of play”

Agree and
document 30-, 60-,
and 90-day plans

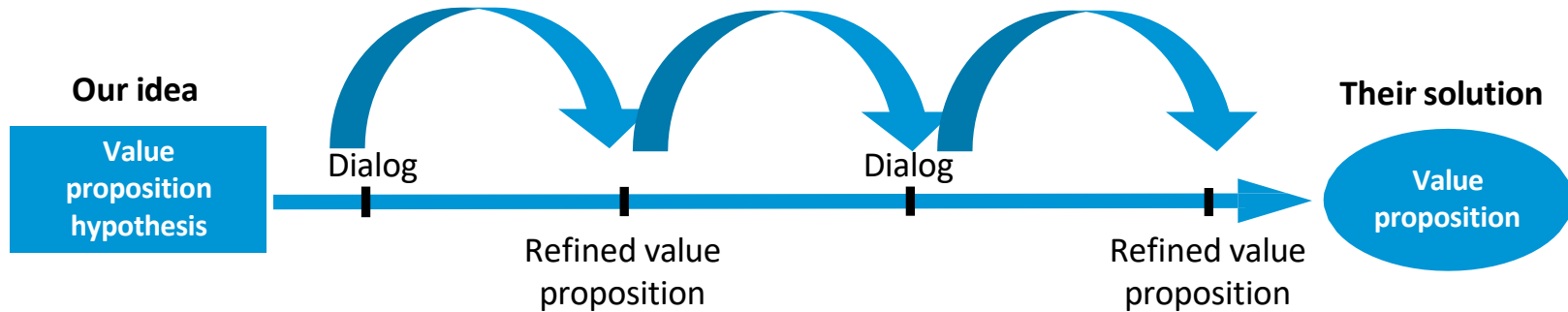
Discuss the
high-level solution
strategy

Establish the field of play

Opportunity Planning Tool stored in SFDC

Understand
Customer

- It is about the **client**—not about HP
- All elements of the value proposition are **validated and co-developed** through a series of client interactions
- Before you can successfully articulate value, you must understand the key business issues of the client and the impact any solution can have



A concise summary of the client's situation, the solution you are offering, and the reasons adopting it make sense.

Call plan

Understand
Customer

Opportunity Planning Tool stored in SFDC

- All **client** interactions should have an **End in Mind** (EIM)
- What key beliefs must the **client** hold to agree with the EIM?
- **Determine** the questions you want to ask
- Think about the questions the **client** might ask and how you will respond
- **High-risk five**: The first five minutes of the meeting
 - The critical space and time you have to make a positive impression and set the tone of the meeting

The screenshot displays the 'Call Plan for' tool interface, which is a form used for planning client interactions. The form is divided into several sections:

- Client Information:** Fields for Client Name, Address, and Call Plan Type.
- Values Proposition & EIM:** A section for defining the value proposition and the End in Mind (EIM).
- Key Beliefs:** A section for identifying key beliefs that the client must hold to agree with the EIM.
- Questions to Ask:** A section for listing questions to ask the client during the meeting.
- High-Risk Five:** A section for identifying the first five minutes of the meeting, which is the critical space and time to make a positive impression.

The interface includes a 'Save' button at the top right and a 'Call Plan for' header at the top left. The form is designed to be user-friendly and organized, with clear sections for each part of the planning process.

What is the key to understanding your customer?

How can you avoid the three common relationship mistakes?

With your table teammates, select one of the three most common relationship mistakes and discuss the impact that can have on your deal.

- Over-investing in the wrong people
- Under-investing in the right people
- Missing some of the key people altogether

You have 3 minutes to complete this exercise.

Be prepared to share your conclusions with the class.



CDSM framework



Validate Opportunity

Validate
Opportunity

Determine
issues,
establish
evidence,
elicit
constraints

Determine
the client
decision
process

Qualify time,
people, and
money

Gain access
to key
stakeholders

Assess our
ability to
respond

Shape the
opportunity

Key questions in deal qualification

Validate
Opportunity

Will they buy?

- Business case
- Client resources
- Sense of urgency
- Defined decision process and criteria

Will they buy from HP ES?

Competitive superiority in:

- Relationships
- Value proposition for both the technical and the business solution
- Evidence

Opportunity gauge

Opportunity Planning Tool stored in SFDC

Validate
Opportunity

Call Plans | Value Proposition | Opportunity Gauge | Decision Grid | Client Resources | Relationship Suite | Competitive Sales Plans | Deal Health Checklist | Close Plan

hp Opportunity Gauge Summary

[Begin/Edit](#) | [Print](#) | [Help](#)

Will They Buy?	Will They Buy Ours?
S1. Business Case	S1. Technical Solution
S2. Resources	S2. Business Solution
S3. Decision Process	S3. Relationship Strength
S4. Urgency	S4. Point of Preference
S5. Relationships	

RESULT: LOW SCORE:
Scoring Legend: • High:25 to 19 • Medium:18 to 12 • Low:11 to 1

Result: LOW SCORE:
Scoring Legend: • High:20 to 15 • Medium:14 to 10 • Low:9 to 1

Combined Buying Potential	Sales Buying Potential
Will They Buy? : LOW	
Will They Buy Ours? : LOW	
Combined Buy Potential : 15%	

Note:
1. Score will not exceed MEDIUM if 'Disagree, Strongly Disagree, or Clear Disadvantage' are selected.
2. Use these guidelines to validate Combined Buy Potential against CDSM sales stage:
Sales Stage 1 - 25%; Sales Stages 2 and 3 - 50%; Sales Stage 4 - 60%; Sales Stage 5 - 80%.

Will They Buy	High	30%	80%	80%
	Med	25%	50%	60%
	Low	15%	25%	30%
		Low	Med	High
		Will They Buy Ours		

Last Modified By:

Customer decision process

Opportunity Planning Tool stored in SFDC

Validate
Opportunity

You need all components of the decision grid to fully understand the decision process

Start with the steps

Always get the **how** directly from the **who**

Customer Decision Grid Input

New/Cancel

Title

Decision

Who

When

Criteria

Status (Not Started)

Add Name

Customer Decision Grid Print Summary

Opportunity Plan Detail

Account Name	Ahold U.S.A., Inc	Opportunity Plan Name	OP-0001864
Opportunity	App Rationalization	Sales Stage	Stage 1&2-Understand/Validate
Owner	Burwinite,Michelle	Close date	5/31/2013

Step	Decision	When	Who	Criteria	Status
Executive Leadership Agreement and Alignment	Review down selected Competitor proposals with CFO for agreement to move forward.	1/23/2013	- BOB PENA (Decision Maker)	Strong business case value props - CFO will be searching for immediate cost savings and evidence of return on investment in first 8-12 months.	In Progress
Contracts awarded	Final decision on contract/partner expected by February 15. Keith and Bob will award the contracts based on input from the CFO.	2/15/2013	Keith Alberson (Executive); - Bob MacKert (Political Influencer)	Agreement on T&Cs, and final proposed solution. Trust in final partner to achieve expected benefit and cost savings.	In Progress

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