

March 15, 2006



Business Generation: Driving incremental sales revenue by guiding customers through the IBM Software Academy events cycle.



ABSTRACT.....	3
I. OBJECTIVE	4
II. WHAT IS THE IBM SOFTWARE ACADEMY PROGRAM?	5
III. EVENTS PROGRESSION MODEL	7
a) Lead Generation.....	7
b) High Level Opportunity Identification	8
c) Exploration of Technology (EoT).....	8
d) Proof of Technology (PoT)/ Architectural Workshop	10
e) Electronic Proof of Concept (ePoC)	11
f) Quick Proposal.....	11
IV. DELIVERABLES: Customer Enablement Packages (CEP).....	13
a) Solution CEP: Deliverable for EoT's (also for all High Level OI Events).	13
b) Product CEP: Deliverable for PoT's.....	13

ABSTRACT

This paper outlines the end-to-end customer event progression model named the IBM Software Academy and the components that are necessary for its development, production, packaging, execution and follow-up activities defined by the TechWorks organization. Contained in this document is expected ROI, an events progression model for closing an opportunity, templates for creating materials and events, branding information and key players involved in delivery. The contents of this paper are such that an IBM Software Academy program will be executed in any geography, region or business unit within IBM utilizing all listed materials and processes.

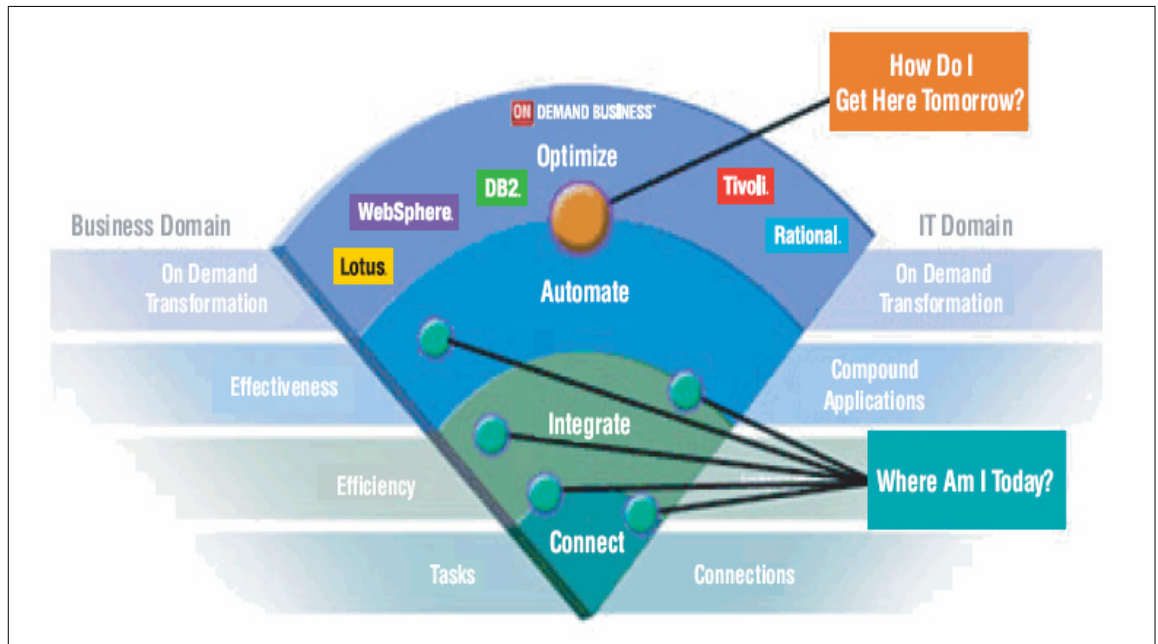


Figure 1

I. OBJECTIVE

The objective of the Software Academy program is to:

- Prepare materials that can introduce our new products and technologies to customer and partner technical leaders to generate new opportunities.
 - Enhance the vision of how customer problems can be solved while enhancing business results and fostering the desire to learn more.
- Create collateral that will assist in moving the technical sales process through to completion in the most efficient manner for our customers.

IBM will also be using this program as a mentoring vehicle with our own field technical teams as well as partners on how to leverage these assets. The long term goal would be to move toward a billable Proof of Concept (PoC) and reduce costs around these highly expensive customized events.

II. WHAT IS THE IBM SOFTWARE ACADEMY PROGRAM?

The IBM Software Academy is an end-to-end campaign developed as a customized series of events available for customers and Business Partners. The program follows the natural evolution of bringing a customer through the sales cycle: Identify, Validate, Qualify and Close.

Both the Identify and Validate phases are not product focused. Instead products are classified into the 6 Categories of Middleware Offerings. These categories stem from the 6 modules outlined in the IBM Software Live! program.

EoT events also follow this format when being designed. It is not until customers reach the PoT phase that specific product events will be conducted along with specific product demos. A list of the 6 Categories of Middleware Offerings is available below.

6 Categories of Middleware Offerings	Products
Information Foundation	WebSphere Application Server, WebSphere Application Server Community Edition, WASXD, Workplace, Portal, Domino, UDB, DB2 Viper, CICS, Identity Management Portfolio
Information Services	UDB, CM, Document Manager (Workplace, Domino DB2), IWWCM, Workplace for Business Controls and Reporting, Recovery Manager, Archiving, Workplace Forms, Compliance(Tivoli License Compliance Manager, Tivoli License Manager, Tivoli Contract Compliance Manager), Tivoli Security Compliance Manager, IBM System Storage Archive Manager, Tivoli Storage Manager, TotalStorage, Information Integration Platform (Profile/Meta/Quality/DataStage, DataState TX, II Classic Federation, II Standard Federation, II Content Edition, II Replication Edition, II Event Publisher Edition), Master Data Management, WebSphere Product Center, WebSphere Customer Center, DataWarehouse, Data Mining, Alphablox, Entity Analytics Solution, Information Accelerators
Business Integration	Portal, Domino, Lotus Domino Workflow, IBM Workplace Collaboration Services Workflow , II Platform (Same products as listed in Information Services II Platform), MQ, WebSphere Message Broker, ESB, WebSphere Business Modeler, WebSphere Integration Developer, WebSphere Process Server, WebSphere Business Integration Server Express, WebSphere Business Monitor, ITCAM for SOA and ITCAM for Response Tracking, ITCAM for WebSphere, Tivoli Omegamon XE for WebSphere Business Integration, Tivoli Business Systems Manager, Web Services, WebSphere Commerce
User Experience	Portal, Workplace Collaboration Services, Workplace Services Express, Workplace Managed Client, Workplace for Business

	Strategy Execution, Domino, Quickplace, Sametime, DB2 Everyplace Express, HATS, WebSphere Everyplace Connection Manager, WebSphere Voice, Activity Explorer, Tivoli Federated Identity Manager
IT Service Management	ITCAM for SOA and ITCAM for Response Tracking, ITCAM for WebSphere, Tivoli Omegamon XE for WebSphere Business Integration, Tivoli Business Systems Manager, Compliance(Tivoli License Compliance Manager, Tivoli License Manager, Tivoli Contract Compliance Manager), Tivoli Security Compliance Manager, Tivoli Enterprise Portal, Tivoli Enterprise Console, IBM Tivoli Monitoring, IBM Tivoli Omegamon XE, Tivoli Workload Scheduler, Tivoli Configuration Manager, Tivoli Provisioning Manager, Tivoli Storage Manager, Tivoli TotalStorage Productivity Center for Data, IBM System Storage Archive Manager, TotalStorage Productivity Center, SAN Volume Controller, Tivoli Access Manager, Tivoli Identity Manager, Tivoli Federated Identity Manager, Tivoli Security Compliance Manager, Tivoli Unified Process
Development	Eclipse, Rational RequisitePro, WebSphere Business Modeler, IBM Workplace Designer, RAD, WebSphere Portal/Portlet Developer, Rational Data Architect, Rational Manual Tester, Rational Functional Tester, Rational Performance Tester, Tivoli Configuration Manager, Rational Method Composer, CC/CQ, Rational Project Console, Rational Portfolio Manager

Table 1.0

III. EVENTS PROGRESSION MODEL

Contained in the 3 phases [Identify, Validate and Qualify] of Business Generation is a logical progression of 4 events making up the program. It is expected that as a customer moves through the sales cycle, he/she will be able to attend an event that parallels with the IBM Software Academy model with his/her specific level of interest as it relates to the IBM middleware portfolio.

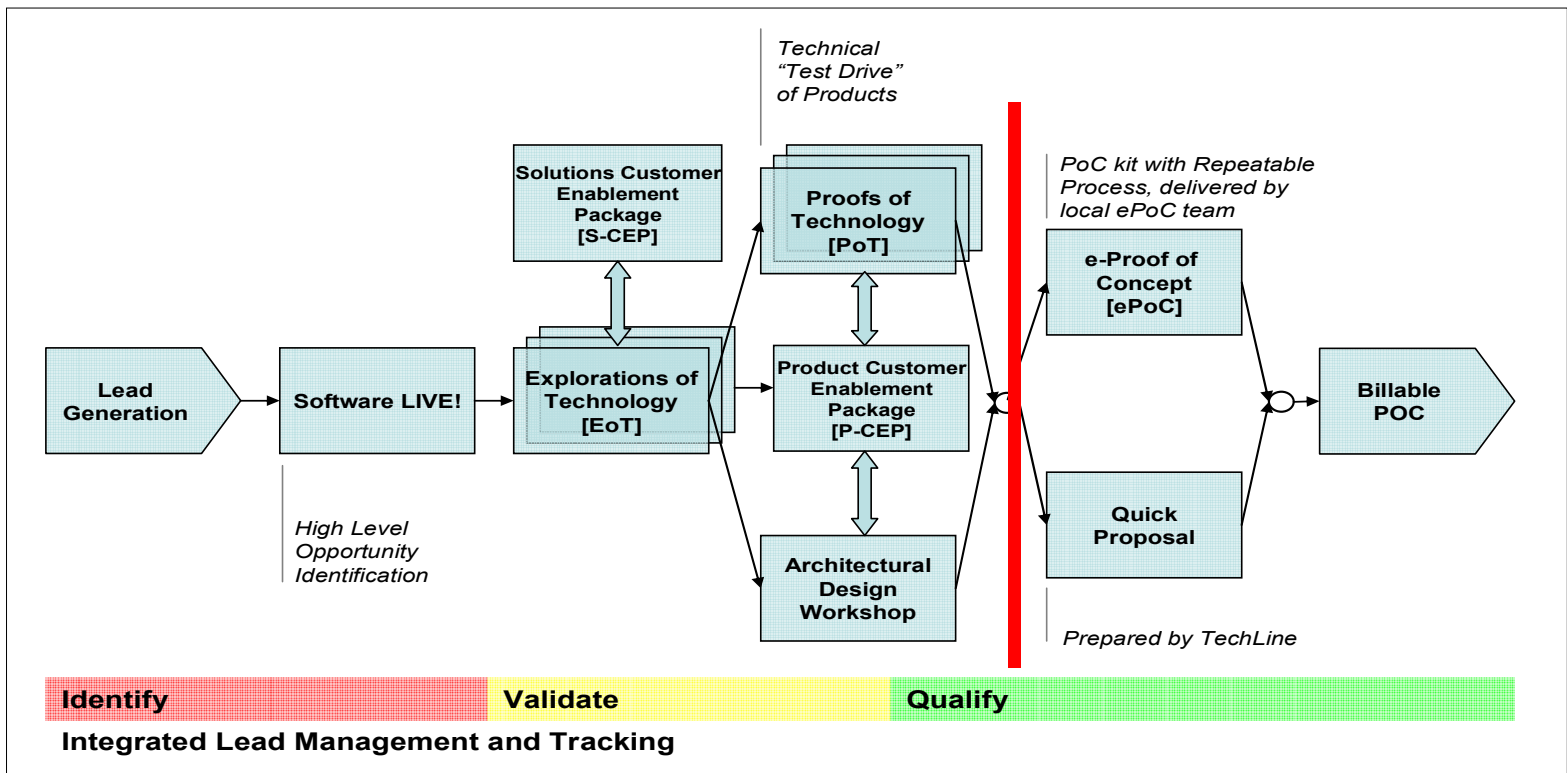


Figure 2

a) Lead Generation

Definition

Lead Generation will be defined as any source that provides an existing or white space customer lead. Examples of this could be, but not limited to, purchased customers lists, Business Partner leads, customer identification tools such as OnTarget or Siebel or any IBM sponsored or hosted customer event.

Target Audience

All existing and potential customers and Business Partners.

Who is your contact?

Local SBU MM (Software Business Unit Marketing Manager)

b) High Level Opportunity Identification

Definition

This phase will be defined as a customer briefing that gives a high-level presentation of the IBM middleware portfolio. As it relates to the IBM Software Academy program, the IBM Software Live! series will stand as the foundation of this stage. This phase will provide customers an understanding of what software they will need to build an On Demand infrastructure using IBM middleware applications and tools. Customers will leave with a clear understanding of IBM's capabilities and leadership in providing the best e-business infrastructure and solutions for their enterprise.

Target Audience

All existing and potential customers and Business Partners.



[Note: The information presented at these events should also be leveraged as an enablement tool for our internal sellers.]

Measurements

Measurements will be gauged by Lead Generation + High Level OI Event = Identified Opportunity

Who is your contact?

Megan Daniels: *Megan Daniels/Somers/IBM@IBMUS*

c) Exploration of Technology (EoT)

Definition

An EoT is a repeatable workshop delivered one-to-one or one-to-many. Positioned early in the sales cycle, EoT's are designed to progress an identified opportunity to a validated one, and generate new opportunities. EoT's give attendees a "taste" of the technology through demos, real customer business scenarios, a high-level discussion of the technology in business, and a basic to moderately technical hands-on experience. They are used to help move customers to where they are ready to send technical influencers to a Proof of Technology (PoT). EoT's are primarily an executive briefing that can be run locally in the business unit's TEC. EoT's are approximately five hours in length and are targeted at middle to upper management including CXO executives. These events are created to help business decision makers connect technology ideas to business problems they are facing by personally interacting with the workshop. There will be 6 EoT's for customers to choose from in the Software Academy program: Information Foundations, Information Services, Business Integration, User Experience, IT Service Management and Development [see [Table 1.0](#)].

Target Audience

Should be offered to middle to upper executive management in a TEC for medium-touch sales, or adapted as a one-to-one briefing if necessary.



[Note: The information presented at these events should also be leveraged as an enablement tool for our internal sellers.]

Measurements

Measurements will be gauged by Existing Opportunity + EoT= Validated Opportunity

Who is your contact?

Feridon Farokhnia: *Feridon Farokhnia/Dallas/IBM@IBMUS*

Building an EoT: Agenda and components

1. Welcome and Executive kick-off w/slide of top three priorities for the day (15 mins)
2. Marketplace challenge(s)/perspective and value prop. (30 mins)
3. Business Scenario: Real world customer example/sample customer challenge (30 mins)
4. Customer Testimonial Video or live Customer (5 mins)
5. BREAK (15 mins)
6. Solution Components (Product/Solution discussion) (1-2 hrs)
 - a. Slides
 - b. Demo
 - c. Solution Summary
7. Walk through of the Solution CEP customer deliverable (5 mins)
8. Lunch (1 hr)
9. Overview of Business and Technical Value of Solution (1.5 hrs)
 - Show the Business Value:
 - a. Include a case study on customer success and how IBM has brought both technology and financial value to the business. A customer testimonial or a Video of customer solutions will be great to include with this topic.
 - b. Include the ROI based on existing customers or ROI based on a made up scenarios to demonstrate the ROI to our customers.
 - c. Include the company that provides the tools for ROI on IBM company. The name of the company that provides ROI on IBM products is called
 - Show the Technical Value:
 - a. Ease of Implementation
 - b. Ease of Integration (Open Standards)
 - c. Ease of Configuration

- d. Buying Vs owning (maintenance cost)
 - e. End user perspective
 - f. LifeCycle, Security/Governance/Technical Differentiators
 - g. Demonstrate why IBM offerings/solutions are better than others
10. Tying it together, summary of day thus far (15 mins)
 11. Next Steps / Q & A (Map products to PoT or Architecture Workshops and discuss all relevant follow on events) (30 mins)
 12. Register customer for follow on event and fill out online feedback forms.

d) Proof of Technology (PoT)/ Architectural Workshop

Definition

A PoT is a repeatable workshop to be delivered one-to-many. The objective is to expose usability, documentation and manageability of a specific IBM technology in a controlled selling environment. Technical decision makers and/or influencers will be invited to a PoT to participate in a hands-on experience with IBM software when a customer has shown specific interest in a product. The main objective for a PoT is to give customers confidence in a product/solution and give IBM sellers an opportunity to introduce complementary products to upsell.

Target Audience

Technical decision makers and/or influencers. This will primarily be a highly technical audience.



[Note: The information presented at these events should also be leveraged as an enablement tool for our internal sellers.]

Measurements

Measurements will be gauged by Existing Opportunity + PoT = Qualified Opportunity

Who is your contact?

Feridon Farokhnia: *Feridon Farokhnia/Dallas/IBM@IBMUS*

Building a PoT: Agenda and Components

1. Introduction: Follow Template from Developers Kit (15 mins)
 - a. Solicit participants objectives from the session
2. Presentation/ Prove the Technology (2-3 hrs)
 - b. Overview, value proposition and product strategy
 - c. Hands on experience with product features
 - d. Major features and functions
 - e. Demos (Optional)

- f. Content is generated from the TechWorks, Skills Transfer Phases
- 3. Walk through the Product CEP (5 mins)
- 4. Lunch (1 hour)
 - g. Uncover additional opportunity and work on qualification
- 5. Presentation/ Prove the Technology (2-16 hrs)
 - h. Hands on experience with product features
 - i. VMWare labs constructed to guide participants through major product functions in easy, step-by-step method, guided by trained instructor
 - ii. Content is generated from TechWorks, Skills Transfer Phases
- 6. Next Steps (Closing the Loop) Q & A (30 mins)
- 7. Register for follow on event and fill out online feedback forms.

e) Electronic Proof of Concept (ePoC)

Definition

An electronic proof of concept is a pre-canned image which is a collection of PoT images. It is a late-sales cycle prescriptive approach to progress a qualified opportunity. At this stage the TechWorks team will no longer be responsible for this progression event. Content will be produced by the ISSX and Brand PoC teams for each specific ePoC. The ISSX PoC lab or the respective brand PoC team will make the ePoC scenario packages generally available for download from a cataloged repository. The preferred location for the delivery of the ePoCs are TECs, with the exception that they can be delivered at the customer site on a case by case basis.

[Note: Short Term- All ePoCs will be up and running in all TECs world wide, with the ePoCs being executed by Integration PoC Teams in the respective GEOs. ePoC skills transfer will be facilitated by brand PoC teams in the respective GEOs.

Long Term- Integration ePoCs executed at TECs by local ITSs/ISSs.]

Target Audience

All customers who have previously attended a PoT event.

Who is your contact?

Local Bran PoC teams in each region.

f) Quick Proposal

Definition

After attending a Proof-of-Technology session with your customer, it is recommended that you engage the Quick Proposal Process to send a high quality unsolicited proposal to your customer to help further explain the benefits of the solution you are selling.



Contents

Over 100 content documents to choose from:

- IBM Systems – from System i5 to zSeries and everything in between
- IBM TotalStorage – DS4000, DS6000, DS8000, ESS, LTO, N Series, SAN, SVC, and VTS
- IBM Software – Information Management, Tivoli, Lotus, WebSphere, Workplace, and zSeries Software
- IBM Printing Systems – full range of IBM printers and printing software
- Solutions – Video Communications for Banking, Grid and Grow, and more solutions to come.
- High quality proposal format
- Time savings when looking for content
- Ability to customize your own proposal
- Deal Hub assistance with customization for IBMers in North America
- Fast turnaround (approx. 2 hours or less) for Deal Hub customization assistance.

Who is your contact?

Debbie Badger: *Debbie Badger/Philadelphia/IBM*

IV. DELIVERABLES: Customer Enablement Packages (CEP)

Definition

The CEP is a customer deliverable, in the form of a DVD, of all information needed on an IBM Software product. It is designed to serve both an executive and technical audience. This single knowledge based repository helps our customer, sales, marketing, and technical evaluators access information easier and faster on the products they are interested in. The objective of this package is to equip customers and IBM sales team members with tools and information in order to better understand the IBM product line and generate interest on proposed IBM solutions.

a) Solution CEP: Deliverable for EoT's (also for all High Level OI Events).

There will be 6 Solution CEP's available (one for each of the 6 Categories of Middleware Offerings, see [Table 1.0](#)). The Solution CEP DVD (CD) package is to be distributed at all IBM sales events including Exploration of Technologies and associated Architecture Workshops.

Development:

TechWorks Marketing Liaison / IBM Marketing Team

Components:

Executive Brief (Solution Specific)

- Marketing Brochure
 - Buyers Guide: Best Practices (not pricing)
 - Customer Testimonial
 - ROI
 - Link to Analyst Reports
 - Customer References: A fully developed story to explain a clients or partners implementation of IBM product or services. Usually one to three pages in length covering client, challenge, solution, benefits Companion Products to solve business needs.
- Multimedia/Webcast/Podcasts

b) Product CEP: Deliverable for PoT's

These will correspond to the specific product introduced in the PoT the customer attends. Product CEP DVDs are distributed at its respective Proof of Technology.

Development:

TechWorks SME will work with Brand enablement team. (IDS team will take the lead on identifying the proper Brand enablement team contact and development of templates. DemoNet will help with the production of the CDs).

Components (2 Directories):

Executive Brief (Product Specific)

- Marketing Brochure
- Buyers Guide: Best Practices (not pricing)
- Customer Testimonial
- Link to Analyst Reports
- Customer References
- Companion Products to solve business needs
- Multimedia/Webcast

Technical Brief (Product Specific)

- Technical Library: Link to product documents (ibm.com)
- Case Studies: A fully developed story to explain a clients or partners implementation of IBM products or services. Usually one to three pages in length covering client, challenge, solution, benefits.
- Product Data Sheets
- Flash Demos
- RedBooks
- White Papers
- Multimedia WebCast/Podcast

Who is your contact?

Catherine Solazzo: *Catherine M Solazzo/Somers/IBM@IBMUS*

Rose Greer: *Rose Greer/Austin/IBM@IBMUS*

Note: All information contained in this document is IBM confidential. For any questions on this program please contact *Catherine M Solazzo/Somers/IBM* .