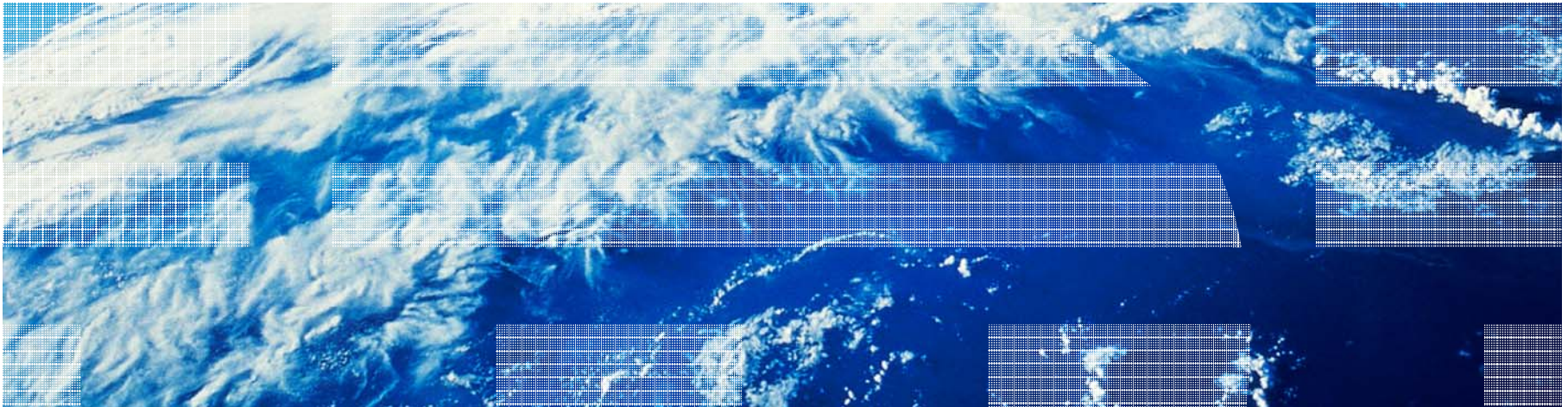# Client Reference Education for System z software Sellers

Jan Jarke, *jjarke@us.ibm.com*

Client Reference Program Manager

Learning Objectives

- Who is responsible for documenting client references?

- Who manages when clients can be contacted for a reference?

- Where can you submit and find client references?

- What is the difference between a client reference and a case study?

- Is client approval required to publish a reference?

Agenda

- Value of References

- Value to Clients, IBM Reps and IBM

- Defining the term "Reference"

- Creating a reference

- Finding a reference

- Helpful links

- Summary and Call to action

- Reference contacts

- Learning objectives

- Back up

- Client Value Method (see where references fall in the process)

- Smarter Planet reference criteria

- Additional resource links

IBM Executives on Client References

In 2007 to demonstrate the importance of references the Sales Leadership Council agreed that references were a sales priority and agreed to setting targets, including references in week 2 and 6 SSL Cadence and include reference objectives in sales PBCs.

Value in participating in the IBM client reference program:

What's in it for clients:

- **Broaden marketplace exposure** and develop new industry contacts

- **Promote success** to management and peers

- **Gain valuable access** to IBM resources and industry experts

- **Gain visibility** and an opportunity to demonstrate innovation and what makes them unique

What's in it for account team:

- **Strengthen client relationships** by broadening client's marketplace exposure and promoting client's success

- **Facilitate future business** by promoting successful implementations

- **80%** of Sellers and First Line Sales Managers rated References/Case Studies as the **#1 asset** to help drive the Smarter Planet strategy

  (Source: Sales Value Survey)

What's in it for IBM:

- **Demonstrate client success** worldwide

- **Increase marketplace awareness** and preference

- **Improve perception** of client satisfaction across client sets, industries and geographies

- **References contribute to revenue** as an important component of sales process

Defining the term "Reference"
Reference = a client success story published internally in CRDB for use in 1:1 sales calls

Volume & Reference Progression

Asset Type

Internal (Wins)
Internal use only

Client Reference Materials Database

System z software
$UCCE$$ WIRE

Internal (Reference)
External usage only with permission

Client Reference Materials Database

PartnerWorld reference submission form

External

Case Study
(option to blind)

Video

Sales cycle

Deal has been won	4-9 months after sale when implementation provides quantifiable benefits

Client participation

No client involvement necessary	Client provides verbal agreement to publish and should be willing from time to time to speak 1:1 with prospects/clients. Reference owner maintains control over when the client is contacted.	Client provides input and final approval

6

It's easier than ever to create a reference

- The reference submission form has been shortened to reduce the time spent submitting references
- Built-in help guides you through the submission process

- Tips for submitting a high-quality reference:
  - Select all Rational offerings involved in the solution and provide details in the solution description on how each offering was involved
  - It is important to provide detailed information in the business need, solution, and benefits sections of the form, the more you provide upfront the less likely you will be asked follow-on questions

- Once submitted, the reference is reviewed. If there are no questions, it is published and you are notified by email.

- If you have any questions, contact Jan Jarke/Austin/IBM@IBMUS

Finding a reference in the Client Reference Database (CRDB)

The CRDB contains over 10,000 reference materials searchable by 20 search parameters

3 easy steps to find a reference:
1. Select your search parameters *(e.g. IOT, product, brand, industry, client segment)*
2. Review search results to see which references you want to use (broaden or narrow your search if needed)
3. Select the 'submit request to use this reference' link at the bottom of the reference to ask the IBM contact if you can use the reference

*If you are not able to find a reference that fits your needs contact the **Deal Hub** who can help find a suitable reference for you.*

Helpful links for sellers to submit and locate reference assets

	What is this	Where reps go to submit	Where to view available assets	Client Approval Required ?	Who to contact with questions
System z software Success Wire	Internal e-mail communication distributed to 2000+ members of the System z software community. Profiles recent wins, customer successes, or successful teams. Subscribe	Link	Archived Success Wires	No	Carol Marting/Raleigh/IBM
Client Reference Materials Database win entry	Seller documented client win: Includes: How they won, client challenge, solution designed to address challenge & ANTICIPATED benefits	Link	CRDB (be sure to check "Wins" box)	No	Jan Jarke/Austin/IBM
Client Reference Materials Database client reference entry	Seller documented client success story for use in 1:1 sales situations. Client now realizing benefits. (Not approved for public use unless pre-approved by rep & client)	Link (for IBM Rep) Link (for Business Partner)	CRDB ParterWorld Portal	No (Unless in Germany or Italy and France if GTS)	Jan Jarke/Austin/IBM
Case studies	Client success stories pre-approved by clients for use publically.	Reps do not submit	CRDB and Link to IBM.com Success Stories site	Yes	Jan Jarke/Austin/IBM
Videos	Client testimonials video taped	Reps do not submit	▪Complete Video Inventory for Download - Internal site ▪External Video Library - For Client Download	Yes	Carol Marting/Raleigh/IBM
Analyst reports	Third party write up of IBM client success stories	Reps do not submit	Link	Yes	Carol Marting/Raleigh/IBM
System z software Client Reference Wiki	THE place to find System z client success related resources	Reps do not submit	Link	N/A	Jan Jarke/Austin/IBM

Points to remember….

…that customer "references" are not the same as customer "case studies" – they are an internal-only record

…that clients only need to provide their verbal agreement to be an internal reference *(there are no long legal forms to sign)*

….that you are the gatekeeper to your client and YOU determine which reference requests will be delivered to the client

…that client references become our lowest hanging fruit for useful case studies

…that client references facilitate future business by promoting successful implementations

…that it takes just 15-20 minutes to enter data into the on-line reference submission form found in the Customer Reference Materials Database (CRMD)

- **Take Action Now!**
  - Document at least one of your client success stories as an internal reference. You and other IBM sellers depend on them!

* Written client approval required in Germany and Italy ONLY (and France/Belgium/Luxembourg if GTS is included)

Contact: Jan Jarke jjarke@us.ibm.com

Questions…contact the System z client references team

Jan Jarke/Austin/IBM@IBMUS
Rational Client Reference Program Manager
Phone: 512-347-0768
E-mail: jjarke@us.ibm.com

Carol Marting/Raleigh/IBM@IBMUS
System z software Marketing Manager
Phone:1-919-486-3479 (T/L: 623-9285) ITN: 26239285
E-mail:cmarting@us.ibm.com

Back Up

How sales can leverage client references in the CVM

Client Value Method

Continually Manage Relationship

Sales

| UNDERSTAND the client's business and needs | EXPLORE options and approach | DEVELOP and agree to client solution | IMPLEMENT client solution | CONFIRM client value and experience |

Delivery

**Deliver Client Value**

|				

▪ There are a lot of reference materials to show your clients how others have been successful
 	
▪ Be prepared to discuss successful references in initial client discussions
 	
▪ Sales proposals with references are the most successful.
 	
▪ Consider which references to use in your sales proposal
 	
▪ Helpful Links:
  – Take the reference education module
  – Search the CRDB
	▪ Create a winning proposal by highlighting a few references
	
	▪ Leverage references in your client facing presentations including slides, videos and podcasts
	
	▪ Shock your clients with the "thud factor," leave behind a case study book or CD with hundreds of featured references
	
	▪ Helpful Links:
	  – Search the CRDB for a relevant reference
	  – Order a case study book or CD
	  – Contact the Deal Hub for reference support
		▪ Now is a good time to have your client speak to a reference
		
		▪ Helpful Links:
		  – Search the CRDB for a relevant reference
		  – Contact the Deal Hub for reference support
			▪ Plant seed for client to be a reference after implementation. Ask them, a great way to get feedback!
			
			▪ Helpful Links:
			  – Client Reference Brochure
			  – Client Reference presentation
				▪ Show that you are proud of the value your client has achieved and ask them to be an IBM reference
				
				▪ Take 15 minutes and submit your client as a reference
				
				▪ Act as liaison between IBM and your client for reference requests
				
				▪ Helpful Links:
				  – Reference Submission Form
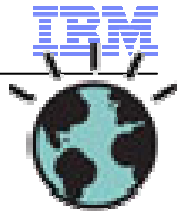
Creating a smarter planet client reference

- As we enter the decade of smart, IBM is committed to sharing our smarter planet success

- Criteria for a smarter planet reference:
  - Exhibits characteristics of all three I's:
    - **Instrumented:** Data capture or integration, possibly through the use of sensors, kiosks, meters, PDAs, appliances, cameras (still and video), smart phones, implanted medical devices or the web. Anything that captures reliable digital information and feeds into a system.
    - **Interconnected:** Integrates data laterally across an end-to-end process, system, organization, industry or value chain. Must demonstrate our industry expertise. Also, may integrate data that exists in an unstructured way or "en-masse" and not associated with a system in particular. Examples: Web 2.0 type interconnectivity across people / communities, Google searches, etc
    - **Intelligent:** Yields new insights across the system enabling actions supporting continual improvement. Outcomes must improve the end-user experience or eco-system. This capability must be designed into the solution at the announcement. Best examples are systems where insights are "real-time", forward-looking or predictive and the solution or system will adjust or improve in autonomic fashion.
    Contains a strong IBM software presence
    Includes Total Contract Value (TCV)) financial data (this information is for internal use only and will not be displayed in the reference)
  - Is nominated through the CRDB

- For more information on what makes a smarter planet reference, please visit the Smarter Planet page on the Client References Wiki

- Contact: Aaron Sulton (atsultan@us.ibm.com)
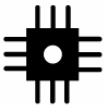
Additional links and resources

Internal Sites

- Client Reference Database

- Deal Hub Support for References

- Submit a reference to the CRDB

- System z Software Client References Wiki

- Corporate Client Reference Internal Wiki

- Client Reference Subscription Service

- Client Case Study Book or CD Order Site

- Client Reference Monthly Update *(view and subscribe)*

External Sites

- External Client Reference Homepage

- External View of IBM Client Case Studies

Client References Manager: Jan Jarke