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Seal the Deal

Participant Instructions

Seal the Deal - Customer Simulation

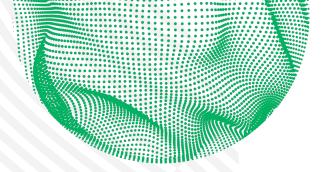**Level 1**   [Introductory Meeting](#)

Level 2   [Discovery Meeting](#)

Level 3   [Deeper Dive Discovery](#)

Level 4   [Introducing Proposal Factory](#)

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Case Study Background Materials

Case Study   [ConstruXHub](#)

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Level 1

Introductory Meeting

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Goal:
A 20-minute Zoom meeting with the main contact of the account you have just received.

Steps:
- Craft an email to the main contact of the account you have just received to setup an introductory meeting.
- The **goal** of the email is to gain a 20-minute introductory meeting to introduce yourself as the new account rep and to review status.
- Think about:
  - Length of the email
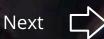 - Benefits you might want to mention
  - How to best include your ask

Ask:
- A 20-minute introductory Zoom meeting.

Next ⟹

Step 1a - 5-minute **phone call** asking for a meeting

Goal:
Gain a 20-minute Zoom meeting with the main contact of the account you have just received.

Some customers may be more responsive to phone calls. In this situation, we'll practice a **5-minute** phone call to setup an introductory meeting.

Steps:
- The **goal** of the phone call is to gain an introductory meeting to introduce yourself as the new account rep and to review status.
- Think about:
  - How to introduce yourself
  - What you want to accomplish
  - How to make your ask

Ask:
- A 20-minute introductory Zoom meeting.

Resources:
- Sample Phone Call Scripts
- Case Study 1 - ConstruXHub
- Case Study 2 Materials
- Case Study 3 Materals

Next ⇨

Step 2 - **Introductory Meeting**

Goal:
Confirm what you know about the account and win an initial discovery meeting to dig into customer issues.

Resources:
- [Case Study 1 - Introductory Slides](#)
- [Case Study 1 - ConstruXHub](#)

Steps:
- Prepare:
  - Outline what you know about the customer to use in the meeting
  - Build in an agenda for the meeting
  - How will you work in the New Relic story?
  - Include your next steps and how you want to ask for a follow-up discovery meeting
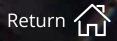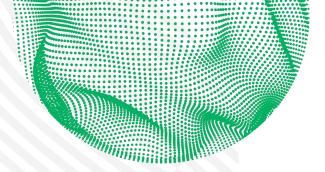- Conduct the introductory meeting on Zoom

Ask:
- A follow-up deeper dive discovery meeting on what you've uncovered with the goal of getting to a PoC and technical validation.

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Level 2

Discovery Meeting

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Initial Discovery

Goal:
Confirm what you already know, probe if anything has changed, and win permission for additional follow-up deeper dive discovery.

Steps:
- Introductions - Who is on the call and what do they care about?
- Align to customer business objectives
- Uncover any new initiatives and/or associated pain points
  - Cloud
  - DevOps (faster software development)
  - Business initiatives/
- Pitch the New Relic platform and consumption pricing (how we do it/do it better)

Asks:
- A follow-up discovery meeting to dive deeper into any new pain uncovered

Resources:
- NR1 Value Framework (platform level CoTM)
- OMA Persona-based Discovery
- Discovery and Positioning deck

Tips

Initial Discovery
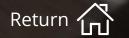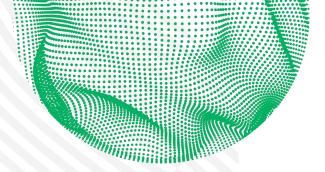
Tips:

- **Paint the picture** - Sometimes you need to paint the picture of what we're doing in order to get customers to open up around the discovery. For example, you might say, "Here's how we think about observability and here's how we've structured our product and our licensing model to make it easy to setup observability." By essentially giving you the data at cost what we're doing is saying if you roll out new products and services, or if your architecture or infrastructure grows, you can observe everything. This is essentially what we do. I want to understand if this is a good fit for you so can you help me understand what you're currently using?
- On the MEDDPPICC scale, **pain is the most important** component because it's going to help you understand how motivated the customer is to move and if it actually makes sense for them to spend time and resources.

Level 3

Deeper Dive Discovery

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Deeper Dive Discovery

Goal:
Identify workflows and pain with a new stakeholder for a potential expansion.

Steps:
- Introductions - Who is on the call and what do they care about?
- Align to customer business objectives
- Uncover **pain** that can driver observability. Look for:
  - Data silos (lot of products)
  - Scaling costs
  - Overhead to manage tools
  - Sampling challenges
- Discuss next steps to drive platform expansion

Asks:
- Permission for a follow-up demo and/or trial/PoC

Resources:
- NR1 Value Framework (platform level CoTM)
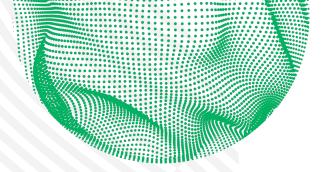- OMA Persona-based Discovery
- Discovery and Positioning deck

Tips

Workflow Discovery

Tips:

- In workflow discovery, the **goal** is to outline the teams that are supporting and building the applications and who the leaders are on those teams so that we can engage with those folks and say how much time is your team being reactive and understand the impact if they're able to build their application faster.
- Workflow discovery is for your **bigger bets**. For example, if you've got a customer that's coming in and spending 25K with us in their thousand person company and they're growing fast they're just not doing observability right. They shouldn't be spending 25K with us. They should either be spending 500K with us or not anything with us. They should have an observability platform and practice in place and that's how we need to position this to them.
- When we can show customers that they're using a lot of different products that can all be **consolidated** on New Relic the question then is, why? When we can say some of the biggest companies in the world are using us wall-to-wall for observability. Plus we've put a licensing model in place that's specifically designed to allow you to collect data from anywhere and scale. This often changes the conversation.
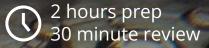
Level 4

Introducing Proposal Factory

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Introducing Proposal Factory

Goal:
Prepare a proposal using consumption numbers from current year and output from a Business Value Assessment.

Resources:
- [Case Study 1 - ConstruXHub Demand Plan](#)
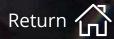- [ConstruXHub - Proposal Factory Template](#)

Steps:
- Fast forward 4 months: You've completed a Proof of Concept with the BidRite team and ConstruXHub is looking to renew
  - You've estimated that they will need **5 more Full Users** to and **3,200 GB/month** to support the acquired team
- Make a copy of the [Proposal Factory Template](#) and the [Demand Plan](#)
- Review the Business Value Assessment numbers in the template
- Using the consumption numbers from this year, your additional usage estimates, and the copy of the Demand Template, update the Proposal Factory Template for ConstruXHub with **a deal estimate**
- Review your proposal with your manager
  - What's most important
  - How will you talk about the value to your customer

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Thank you.

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