



SPO Steps

The purpose of these slides is to describe the 8 steps of the SPO.

How sales activities can align with our clients buying process



SPO Step 1



| | | |
|--|---|---|
| Sellers understand the customer's business and IT environment | | Buyers evaluate their own business environment (ongoing) |
| Sellers | <ul style="list-style-type: none"> • Research the customer's industry (websites, newspapers, reports, trade fairs) • Understand industry problems and drivers • Understand their technology environment & preferences • Understand their business plans, current & future projects • Create foundation for relationship – open the door • Position conditions of satisfaction form • Position standard terms and conditions • Develop sales strategy – coverage plan – who do you need to speak to • Create a document (an initial account plan) that can be validated with the customer | |
| Goal | <i>The customer and the seller agree to the value of a relationship</i> | |
| Proof | <ul style="list-style-type: none"> ➔ The customer validates (reads) the documented account plan and expresses interest in continuing the relationship to speak about a specific project ➔ The customer's business plans reflect the seller's priorities ➔ The sellers are speaking to key players in the customer's organization – the foundation of the relationship has been created ➔ The next meeting ➔ <i>You have discussed the last project and the conditions of satisfaction process (for existing customers)</i> | |
| Tools | TBO | Talking Business Overview |
| | TSL1 | Total Solution Landscape Existing Environment |
| | COS | Conditions of Satisfaction Form |

SPO Step 2



| Sellers create plans linked to their customer's business plans | | Buyers develop their own strategy and plans |
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| Sellers | <ul style="list-style-type: none"> • Continue the logical flow from step 1 and start to diagnose business needs, problems and pains • Look for opportunities • Decide whether the customer REALLY has a pressing need to take action • Assess the quality of the opportunity and decide to engage or disengage • Create curiosity and interest with potential sponsors • Introduce the concept of value and begin searching for ways to sell with value | |
| Goal | <i>The customer DEMONSTRATES interest in working with the seller on a specific project</i> | |
| Proof | <ul style="list-style-type: none"> ➔ You have had a good conversation with the customer about a specific project, and you have agreed to go into this in detail ➔ You are speaking to some of the right people ➔ They have a good reason to take action and you know what it is ➔ You have talked about selling with the concept of value and they have validated that this is what they would like to do | |
| Tools | PPM OA VC1 | Pain and Personality Map Opportunity Assessment Value Chain – part 1 |

SPO Step 3



| Sellers establish the buying vision with the customer | | Buyers recognize needs |
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| Sellers | <ul style="list-style-type: none"> • Clarify and validate the business needs • Define initial solution requirements (what do they need it to DO) • Move from the business needs to a vision of what they want to do • Confirm that you are speaking to the right people • Negotiate access to the key decision maker • Start deciding who the right sales people are to take over your activities in needed | |
| Goal | <i>The customer validates needs, vision, and support access to the key decision maker</i> | |
| Proof | <ul style="list-style-type: none"> ➔ The customer has validated their business needs ➔ They have a clear buying vision, you know what it is, and hopefully you helped them create it ➔ They have agreed to take you to the key decision maker | |
| Tools | EPIC PSM | Vision Creation Question Asking Model Power Search Mail |

SPO Step 4



| Sellers describe their capabilities and qualify the opportunity | | Buyers evaluate their options |
|---|--|-------------------------------|
| Sellers | <ul style="list-style-type: none"> • Review and Influence the customer’s evaluation and buying criteria, and build this in to the engagement plan • Document and validate the engagement plan • Develop the draft solution with the business perspective and the IT perspective • Review and validate the draft proposal with the customer • Create the refined value statement with the customer if needed | |
| Goal | <i>The Key Decision Maker and the seller agree to go forward with the draft proposal</i> | |
| Proof | <ul style="list-style-type: none"> ➔ A documented draft proposal which has been cleared by the key decision maker ➔ An engagement plan which has been cleared by the key decision maker ➔ A documented revised value statement <p style="text-align: center;">*all of these must be validated and confirmed by the key decision maker – otherwise the opportunity will NOT be qualified</p> | |
| Tools | <p>COS2 Conditions of Satisfaction</p> <p>EP Engagement Plan</p> <p>TSL2 Total Solution Landscape Draft Proposal</p> <p>VC2 Value Chain – part 2</p> | |

SPO Step 5



| Sellers develop the final solution with the customer | | Buyers select their solution option |
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| Sellers | <ul style="list-style-type: none"> • Ask all of the questions that need to be asked to guarantee the eventual success of the solution. • Create and document the solution blueprint and build the recommended implementation plan • Assess the customers interests behind all issue that arise • Define the conditions of satisfaction process elements • Build or aid the building of the ROI forecast | |
| Goal | <i>The customer conditionally approves the proposed solution</i> | |
| Proof | <ul style="list-style-type: none"> ➔ Mutually agreed to proposal ➔ Documented, validated solution blueprint ➔ Documented implementation plan ➔ Return on Investment forecast (VC3) | |
| Tools | <p>COS Conditions of Satisfaction</p> <p>TSL3 Total Solution Landscape Final Solution</p> <p>IP Implementation plan</p> <p>VC3 Value Chain – part 3</p> | |

SPO Step 6



| Sellers close the sale | | Buyers resolve concerns and decide | |
|------------------------|--|------------------------------------|--|
| Sellers | <ul style="list-style-type: none">• Make necessary changes and adaptations to the solution to make sure it fits the customer's requirements• Resolve any open problems, concerns and issue• Negotiate the final terms and conditions• Prepare contracts | | |
| Goal | <i>The deal is done</i> | | |
| Proof | <ul style="list-style-type: none">➔ Signed contract➔ Signed statement of work➔ Dates established➔ Project teams defined and comitted | | |
| Tools | Negotiation planning tools | | |

SPO Step 7



| Sellers monitor implementation and check conditions of satisfaction | | Buyers implement and evaluate |
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| Sellers | <ul style="list-style-type: none"> • Take the COS form back in and complete with sponsors • Review forecasted benefits and get approval to use in reference stories • Create reference stories • Look for ways to find new opportunities • Troubleshoot any problems | |
| Goal | <i>The customer acknowledges the value of the solution</i> | |
| Proof | <ul style="list-style-type: none"> ➔ Completed COS forms ➔ Completed reference stories ➔ New opportunities (already step 2) | |
| Tools | COS3 RST | Conditions of satisfaction 3 Reference Story Template |

SPO Step 0



| Sellers organise and execute an acquisition campaign | |
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| Sellers | <ul style="list-style-type: none">• Write up reference stories• Define target industry and find names / numbers• Create an atmosphere in the sales organisation that promotes & motivates "cold calling" activity• Find new opportunities• Create industry knowledge to be used in other calls |
| Goal | <i>Find new customers to work with</i> |
| Proof | <ul style="list-style-type: none">➔ Meetings arranged➔ Tele-conferences arranged➔ New opportunities (already step 2) |
| Tools | AC Acquisition Campaign Template RST Reference Story Template |