



# Evolving Collaborations

*Collaborative solutions for continuously evolving business partnerships*

## Project Examples

# Evolving Collaborations

This document provides examples of Evolving Collaboration's projects and experience. Within each project we outline the following:

- Client's Business** – what the client does
- Business Issues** -- the challenges and issues the client had to address
- Project Objectives** – why and what we were engaged to do
- Results**

Each project displays the evidence of the skills and experience that we can bring to an engagement and the services that we can offer your organization:

- Slide 3:** Partner Business Strategy & Alignment – Consultative Selling Approach  
Skills Development – Consultative Selling Techniques  
Creation of a Consultative Selling Business Model 'Play Book'
- Slide 4:** Channel Management Skills Assessment, Global Alignment and Channel Training Roadmap
- Slide 5:** Channel Enablement  
Global Business Plan for the Facilitation & Management of Advisory Councils
- Slide 6:** Channel Management / Sales / Marketing / Best Practice Management / Benchmarking
- Slide 7:** Sales & Channel Business Plan  
Portal Technology – Strategic Partnership Development & Management
- Slide 8:** Partner Management & Lead Generation
- Slide 9:** CXO-Level Sales, Marketing, Partner Tools Development & Lead Generation

# Evolving Collaborations –

Business Strategy - Alignment /Skills Development / Creation of 'Play Book'

Client Business	Business Issues	Project Objectives	Results
<p><b>Global Software Company</b></p>	<ul style="list-style-type: none"> <li>■ Management of partners worldwide. Sell primarily all learning and development solutions through partners.</li> <li>■ Wanted partners to engage in more consultative selling-type engagements.</li> <li>■ Realized they were losing revenue dollars due to partners not engaging in a consultative selling process.</li> <li>■ Wanted to establish and document a short &amp; long-term strategy and the critical success factors involved in a consultative selling model; determine which partners are/were in a position to implement a consultative selling model into their overall business strategy; &amp; have a program in place to train those partners that wanted to evolve their business to include a consultative selling model.</li> </ul>	<ul style="list-style-type: none"> <li>■ <u>Project I</u>: Perform a situational analysis that includes interviewing internal marketing, sales, support teams, and partners. Document findings, observations and recommendations to implement.</li> <li>■ <u>Project II</u>: Create a business model that can be used to train partners on 'how to' evolve their business to employ a consultative selling model.</li> <li>■ <u>Project III</u>: Leverage existing sales tools &amp; strategies to create workshops for WW Partner Conference - 2005</li> <li>■ <u>Project IV</u>: Mini-projects focused on supporting Channel Partners through the implementation of client's tools into their consultative selling process</li> <li><u>Project V</u>: "Play Book"/ Profile: assessment for partners to determine if their business profile meets the needs outlined to be considered in the 'consultative selling' partner category. Goal – to begin eliminating partners that are not bringing value &amp; to focus on those that are.</li> <li><u>Project VI &amp; VII</u>: Rewrite the training book &amp; recreate the training presentation for new learning &amp; development tool that will be delivered on a continuous basis to the channel sales teams. Create the graduate series version of the sales training book &amp; presentation for the learning &amp; development tool as well as the new version upgrades.</li> </ul> <p>Goal: include all the consultative selling and marketing strategies created for the WW Partner Conference Workshop delivered in July 2005.</p>	<ul style="list-style-type: none"> <li>■ <u>Project I</u>: Provided comprehensive presentation and timeline including documented findings, observations and recommendations. Client asked to have recommendations implemented.</li> <li>■ <u>Project II</u>: Created consultative selling business model through industry experience and gathering best practices from partners who have established successful learning &amp; development consultative selling models.</li> <li>■ <u>Project III</u>: Content Creation and Project Management of 3 Workshops (development &amp; overall process); including collaboration with design agencies. Presented at WW Partner Conference in July 2005.</li> <li>■ <u>Project IV</u>: Created a process by which the partners could integrate the new tools to meet their business needs &amp; timeline</li> <li>■ <u>Project V</u>: Created the 'Play Book' Guide: a step-by-step guide for partners on what is required to operationally setup, manage and support consultative selling strategies and tools within their business. Provided checklists.</li> </ul> <p><u>Projects VI &amp; VII</u>: Successfully completed both projects as of January 2006.</p>

# Evolving Collaborations –

## Skills Development Assessment, Global Alignment and Channel Training Roadmap

Client Business	Business Issues	Project Objectives	Results
<p><b>Global Networking Company</b></p>	<ul style="list-style-type: none"> <li>■ Channels are a key success factor to their business.</li> <li>■ As growth and maturity in their channel management continues, they want to ensure that they have the right competencies outlined and the right corresponding training offerings to ensure (most important) an effective, efficient and continuous skills development process over the next 3 years.</li> </ul> <p>The goal:</p> <ul style="list-style-type: none"> <li>■ To be able to recruit the right channel managers that match the competencies required for each channel management level.</li> <li>■ To have the profiles clearly defined which will provide them with the ability to measure and promote their channel managers based on their displayed skills, experience, knowledge and success in the field versus other factors (i.e. years of service, etc.).</li> <li>■ Create a partner enablement organization versus a partner support organization -- that will ultimately result in more revenue through the channel.</li> </ul>	<ul style="list-style-type: none"> <li>■ Compare the roles and responsibilities for channel managers against the defined core competencies to validate what the success factors are and what needs for training will be in the future.</li> <li>■ Identify today's gaps and future gaps in the current competencies against the newly defined core competencies - by role.</li> <li>■ Review, evaluate and analyze worldwide channel training available today against the competencies, the gaps and make recommendations.</li> <li>■ Provide a roadmap of recommended training, programs, projects, and/or mentorship's by channel roles, based on the competencies, that will meet channel development areas and training plans.</li> </ul>	<p>Created a Global Skills Development Roadmap for Channel Managers. This included:</p> <ul style="list-style-type: none"> <li>■ The recommended steps and process to integrate the new training Roadmap</li> <li>■ The list of activities to ensure the training is reinforced and applicable to the day-to-day activities of the channel managers</li> </ul> <p>Provided a Learning Provider (LP) Catalog that included:</p> <ul style="list-style-type: none"> <li>■ An overall analysis of where their current training ranks versus where they need to be to meet the requirements in the Roadmap – skill level of training</li> <li>■ How to chose the right training/LPs to execute on that training.</li> <li>■ Requirements outlined per course</li> </ul> <p>■ Gained buy-in from all global channel training representatives</p>

# Evolving Collaborations –

Channel Enablement / Global Business Plan for Facilitation & Management of Advisory Councils

## Client Business

## Business Issues

## Project Objectives

## Results

Client Business	Business Issues	Project Objectives	Results
<p><b>Database Management Company</b> <b>State and Local Government</b></p>	<ul style="list-style-type: none"> <li>■ 2-year old business unit in a 20-year old company.</li> <li>■ Struggling to meet revenue projections.</li> <li>■ Sales channels were not producing results needed to keep business unit alive.</li> <li>■ Need: Uncover and assimilate a clear understanding of the current channel relationship.</li> <li>■ Increase revenue opportunities within business unit.</li> </ul>	<ul style="list-style-type: none"> <li>■ Implement processes that will allow channel sales teams and managers to move business unit sales into a more strategic focus with the result being larger revenue deals.</li> <li>■ Sales to State and Local government</li> </ul>	<ul style="list-style-type: none"> <li>■ Armed channel sales team with sales kits, training and tools.</li> <li>■ Refocused channel representatives in the region to sell service line.</li> <li>■ Set a process in place to ensure that future channels are completely equipped to market and sell the business unit services.</li> <li>■ Implemented value selling into the documents, proposals and strategies.</li> <li>■ Resulting in over \$3 million new business in the pipeline; with over \$1.2 million closed</li> </ul>
<p><b>Global Research and Consulting Company</b></p>	<ul style="list-style-type: none"> <li>■ Strategically: need a systematic approach and business plan to run all their customer advisory forums - globally.</li> <li>■ Need to integrate tactical and strategic steps to make the current advisory councils more successful.</li> </ul>	<ul style="list-style-type: none"> <li>■ Observe and identify how the current advisory councils are run – assess the strengths and weaknesses</li> <li>■ Interview a series of 20+ staff members in various positions and business units to gain a clear understanding of their vision and value of all advisory forums</li> <li>■ Leverage our industry best practices and the knowledge obtained from the organization to create the business plan and framework for running advisory forums that can be replicated across the different business units and the global regions.</li> </ul>	<p>Created an overall Guide to run business customer advisory forums. This included:</p> <ul style="list-style-type: none"> <li>■ Business plan for running the forums</li> <li>■ Framework to execute the forums</li> <li>■ Templates and checklists to use throughout the lifecycle of the advisory councils, strategy sessions and focus groups</li> <li>■ A systematic process to follow</li> <li>■ A list of roles and responsibilities that need to be assigned to manage the ongoing activities of each forum</li> <li>■ Facilitated and managed one of their advisory councils (to observe and understand their needs and provide the applicable recommendations)</li> </ul>

# Evolving Collaborations –

Channel Management / Sales / Marketing / Best Practice Groups

Client Business	Business Issues	Project Objectives	Results
<b>Computer-Based Training</b>	<p>New business for Company:</p> <ul style="list-style-type: none"> <li>Need for product specialists to support product sales through territory sales representatives</li> </ul>	<ul style="list-style-type: none"> <li>Marketing and management of new Skills Management product line</li> <li>Territory of 11 sales representatives</li> <li>Consult on technology-based skills development solutions</li> <li>Market integration with SAP, PWC and KnowledgeSoft</li> </ul>	<ul style="list-style-type: none"> <li>Created sales tools to focus sales representatives on product line</li> <li>Assisted sales team with making revenue plan for the year</li> </ul>
<b>IT Advisory Services Sales</b>	<ul style="list-style-type: none"> <li>State and Local Government vertical had not been tapped &amp; was a prime target for new business</li> <li>Retention of clients was becoming a critical key issue in continuing to drive and keep revenue growth in the business.</li> <li>Support for WW Account Managers covering large IT vendors</li> </ul>	<ul style="list-style-type: none"> <li>Account Executive specifically focused on State and Local Government in So. California.</li> <li>Account Representative focused on overall retention issues</li> <li>Account Representative focused on IT Vendors such as IBM, DEC and Unisys</li> </ul>	<ul style="list-style-type: none"> <li>Created business plan that focused on revenue that could be derived from this vertical. Worked with internal Gartner analysts and marketing resources to capture a new vertical and drive analyst coverage of this vertical.</li> <li>Ran Best Practice groups for Gov. &amp; Education clients and Aerospace clients</li> <li>In each position, overachieved sales numbers and retention numbers</li> <li>Attended 4 Winner's Circle</li> </ul>
<b>IT Advisory Services Marketing</b>	<ul style="list-style-type: none"> <li>One of three people hired to launch Marketing Communication department within already established 10 year old company.</li> <li>No consistent: messaging; branding; positioning; collateral; lead generation plan; Communication plan out to public and in to the employees, etc</li> </ul>	<ul style="list-style-type: none"> <li>Work on the new branding and execution plan. Changed everything as it pertains to Marketing Communications; Product (or Service) Marketing; Lead Generation activities; Sales Training and tools.</li> </ul>	<ul style="list-style-type: none"> <li>Created new brand. Managed PR &amp; branding agency, industrial designers and graphics group (in-house) to create a new idea launched to market our services via company sponsored conferences as well as in trade show settings. Involved in re-creation of collateral to bring synergy and consistency to the message.</li> <li>Trained sales people on new positioning of services.</li> </ul>

# Evolving Collaborations – Sales & Channel Business Plan

## Portal Technology – Strategic Partnership Development & Management

Client Business	Business Issues	Project Objectives	Results
<p><b>Network Provider Model--</b> Integrated network of pre-qualified and Certified Architects, Builders, Contractors, Property Managers, Warranty Companies, Maintenance &amp; Handy Man Services.</p> <p>Provides 'one-stop source' for the consumer of these services to choose from. The service side then has a pool of qualified service personnel to dispatch from.</p>	<ul style="list-style-type: none"> <li>■ Final stages of creating business plan and in the due diligence process before final meeting with venture capital firm - funding.</li> <li>■ Needed to gather final information and service model justification through:               <ul style="list-style-type: none"> <li>■ market research</li> <li>■ understanding of competition</li> <li>■ understanding of target market</li> <li>■ partnership arrangements</li> <li>■ revenue projections</li> <li>■ staffing projections and</li> <li>■ sustainability of the business</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ Contracted to create the Sales and Marketing Plan within the overall business plan. Match plan and do market research on this Industry.</li> </ul>	<ul style="list-style-type: none"> <li>■ Created marketing and sales business plan with 1, 3 and 5 year projections. Included revenue generation, partnership agreements, marketing strategy, budgets and staffing.</li> </ul>
<p><b>HR Portal for Employees</b> Financial and Health Benefits</p>	<ul style="list-style-type: none"> <li>■ New service offered through direct sales.</li> <li>■ Need: Partnerships to enhance service offering and provide additional sales coverage.</li> </ul>	<ul style="list-style-type: none"> <li>■ Management of new business partnerships</li> <li>■ Create and execute on partner programs and processes.</li> <li>■ Partners: SAP, PWC and HP.</li> </ul>	<ul style="list-style-type: none"> <li>■ Established strategic plan with partner managers to roll out sales tools; marketing plans and lead generation activities.</li> </ul>

# Evolving Collaborations – Partner Management & Lead Generation

Client Business	Business Issues	Project Objectives	Results
<p><b>Data Warehousing</b> <b>Data Marts</b></p>	<ul style="list-style-type: none"> <li>■ Pre-IPO early stage company with strong sales team and partnerships established.</li> <li>■ No plan in place for lead generation programs; field sales communication; or partner marketing established</li> </ul>	<ul style="list-style-type: none"> <li>■ Develop successful marketing relationships and activities with partners -- SAP, PeopleSoft, IBM, CTP, PWC, KPMG, Hyperion, Brio, Microstrategy and Microsoft.</li> <li>■ Create sales/partner marketing tools and the execution of all lead generation activities.</li> <li>■ Open two-way communication with the field sales and corporate; gain understanding of the needs of the regional and vertical sales teams</li> <li>■ Create marketing announcements; event calendars; intranet sales web site; new sales hire packets; sales promotions and spiffs.</li> </ul>	<ul style="list-style-type: none"> <li>■ Managed marketing relationship with the established partners – SAP, PeopleSoft, CTP, PWC &amp; KPMG.</li> <li>■ Established relationships with BI tools Vendors including Microsoft.</li> <li>■ Managed overall IBM relationship.</li> <li>■ Built a team: Trade Show Manager and Field Marketing Managers.</li> <li>■ Created model and process that would allow for ‘turn-key’ type of Programs and enable quick/efficient execution of the events.</li> <li>■ Established lead flow, capture and database management process.</li> </ul> <p>Execution of these events included:</p> <ul style="list-style-type: none"> <li>■ Creation of messages</li> <li>■ Coordinating internal and partner resources</li> <li>■ Management of project logistics, timelines, vendors; design team and budgets.</li> </ul> <ul style="list-style-type: none"> <li>■ Events consisted of: (the first) national seminar series; email and direct mail campaigns; web seminars; regional seminars; and tradeshow.</li> </ul>

# Evolving Collaborations –

CXO-Level Sales, Marketing, Partner Tools Development & Lead Generation

Client Business	Business Issues	Project Objectives	Results
<b>Software Application Integration</b>	<ul style="list-style-type: none"><li>■ Pre-IPO, early stage</li><li>■ Strategy required to leverage relationships &amp; develop collaborative processes between business development; partners; channels; sales and marketing teams.</li><li>■ Marketing and sales tools needed to increase sales and marketplace awareness.</li><li>■ Messaging focus on CXO level</li></ul>	<ul style="list-style-type: none"><li>■ Manage company's first seminar series - focus on the launch of a new product-line and overall introduction of pre-IPO company to the marketplace.</li><li>■ Create marketing &amp; sales training tools to for WW sales force and solution partners to introduce new Enterprise Solution and positioning.</li><li>■ Position and collaborate on marketing collateral and presentations with partners for lead generation events including web seminars.</li></ul>	<ul style="list-style-type: none"><li>■ Launched successful seminar series in 12 U.S. cities</li><li>■ Created and provided sales, partner and channel sales team with sales kits, training and sales tools.</li><li>■ Assisted VP of Marketing with the creation of a new sales presentation focused on CXO-level for sales and partner teams</li></ul>