Consultative Selling:
Using the Cisco
Smart Business
Roadmap

How to Become a Trusted Advisor
Objectives

- Appreciate the benefits of a consultative sales approach
- Understand the process and benefits of engaging with prospects based on their business needs
- Develop an actual roadmap for your customers, to fully meet their needs
- Learn how to use the sales tools
  - Discovery Guide
  - Value Assessment
  - Solutions Recommendation Guide
Cisco Smart Business Roadmap

What Is It?
- A clear process to prioritize business challenges
- A roadmap to help customers see their way through to the future

What Are The Benefits?
- Customer confidence, best solution for today and tomorrow
- Strong IT and business vision alignment
- Enhanced business results
Why Do We Need Smart Business Roadmap?

- IT vendors need to understand the customer’s business challenges
- IT vendors need to speak in a business language— not technical jargon
- IT vendors need to sell complete solutions and differentiate themselves
- Customers need to trust solution for today and tomorrow
Partner Success Story Video
embed SBR_Partner_Boicenet.wmv
A Common Sales Situation Today

Partner:
- Positions alternatives

Technical Decision Maker:
- Missing link to business challenges

Business Decision Maker:
- Missing relevance to business challenges

Proposal:
- Cisco Too Expensive
Business Challenges

Customer Responsiveness
- Enhanced customer service
- Flexible channel and delivery options

Operational Efficiency
- Do more with less
- Improve business processes
- Access real-time business information

Cost Containment
- Improved business models, lower cost structure
- Ease adoption of new applications and services without incurring costly upgrades

Security
- Data security
- Regulatory compliance
Business Decision Value Chain

- Business Strategy
  - SBR Approach
    - Early engagement = higher $$$ sale
- Business Solutions
- Technologies
- Products

- Product Driven Tactical Approach
  - Compete on price = low $ sale
Smart Business Roadmap: Business Phases

Business Securely Connected — Internally
- Automate business processes
- Reduced processing errors
- Improved employee productivity

Externally Connected
- Greater access to data
- Improved collaboration for employees, customers, suppliers
- Additional business process improvements

Differentiated Services
- Complete access to Information
- Seamless customer experience
- Maximum profitability

Foundation  Growth  Optimized
Smart Business Roadmap: Application Drivers

**Business Securely Connected—Internally**
- Automate basic functions: MS Office, Exchange, DSL/Cable...
- CRM if customer intense industries, Salesforce.com
- Initial Web enabled applications

**Externally Connected**
- ERP: compliance modules, CRM... business process upgrades
- Document management, imaging, Web portals
- Industry applications, to gain parity with peers

**Differentiated Services**
- Business process efficiencies
- UC business process integration
- Technology to differentiate

**Foundation**

**Growth**

**Optimized**
Smart Business Roadmap: Cisco Solutions

Differentiated Services
- UC Applications, XML, HR
- Business intelligence connectors
- Advanced Security — CS-Mars
- Video applications

Externally Connected
- Unified Communications (Voice) convergence
- Application connectors — Microsoft
- Mobility
- VPNs for clients, business-to-business

Business Securely Connected — Internally
- Routing — ISR, voice ready
- Switch — Catalyst modular switch
- Security — Adaptive security appliance with stateful firewall, Anti-X

Foundation  Growth  Optimized
Phases of Support Services Adoption

- **Foundation**
- **Growth**
- **Optimized**

**Technical Services**
- Network Readiness Assessments
- Professional Services

**Network Level Coverage**
- Discovery
- Technical Services

**Proactive Monitoring & Management**
- Business Advisory Services

**Professional Services**
- Optimized
Why Use It

What Will SBR Do For You?

Cisco’s Smart Business Roadmap Sales Methodology Provides Opportunity to Build Long-term Consultative Relationships with Customers

Increases Profitability
- Larger deal size and product attachment sales
- More service and support offerings deliver ongoing revenue-stream
- Solution differentiation from competition allows premium margin

Increases Customer Loyalty
- Solution roadmap allows partners to retain customers by planning for long-term optimization
- Proactive planning enhances customer satisfaction
- Cisco training and sales tools enable consultative sales engagements

Bottom Line: “A New Way of Doing Business”
Consultative Selling: Using the Cisco Smart Business Roadmap

A Practical Workshop
What to Expect Today
Understanding and Using Cisco Smart Business Roadmap Tools

Step 1
- Introduce SBR
- Identify and prioritize business challenges

Step 2
- Discuss in detail top business challenge
- Apply Implementation Rating

Step 3
- Leverage proven models to create customized roadmaps
- Frame recommendations as solutions to business challenges
- Identify service opportunities
Preparing for the Smart Business Roadmap Meeting

This is not an ordinary sales call!

- **Segment** your customer base
  - Smart Business Roadmap candidates
  - Transactional customers

- **Identify** your go-to person: The Technical Decision Maker (TDM) or the Business Decision Maker (BDM)

- **Position** the DISCOVERY meeting as a collaborative process/business discussion

- **Personalize and customize** the Discovery Guide and Value Assessment to address your customer’s vertical and business needs.
Before You Begin: The Pre-qualifier

Determine the right approach for your customer

- Select horizontal or vertical
- SMB….or MM versions
- Verticals Available:
  - Retail
  - Manufacturing
  - Retail Banking
  - Tourism
### Step 1: The Discovery Guide Worksheet (Example Page)

**How To Use This Tool:**
- Lead a discussion with your customer that focuses on the four business challenges. After you have finished discussing the business challenges, have your customer rank the importance of each business challenge from 1 to 5 (1 = least important, 5 = most important).
- Example issues have been included in the worksheet below as well as a ranking number for each business challenge. Once you have identified your customer’s priority business challenge, move to the Value Assessment (Step 2) and select the worksheets which map to that business challenge.

#### Business Challenges

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Ranking</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Operational Efficiency</td>
<td>Priority</td>
<td>a. Foundation Phase - Manual processing of orders is slow and results in increased error rates</td>
</tr>
<tr>
<td>2. Customer Responsibility</td>
<td>Priority</td>
<td>a. Foundation Phase - Employees do not have access to critical applications to service customer needs quickly</td>
</tr>
<tr>
<td>3. Cost Containment</td>
<td>Priority</td>
<td>a. Foundation Phase - Employees are unable to access and share personal information online resulting in higher administrative costs</td>
</tr>
<tr>
<td>4a. Security</td>
<td>Priority</td>
<td>a. Foundation Phase - Company data and online Web presence is not protected and unauthorized access</td>
</tr>
<tr>
<td>4b. Security (Compliance)</td>
<td>Priority</td>
<td>a. Foundation Phase - Data shared incorrectly, algorithms and mobile services do not exist and compliant - CTO reporting requirements for data management and security compliance and reporting due to sensitive customer and business information</td>
</tr>
</tbody>
</table>

- **5 “Silver Bullet” questions quickly identify and prioritize key business challenges**
- **Simple ranking system**
- **Notes section for account manager to take notes**
- **All tools are available as downloadable pdfs.**

**Ranking # Goes Here** – the larger the number the higher the priority
SBR Discovery Guide Video
Step 1: Uncovering the Key Business Challenge
Step 2: Value Assessments Worksheet (Example Page)

- Drill down on each business challenge
- Sample dialogue:
  - Situation in more detail
  - Consequences, costs, impacts
  - Capabilities to address challenge
  - Value of the capabilities
- Probes for additional contacts within the account to strengthen the opportunity
- Notes section for account manager
SBR Discovery Guide Video

Step 2: Value Assessment
Your customer is currently in the Growth phase – please move onto the Solutions Recommendation Guide (Step 3) to help them determine what Cisco solution can help them Optimize their business.

<table>
<thead>
<tr>
<th>Implementation Rating¹</th>
<th>Final Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question:</td>
<td>2</td>
</tr>
<tr>
<td>³ Status of customer network implementation: 0 = Not At All; 1 = Foundation Phase for an internally focused network; 2 = Growth Phase for an internally and externally connected network; 3 = Optimized Phase for a network that is fully integrated into the business</td>
<td>2</td>
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¹ Status of customer network implementation: 0 = Not At All; 1 = Foundation Phase for an internally focused network; 2 = Growth Phase for an internally and externally connected network; 3 = Optimized Phase for a network that is fully integrated into the business
Step 3: Solutions Recommendation Guide
Worksheet (Example Page)

- Provides example solutions that can evolve with the customer
  - Recommended Solution
  - Business Capabilities Enabled
  - Benefits
  - Service Opportunities aligned to each phase of business evolution
- These are *examples* only
- Each customer will need a custom solution roadmap tailored to meet their needs
Step 3: Solutions Recommendation Guide

A framework for developing solutions that address business challenges today and in the future

- Create customized solution:
  - Business Challenge + Implementation Rating = Solution Framework
  - Solution Framework + your customization = Phased IT Roadmap

- Solution Presentation: Focus on Business capabilities enabled and benefits to the business

- Tie the solution directly to the business’s challenges and goals

- Identify service opportunities

- Video Clip 3
SBR Discovery Guide Video

Step 3: Presenting a Customized Solutions Roadmap
Smart Business Roadmap

Only Cisco and Partners
- Integrated solutions
- World class support services
- Industry leadership

Discovery Guide and Value Assessment

Foundation → Growth → Optimized

Cisco Solution Roadmap
Smart Business Roadmap

Next Steps

- **ACCESS** – SBR Resources and remote training materials at [www.cisco.com/go/smbpartner](http://www.cisco.com/go/smbpartner)
- **PRACTICE** – the language and techniques of SBR
- **SHARE** – the SBR approach and tools across your entire organization. Sales representatives, account managers, and even SEs should be approaching customers from a business point-of-view
- **USE** – your SBR expertise. Select your top customers and begin the consultative process!

**SUCCEED!**