



| Taking it to a higher level in 2008

Prospecting with Confidence

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got pipeline?



Some C's and VP's who have put me on their calendar

| | | |
|-----------------------------------|-----------------------------------|----------------------------------|
| VP Aftermarket, Cessna | CISO, Cambridge Health Alliance | VP Logistics, Alstom Power |
| CIO, Dept of Public Safety | VP Facilities, Cessna | VP Sustainment, BAE |
| CIO, Stanley Bostitich | Dir. Aviation Security, Massport | CIO, Tufts Assoc Health |
| CIO, Mass General | Commissioner, Boston PD | Exec Dir, RI Emergency Mgmt |
| VP IT, Otis Elevator | CIO, New York Power Authority | CIO, Dartmouth College |
| CIO, Suffolk University | CIO, Tufts University | CIO, State of Maine |
| CIO, Stoneybrook | CIO, VT Student Assistance | VP Global IT, Otis Elevator |
| VP Supply Chain, Textron | VP Supply Chain, Cessna | CIO, Tufts Health Plan |
| COO, BCBS-VT | CIO, Albany Medical Center | CIO, Partners Healthcare |
| VP Aftermarket, Sikorsky | VP WW Cust Support, Sikorsky | VP Logistics, BAE |
| President of the Senate, Maine | VP Supply Chain, Carrier | CIO, Chemtura |
| VP HR, Bryant University | CIO, Lahey Clinic | VP Infrastructure, Textron |
| CIO, Aviva Life Insurance | President C4i, DRS | CIO, CT State University |
| VP Bus. Processes, Chemtura | Deputy Director, RI DOR | Chief of Staff for Lt. Gov, MA |
| CIO, UNH | Deputy General Counsel, UTC | CIO, Partners Physicians Network |
| VP, Retail Brand Alliance | President, Perceptive Informatics | Intelligence Director, MBTA |
| Chief, Investigative Services, NH | CIO, Textron Defense | CIO, Mass Dept of Education |



Agenda



- When they answer your call
- Boiling down the message
- Scheduling meetings using e-mail
- Working with administrative assistants



Why do you call people?

1. Not necessarily to spend time with them

- Wrong person
- Wrong timing, etc.



2. Not necessarily to have a conversation right then

- Busy people buy things
- You want them undistracted

**Average time in a first call =
Just a few minutes!**



Why do you call people?

1. Assess interest / curiosity

- In something IBM is doing
- Could be in their industry, LOB, job role, problem we solve, acquisition, etc.



2. Explore availability

- Doesn't have to be right now
- Looking for undistracted time with them

Are you curious enough to grant me time on your calendar?



What do you say?



1. Assess interest / curiosity





- how IBM is helping to extend SAP functionality
- how IBM is helping to solve data privacy issues
- how IBM is helping legal departments to manage cases more effectively
- how IBM is improving visibility into the supply chain
- how IBM helps to protect companies from hackers

2. Explore availability

“I know that I am reaching you out of the blue, is this a good time for a quick conversation?”

“I am not necessarily looking to have a conversation with you right now, but is this something you are interested in?”







 dsdunkle@us.ibm.com - Diane ...   





Meeting Edit Help

James McAdam *Hey, Diane, I really need to talk to you. Can I call you now?*

Type your text


Waiting for response... 

 dsdunkle@us.ibm.com - Diane ...   

Meeting Edit Help

Louis Brown *Hi, Diane, I need 20 minutes with you. What does next week look like?*

Type your text

Waiting for response... 

Like feeding ducks



Benefits of the scheduled call

1. The customer expects your call and can focus
2. You have time to prepare, do research, find help
3. The customer can invite their own people
4. You won't waste time preparing to talk to people you don't reach
5. Getting time on their calendar earns you the right to an assumed next step



New York Power Authority

September

A few minute conversation with CIO asking, “Have you talked to IBM lately? Are you interested in what we are doing in software? Is this is a good time?”

October

Conference call

December

\$500K Websphere deal closed



Bowdoin University

May 7

Reached CIO. "... calling to see if you are interested in how we are helping schools to keep private data from getting into the wrong hands. Is this is a good time?"

May 9

CIO and Tivoli rep speak

May 11

Proposal delivered for Tivoli Compliance Insight Manager (Consul acquisition)



The Preparation Dilemma: Quantity vs. Quality

Quantity of calls

- Make more calls
- Reach more people
- But higher risk of appearing unprepared



Amount of preparation

- Feel more prepared
- Reach fewer people
- But danger of wasting time preparing for conversations that never happen



The Preparation Dilemma: Quantity vs. Quality

Quantity of calls

- Make more calls
- ***Reach more people***
- You may never feel totally prepared



Amount of preparation

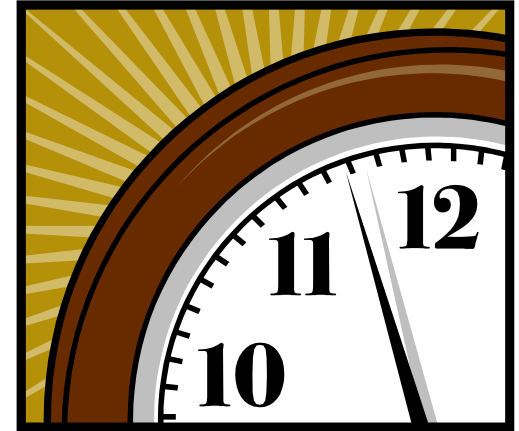
- Feel more prepared
- Reach fewer people
- Danger of wasting time preparing for conversations that never happen

You can't sell to people you don't call!



Prepare for a 15 minute conversation

- Be ready to talk about 3 things:
 - Why you are calling
 - How IBM can help
 - Who we have helped (reference stories)
- Use Sales plays (but don't get bogged down in them)
- Google the person (use the word “says”)
 - Eg. “Bath Iron Works”, “Jason Smith”, says
- Look at their website, job postings, news
- Use IBM website to get good ideas on how to word things



Websphere Business Monitor



- Why you are calling

Interest in how IBM helps customers get more out of SAP investment

- How do we help

2 ways we can help

- Customization
- Deliver information, metrics, business processes, KPI's

- Who have we helped

130 references



Tivoli Compliance Insight Manager



- Why you are calling

Interest in how IBM is helping companies to protect and monitor employee access to private data

- How we help

A way to monitor all data sources and report on who is accessing what, when, how often & who gave them access

- Who have we helped

Ford, Kroger, Office Depot, Hanes



Infosphere Change Data Management (DataMirror)

- Why you are calling
- How do we help
- Who have we helped

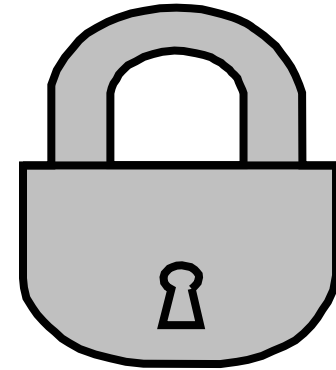
Interest in how IBM is helping retailers to reduce returns from on-line registries

A way to update your Data Warehouse in real-time whenever a store sells a registered item without impacting production systems

Tiffany reduced wedding and baby registry gift returns by 70%



Security Update



- Why you are calling

Talked to IBM lately about security portfolio; many acquisitions; highest rated by Gartner/analysts.

- How do we help

1. Web app security; hackers (Watchfire)
2. Protect internal data from breaches (TCIM)
3. Provisioning make sure people who have left the co. no longer have access to systems/data
4. Encryption regs (PCI compliance)

- Who have we helped

Lots and lots of co's depending on industry you are calling



Tivoli Storage Manager



- Why you are calling

Interest in how we help our customers to deal with all of the data they have to store (explosive growth per person, data retention requirements from regulations, multiple storage devices, etc)

- How do we help

A unique way to back up everything once & then only backup changes from that pt on; Huge benefits: transfer less data over the network, fewer tape drives and people to manage, while providing complete recovery of mission critical data

- Who have we helped

SunGuard, American Express, Central Pacific Bank



Have you talked to IBM recently about our software?



- Why you are calling

Interest in IBM's software portfolio, acquisition strategy, how we are helping co's in your industry/with your title/etc.

- How do we help

Cognos for BI (largest acquisition to date); Telelogic doubled our development solutions; Multiple security acquisitions – highest rated by Gartner; Encentuate (single sign-on)

- Who have we helped

Lots of co's in their industry (easy to find with google)



Typical responses

“I am heading to a meeting.”

“Can you send me information?”

Still go for the conference call

“I have a few minutes. Is that enough time?”

“When would be a better time to reach you?”

Get the email address; “You bet. I will send you some links to our website. What is your email address?”

“Now the other thing that I would be happy to do is we could pick a time when you are expecting my call. I can tell you a little more about... and that might even be quicker than reading through an email from me. Would later this week be better?”

“You bet. We are helping.... I am not necessarily looking to take up your time right now but is this of interest?”



Develop Your Questioning Skills

- “What specific business benefit will this initiative give you?”
- “How will you know when you have attained it?”
- “Who will be impacted most if you don’t do this?”
- “Is this your most pressing concern?”
- “When must you make a decision about which action to take?”
- “What if there are delays?”
- “When does the organization need to see results?”
- “I want to make sure I understand your decision making process. Would you please walk me through it?”
- “Who else would you want to include in this discussion?”
- “What are your criteria for making a decision?”



Skill Practice

- 1. Choose a partner to work with. Each of you fill in the Skill Practice Worksheet with a different play from the presentation.**
- 2. Using the Skill Practice worksheet, practice the play you chose, each partner taking a turn as the salesperson and each as the executive. The goal is to get a scheduled call with the executive.**

NOTE: When role playing the executive, you have not spoken with IBM in a while but someone on your staff just last week suggested talking to IBM about some of your current challenges. You are interested in hearing what IBM is doing but have an unbelievably busy day and some very recent negative experiences with salespeople cold calling you.



Who to call

- Hoover's (senior executives)
- Company website
- Spoke
- ZoomInfo
- Jigsaw.com
- OnTarget
- Convention attendees/Speakers
- IBM team members (ask everyone for lists)
- Google
- President/CEO's office
- Call the wrong person



How often to call?

According to Jill Konrath in *Selling to Big Companies: How many times do you contact a CIO before you quit because it's clear they are not interested in your offering?*

A. 1-3 times

B. 4-6 times

C. 7-9 times

D. 10+ times



Email



- Announce emails with a voice message
- State the **real** reason in Subject
 - Eg. “Meeting Request”
- Stick to 3 key points (Don’t back up the truck!)
 - Who you are / What you want / What IBM has done for other companies
 - Ping again in 60-90 days
- If no luck, try asking assistant for a direct report



Security Meeting

Dear Patricia,

I spoke today with your office about scheduling time with you and Pam suggested email.

I am with IBM and would like to talk with you about IBM's portfolio of security software solutions including our most recent acquisitions. Gartner positions IBM consistently at the top of the "Leaders Quadrant" for our solutions that provide automated identity and access management, security event management, web application security, access rights and privacy management and much more.

May I schedule a time to speak by phone or meet in the next few weeks? Thanks! I look forward to hearing back.

Best Regards,



Use numbers: Meetings at Brown University and Cambridge Health Alliance with these stats

Gartner stats:

- Data Centers have doubled their power consumption in the last 5 years
- Energy costs will increase up to 54% by 2010
- By 2012, for every \$1 spent on hardware, \$1 will be spent on power and cooling
- IT Executives now rank power and cooling in the top 5 among current concerns
- Most data centers will struggle to accommodate the growth and meet growing business demands and power/cooling requirements of new high-density servers

IBM Mainframe clients are seeing results:

- Up to 45% reduction in power and cooling
- 20% increase in server/storage utilization
- Up to 80% reduction in data center space
- TCO significantly lower than distributed environments
- Substantially more secure than distributed



Increase your odds

- Call execs the day before a holiday weekend or break
- Hone your questioning skills
 - Don't ask a question without explaining why (give to get)
 - Word questions strategically
- Save what you prepare
 - Make file folders for each play with key info
 - Keep them close by
- Always be looking for prospecting messages



How do clients indicate a BPM need?

“Clients use value statements to indicate desired outcomes and objectives”

- **Improve business agility**
 - Insurer: new multi-channel quote solution in 5 months
- **Streamline processes and reduce costs**
 - Healthcare payer: real-time online claims correction
- **Improve customer service**
 - Retail: online purchases returned/exchanged at local stores
- **Boost worker productivity**
 - Insurance: automated underwriting approval in minutes not days
- **Enhance customer/partner collaboration**
 - Telecom: real-time activation of bundled service plans
- **Improve monitoring and reporting**
 - Banking: 360° customer view for sales and support
- **Simulate and predict process outcomes**
 - Industrial: supply chain flexibility and resilience
- **Empower business users**
 - Government: integrated case management for social services

"Organizations should consider investing in BPM to increase enterprise agility and encourage greater business-user involvement in the process improvement lifecycle."

Gartner, Inc. (Dec 2007)



Additional Resources

- Keep printed copies of software sparklers nearby: [http://w3-03.ibm.com/software/sales/salesite.nsf/salestools/WW+SSR+Community\\$Software+Sparklers](http://w3-03.ibm.com/software/sales/salesite.nsf/salestools/WW+SSR+Community$Software+Sparklers)
- Visit the Software Acquisitions Cheat Sheet page often for messaging ideas: [http://w3-03.ibm.com/software/sales/salesite.nsf/salestools/WW+SSR+Community\\$SWG+Acquisition+Sales+Sheets](http://w3-03.ibm.com/software/sales/salesite.nsf/salestools/WW+SSR+Community$SWG+Acquisition+Sales+Sheets)
- Listen to Jill Konrath, author of Selling to Big Companies Presentation on CIO Level Prospecting: <http://w3-03.ibm.com/services/salesone/ShowDoc.wss?docid=J217515M20051H65&txt=jill%20konrath&sort=null&node=txt,jill%20konrath>



Working with assistants

- Treat them well!
- Ask them for help
 - “I would like to set up a meeting with Joe and was hoping you could help me.”
 - “I have not spoken with Sam before. Would you tell me the best way to request time with him?”
- If they want you to send them your email, do it!



Closing Thoughts

- Make your goal to get on their calendar!
- Prepare just enough to pick up the phone
 - Call high, get them interested, then invest preparation time
 - Use their time restriction your advantage
- Push yourself to call people even if you do not feel 100% prepared
- Decide right now what message and who you are going to call



Prospecting is very rewarding!



You gain:

- More visibility into your accounts
- Senior advocates to leverage
- Happier managers
- Bigger pipeline
- Satisfaction and Success!





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Thank You and Good Luck!

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