A Digitech Systems White Paper

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Implementing a CustomerCentric® Sales Methodology

Digitech Systems has partnered with John Holland, cofounder of CustomerCentric Systems (CCS) to develop a unique selling process customized to our ECM product suite. This selling process includes numerous sales tools such as conversation scripts specific to job title and industry, sample collateral for key vertical industries, and industry-specific white papers that orient resellers to key market issues and compliance initiatives that may influence ECM purchasing decisions.

A trip to the Digitech Systems Enterprise Selling Seminar is essential to understanding how to utilize these tools. This course is designed to teach resellers about the processes and tools of the CustomerCentric methodology. You'll learn how to implement defined selling processes that provide management insight into the effectiveness of sales activities and offer a fact-based tactic for forecasting sales success and revenue.

This paper is designed to provide resellers who have attended the Enterprise Selling Seminar with a guidebook for implementing what they learned. It includes sections that:

- Explain the ECM and Digitech Systems –specific messaging available exclusively to those who have attended the class
- Offer tips on changing core sales processes and tracking mechanisms
- List suggested implementation schedules and checklists

Read on to find out how to grow your ECM business by changing the way you sell…

What if you could grow your sales effectiveness by 10%? 20%? 100%? What if you could shrink your sales cycle from 6 months to 6 weeks?

We all know there is no "quick fix" when an organization sets a goal to raise revenues through improved sales effectiveness. However, the Enterprise Selling Seminar you attended equipped you with several tools designed with that goal in mind. During the Seminar, you learned about how to use Solution Development Prompters to qualify buyers and position offerings to solve a problem, achieve a goal, or satisfy a customer need. You also saw tools such as the Sequence of Events, Success Milestones, and the Sales Call Debrief in action through role play exercises. Now that you're home, you're probably wondering, "Where do I start?"

This white paper is designed to give you suggestions on how and where to start when implementing the CustomerCentric Selling methodology and tools within your organization. We cannot over-emphasize the importance of executive buy-in for this process, as it is key to realigning company processes and encouraging individual change. If your CEO or Sales Manager has not attended a Seminar, they should attend the next available class.

> "When successfully implemented, the sales process becomes part of the culture of the adopting company and ultimately shapes the customers' experience. Implementation of the process requires extensive effort on the part of Sales and Marketing, but also requires involvement and support by senior executives, ideally up to the chief executive officer, to realize it's full potential.
>
> -*CustomerCentric Selling*, pg 245-46

The implementation process really has two main parts, and Digitech Systems has already taken care of the hardest one for you! CustomerCentric Selling starts with Sales Ready Messaging®. As you learned in the class, this Messaging is targeted to specific titles within specific vertical industries. Read on to find out how to access the Messaging that Digitech Systems has already completed; all you'll need to do is fill in the information specific to your company. The second major step has to do with redefining your sales process around the milestones you learned in the class including understanding the buyer's goal, identifying your champion, and getting a Sequence of Events in place to manage the buying process. These topics are covered in the second half of this paper.

Develop Your Messaging

Your Seminar attendance entitles you to direct, free access to a wealth of Sales Ready Messaging developed by Digitech Systems over the last few years. This messaging targets some of the hottest sectors for ECM technology purchasing including:

Healthcare	Insurance
Education	Government
Financial Services	Retail

You should have received a CD at the end of the Seminar containing all available messaging for these industries; you can also gain online access to this information by contacting your CDM.

In addition to the available messaging information, you'll want to consider what specific tools you need for your organization, such as case studies and phone scripts. Since these contain specific measurable benefits from existing customers, they offer the proof you need to gain mindshare with new prospects—especially in a tight economy! When you see the difference these Sales Ready Messaging tools make for your ECM business, you'll want to consider building similar tools for your other product lines and services as well, so we've also included a section below suggesting a development process similar to the one we used to build the ready-made tools to which you now have access.

The roll-out of your new CustomerCentric style messaging will impact almost all areas of marketing and PR within your organization. The update should include marketing programs, brochures, websites, tradeshow materials, mailers, etc. …essentially anything you use to communicate about your products and services to target buyers. Review these materials annually, or anytime your product offering changes to keep them up-to-date with new capabilities and shifting buyer needs in each marketplace.

Ready-Made Industry Focused Materials

We've done the hard work for you! Visit http://mydsi.digitechsystems.com to view the Sales Ready Messaging we've already developed for you. Each industry includes all of the following tools.

Introduction to the Industry Whitepaper: Designed to give you a feel for what key issues and compliance initiatives are current for a specific vertical industry. Keep in mind that these whitepapers were developed with a reseller audience in mind, so your sales prospect, who lives and breathes these issues daily, might find them overly simplistic. For your end user buyer, turn instead to the Industry Briefs also available on MyDSI.

Key Player and Goal Lists: A list of the key players involved in selling, funding, and implementing an ECM solution within the target industry. These documents also break down the goals and capabilities most likely to resonate with each specific buyer.

Solution Development Prompters™ for each Key Player and Goal: The heart of it all! As you know, these scripts empower your salespeople to have conversations with buyers that will move them closer to the sale. Broken down into diagnostic questions and key capabilities, these industry, job title, and goal-specific templates are the heart of the Sales Ready Messaging.

Sequence of Events Template: A sample template, specific to each industry has been provided. Your salespeople should start here when defining the buying process with their prospects.

Success Metrics Template: A sample template suggesting some commonly used metrics to measure how the ECM implementation will change your buyer's business for the better. These Success Metrics are designed to take a baseline measurement followed by quarterly check-ups to document progress toward the buyer's goals. These success metrics then become the measurable information you need for strong case studies.

Sample Collateral: Includes several campaigns for each targeted vertical industry including postcard and fax mailers as well as sample advertisements. We will customize these materials with different job titles and goals and your own contact information. Just ask your CDM for our help.

We know that the ECM marketplace is outpacing overall software market growth with an annual growth rate of nearly 19%, and as previously mentioned, this messaging targets some of the hottest sectors for ECM technology purchasing including:

Healthcare	Insurance
Education	Government
Financial Services	Retail

We've provided sample messaging for the healthcare industry on MyDSI for all resellers to access. Because we feel strongly that these materials are most effectively used by individuals who have been trained in the CCS methodology, we make materials for the other industries available only to individuals/organizations that have attended the training class. This is an added benefit available only to Digitech Systems resellers, like you, who have attended the Enterprise Selling Seminar. Take advantage of this unique opportunity to get ahead in the marketplace!

Case Studies with Measurable Benefits

Once you've been through the Sales Ready Messaging tools available on MyDSI, you'll want to customize them into call introduction scripts that you can use to promote your own business. The most effective scripts reference a similar buyer in a similar industry with whom your prospect can identify. Here's where your current ECM customers come in! You're probably already using some of your best customers as references, but have you ever documented their results in case studies? Why not take a success metrics template with you and go visit them? They'll be happy to know how their purchase decision has impacted their organization, and you collect reference-able figures you can drop into the Call Introduction Script presented in the Seminar. Even if they're estimating their results, having measurable results enhances their credibility both within their own organization and when communicating with the public.

Digitech Systems is happy to help you with this process! Please contact your CDM for more information on how to get us to write your customer success stories for you.

Write phone scripts

You'll want to take the Call Introduction Script presented in the class and turn it into scripts for each vertical market and key player that your organization chooses to target. As mentioned above, you'll need to begin collecting measurable benefits from your existing customers who are similar in order to develop scripts that have the greatest possible impact. Contact your CDM if you'd like help developing the phone scripts or if you'd like to have Digitech Systems' CCS experts review your materials for you.

Author Additional Solution Development Prompters (SDP) to Suit your Other Offerings

Undoubtedly, you target industries other than the "hot growth" segments represented in the ready-made messaging available from Digitech Systems. You also probably offer products and services (i.e. conversion services and hardware) in addition to the Digitech Systems ECM suite. You'll need to develop your own Sales Ready Messaging for these items, but the process is not complex.

Begin by listing targeted offerings and vertical industries in order to identify what your messaging needs are. Next name the key buyers and decision makers within each industry. Focus on what they're trying to accomplish in order to identify their list of goals. Now pair up 4-5 capabilities of your offerings that will help each buyer achieve each goal. Finally, draft SDPs to provide conversation models for each title in each industry for each goal.

Fair warning: it's taken us several years to develop the messaging you see on MyDSI, so don't expect this to come together overnight. It can be time-consuming, and you'll want to involve representatives from Sales management, Marketing, PR, and even Product Development in the process in order to gain the widest viewpoint possible. We even asked our resellers to help us with this process by reviewing what we built as it became available and by providing their feedback from actual customer experiences. Keep in mind, this messaging is ever-evolving. It will change as the marketplace needs change and as product and service offering are updated.

Train Your Organization

The second major phase of implementation is to train your organization in the CCS methodology and to implement systems and structure changes. The first step is to send all individuals impacted by this change to an Enterprise Selling Seminar hosted by Digitech Systems. This should include not only Salespeople, but also the Director/ Manager of Sales, Director/Manager of Marketing and whatever Executive

> The potential reward for companies successfully implementing a sales process is enormous, but we'd be setting unrealistic expectations if we told you it was easy".
>
> -*CustomerCentric Selling*, pg 246

positions will be necessary to endorse and support the change.

Following training, you will want to outline a new Sales Process based on the principles and skills you learned in the class. You should also evaluate individual personnel for their desire to be involved in the change, their willingness to learn the new skills required, and their willingness and ability to execute the CCS methodology. Finally, Sales management systems and reports will change in ways that allow you to forecast revenues with more accuracy and to better control sales processes. Read on to learn more.

Sales Process and Tracking Tools

Following training, you will want to outline a new Sales Process based on the principles you learned in the class. Whether you're using Microsoft Excel spreadsheets or sales management software to track your sales pipeline, this new process should be accompanied by Tracking Tools specifically designed to reinforce the use of the new process.

Inactive No current Activity	In assigned territory
Active Interest expressed	Customer contact made
Goal Shared Initial Sell Cycle Control letter sent	Goal(s) shared w/seller Solution(s) developed
Champion	Letter content confirmed Access to key players agreed to Key players interviewed
Evaluating	Key player agree to proceed Sequence of Events agreed to Asked for the business

Win	Verbal	Loss	Proposal

To reduce change resistance, involve the sales people who have attended the Enterprise Selling Seminar in reviewing your existing sales processes and determining how to incorporate the model presented in the class. Have everyone buy-into and support this new process, because they'll be expected to begin to use it.

For Digitech Systems, this process evaluation led to our organization selecting a new sales management tool that incorporated the CCS workflow steps and milestones directly into the sales tracking and management software. We worked closely with the manufacturer of the system to design and implement our custom sales process, which is outlined in the diagram to the left, into all status reports and forecasting analysis that the system offers. We have found this tool to be an ideal way to change the behavior of the organization. "SalesNet has allowed us to pre-define how sales prospects move through our sales funnel. Prospects enter the revenue forecasts only after they have shared a goal with the salesperson, and we have been able to confirm that they can act as a champion for our offering within their own organization—key distinctions covered in detail in the Enterprise Selling Seminar. It has been a critical part of managing the change to the CCS methodology for Digitech Systems," says Sean Morris, Director of Sales.

Personnel

As with most organizational change efforts, personnel can be the greatest help or highest hurdle. Prior to beginning implementation, make a list of the individuals who will require training in the new process. Digitech Systems recommends all of the following individuals within your organization attend a Seminar: salespeople, sales managers and directors, marketing managers and directors, CFO, and CEO. Additional thought should be given to how to engage all of these people in the change initiative, so that they take ownership of the success of the new processes and systems. Our suggestion is to include everyone in conversations about sales milestones and potentially garner their assistance in reviewing the software tools used to track sales efforts

> *First-level managers are the linchpins in implementing CustomerCentric Selling. Sales managers must learn and support the process. Their actions speak louder than their words."*
>
> *– CustomerCentric Selling, pg 246*

and forecast revenues. To underscore the importance of using the new tools and systems, you'll want to include measurements on employee review forms that ask specific questions about implementation and to give you an opportunity to explain how metrics will be used to track employee progress as well as sales success.

For Managers: Re-grade Your Existing Sales Pipeline

One of the most painful, but valuable, parts of the implementation process is to honestly re-grade existing funnels with all salespeople. Be aware that the value in these funnels frequently drops 50-80%, but the funnel now more closely reflects reality. A slimmer, more realistic pipeline allows the sales manager to help the salesperson target their time and resources toward opportunities that are most likely to close ultimately offering them a more realistic opportunity to achieve quota. A word of caution: do this without recriminations to encourage honesty on all sides. During the Seminar, you received two tools that help with this process: the proposal withdrawal letter and the sales call debrief.

Proposal Withdrawal Letter: How many of your sales opportunities are graded as "proposal sent?" How many of those proposals have been out for over a month? A quarter? A year? This is painful. The longer these proposals remain without activity, the less and less likely they become to actually close. Yet they are graded at a high probability to close due to the position of proposals near the end of the sales timeline. For all proposals more than 45 days old, issue proposal withdrawal letters, utilizing the template provided in the training seminar. All new proposals should contain a timeframe or deadline for action after which pricing, etc. must be renegotiated to remain valid. These withdrawal letters will push closable opportunities to close and will clean out the rest of the clutter in your pipeline.

Sales Call Debrief: The second tool for managers to use in their pipeline review process is the sales call debrief. This series of questions is designed to determine the status of remaining opportunities. To establish your baseline, review the remaining sales opportunities with your salesperson, and ask them to complete the answers to these questions prior to sitting down with you, as their manager. As you discuss each opportunity in detail, decide together what status they should have relative to your new sales process. If you're working with a process similar to the sample provided in the previous section, managers should work with salespeople to get opportunities that remain in the funnel to an E status within the next ninety days.

For any new opportunities identified after attending the Enterprise Selling Seminar, these debriefing questions will be answered in a letter or email sent to the buyer. This gives the Sales Manager an auditable record so they can help with the qualify/disqualify decision.

Management Reports

The last step in the implementation process is to determine what management reports are needed to report sales activity to the organization and to forecast revenue more accurately. This will be different for each company, but some ideas are presented below to get you started.

Executive-level Reports: First, obtain CFO and CEO buy-in to your new sales process and status milestones. Next, agree on what probability to close to assign to each stage of the process. Then, determine at what point opportunities move from the funnel to the forecasting reports. Finally determine what information is needed on forecasting reports to provide the executive officers enough visibility into the sales process that they feel comfortable with how numbers were calculated, and they feel confident in using this information for business planning.

Sales Management Reports: Sales management reports are designed to help you, as the Sales Manager to keep track of sales opportunities in your marketplace and to monitor the performance of your staff. As such, these reports will be highly individualized to your preferences and the unique needs of your organization. In getting started, we recommend that you build reports that provide you a longer-term view of sales prospects so that you can spot potential slow spots in your sales funnel well in advance and correct the problem before it arrives. We also recommend that you work with your sales team to define performance metrics, such as monetary value in the funnel, number of calls per week, number of sales per month, etc. that offer you insight into sales person activity. You'll want to include both activity and results-based measurements. In addition, you may want to discuss specific metrics with each member of your sales staff that you both agree would help you to monitor their progress and help diagnose performance problems early.

Getting Started

Although the implementation process will vary for each organization, we've included a list of activities for you to work through in rolling out the CustomerCentric methodology within your own organization. Feel free to copy this list into your own project plan with target due dates and individual assignments identified. Your CDM is here to assist you with this process, and they are well-versed in the CCS training, tools, and processes. Use them as a personal consultant as you make this important change for your organization.

The First 30 Days

Obtain executive buy-in to process changes

Define Sales process with team

Identify top five opportunities and implement Sequence Of Events for each

Begin researching sales management tools

Begin the first 15 minutes of each weekly team meeting with a "skills review" role play. Debrief the role play afterwards.

Draft proposal withdrawal letters

The Next 90 Days

Send proposal withdrawal letters

Continue holding "skills review" sessions weekly

Hold refocus meetings to identify goal(s) for each buyer who remains in the pipeline

Manager review of each salesperson's funnel using the sales call debrief

Collect customer case studies

Write phone scripts

Begin making <number> cold calls per week

Develop custom Solution Development Prompters

Implement new sales process

Develop new management reports

Vocabulary and Terminology

CustomerCentric Selling® (CCS)
Sellers empowering buyers to achieve goals, solve problems or satisfy needs by executing the CCS process and Sales Ready Messaging. A registered trademark of CustomerCentric Systems.

Debriefing Questions
Key elements of the Champion Letter that a seller should be able to answer after calling a Key Player.

Funnel
All the opportunities listed in an individual salesperson's territory that are at or past the "active" stage.

Goal
A business issue a buyer is willing to spend money to achieve.

Pipeline
All of the opportunities sellers are working on within an organization that are at least to an "A" status. The pipeline is the sum of each seller's funnel for an organization.

Pipeline grading
Based upon a review of documented deliverables, sales managers make the decisions on where opportunities stand against milestones.

Proposal Withdrawal Letter
A letter sent by the seller to withdraw proposals that have been issued and on which no decision has been made. Unless there are extenuating circumstances, we recommend sending withdrawal letters about 45 days after the proposal was sent.

Sales Ready Messaging®
Material jointly developed by Sales and Marketing that influence the conversations sellers have with buyers that ensure more consistent product positioning. A registered trademark of CustomerCentric Systems.

Sequence of Events
Once getting access to all Key Players, the seller negotiates with the committee the steps needed to reach a buying decision, complete with dates and an estimated time for the decision to be made. This document becomes the basis for sales managers to assess and forecast opportunities.

Solution Development Prompter (SDP)
A questioning template specific to an industry/title/goal of a Key Player that maps usage scenarios to a goal and provides corresponding diagnostic questions to help the seller develop a buyer vision.

Success Story
A specific account of results achieved using a seller's offering whose key components are: Industry/title, goal, contributing reason, corresponding capability, capability statement and quantified results.

Usage Scenario
Taking a feature and focusing on usage by putting it into event, question, player and action format.

Digitech Systems, Inc.

About Us

Digitech Systems, Inc. enables businesses of any size to more effectively and securely manage, retrieve and store corporate information of any kind. By significantly reducing the cost of electronic document and content management systems (ECM), Digitech Systems has moved ECM from a luxury to an essential element of a well-managed business.

Delivering the industry's smartest suite of ECM products and services, Digitech Systems is established by its customers as the trusted source for managing, storing and providing immediate, secure desktop or Web-based access to any and all corporate information. ImageSilo, PaperVision Enterprise and a variety of document and content capture products are available from Digitech Systems as a fully integrated suite, or as process components to match the individual needs of small businesses or major corporations.

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About CustomerCentric Selling

CustomerCentric Selling (CCS) is a proven methodology for predictably improving revenue growth and sales performance. Founded in 2002, CCS helps clients worldwide to implement repeatable, auditable and scalable sales processes that, when combined with Sales Ready Messaging, guides marketing and sales to have meaningful conversations with customers and prospects. This results in winning high-value deals, retaining and growing client relationships and improving the predictability and accuracy of sales forecasts.

Clients such as Microsoft, Hewlett Packard, Business Objects, Rockwell Automation, EMC and Raytheon have deployed CCS worldwide. For more information, visit www.customercentric.com, or call Jill Clark at 800.993.1228 ext. 706.