******Part 1 – Rapid Assessment Tool**

**1. Deal Desk Economics**

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| **Company Name:** | Large Law Firm |
| **Review Date:** | Aug 2018 |
| **Sales Rep / SE / Partner Rep:** |  |
| Initial Deal Size Range: i.e. $150 – 200k | $225,000 |
| Number of years of support being sold? | 3 Years Pre-Paid |
| Expected Discount Level %: | 50% |
| Expected Gross Margin %: |  |
| Forecasted Close Date: | Oct 2018 |
| Opportunity Number (in SFDC): |  |
| Is Deal Desk approval required? Yes / NO | YES |

1. What are we SELLING (Product and License Type; Perpetual, Subscription, Cloud)?

**Entire Backup Suite of Veeam Software**

1. What Additional Revenue can we expect in the next 12 – 24 months?

**$100,000 for expansion and potential Cloud**

1. If there is additional revenue, what is the Get-Well Plan to reduce future discounts / Improve Margins?

**Special One-Off pricing being offering customer if he buys with the quarter**.

1. Are there any Special Terms and Conditions we might not like? What are they?

**Not that we are aware of yet.**

**2. Budget and Authority**

1. Has the Budget been approved - Yes / No?

**Yes, at start of year.**

1. Has the Budget been released – Yes / No?

**No - Pending Partner Board approval**

1. Has anything changed in the customer’s Approval process? Explain.

**Don’t know?**

**Complete and Review Relationship Map Template**

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1. Are you speaking with the Decision Maker who has Final Authority to spend the budget?

**Technical Decision Maker – Yes, Financial Decision Maker - NO**

1. Have you or your boss met them in Person?

**Technical Yes, Financial - NO**

**3. Needs and Timing**

1. What Needs and Business Outcomes will the solution address?

**Current backups are unreliable and take too long to complete. Need a faster solution to meet backup window requirements.**

1. Is the solution Strategically Relevant, Tactically Urgent and provide Rapid Time to Value? Explain.

**Rapid Time to Value only.**

1. What is the Compelling Event that will ensure the deal closes as forecasted?

**Customer wants to move off CV due to lack of HPE support + StoreOnce integration/ with CV. Software Maintenance is up for renewal and customer wants a new solution.**

1. What happens if you miss the Compelling Event?

**Customer continues with current solution and continues to look at alternatives.**

**Part 2 - Big Rock Review – Deep Dive**



**4. Solution Fit**

1. What are the customer's Selection Criteria? / Are we a good Fit?

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| **TECH RECOMMENDATION – Integration with HPE**  |
| **Prod POC Success – Helpdesk, File Servers, SQL Clusters**  |
| **TCO vs COMPETITION**  |

1. How has the customer discovered our Value; Presentation, Demo, POC, other?

 **Presentation, Demo, Test and Production POC, References Calls, Lunch and
 Dinners**

1. What part of our value proposition has grabbed the most customer attention?

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| **TCO over 5YRS**  |
| **AGGRESSIVE BUSINESS CASE + HPE PARTNERSHIP**  |
| **VEEAM RECOVERYCAPABILITIES / FOCUS ON VIRTUAL INFRASTRUCTURE**  |

1. Has your Sales Leader met the Customer?

 **Technical Decision Makers only.**

1. What Business outcomes is the customer expecting to achieve from the solution?

**Don’t Know**

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**5. Winning Sales Strategy**

1. What is your STRATEGY to WIN other than low price?
* Upgrade, Tech Refresh, Rip and Replace, Land and Expand, New Workload Expansion

**“Rip and Replace”**

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| **POC combined with business case ROI**  |
| **Technical – BLG team to recommend Veeam**  |
| **HPE Partnership – customer HPE shop /CV/RUBRIK LACK HPE support**  |

1. Who is the Incumbent Technology provider?

**Commvault**

1. Who is the Primary Competitor and what is their strategy to Beat you?

**CV – continues provide capacity at discounted rates / positioning
cloud integration**

1. What part of the customer’s Cloud Strategy is competitive with the solution you are
 recommending?

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| --- |
| **The customer is considering backup to cloud managed service in the future. Technical decision maker has said Cloud option is 2 years way** |

**6. Competitive Edge**

1. How are you Perceived in the account?
* Product Vendor, Credible Source, Problem Solver, Trusted Advisor?

**Problem Solvers based on multiple POCs**

1. Do you have Access to Power? Explain How.

**Meet with IT director all the time**

**CIO has not been available. Trying to get a meeting sponsored by HPE.**

1. Have you met the Key Decision Maker(s) in Person?

**Technical Yes, Economic - No**

1. Who is your Coach and are they sharing key inside information about how your
 campaign is being perceived inside the account?

**Tasneem B. National Technical Architect / Ricky N. Procurement Mgr**

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**Go / No Go Decision Point**

1. Based on what you know now, why should you continue Pursuing the opportunity?

**They love our technical solution. Basically, have it all installed due to multiple POCs.**

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**7. Value Added Partnering**

1. Who is the Registered channel Partner, and have you shown up Together with
 them at the Customer?

**CDW. They sell lots of other kit to customer. They are leaving us to run this campaign. But will fulfill order when it comes.**

1. Do you have a Roles and Responsibilities Agreement (email) with the partner?

**No. Informal conversations over the phone.**

1. How is the partner Adding Value in the sales campaign?

**Has relationship in Procurement and can expedite the PO once it’s been approved.**

1. Is there an Alliance Partner involved: Cisco, MS, VMware, NetApp, HPE, Nimble,
 Pure and how are they Adding Value?

**HPE. Very helpful in exchanging info about how the project is coming with Technical team.**

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**8. Customer Success**

1. What is your strategy to ensure Customer Success after you win the deal?

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| **Relationship – continue to build on established technical relationships and expand to others within BLG**  |
| **Tech – consistent engagement with team for updates and customer service follow-up** **POC has proven we can do the job.** |

1. What Risks could cause the project to Fail?

**POC has proven we meet technical requirements**

1. What Support Level have you quoted?

**Premium 24 hour support.**

1. What Services are required and who will deliver them?

**Already delivered via POCs**

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**9. Negotiate the Deal**

1. What is the Customer’s approach to negotiating with Vendors?

**Not sure. Will check with HPE and CDW.**

1. How many rounds of negotiating with the Customer do you expect?

**Not Sure.**

1. Will the deal be negotiated with the End User or the Procurement Department?

**Not Sure.**

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**10. Next Step Action Planning**

1. **Critical Look Back Question:** If the prospect were to notify you today that you lost
 the deal, what Fatal Flaws in your campaign do you think they discovered that led to
 the lose…

**Have not had access to CIO to confirm everything Technical Decision maker is saying and to confirm timing and procurement process.**

 How will you address the flaws Now…. before you get the bad news phone call?

 **Have HPE sponsor a meeting with CIO, asap.**

Use the **Action Item Planner** (separate document) to keep track of the action items that come out of the Rapid Assessment and Big Rock Review.





