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Chief Evangelist, AIIM

## 5 Tips for Selling Solutions – by Rob Gray, Sales Success Manager, Google

1. Know your customer. Understand your prospects in depth.
2. Know your product. Understand your offerings.
3. Know the market. Be able to have a discussion with your customer, about your product, and in the context of new trends, your competition, emerging technology etc.
4. Be a good listener. Goes with #1 but it's not the same thing.
5. Don't be a "methodology guy" – Don't make it blatantly obvious that you are using some type of methodology (like SPIN etc.). Just listen, understand what they need, and explain how you can help.

## How to Sell Capture/ECM/ BPM to Business Leaders

### Insights and research from 248 AIIM solution providers and 300+ technology buyers

We are seeing a massive change in how organizations identify, procure, and implement solutions. Cloud computing has made it a lot easier to adopt new technology, and the business leaders are now taking over the IT buying decisions. They buy solutions to address a business problem or opportunity, not as enterprise infrastructure or platform.

Below is summary of insights and research from 248 AIIM solution providers and 300+ technology buyers. It covers how to best sell Capture, Enterprise Content Management (ECM), and Business Process Management (BPM) **and Information Governance (IG) solutions in a changing market.**

### A New Breed of Technology Buyers

87% of AIIM solution providers think the growth in IT spending is coming from the business buying IT, not IT staff buying IT. IT is still relevant, but only when the organization has established a project for buying a new or replacing an existing solution.

IT was traditionally sold top-down with change management, but the freemium model for consumer technologies is now the new way to also sell B2B technologies. 68% of AIIM solution providers claim cloud and consumerization is changing the buying phases from plan-buy-implement to try-buy-scale. This has already the adoption model for new solution providers like Slack, Box, DropBox, and Evernote.

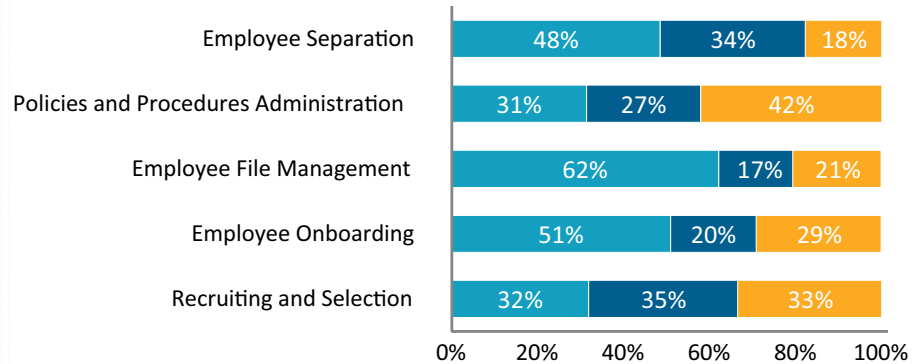
### Fight Paper and Legacy IT

40% buy ECM to replace paper, and 40% buy ECM to replace legacy solutions. The decision to do this is made by business leaders, while IT staff are often tasked with implementing the new solution.

We asked earlier this year 300+ HR, Accounting, Finance, and Procurement professionals in the US about the adoption of Capture, ECM, and BPM technologies. We documented the cost of paper-based processes, and the benefits of automating document processes. This research is now part of the AIIM How to Sell class.

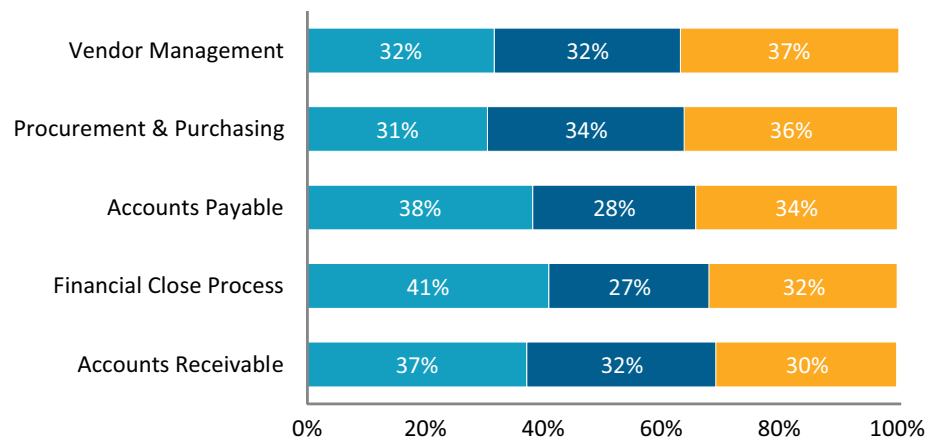
# How to Sell Intelligent Information Management

*Paper usage in HR - below are the findings (N=75, US):*



- A lot of documents are processed as paper documents
- We mostly use email for document processing with scanned/printed paper documents
- We have digitized and automated document processing with scanned/printed paper documents

*Paper usage in Finance, Accounting and Procurement - below are the findings (N=201, US):*



- A lot of documents are processed as paper documents
- We mostly use email for document processing with scanned/printed paper documents
- We have digitized and automated document processing with scanned/printed paper documents

## Sell Solutions, NOT Projects

Technology buyers want solutions that are simple, smart, scalable, secure, safe, and sexy according to analyst R.Wang in Constellation Group. They want a solution, not a project. The word "custom" scares them away.

The average deal size is now USD 50-99k, but we expect this to continue to drop due to the application of the ECM market.



# How to Sell Intelligent Information Management

## 6 Tips for Selling Solutions –

by Thornton May, Futurist and Dean of the IT Leadership Academy

1. **Understand the Buyer Context.** In the 2002 science-fiction film *Minority Report* protagonist Tom Cruise is interrupted while fleeing police by a billboard suggesting “John Anderton, you could use a Guinness right about now.” In all actuality, a Guinness is the last thing the fleeing fugitive needed. In the content management sales space, many sales teams similarly get the timing of their pitch wrong. Those who sell have to understand the true needs of those who buy.

They have to understand when the time is right.

2. **Understand the Buyer’s Business.** The true strategic partner understands their customer’s business better than the customer does. Most people selling to Dunkin Donuts do not realize that 60% of their business is beverage, not bakery. Understand current customers and provide insight into future customers. Understand what is important and what is not important to the customer. Have a point of view about what will be important moving forward.

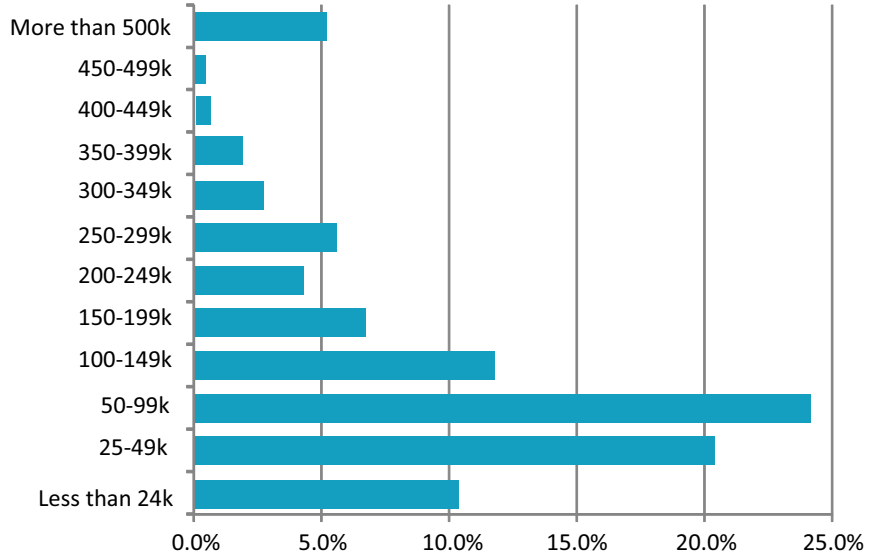
3. **Focus on the Success of the Buyer.** Can you authentically say that you “put your customer first”? Do you REALLY understand your customer? In a sensor-rich economy it is surprising how poorly understood buyer motivations truly are. What really motivates buyers? How are they evaluated? What does their boss and their boss’ boss want?

4. **Do Not Assume You Know What Customers Want. Let Them Tell You!** It is a mistake to think that purchasers are only interested in price. Indeed research conducted by Xerox indicates that over half [54%] of consumers would pay more money for better customer service.

5. **Be Specific.** Less than 4% of the sales presentations delivered to C-level executives specifically mention cost to acquire, cost to operate and cost to retire estimates.

6. **Tell me Something New/Something I Didn’t Know.** The way we create and consume context has changed. What does this mean with regards to creating value and achieving enterprise goals?

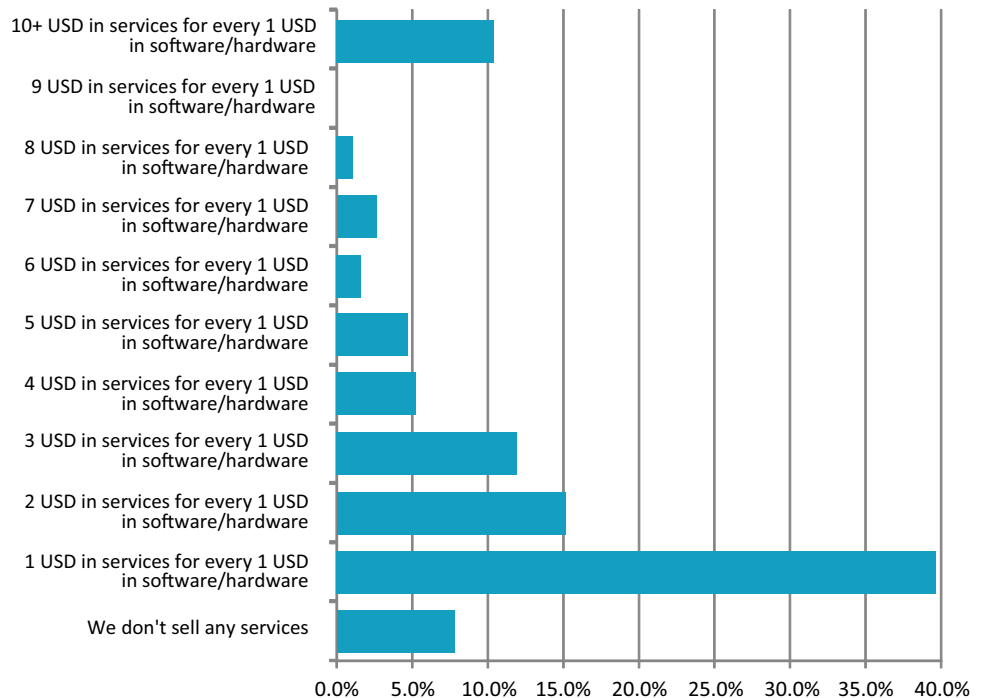
What is the average deal size in USD?



## Make It Easy to Buy

The old rule of having to spend four dollars in services for every dollar in software and hardware to implement ECM is no longer valid. A maturing industry combined with new buyer expectations for solutions, not projects, has reduced the services vs. solution ratio to 1-1.

How much do you sell of services (e.g. implementation, migration, training)?





## 5 Tips for Selling Solutions –

by Bruce C. Barnes, President of Bold Vision, former CIO of Nationwide Insurance

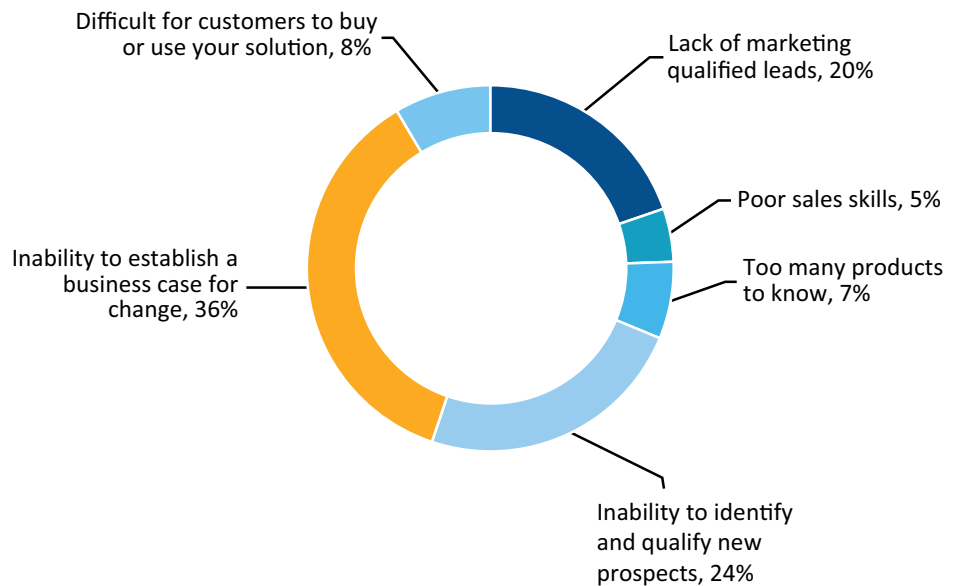
1. **Mental Models Matter.** Speak to the real issues and motivations that the buyer is listening for. In today's time-compressed and overly complex world of moving parts, understand that executives are looking for ways to reduce their time spent on myopic tactical issues, as well as reduce the overall complexity of the things they need to manage. Show with added specificity how you can help them to do both.
2. **Understand Your Customer's Business!** Know what they do, how the money is made, how they stack up against their competitors (and why), and where future opportunities may lie for their competitive advancement. Customers have no time nor interest in schooling you on basic things you should know already, so show your interest and commitment to them in always being prepared and informed. Know that it is not always about price.
3. **Be An Information Junkie!** Understand that you are ultimately selling a relationship, not a product. As such, you should strive to be an ongoing trusted source for leading insight and leveraged relevant information. Become another set of eyes and ears of your customer. Understand, and craft your proposals and personal ownership around, what the ultimate success metrics for the customer actually are.
4. **Be Creative and Innovative!** Be fearless and imaginative in showing flexibility in your products, your services, your use of potential partners at your disposal, and in the nature of the value-based relationship that you hope to establish. Find ways to get as close as you can to being that true "partner" to your customer though finding ways to equitably and agreeably share such things as cost, profit, risk, resources and information.
5. **Think And Act Longer Term!** The most successful relationships are longer term in both focus and performance. Sooner or later you will need to address an issue that has not been anticipated contractually. Remember that while sometimes true partnerships may be counter cultural (especially in companies with thin margins), they are always a major factor in provider success.

## The Need for Sales Transformation

71% of AIIM solution providers think B2B technology buyers now benefit from cloud, mobile, consumerization, and internet of things, but many sales staff still works like it is 1966. They focus on the technology, not business impact. They don't provide prospects with business insights or leverage social selling, analytics, and effective story telling.

Many purchases starts with a Google search, and your marketing staff need to ensure technology buyers find you and your content. The best performing sales staff engage business leaders before they know they have a problem – or they challenge the their perspective if coming late in the buying cycle.

What stops sales staff from meeting their solution sales targets is according to AIIM research; 1) the inability to identify and qualify new prospects (24%); and 2) Inability to establish a business case for change (36%). It's NOT about having too many products to know (7%) or poor sales skills (5%).



## Rethinking Sales Enablement

Leading solution providers offer qualified prospects a 1-2 day business assessment to analyze an opportunity and get insights to establish a business case for change. 72% of AIIM solution providers think will to shorten the sales cycle.



# How to Sell Intelligent Information Management

## 5 Tips for Selling Solutions –

by Hasse Iwarsson, President of Fiwe, former President of Canon UK and Ireland

1. Think customers' customers - don't think just about the customer, think how they are serving their customers.
2. Understand the customer objective. If you understand the process, then you get the business right
3. Eat the elephant bite by bite - get one thing right, then the next one. Not everything at the once.
4. Ensure the expected benefits are actual archived in money terms. Get additional sales by ensuring they get what they achieved.
5. Under promise, and over deliver.

AIIM solution providers need to better support their sales staff with sales resources. We need new sales resources that make it easier for sales to identify and engage possible customers.

- Only 34% provide sales with battle cards to identify prospects and possible pain points
- Only 41% provide sales with content assets to secure a meeting with a possible customers
- Only 53% provide sales and pre-sales with a short assessments to analyze existing ways of working and establish a business case for change
- Only 51% provide sales and pre-sales with ROI calculators to demonstrate business benefits
- Only 36% provide sales and pre-sales with competitive intelligence and ongoing analysis of competitor pricing, weaknesses, etc.

## Next Step

AIIM has the insight and resources to help you better identify and engage new customers. Get help to develop sales resources that makes it easier to sell solutions to business leaders.

Schedule a 2-day AIIM How to Sell training course that educates sales and business consultants in how to best identify and engage business and IT leaders for selling solutions. Each class is customized based on your offerings and/or target markets.

Learning objectives:

- Identify more opportunities for selling solutions
- Engage stakeholders and demonstrate business benefits
- Establish a solid business case for buying your solution
- Grow your solution business

The training course has just been updated to include new AIIM buyer research from its 140,000 community members. It also includes non-public research from 300+ Finance, Accounting, HR and Procurement professionals identifying market and sales opportunities. Learn who to target, how to establish a business case, and how to meet their business and IT requirements.

# How to Sell Intelligent Information Management

Sample research – cost of paper based processes:

What do you think are the total costs (incl. staffing and other resources) to process the following documents as PAPER from start/creation to end/archiving?

	More than \$10	More than \$20	More than \$60	Median	Mean
Invoice in Accounts Payable	78%	65%	21%	\$21 - \$30	\$31 - \$40
Invoice in Accounts Receivable	79%	61%	22%	\$21 - \$30	\$21 - \$30
PO in Procurement & Purchasing	82%	66%	22%	\$31 - \$40	\$31 - \$40
Contract in Vendor Management	84%	71%	24%	\$31 - \$40	\$31 - \$40

Source: AIIM, N=201

89% of trained solution providers report that AIIM training made them more effective at identifying opportunities and engaging stakeholders. Some feedback from last year's course attendees:

*"One of the best training sessions I have attended in a long time. Useful and powerful information, critical to what we are trying to accomplish"*

- **ECM Director**

*"The combination of course content and dynamic presentation made this training one the best I have experienced"*

- **National Enterprise Account Manager**

*"Brilliant! Recommend this course to anyone selling ECM"*

- **Solution Consultant**

*"Thanks again for one of the most engaging, enjoyable and quality training sessions I have ever been involved in"*

- **Sales Manager, Major Accounts, Government and Education**

*"Best course I have attended in my 2 years at ...."*

- **Marketing Manager**

For more information contact your account manager or Atle Skjekkeland at [askjekkeland@aiim.org](mailto:askjekkeland@aiim.org)

# How to Sell Intelligent Information Management



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## About the Author

Atle Skjekkeland, AIIM Chief Evangelist [www.linkedin.com/in/skjekkeland/](http://www.linkedin.com/in/skjekkeland/)

*"Working with Atle is like working with a MENSA Navy Seal - failure is not an option. He adds sparkle and hope to every initiative he undertakes."*

- Thornton May, Futurist, Author, Educator.

*"He's one the most forward looking people in the business and deeply understands the trends in our industry like few others. Perhaps most importantly though, he's a go-getter and is excellent at activating successfully on a strategic agenda."*

- Dion Hinchcliffe, 7Summits, InformationWeek, ZDNet.

*"I have known Atle for about 5 years. During that time, he revived the fortunes of AIIM in EMEA, sponsored many worthwhile events there. We had him as a speaker at several Gartner conferences and his presentations were very well received, and highly rated. Atle is knowledgeable, likable and motivated, especially skilled at getting people to work together."*

- Debra Logan, Gartner.



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## About AIIM

AIIM has developed an effective practice that can help you transform your sales force. Our offerings include:

- Identify Market Opportunities - Get help identifying opportunities and value propositions for a vertical or horizontal market. We just identified document technology adoption levels and cost of paper-based processes in Finance, Accounting, Procurement, and HR. Schedule a 2-day planning session to identify opportunities, value proposition, demand generation, and sales enablement.
- Identify How to Improve Your Solution Business - Get help establishing an effective organization for selling solutions. From comprehensive consultation with 250+ IT solution providers, we have identified how to best manage sales staff, reduce the sales cycle, make it easy for customer to buy, and reduce the implication cycle. In a brief assessment, we can identify how you can grow your solution business.
- Train Sales in How to Identify & Engage Possible Customers - Get help training your sales and business consultants in how to identify and engage new customers. We have previously developed custom sales courses for Oracle, HP, and Konica Minolta. Our custom sales training for Oracle's first ECM solution helped them meet their annual sales target by 150% in Europe. Schedule a 2-day course to get started on your path to success.

*"If you work with your organization's information or collaboration resources and technologies, you'll surely find AIIM a treasure trove of resources." - Andrew McAfee, Professor and author, Enterprise 2.0 and Race Against the Machine*

*"AIIM has a unique perspective on all things Content. Technology, trends and customer adoption patterns are changing so rapidly that it is becoming impossible to keep on top of what is important to us - how will our customers adopt new technology in applying content to their business. IIM has the community reach, interaction with vendors and ability to ask the questions that matter, which has allowed us to understand how content will be deployed, who will be responsible and how does it apply to critical business processes in the enterprise. No one else has been able to provide this industry perspective". - John Newton, Chairman and CTO, Alfresco*