

INSERT LOGO

Sales Playbook

Sales Planning Manager

<presenter name>

<Email>

<Date>

We would like to develop a “Sales Playbook” to increase the retention and effectiveness of new hires

Situation

- Currently, we provide limited sales process training or roadmaps to members of the Sales Organization
- Best practices exist throughout the organization, but have not been documented into a consistent framework for pursuing business with customers
- A variety of sales tools exist, but have not been effectively integrated to the sales process

Complication

- Trend towards sales force working with larger, more complex accounts
- Number of new hires are at all time highs, thus increasing the need for efficient on-boarding
- Current on-boarding process is being updated, and the lack of sales process training has been identified as a need

Key Question

How can we work to create and institutionalize a world-class “Sales Playbook” within the Sales Organization?

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Where we are and where we should go

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Cost and Benefit

Appendix

Key stages are in place but the underlying participants, activities, and tools, are unclear

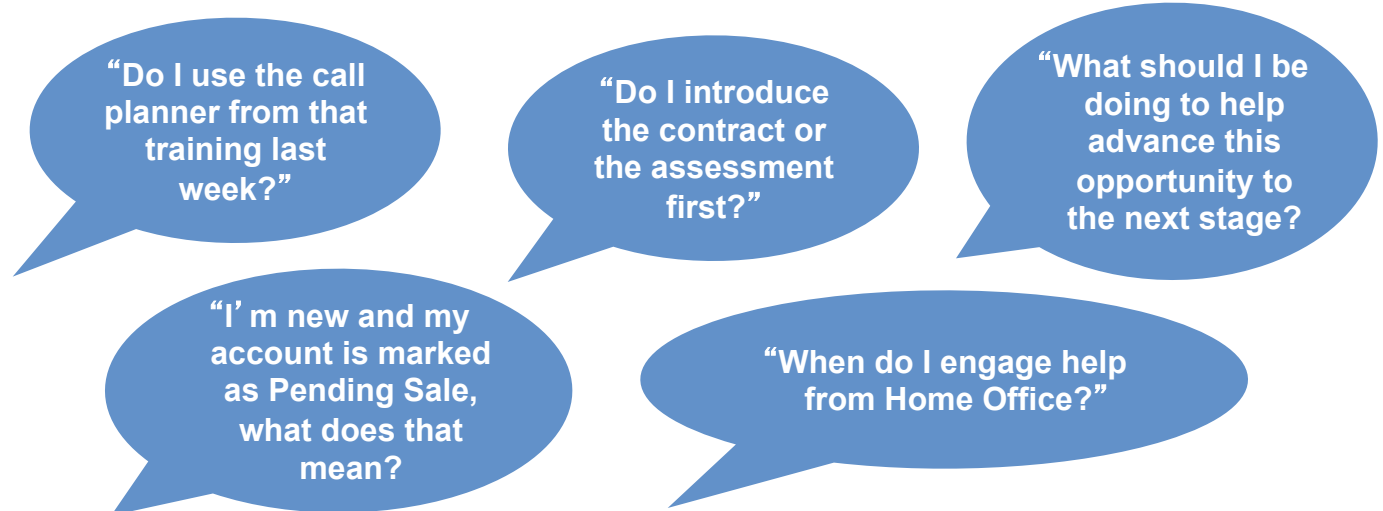
Key Stages

The milestones of the sales process have been identified



Sales Process Mapping

Currently, the participants, activities and tools are unclear



The lack of a “Develop Solution” stage in the current sales cycle indicates the key stages also need refinement

Current Sales Cycle

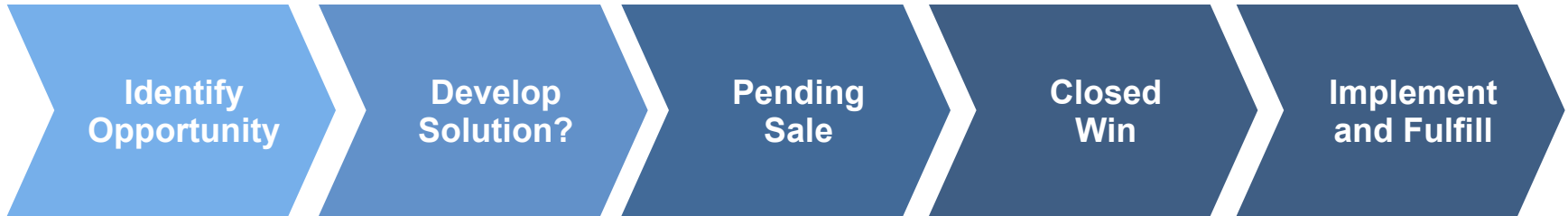
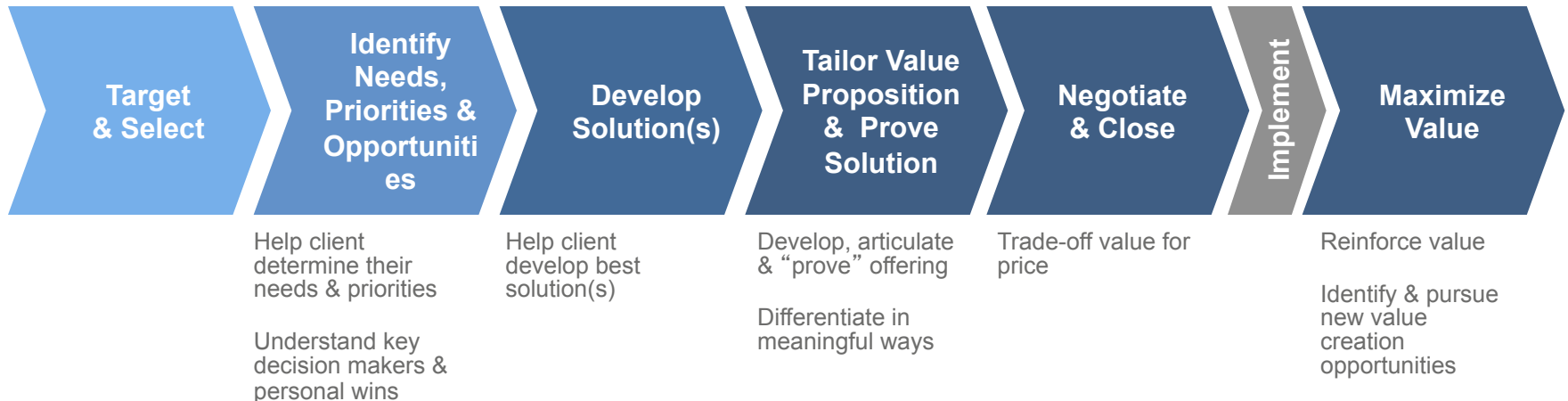


Illustration of a more common Sales Cycle



Effective sales processes document key stages, activities, participants, tools, and milestones

Stage	Identify A: Profile account	Identify B: Prepare Account Plan	Identify C: Verify Account Potential	Identify D: Finalize Action Plan
Activities	<ul style="list-style-type: none"> Assess historical & current relationship with firm Research account's financial position, competitive landscape, & strategy Make strategic calls for further discovery Query other Divisions for info 	<ul style="list-style-type: none"> Complete Client Profile in account plan Identify key client personnel Schedule discovery meetings with key client personnel Review Client profile with Service Center Manager 	<ul style="list-style-type: none"> Review Discovery Questions Prepare Discovery meeting agenda Hold meetings with key client personnel Identify Key Business Issues Perform additional account research 	<ul style="list-style-type: none"> Update and refine account plan document Determine and prioritize Single Sales Opportunities Update & refine action plan Review account plan with Sales Manager Answer unresolved questions
Participants	<ul style="list-style-type: none"> Responsible: Sales Professional Resource: AR, Sales Reporting, Service Center Team Members 	<ul style="list-style-type: none"> Responsible: Sales Professional, Service Center Manager Resource: Sales Manager, Peers, District Manager 	<ul style="list-style-type: none"> Responsible: Sales Professional Resource: Sales Manager, Peers 	<ul style="list-style-type: none"> Responsible: Sales Professional Resource: Sales Manager, Peers, Solutions Group
Tools	<ul style="list-style-type: none"> OneSource CRM / SFA AR Reports Publicly available financial reports 	<ul style="list-style-type: none"> Sales Knowledge Community Value Proposition Training Account plan document 	<ul style="list-style-type: none"> Discovery Questions Meeting Agenda Six Critical Skills Training Key Business Issue Tool Discovery Questions 	<ul style="list-style-type: none"> Account plan document Guidelines for Single Sales Opportunities Guidelines for engaging Solutions Group

Each stage in the customer buying process presents an opportunity to create “value”

Customer Buying Process



Transactional Buyer

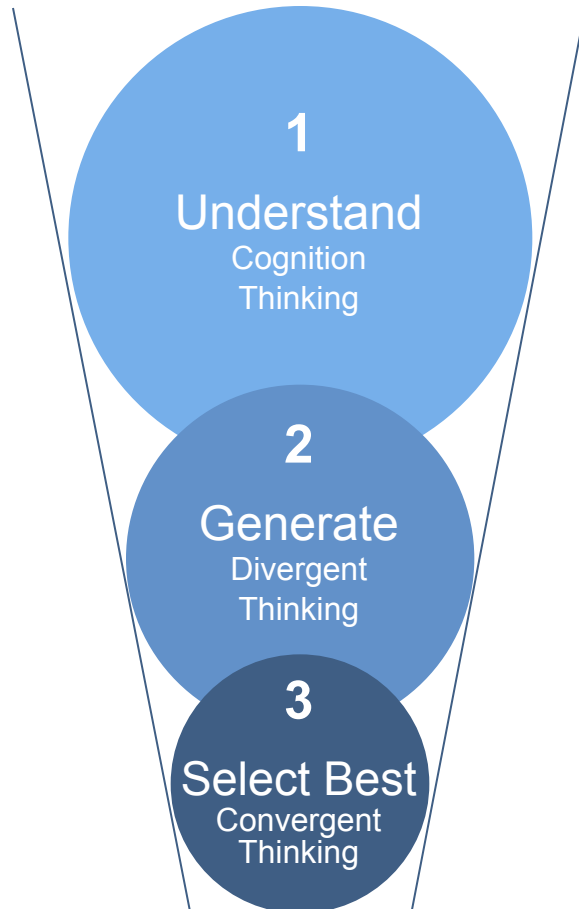
Customer has fully defined needs & problems	Customer is aware of options & relevant decision criteria	Customer has few issues or concerns	Seller can help make purchase cheap & painless	Customer knows how to use product
---------------------------------------------	-----------------------------------------------------------	-------------------------------------	------------------------------------------------	-----------------------------------

Consultative Buyer

Seller can create value by helping customers define needs	Design customized solutions & help make informed choices	Counsel customers & help resolve concerns	Help make purchase easy & painless	Advise & problem solve rollout issues
-----------------------------------------------------------	----------------------------------------------------------	-------------------------------------------	------------------------------------	---------------------------------------

Adapted from “Rethinking the Sales Force”, Neil Rackham & John De Vincentis

A well-designed sales process links the customer decision-making process with fundamental selling steps



Adapted from J. P. Guilford's The Nature of Human Intelligence

Situational Awareness

- Do we have a problem or opportunity?
- How large is it?
- Does it justify action?
- What does the utopian solution look like?

Generate Alternative Solutions

- What are my options?
- What decision criteria should we use?
- What are the risks?
- What if it goes wrong?

Select Best Solution

- Which option best meets our criteria?
- Can we trust these people?
- Did we make the right decision?
- Are we getting value from this decision?
- How quickly will we see results?

Sales force tools must be integrated into a sales process and aligned with the value proposition

Understand needs, priorities, “personal wins”, profile

- Thought provoking, not bureaucratic

Account Profiling tool

Tailor complete value offering to align with account profile and needs

- Easy starting point
- Comprehensive

Value Demo tool

Solution Selection Tool

Work collaboratively with Support resources to build deal scenarios

- Disciplined
- Comprehensive
- Recognizes market conditions

Deal Building Plan

Negotiate and help customer make appropriate tradeoffs

- Transparent tradeoffs
- Apples vs. oranges
- Alignment with their needs

Market Offering Scenario A


Market Offering Scenario B

Relentlessly reinforce value being delivered, drive performance, and entrench relationship

- Insight, not data
- Actively help them comply

Account Review Tool

A newly defined sales process would be assembled into a “Playbook” and presented in multi-media

What is in a Sales Playbook?	
<p>A Sales Playbook contains detailed information about your entire sales process, including:</p> <ul style="list-style-type: none">• Why people should buy your product• The Value they receive• The Profile of an ideal prospect• The definition of a qualified deal• The typical stages of your sales cycle• Roles and responsibilities of the sales team and the customer• Supporting collateral and resources• Competitive positioning• Internal documentation and booking process	<p>The Sales Playbook is a succinct, multimedia rich road map designed to guide your sales team on the most effective ways to sell your product.</p>  <p>A video player interface is visible below the text and image, featuring a progress bar and navigation controls (play, pause, stop, previous, next, full screen, etc.).</p>
Print 5 Contents	6 Exit

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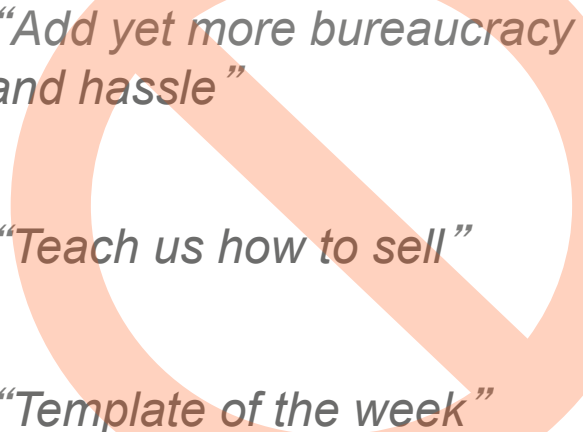
Appendix

Field Sales Teams will be involved in the development of the Sales Playbook so this does not happen



It is important that we understand what we want to accomplish by institutionalizing the Sales Playbook

The clear intention is NOT to...

- 
- *“Add yet more bureaucracy and hassle”*
 - *“Teach us how to sell”*
 - *“Template of the week”*

...but rather to...

- Add structure to an often “black box” and inconsistently applied practice
- Increase clarity and transparency for all involved in customer relationship management
- Act as a thought stimulator and guide
- Provide an anchor around which to coach, plan for call “advances”, develop enablers, and execute the our selling model

The Sales Playbook can be developed in six weeks and ready for launch at the Annual Company Meeting

Phase I

Assess Buying Process
and Best Practices

2 weeks

Key Activities:

- Conduct immersion interviews with stakeholders to identify needs & requirements
- Review current sales process materials, tools, & customer research
- Conduct 1-on-1 interviews with top performers to uncover customer buying process and sales process best practices

Deliverables:

- Proposed Sales Playbook template / format
- Summary of immersion insights

Phase II

Construct Sales
Playbook

3 weeks

Key Activities:

- Consolidate research and interviews into preliminary Sales Playbook blueprint
- Refine Sales Playbook through 2 working sessions
- Identify any change management challenges

Deliverables:

- Final Sales Playbook content

Phase III

Gain Commitment to
Rollout Plan

1 week

Key Activities:

- Develop preliminary rollout plan
- Revise rollout plan with Core Team
- Meet with Steering Committee to gain approval for rollout plan

Deliverables:

- Rollout plan; including activities, timeline, & responsibilities
- Identify requirements for possible integration to Knowledge Community

Roles & responsibilities will be led by the Project Management Team (PMT)



Key meetings are crucial to achieving a very tight timeframe

Meeting	Objectives	Participants	Format & Timing
Core Team Kickoff	<ul style="list-style-type: none"> • Introduce project plan & objectives • Discuss characteristics of a good sales process 	Core Team PMT	2-hour meeting or conference call May 5
Immersion Interviews	<ul style="list-style-type: none"> • Uncover customer buying process • Capture selling process best practices & improvement ideas • Assess variability & change management challenges 	SMEs Select Core Team members	1-on-1 interviews with PMT 1-2 hours, in person or over phone Weeks of 5/8 – 5/22
Core Team Worksession 1	<ul style="list-style-type: none"> • Agree to high-level sales stages as a full team • In breakout groups, refine sales process steps 	Core Team PMT	1-day meeting in Dallas May 18 or 19
Core Team Worksession 2	<ul style="list-style-type: none"> • Review & refine integrated Sales Playbook proposal • Develop Rollout Plan 	Core Team PMT	1-day meeting in Dallas Week of 5/29 or 6/5
Recommendations Meeting	<ul style="list-style-type: none"> • Present Sales Playbook & rollout plan to Steering Committee • Gain support for next steps 	Steering Committee Core Team PMT	½-day meeting in Dallas Week of 6/5 or 6/12

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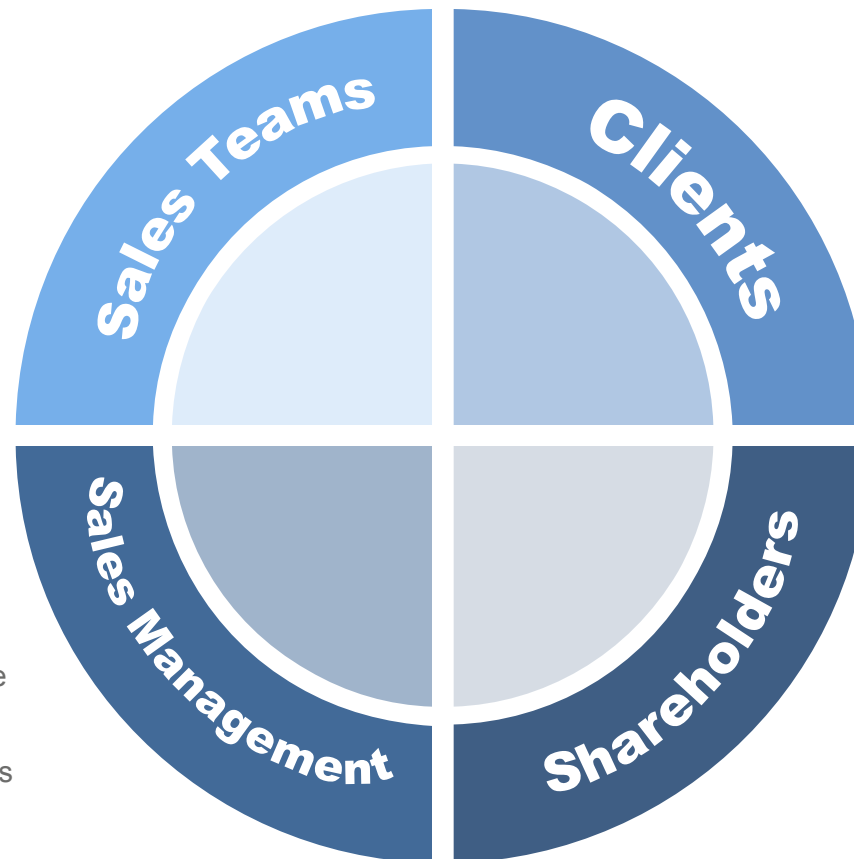
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Activity	xxx	XXXXX,XX
Activity	xxxx	XXXXXX,XX
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Activity	xx	xxxx,xx
Activity	xxx	xxxx,xx
Total	xxxx	XXXXXX,XX

An effective Sales Process will provide benefits to multiple constituents

- More effective use of time
- Improved pipeline productivity
- Less confusion over roles
- Better team communication
- Targeted “tools” and sales aids
- More knowledge sharing
- Enables better decision-making

-
- Foundation for sales training
 - Guidance for new sales reps
 - Establishes consistent language (improves clarity)
 - Help prioritize and address sales force needs
 - Improved pipeline assessment



- Improved responsiveness to client needs
- Development of unique solutions
- Consensus on the best solution
- Consistency and clarity of message

-
- Increased earnings

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Coaching Tools will need to be developed that coincide with each step of the Sales Playbook

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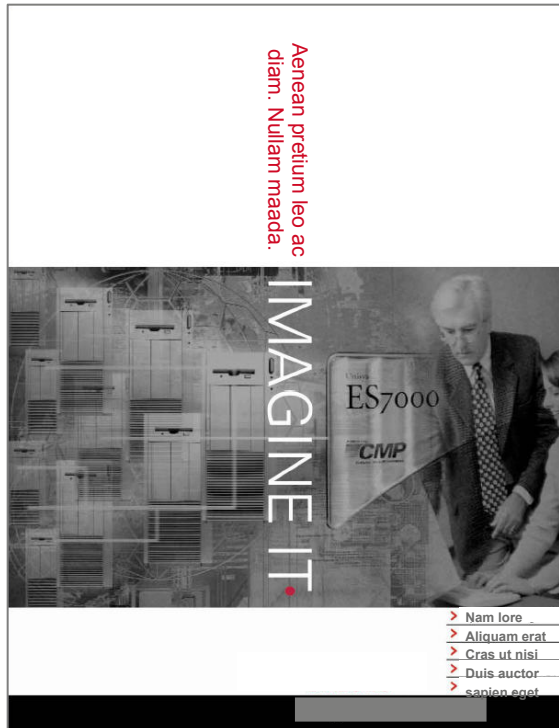
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eBrochures will be used to gain client interest early in the sales cycle



Identifying and developing a highly-qualified staff with the specialized skills you need to support your IT environment is a constant challenge. Not only is retention difficult and costly, but staff training alone can put a significant strain on both your time and resources.

You know the tremendous pressures of running an IT infrastructure; the more diverse your systems, the more extreme the problems can be. Your operating costs are high and your systems management is far too complex. Your staff may be stretched so thin that the service levels you are providing are not always meeting expectations. In addition, your staff may be overworked already, and many may even lack the skills needed to operate effectively.

With high operating costs and complex systems management, businesses like yours are constantly seeking new ways to operate more effectively by implementing new and innovative solutions. Often, considerable time and resources are spent simply maintaining your infrastructure, preventing you from pursuing new initiatives that could yield a significant impact to your business.

The average IT shop operates more than four opening systems within its data center. Narrowing that number can significantly reduce the complexity of your infrastructure and improve your staff's ability to operate and maintain it. With budgets so tight, eliminating the need for expensive, specialized skills—when you can find them—can significantly reduce your operating costs. One of the best ways to improve staff efficiency and effectiveness is to optimize your infrastructure by standardizing on Microsoft.

Our Approach.

Unisys enables customers to create a more effective and efficient work environment in two ways:

1) Simplifying your infrastructure.

Standardizing the infrastructure with self-managing and self-healing Windows-based ES7000 servers dramatically reduces the amount of human intervention needed to manage these systems. Standardizing on Windows-based ES7000 servers can help reduce your IT operations cost structure by up to 20 percent.

2) Optimizing staff resources.

Automation provides a virtual staff to deal with most systems operations, freeing up time and resources for strategic plans and new project implementation. ES7000 out-of-the box functionality improves your staff's productivity—and maximizes your operation's efficiency.

Best-of-Breed Infrastructure

Unisys has created a mainframe-class system that brings our mission-critical heritage to open standards-based computing. Unisys, Intel, and Microsoft have committed our exceptional processor, operating system, and mainframe expertise to a single, mainframe-class system, based on Intel processors and Microsoft operating systems.

Unisys, Intel, and Microsoft have jointly developed the most cost-effective yet powerful open standards-based platform on the market—the Intel processor-based Unisys ES7000 server running Microsoft Windows 2000 Datacenter Server and Windows-based applications and databases. ES7000 servers deliver the power and reliability needed for any enterprise IT infrastructure.

The ongoing Unisys, Intel, and Microsoft strategic alliance continues unabated, with our engineers working together to develop next-generation processors, Windows Datacenter operating systems, and server technology that take advantage—and enhance the value—of this best-of-breed infrastructure for enterprise-class Windows. This powerful partnership has yielded significant innovations that have redefined enterprise computing and data center economics—creating greater business value for your enterprise.

Intel is the leading developer of microprocessor technology and the world's largest chip maker. The company has led the microprocessor industry for more than three decades. Microsoft has a 28-year heritage and today invests more than \$5 billion dollars annually in Windows Research and Development. Unisys is a worldwide information technology services and solutions company with offices and clients in more than 100 countries and a 118-year history in developing technologies. Unisys introduced the

world's first commercial mainframe computer more than five decades ago and the world's first Windows on Intel mainframe in 2000.

The combined product of these leading companies ensures the stability, strength, and long-term investment protection critical to your success today and into the future.



Developing Client Questionnaires will ensure a consultative approach is taken

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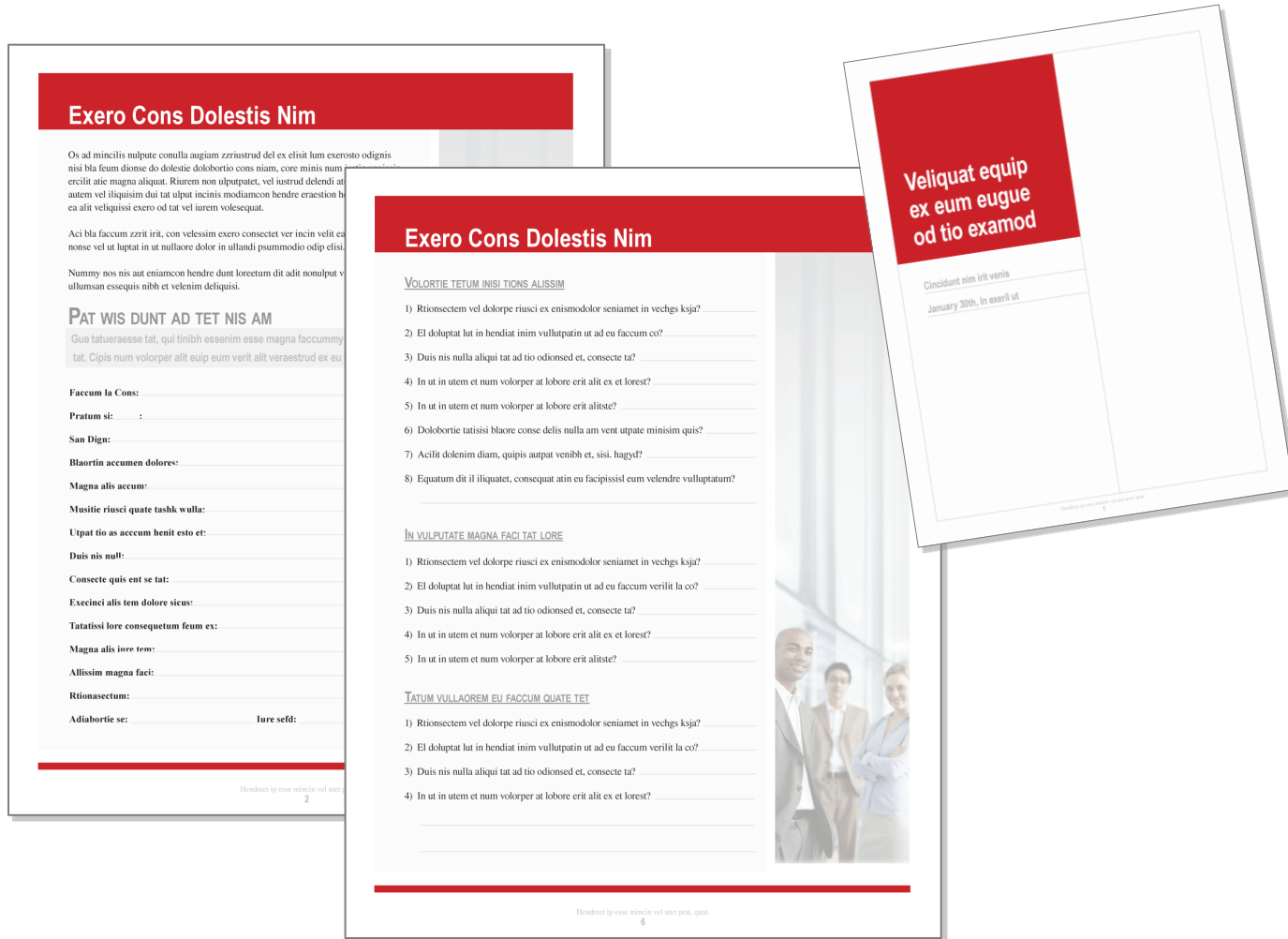
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A clear Analysis Grid will allow a Sales Rep to transfer information gathered into a high value solution

The image displays two overlapping document templates, likely for a sales analysis grid. Each template features a red header bar with a large letter (G and A respectively) and a title in Latin. Below the header, there is a main content area with a table-like structure. To the left of the main content, there is a sidebar with a list of items, each preceded by a small icon (a square, a circle, and a triangle). The templates are designed to capture information in a structured manner, with the second template being a more detailed version of the first.

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Create central, shared repository of benefits structure and eligibility to accurately apply eligibility rules against date that is being maintained in HR database.

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Proposal Templates must be standardized and aligned to the Analysis Grid



Sales Presentations will need to present the value proposition in simple terms



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- Date



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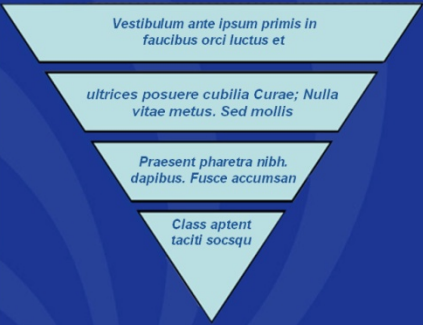
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Business Review Presentations reinforce value provided for the client throughout the sales cycle

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Email Templates make sure we are sending a consistent message to our clients all the time



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Industry News

RFID Is Prescription For Drug Companies

Network World, June 14, 2004

Importation News

Medimmune: To Lower Price Of FluMist Before Next Flu Season

Baltimore Sun June 18, 2004

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The front lines of technology are typically unfamiliar territory for drugstore giant CVS. "We're not on the bleeding edge of any technology, nor do we want to be," said Jack DeFino, vice president of inventory management and merchandising operations at CVS in Woonsocket, R.I. But the chain is making an exception for radio frequency identification (RFID). With RFID, CVS isn't content to sit back "and have our destiny decided for us," said DeFino, who spoke last week at an IDC-sponsored event. RFID is not a new technology, but its application in the consumer packaged goods (CPG) supply chain is a recent phenomenon led by industry heavyweights such as Wal-Mart, Gillette and Procter & Gamble.

Pharmaceuticals is a different animal, however. It's a complex, highly regulated environment, DeFino said. "This is not a CPG supply chain. It's a very convoluted supply chain with people who don't talk to each other and don't want to share information," he said. But a common drive to combat drug counterfeiting and streamline operations could help open the lines of communication in the pharmaceuticals industry.

Today between 2% and 7% of pharmaceuticals are counterfeit - a figure that is drastically higher in emerging markets, said Jamie Hinton, a partner in the health and life sciences practice at Accenture, at the IDC event. In some countries more than 50% of the drug supply could consist of counterfeit drugs, according to a recent report from the U.S. Food and Drug Administration.

Medimmune officials on Tuesday announced that, in an effort to "reinvigorate its FluMist influenza vaccine after a disastrous first season," the company will cut the price of the nasal spray vaccine by almost half, the reports. Medimmune had projected sales of four million doses of FluMist last year. However, the high price, cold-storage requirements and approval for use only in people ages 5 to 49 contributed to lower-than-expected sales of less than 500,000 doses. In addition to reducing the price of FluMist to \$23.50 from \$48, Medimmune is dropping its consumer marketing campaign and focusing on "winning over skeptical doctors," the Washington Post reports. According to the Post, the new strategy is a "major reversal" for Medimmune, which launched FluMist in 2003 with a \$25-million television and print advertising campaign. Armando Aristo, senior vice president of commercial operations for Medimmune, said that doctors who could prescribe FluMist "didn't fully understand what FluMist was," and they were not convinced that the vaccine was safe before the company "stepped out with a direct-to-consumer marketing campaign." Aristo added that Medimmune will not run another direct-to-consumer ad campaign "until we feel comfortable that the prescribing community feels good about the vaccine."



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