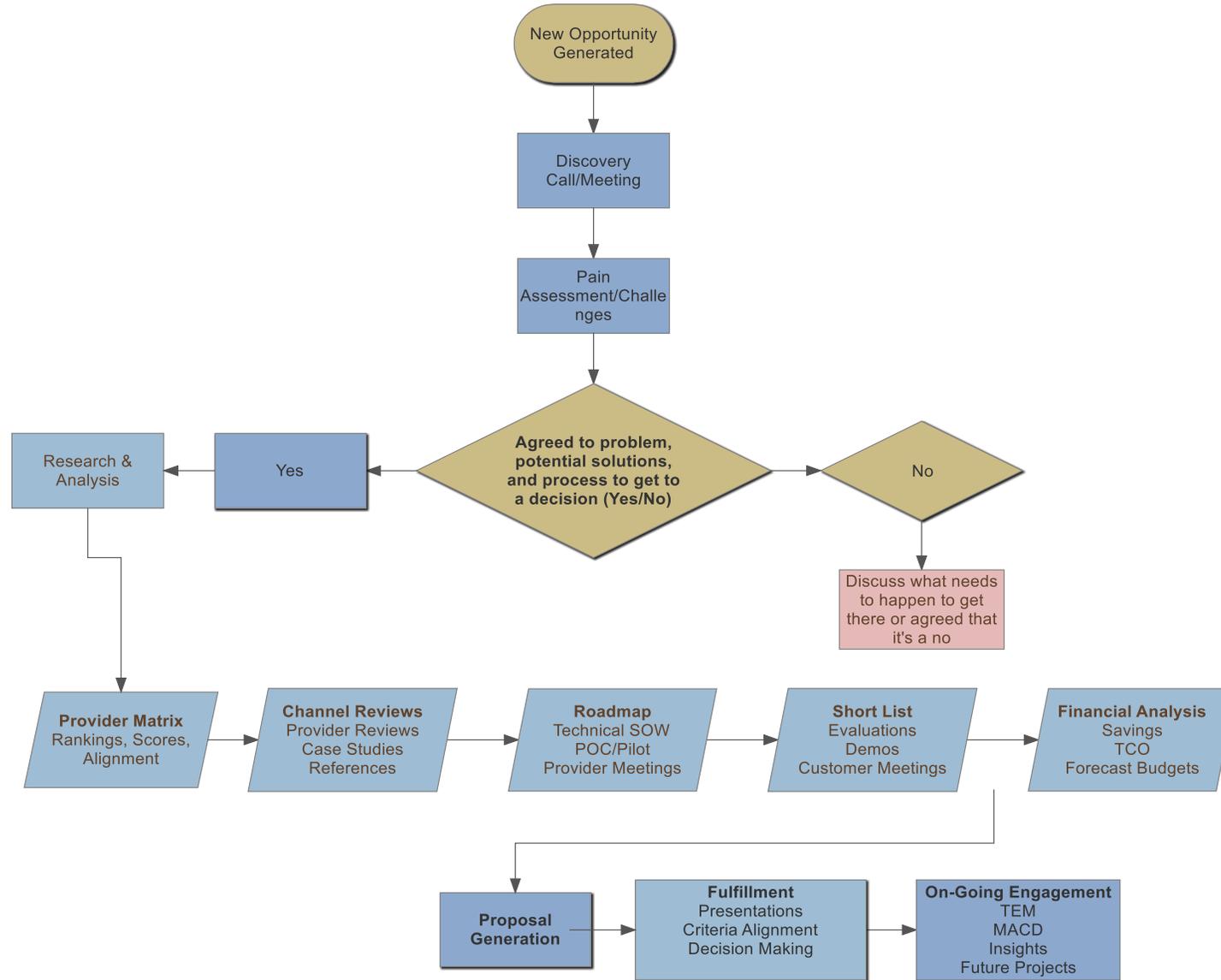


New Opportunity Sales Guide

SCP Consulting
Framework



You have an
appointment!

What's the purpose? UFC

Goals & Objectives

Who is the meeting with and where?

What are typical pains or issues we have solved that are similar?

How to prepare? First meeting requires mostly listening skills

Discovery Call

Introductions

Understanding why they need help
(Why use a partner?)

What's the problem? Pain discovery

Success criteria

Timeline/Roadmap

Pain
Assessment/Challenges

Agree on

Agree on this issues and priorities

Discuss

Discuss potential solutions

Agree on

Agree on best direction/strategy

Discuss

Discuss how to present the solution with client

Roadmap

Develop Roadmap and decision criteria

Research & Analysis

Provider Matrix & Scoring

Channel reviews & rankings

Short Lists – Evaluation Results

Technical scopes & POC

Roadmap/Timeline

Financial Analysis

Proposal Generation

- Proper templates to use
- Executive Summary
- Challenges/Pain
- Potential Solutions
- Service Provider Marketplace
- Evaluation Data
- Financial Analysis
- Recommendation
- TCO Analysis
- Intelligent Matrix (Weighted)
- Technical Diagrams
- Implementation Plans
- Timeline
- Expectations
- Cost/Benefit Analysis

Fulfillment

Presenting the solution

Alignment with Success Criteria

Customer Feedback and Direction

Timelines & Expectations

Decision making process and support



On Going Engagement

- Managed TEM services
- Audits & Cost containment
- Insights for future needs
- MACD work (UCaaS, Other)

