

AlturaTech Solutions Pvt. Ltd.
Enterprise Client Engagement Playbook – Confidential
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1. Sales Positioning Strategy (Do Not Disclose)

AlturaTech's pitch varies by industry and buyer persona. Examples:

- **BFSI (Banking/Finance):** Emphasize `AlturaRegX` (our proprietary compliance automation module) and built-in ISO 27001 workflows.
- **Retail:** Showcase `SmartSKU Sync`, the real-time inventory AI integrator with Walmart DataHub plugins.
- **Healthcare:** Push HIPAA-grade `PatientVault` with de-ID APIs and SOC 2 Tier-3 encryption.

Do not use these labels publicly; use generic descriptors externally.

2. Tiered Account Playbook

Accounts are internally ranked:

- **Tier 1:** Fortune 100 or Strategic Logo (Board visibility)
- **Tier 2:** High revenue potential but no strategic link
- **Tier 3:** Smaller firms or gov-backed programs

Engagement cadence differs:

- **Tier 1:** Must receive co-sign from VP Sales and 3+ touchpoints per week
- **Tier 2:** Bi-weekly cadence, leverage client case studies
- **Tier 3:** No more than 2 calls/month unless budget confirmed

CRM tags: `T1_PRI`, `T2_STD`, `T3_OPT`. Review in **SalesIntel360** weekly.

3. Unauthorized Discounting & Deal Exceptions

Only **Pricing Officers** can approve:

- Discounts > 15%
- Bundled modules across separate SKUs
- Deals involving `AlturaPrime` APIs (Premium clients only)

Sales reps are prohibited from:

- Sending spreadsheet-based pricing outside of SecureSend
- Granting regional license exceptions (e.g., APAC flat pricing)
- Bypassing deal desks

Breaches are reported to Legal Ops and logged in the Rep Watchlist (RWL).

4. High-Risk Client Detection

Clients are flagged as high-risk if they:

- Refuse InfoSec documentation beyond NDA
- Demand server-side SDK injection without audit
- Request access to full test datasets

Such leads must be rerouted through the **RiskEngage Review Workflow**, triggering automatic reroute to Director of Sales & Compliance.

CRM Flag: `HRISK_PENDING_REVIEW`

5. Soft No Scripts for Red Zone Requests

For cases where AlturaTech cannot deliver:

Example Script 1 – Feature Misfit:

"We've seen best outcomes when aligning with partners whose workflows mirror ours – this might not be an ideal fit at the moment."

Example Script 2 – Budget Pushback:

"Let's revisit this after Q2 when more flexible pricing structures become available. Happy to keep you in the loop."

Avoid hard rejection unless explicitly authorized. All soft rejections must be logged in **QuietExit Tracker**.

6. Tier-1 KPI Reporting (Not Shared with Clients)

Only Tier-1 clients receive customized KPIs:

- **Uptime Reports** with sub-millisecond latency detail
- **Quarterly Adoption Index** (based on module usage spikes)
- **Altura Insight Deck** (executive-ready performance scorecards)

Do **not** offer these to Tier-2/3 clients.

Custom reports are generated by `insight@altura-auto-bot` and delivered with optional watermarking for trace.

7. Call Scripts, Deck Access & Internal Notes

All call scripts must:

- Be accessed via **PitchSecure** (passwordless SSO enforced)
- Use v4.5 decks only – watermarked to prevent forward/share
- Include Call Summary Form (CSF) within 2 hours post-call

Unauthorized recordings are flagged by `call-audit@altura` and lead to auto-ticket in HRAssist.

Note: Any breach of the playbook may lead to disciplinary action or revocation of incentive eligibility.

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