Solution Sales Playbook Template

CLOUD STORAGE

CompTIA

Contents

How to Use This Template

This template offers you a head start in creating a solution sales playbook for selling cloud-based storage 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.

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.

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.

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*.

What is it?

CLOUD STORAGE PLAY

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.

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

The Play:
Background and Opportunity

In the 1990's, the market first explored the idea of providing storage capacity on-demand.

Firms called storage service providers (SSPs) came on the scene as a variant of application service providers (ASPs) and the first wave of managed service providers (MSPs) firms.

Spurring on the model:

- Growth in storage capacity
- Need to reduce storage costs
- Newly built, high-speed network bandwidth in metropolitan areas

The model:

- Appeared feasible and cost effective
- Leveraged bandwidth to store primary data offsite
- Added resiliency
- Added an on-demand component to the storage cost model

Eventually these firms fell victim to the Internet bubble before proving out the model.

The Play:
Background and Opportunity

Today, cloud computing and Infrastructure-as-a-Service, the provisioning of basic compute services such as CPU and storage capacity, is widely accepted.

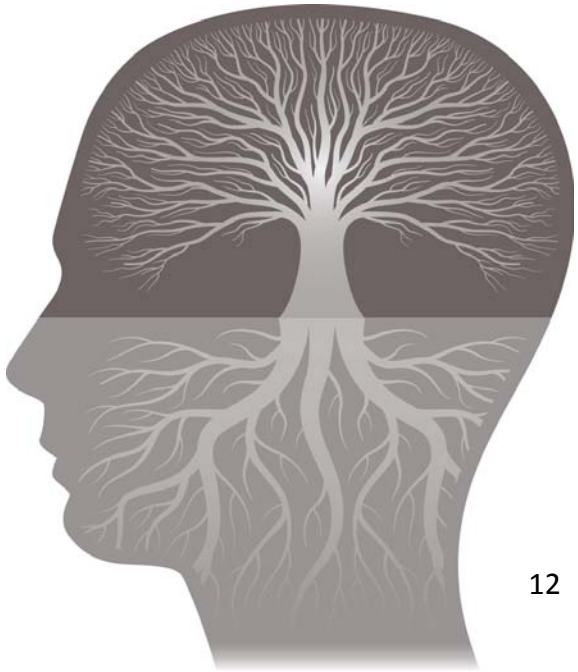
This acceptance revived the concept of storage-as-a-service in the cloud for customers seeking to add tiers of long term archives, or even for the mobile user looking to store music in the cloud and access it from their smart phone or tablet.

The Play:
Background and Opportunity

Cloud-based storage offerings run the gamut from capacity on-demand from large providers such as Amazon Web Services, to more sophisticated multi-tier and archive offerings, to SMB and consumer-oriented offerings from the likes of box.net or Dropbox. One could even argue that Microsoft's moves to Office 365 and Sharepoint applications based in the cloud are ways to get people to store more data in the cloud – in essence, a storage play.

The Play:
Background and Opportunity

Selling Infrastructure-as-a-Service is a different paradigm from both managed services and traditional transaction-based solution provider businesses. Sales and technical teams must obtain the right level of knowledge and deploy the right sales methods in securing cloud-based opportunities.



The Play:
Select Your Approach

Approaches

- Resell an Existing Cloud Service
- Build a Service
- Resell a Gateway or Appliance-Based Solution

When adding cloud-based storage to your portfolio there are a few approaches to consider. Each approach has implications for 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.

The Play:
Your Approach – Resell Existing

Reselling an existing service is the easiest and most cost effective approach. Many national cloud service providers offer storage on-demand. There are also a variety of specialty cloud-based storage vendors who provide these services with specialized levels of security, performance, and access based on the user need.

Depending on the provider, this option may also allow the solution provider to "front-end" configuration and billing of the cloud service, or possibly even white label the offering.

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. And also carries the highest cost of sales.

The Play:
Your Approach – Resell a Gateway or Appliance-Based Solution

Many vendors have developed hardware and/or software based appliances and gateways to provide secure and dedicated access to offsite storage services.

These gateways often provide:

- A layer of value above and beyond simple capacity-on-demand
- Security and encryption that makes external cloud storage more palatable to customers who are hesitant to put any primary data offsite

This approach also fits into a more traditional resell model for many solution providers since they'll be reselling a recurring revenue service and reselling hardware and software, which needs configuration and installation.

What's the situation for the customer?

CLOUD STORAGE POSITION

Position:
Problem Definition

For decades, the growth of storage has challenged budgets and operations. Why?

Distributed computing moved storage outside the mainframe glasshouse and it proliferated across the enterprise.

Operations often over purchased storage leading to low levels of utilization, and irate CFOs and CIOs paying for unused capacity.

Over purchasing was due to:

- Genuine lack of visibility
- Poor planning
- Inability to quickly provision new storage

Position:
Problem Definition

Clients require cloud-based storage solutions to address key ongoing challenges.

The wave of SAN and NAS technology and more sophisticated management software began to tame the storage beast through consolidation. However, new applications drove ever-increasing capacity requirements.

The concept of storage tiering helped. However, it did not address some of the fundamental challenges presented by the growth of data.

Position:
Pain Points

Your customers' pain points may include:

- High cost of storage growth
- Cost of managing disparate storage platforms
- Time to provision/de-provision
- Lack of economies of scale
- Low capacity utilization (driving up cost)
- Cost and complexity of replication for disaster recovery
- Customer dissatisfaction with access to information globally

Position:
Needs Definition

Your needs definition may focus on the following:

- Reduce the cost of storage overall
- Run at the highest possible utilization rate
- Provide users multiple cost and performance options for capacity
- Provide fast expansion of new capacity and decrease in unused capacity
- Improve resiliency through offsite storage

The impact of not addressing these challenges include:

- Increased cost
- Low customer satisfaction within the user organization
- Slow development cycles impacting time to market
- Difficulty delivering storage access across and global and mobile footprint

Playbook Action:
Developing Your Position

- ☑ Reach out to existing customers and discuss how they struggle with managing the costs of storage.
- ☑ Model this approach with your own company. Talk to your IT department and determine what might appeal to an SMB customer.

What's your strategy?

CLOUD STORAGE GAME PLAN

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?

Game Plan:
Use Case Definition

Cloud-based storage provides:

- A pay-as-you go model for storage capacity
- Multiple service level options for users without building dedicated infrastructure to provide each service level
- Built-in disaster tolerance where the data is stored offsite
- An easy-to-manage and cost-effective method to expand storage capacity when needed
- Users with an alternative method of meeting their unique cost and access requirements for storage
- IT departments with the ability to offer their mobile users cost-effective storage capacity on their mobile devices

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.

Game Plan:
Prospecting/Scoping Questions

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 storage in terms of the financial, business, and operational Impact?
- How can you summarize the holistic impact of the solution?

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

Game Plan:
Prospecting Questions – Technology

- What is your total amount of storage (GB/TB)
- What different types/brands of storage device do you use? (DAS/SAN/NAS)
- Do you replicate any of your storage devices offsite?
- Do you use any snapshot or copy technology for backups or for specific applications?
- What percentage of storage is non-shared – can't be shared or re-provisioned to a SAN or network connected host?
- Do you employ storage tiering – different types of data on different storage arrays based on performance, recovery or cost criteria?
- What is your cost/GB by tier?
- Do you use any storage virtualization or storage management software platform?

Game Plan:
Business Questions

- What is the compound annual growth rate (CAGR) for storage expenditures?
- What is the CAGR for storage capacity?
- What percentage of your data falls under compliance requirements?
- What is the ratio of GB/TB under management per storage operations employee?
- Have you classified data and its relative value to other data?
- Are you using any “Big Data” analytics applications, which drive large quantities of data or temporary storage requirements?

Game Plan:
Scoping Questions

- How many servers need connectivity to cloud-based storage?
- Where are the servers located? How many data centers?
- How are the servers backed up?
- What are the security and access requirements for the data?

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.

Game Plan:
Impact of the Solution – Financial

Characterize the advantages of cloud-based storage 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 management of storage operations?
- Were there shifts in CAPEX to OPEX?
- Can you calculate the risk avoidance benefits of keeping primary or secondary storage offsite?
- What is the value of the ability to reclaim unused storage and de-provision when not needed?

Game Plan:
Impact of the Solution – Business

Questions to consider for business impact:

- How can you reduce costs and translate those funds to greater investment in IT areas, which produce a competitive advantage?
- Can you shift cost from infrastructure to revenue generating applications?
- Can faster provisioning mean getting applications to market faster?

Game Plan:
Impact of the Solution – Operations

Questions to consider for operational impact:

- Is there a reduction in labor costs?
- Is there a reduction in time to provision new storage?
- Does this solution positively impact time to market with new application?
- Is there a reduction in time for upgrades and patch/driver management?

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 large retail customer who was challenged by"….

"They were very concerned that"….

"And they wanted to get to an end state where they could tier storage off-site"…

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

"The result was an improvement in"…

"A reduction in"…

"And that lead to"…

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 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 Storage:

1. Cost Analysis
2. Optimization
3. Implementation and Configuration

Game Plan:
Value Add – Cost Analysis

Cost analysis for cloud-based storage includes analyzing the benefits of storage tiering in general.

Cost analysis can be time consuming and requires an in-depth knowledge of how storage grows and how utilization varies 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.

Game Plan:
Value Add – Optimization

Many end-users require improvements and optimization to how they manage their storage environment including refresh of hardware.

Optimization exercises may very well uncover particular areas to introduce limited cloud-based storage or highlight storage management efficiencies that could be gained through managing storage with a cloud-based interface.

Deliverables:

- Interviews with current operations team and review of current hardware
- Software and policy review
- Gap analysis and remediation plan mapped to the customer's objectives for for both the cost of storage and management policies

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.

In addition to basic configuration of cloud storage via a portal, migration of existing capacity to the cloud may require dedicated effort, planning and services.

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.

Who are the players?

CLOUD STORAGE TEAM

Team:
Overview

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?

Educate your team on the key players and their motivation.

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 storage approach.

Team: CIO

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

The budget line item for storage has been growing consistently. And – with the advent of "Big Data" and the goal of mining large quantities of information to uncover new revenue opportunities – the desire to retain more data and access data in the cloud will only increase.

Cloud offers a viable alternative for storage data particularly for temporary use in data mining. This will appeal to the CIO's desire not only to reduce costs but also to deliver cutting edge functionality and competitive advantage to the business.

Team:
Head of IT Infrastructure

The following elements of cloud-based storage solutions interest the Head of Infrastructure, it

- Reduces the cost of labor
- Allows the organization to eliminate or shift that labor to other areas
- Shifts the burden of the management of SAN/NAS components to an external provider
- Shifts 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 provisioning/de-provisioning storage in an on-demand fashion

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

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.

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

CLOUD STORAGE 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.

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 cloud-based storage might first start as a singer tier of storage, perhaps archive, then grow.

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.