Solution Sales Playbook Template

CLOUD BACKUP AND RECOVERY

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Contents

How to Use This Template

This template offers you a head start in creating a solution sales playbook for selling cloud-based backup and recovery solutions.

While sales playbooks in general can take many forms – Word documents, slide deck presentations, binders of printed collateral, a collection of electronic files in a shared folder – this template provides content and ideas for you to integrate into *your* sales playbook, no matter what form it takes.

.PDF version – Formatted for viewing on different devices, the PDF file of the template is offered as a way to share the content internally.

.PPT version – Available to you for cutting, copying, pasting, and appending to the template as you deem appropriate for your business and your solution.

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How to Use This Template

Here are a few ideas for getting the most out of this template:

▸ Working with your team use the Playbook Actions in each section to customize the playbook for your unique play.

▸ Schedule some meeting time with your sales team. Tackle each section as group – discussing what fits with your organization and what may differ based on what your sales people experience in the field.

▸ Use your CRM or a shared folder to store this template. Ask your sales people for feedback on the applicability of different sections. Ask them to upload playbook-related resources, such as solution presentations, case studies, cost models, SOWs, reference architectures, and so on.

▸ Have your team participate in a CompTIA Playbook Workshop. The workshop offers time and space for your team to focus on building out the playbook.

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About Playbooks

What is a Playbook?

A playbook is a document or a set of documents where an organization records key information for helping sales and technical teams to:

- ▸ Understand their customers' business and the technology trends that impact them.
- ▸ Ask the right questions to qualify, scope, and propose the right solutions.
- ▸ Improve competitiveness and raise the probability of closing sales.
- ▸ Ensure sales teams sell repeatable solutions consistently across customers thereby improving profit and reducing delivery risk.

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About Playbooks

What's included?

Each CompTIA Playbook is divided into 5 sections:

① **The Play.** What is the play? Includes the background and opportunity for the solution.

② **Position.** What's the situation? Includes customer pain points, problem description, and needs definition.

③ **Game Plan.** What's your strategy? Includes the use case definition and prospecting/scoping questions.

④ **Team.** Who are the players? Includes descriptions of what motivates different stakeholders within the target organization.

⑤ **Equipment.** What tools/resources do you have? Includes suggestions for generating resources helpful in the sales process.

To learn more about how to use playbooks, review CompTIA's *Quick Start Guide to Improving Sales Performance with Solution Playbooks*.

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What is it?

CLOUD BACKUP AND RECOVERY PLAY

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The Play:
Background and Opportunity

As many solution providers have added managed services to their portfolios over the past several years, cloud computing provides both the opportunity and the imperative to take a monthly service billing model one step further – to the core infrastructure that customers use to run their businesses.

Nowhere is this opportunity greater than in the area of backup and recovery.

Cloud computing is transforming not only end-user computing but also how solution providers grow and profit.

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The Play:
Background and Opportunity

Effective backup and recovery operations requires keeping and retaining data at an offsite secure location. Cloud-based computing is built around this premise.

But selling Infrastructure-as-a-Service is a different paradigm from both managed services and traditional transaction-based infrastructure business.

Sales and technical teams must obtain the right level of knowledge and deploy the right sales approach to securing cloud-based opportunities.

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The Play:
Select Your Approach

Approaches

➤ Resell an Existing Service

➤ Build a Service

➤ Franchise a Solution

When adding cloud-based backup and recovery to your portfolio there are a few approaches to consider. Each approach has implications on how you train and compensate your sales teams.

This document assumes that you've made the decision to follow one of the approaches or perhaps a hybrid of more than one.

There are differences in how you go to market in each approach. You can customize the subtleties of the playbook approach as you choose partnerships and better understand how your technology and cloud partners can help you succeed.

Your partners' expertise and marketing collateral and strategies should be key inputs into this playbook.

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The Play:
Your Approach – Resell Existing

Reselling an existing service is the easiest and most cost effective approach. Many national cloud service providers and specialty cloud backup vendors offer backup to the cloud. Even traditional backup software vendors offer a cloud-based or SaaS version of their products.

With this approach, you will likely not hold a direct SLA with the end customer. You derive profit through straight margin or an agent/finder's fee for the contract.

This approach is heavily reliant on the ability to include additional consulting or managed services since margins on the resell of existing cloud services are narrow.

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The Play:
Your Approach – Build a Service

You also have the option of building your own service. This involves:

▶ Acquiring a data center space

▶ Developing a platform from existing market-available infrastructure

▶ Running data center operations

▶ Making direct investments in marketing and demand generation to build the revenue scale to fund capital investments (most critical)

If done efficiently, there is great profit in owning and provisioning the infrastructure. However, this is the

most cost intensive and risky option.

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The Play:
Your Approach – Franchise

As an alternative to building your service from scratch, there are several firms who have built and support a "reference architecture" for cloud-based backup services.

As part of these services, solution providers can receive:

▶ Training

▶ Marketing support

▶ Assistance identifying locations

▶ Assistance setting up data center infrastructure

This option offers you the ability to sell unique branded cloud solutions at a much lower investment profile than building your own from scratch.

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What's the situation for the customer?

CLOUD BACKUP AND RECOVERY POSITION

Position:
Problem Definition

Backup and recovery solutions have become a major source of opportunity and profit for both traditional solution providers and MSPs.

Since the advent of distributed computing in the 80's and 90's, customers struggled to adequately backup data and ensure recovery across an ever growing volume of systems – often spread across facilities and geographies.

Increased regulatory requirements added to an already challenging environment – dictating how and for how long archive data must be kept.

As tape-based solutions have become increasingly difficult and expensive to manage, vendors developed disk-based solutions coupled with de-duplication technology to attempt to match the cost profile of long term tape storage and rotation schemes.

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Position:
Problem Definition

The primary challenge:

▶ Storing an ever-increasing amount of data

▶ For long periods of time

▶ Off-site

▶ With little or no disruption to production during backup

▶ Indexed and accessed for quick recovery or legal discovery

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Position:
Pain Points

Your **customers' pain points** for cloud-based backup and recovery may include:

▶ Backups not meeting backup windows

▶ Regulatory archives mandating costly long term retention

▶ Securing offsite recovery and archive data

▶ Management time and cost for tape-based solutions

▶ High cost for redundant offsite backup operations

▶ Length of time to recover from an outage

▶ Challenges backing up mobile users

▶ Unreliable remote office backups

▶ Lost tapes

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Position:
Needs Definition

Your **needs definition** may focus on the following:

▶ Reduce the cost of backup and recovery

▶ Meet regulatory mandates for retention and legal discovery

▶ Reduce the management time and complexity

▶ Provide for redundancy in the system

▶ Shift cost from capital expense to operating expense

▶ Reduce the reliance on attracting and retaining highly skilled labor

▶ Provide reliable, secure backup and recovery for mobile users and remote offices

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Playbook Action:
Developing Your Position

☑ Reach out to existing customers and discuss how they struggle with backup and recovery and what they are looking for from a solution.

☑ Model this approach with your own company. Talk to your IT department and determine what might appeal to an SMB customer.

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What's your strategy?

CLOUD BACKUP AND RECOVERY GAME PLAN

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Game Plan:

Use Case Definition

Define the solution or use case in high-level terms.

The use case definition provides key inputs for marketing collateral and your sales teams' "elevator pitch."

Questions to consider:

▶ What is the solution or use case to be addressed with the technology?

▶ What are the main benefits of the solution?

▶ What specific capabilities do you highlight based on your unique customer base?

▶ What are the advantages of your approach?

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Game Plan:
Use Case Definition

Cloud-based backup and recovery provides an easy and cost effective method to backup and recover data for mobile users, remote offices, and any population of servers and desktops that needs automatic remote disaster recovery.

Cloud-based backup removes the need to manage offsite tapes or create onsite redundancy in backup hardware and software.

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Game Plan:
Use Case Definition

Employees can retrieve individual files right to their desktop or laptop with little IT intervention.

Advanced archiving features allow an IT organization to:

▶ **Maintain** compliant archives and cloud-based access to email and other content.

▶ **Eliminate** the need to purchase and operate backup software, powerful servers, tape libraries and disk farms.

▶ **Reduce** the cost of backup and recovery.

▶ **Provide** a way for an SMB to obtain a high level of redundancy and functionality in the backup and recovery process, which was previously not affordable.

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Game Plan:
Use Case Definition

Cloud-based backup and recovery provides:

▶ A pay-as-you-go model for increased backup capacity

▶ Automated backup of servers, desktops, and mobile users regardless of location

▶ Reduced cost of backup and recovery infrastructure

▶ Built-in redundancy to backup and recovery operations

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Playbook Action:
Developing Your Strategy

☑ Challenge your marketing, practice management, and technical teams to dig deep and define concrete benefits to real customers and articulate those messages.

☑ Consider how you will support the messaging with collateral, thought leadership content (white papers, webinars), and live events such as seminars.

☑ Work with your marketing team or service providers to best represent the offering on your website.

☑ Create a 60-90 second elevator pitch and script this for your sales team to use in tele-prospecting.

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Game Plan:
Prospecting/Scoping Questions

In this section, document the key questions your team must ask to qualify, size, and scope the solution.

Questions to consider:

▶ What questions enable your sales team to uncover needs and build credibility with prospects?

▶ What questions allow your sales team to size the solution, choose the best-fit approach and build credibility?

▶ How can you characterize the advantages of cloud-based backup and recovery in terms of the financial, business, and operational Impact?

▶ How can you summarize the holistic impact of the solution?

Game Plan:

Prospecting Questions – Technology

▶ What does the process currently look like for backing up servers, desktops, and mobile devices?

▶ What percentage of your servers is virtualized?

▶ How many laptops do you backup daily?

▶ Are you able to meet your backup windows?

▶ How much of your backups go to tape vs. disk?

▶ If tape, how do you manage offsite tape storage and rotation?

▶ What are your retention goals or mandated requirements?

▶ Have you established RTO and RPO objectives for your applications? Is backup and recovery the way you will meet these or are other technologies part of your BC/DR planning? Replication? HA?

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Game Plan:

Prospecting Questions – Business

▶ Have you performed a financial analysis of the cost of backup and recovery?

▶ Have you conducted a risk assessment of backup and recovery operations?

▶ How do you maintain compliance with data and email retention (archiving policies)?

▶ Have you experienced data loss? Was there a cost associated with that loss?

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Game Plan:
Scoping Questions

▶ How much total data do you backup daily?

▶ How much total data is your archive (disk or tape)?

▶ How many devices (servers/desktop/laptop) will the infrastructure need to scale to?

▶ How many different locations must you backup?

▶ How many mobile users do you need to backup who may not regularly be in an office?

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Playbook Action:
Developing Questions

☑ Run a training session where your technical team reviews with the sales team what types of answers to expect from the scoping questions. How do the questions impact solution type and size? What might be some second level questions to ask in order to go deeper?

This type of activity illustrates the role these questions play in uncovering, sizing, and qualifying opportunities. These questions also illustrate to your sales and pre-sales team "why" the answers are important and what they mean.

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Game Plan:

Impact of the Solution – Financial

Characterize the advantages of cloud based backup and recovery in terms of the financial, business, and operational impacts.

Questions to consider when crafting statements detailing financial impact:

▶ What was the cost of the solution?

▶ What was the customers existing financial run rate vs. the new run rate with a cloud solution?

▶ Was there a reduction in labor cost for backup operations?

▶ Were there shifts in CAPEX to OPEX?

▶ Can you calculate risk avoidance – such as fines for lost data or not responding adequately to legal discovery?

▶ Can you put a financial estimate on downtime avoidance or faster recovery?

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Game Plan:

Impact of the Solution – Business

Questions to consider in articulating business impacts:

▶ How can you reduce costs and translate those funds to greater investment in IT areas, which produce a competitive advantage?

▶ How do you shift cost from infrastructure to revenue generating applications?

▶ How do you minimize downtime and prevention of data loss?

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Game Plan:

Impact of the Solution – Operations

Questions to consider in evaluating the impact on business operations:

▶ Was there a reduction in labor costs?

▶ Quicker restores?

▶ Fewer incidents of missed backups?

▶ More users executing file restores themselves?

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Playbook Action:
Holistic Impact of Solution

☑ Develop several short case studies, real or imagined, to illustrate customer benefits from your crafted solution. Use the financial, business, and operational format as a model. Commit each sales person to being able to memorize and pitch in 30-60 seconds at least 3 example cases. A model script might look something like:

"We had a regional banking customer who was challenged by"….

"They were very concerned that"….

"And they wanted to get to an end state where they could"…

"So we worked with them to craft a solution which provided"…

"The result was an improvement in"…

"A reduction in"…

"And that lead to"…

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Game Plan:
Potential Value-Add Services

Critical to making money in cloud solutions is **bundling your own services**. Taking margin on just the cloud service whether you resell it, white label it, or even deliver it yourself is only one piece of the profit puzzle.

Consider a broad range of add-on and complementary services. Use the following descriptions as a guide to develop service offerings for your firm.

Examples of Potential Value-Add Services for Backup and Recovery:
1. Cost Analysis
2. Optimization
3. Implementation and Configuration
4. Backup Operations Managed Services

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Game Plan:
Value Add – Cost Analysis

Cost analysis can be time consuming and requires an in-depth knowledge of how backup systems grow and operate over time.

Deliverables:

▶ Interviews with current operation team and data gathering

▶ Financial spreadsheet analysis comparing costs to a potential cloud-based solution including deployment/migration cost and effort

The key to understanding the financial benefits of cloud-based solutions is performing a cost analysis comparing current state to future state.

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Game Plan:
Value Add – Optimization

Many end-users require improvements and optimization of current backup environments including refresh of hardware.

Optimization exercises may uncover particular areas to introduce limited cloud-based backup as a test bed or to save costs – in remote offices or for mobile workers for example.

Deliverables:

▶ Interviews with current operations team and review of current hardware

▶ Software and policy review

▶ Gap analysis and remediation plan mapped to the customers objectives for backup and recovery

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Game Plan: Value Add Implementation and Configuration

Complex critical projects should be properly resourced with dedicated skills and the proper level of project/program management.

Technology implementation projects should include deliverables such as – project/resource plan, a mix of full-time or part-time resources, testing, and documentation of the solution/policies.

Proper planning and resourcing of IT projects is paramount to project success.

Customers must consider how to migrate or maintain the legacy backup and archive environment – an opportunity for additional services.

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Game Plan: Value Add Operations Managed Services

Consider bundling cloud-based services and managed services for additional revenue and profit.

Many customers considering cloud-based backup and recovery are drawn to it due to the high cost of maintaining and operating complex infrastructure and retaining the skilled labor to do so. Therefore, many are open to a managed service, which monitors and manages resources in the cloud.

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Playbook Action:
Your Value-Add Services

☑ Work with your technical team to craft "packaged" and repeatable service offerings which map to customers needs and augment the overall solution profit opportunity for cloud.

☑ Be sure to create model SOWs and mock deliverables in the early stages so your sales teams can leverage those documents in the sales process. Walking through a comprehensive Statement of Work for a complex project can be a highly effective selling tool.

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Who are the players?

CLOUD BACKUP AND RECOVERY TEAM

Team:
Overview

Educate your team on the key players and their motivation.

Questions to consider:

▶ Who do you talk to about this solution?

▶ What are their titles?

▶ What problems do they care about solving?

▶ Where might you find them in the organization?

▶ Are they in a vertical market that has special factors – such as regulations or extreme cost pressures – that motivate them in a unique way?

Team:
CFO

Chief financial officers want to understand how innovation in process and technology can remove cost from the organization and improve the bottom line.

The following elements of cloud-delivered services are particularly attractive to the CFO:

▶ Pay-as-you-go capacity

▶ Ability to predict cost outlays for technology

▶ Minimizes the hit of unplanned/budgeted large technology expenditures

▶ Shifts to OPEX from CAPEX

▶ Reduces overall cost of operations

▶ Minimizes business risk with offsite storage and compliant archives

Based on the benefits, the CFO can be a big advocate of a cloud-based backup & recovery approach.

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Team:
Head of Compliance

The following elements of cloud-delivered services are of interest to the Head of Compliance:

▶ Backup retention and legal discovery mandates vary by industry, but many firms adhere to strict policies on the long-term retention and "immutability" of electronic records.

▶ Cloud-based solutions may be both a concern for and an advantage for the compliance department.

▶ Minimizes the risk of internal staff not being resourced properly to maintain compliance since external cloud providers are often more experienced in offering backup and archiving services.

Compliance officers focus on minimizing business risk and exposure due to regulations.

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Team:
CIO

The following elements of cloud-delivered solutions are of interest to the CIO:

▶ Meets the challenge of costly and labor intensive traditional backup and recovery operations.

▶ Addresses the risk of data loss impacting user productivity.

▶ Can help meet regulatory requirements around securing long-term storage of customer data.

▶ Offers cutting-edge solutions with cloud-based backup and recovery since it is reaching a level of acceptance as a safe first step into cloud.

The CIO is a corporate steward of both cost control and risk reduction.

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Team:
Head of IT Infrastructure

The head of IT infrastructure is ultimately responsible for managing operations and often bears the brunt of the labor costs in the IT organization.

The following elements of cloud-delivered solutions are of interest to the Head of Infrastructure:

▶ Reduces the cost of labor.

▶ Allows the organization to eliminate or shift that labor to other areas.

▶ Shifts the burden of the management of server, storage and networking components to an external provider.

▶ Transfers the responsibility of providing for redundancy of the infrastructure used.

▶ Shifts effort outside of the organization while maintaining control over the core elements of setting policies and executing restores where desired.

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Playbook Action:
Identifying Your Audience & Team

☑ Role-play potential prospect interviews when training sales and technical teams on the pitch. Leverage your scripts, and have your executives play the parts of the end-user executives. Challenge sales teams to speak only to the unique concerns of each constituent.

This activity helps teams become fluid in the language of finance and business requirements which tend to be more of the focus in decisions about using cloud-based services.

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What tools do you have available to your team to execute the play?

CLOUD BACKUP AND RECOVERY EQUIPMENT

Equipment:
Additional Elements

Other playbook elements might include, but should not be limited to:

- ▶ reference architectures
- ▶ solution presentations
- ▶ case studies
- ▶ cost models
- ▶ pricing guidelines for services
- ▶ sample SOW's for projects related to this play

The most important elements of the playbook will be those that support your sales team's ability to sell the business value vs. the technical specifications of cloud solutions.

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Equipment:
Reference Architectures

Draw directly from your vendors' technology portfolio for diagrams and reference architectures that can be reviewed with potential clients.

Provide examples of **complete solutions** including the required services to help the customer visualize what an end state environment might look like.

For example, show how an integrated computing solution can be deployed on-premises to deliver cloud-based desktop services internally.

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Equipment:
Case Studies and Solution Presentations

Solution Presentations

Build PowerPoint presentations supported by industry research and example approaches to solving the problem. Leverage this presentation to build credibility and guide the scoping discussions.

Case Studies

Tell stories succinctly by highlighting the financial, business, and operational benefits of the solution.

Build PowerPoint and Word case studies, success stories, and reference architectures that can be used as proof points of past success.

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