

# Problem Solving Skills (Case Studies)

---

Zbigniew Smierzchala

# Topics

---

- What sets me up to succeed
- Case Studies

---

Market – Research and Competitive Analysis (Methods, Processes)

---

Capture VoC (Voice of the Customer) from RFP analysis

---

Competitive Assessment – Gap Analysis

---

Improve Value Proposition Messaging for software solutions

---

Improve Conversion Rate for Sales Opportunities with 5 why Analysis

---

Tactical action plan for a defined sales initiative

---

Sales initiatives prioritization matrix (example)

---

Partner Business Plan Example

---

# What sets me up to succeed

## Talents

Talents to learn quickly, **winning others over**, think strategically and create ideas

CliftonStrengths®

CERTIFICATE OF TALENT FOR  
**Zbigniew Smierzchala**

### SIGNATURE THEMES

Strategic

Learner

Ideation

Analytical

Woo

Copyright © 2000, 2006-2012 Gallup, Inc. All Rights Reserved.

## Business and Technical Skills



### Cloud Architecture: Core Concepts



LinkedIn LEARNING

Certificate of Completion  
Congratulations, Zbigniew Smierzchala

Edge Analytics: IoT and Data Science  
Course completed on Sep 3, 2019



NICOLAUS COPERNICUS  
UNIVERSITY  
IN TORUŃ



HSB

## IT Industry Experience

Market and Competitive Intelligence



Business Development, Sales Management,  
Direct Sales, Market and Competitive  
Intelligence

Business Development, Sales, Channel  
Management, Consulting

# Case Studies

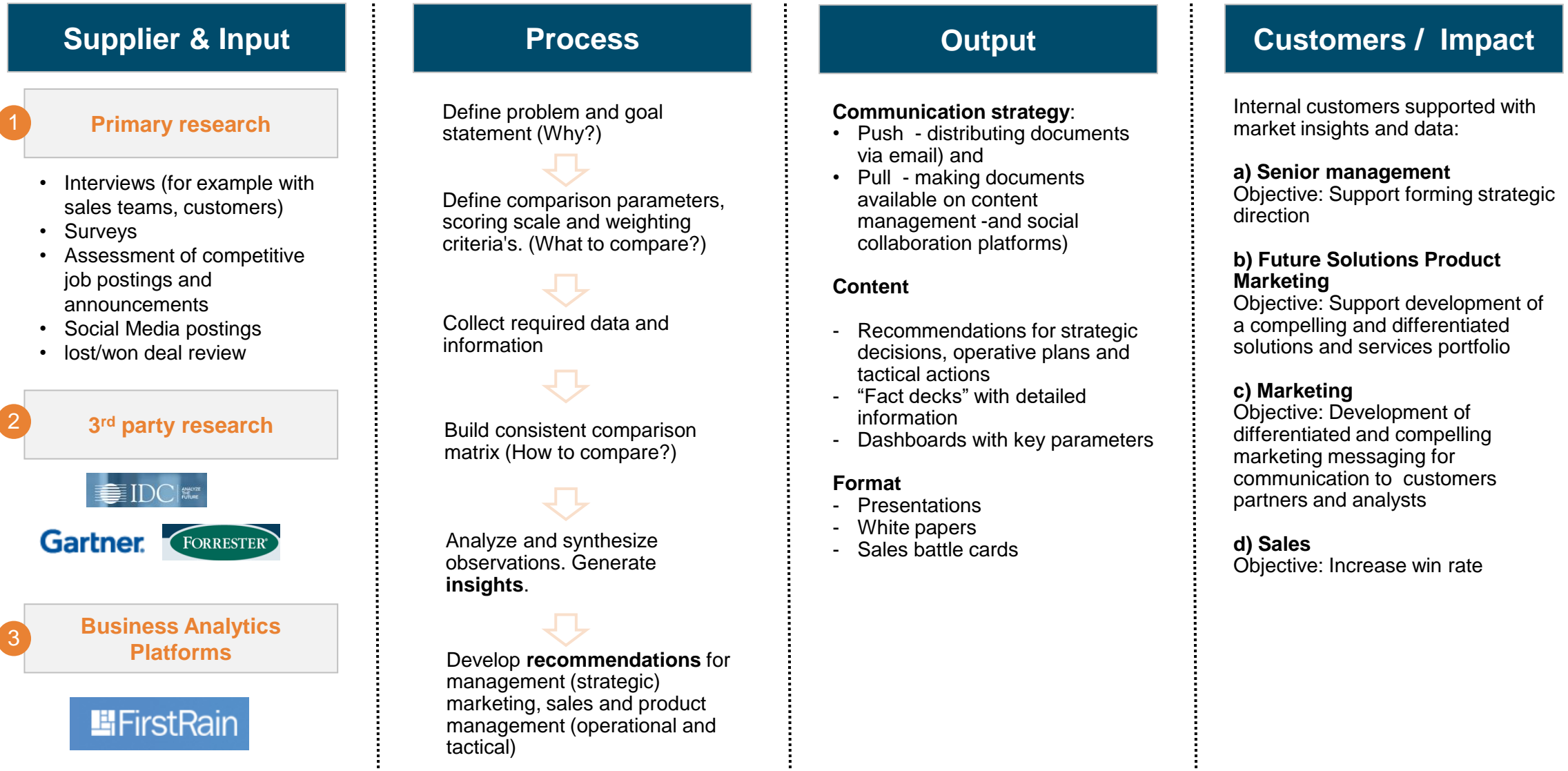
Highlighted projects **A → H** will be explained in more detail on next slides

Deliver **unique value proposition** to **customers**, utilizing inside and outside **resources** to achieve market **penetration**, **revenue** and **profitability** expectations

Market-Segmentation	Target Customers	Value Proposition	Marketing mix/ Channels	Action Plans	Resources/ Budget Model	Controls
<b>A</b> <b>Market – Research and Competitive Analysis</b>	In-depth market studies and operational target customer prioritization (by industry / size / region)	Capture <b>VoC (Voice of the Customer)</b> from <ul style="list-style-type: none"> <li>- Win - Loss analysis</li> <li>- Customer interview – direct and thru 3<sup>rd</sup> party)</li> </ul> <b>B</b> - <b>RFP analysis</b>	<b>C</b> <b>Value Proposition Messaging</b> <ul style="list-style-type: none"> <li>- Analyst Engagement/ Influencing</li> <li>- Partner risk assessment</li> <li>- Developed Success Stories / Use cases</li> <li>- Partner Program Development</li> <li>- Solutions Demo scripts</li> <li>- Input for SOW and other project documentation</li> <li>- Customer requirements checklists for sales</li> <li>- Simple and complex ROI calculators</li> </ul> <b>D</b> <b>Elevator Pitch</b> development <ul style="list-style-type: none"> <li>- Key Note Speaker</li> <li>- Roadshows and end – customer events</li> </ul>	<b>E</b> <b>Improve Conversion Rate for Opportunities</b> <ul style="list-style-type: none"> <li>- <b>Improve RFP win rate</b></li> <li>- Development and Execution of <b>Tactical action plans</b> for defined sales initiatives</li> </ul> <b>F</b> <b>Sales initiatives prioritization, management and control</b> <ul style="list-style-type: none"> <li>- Channel Partner Management</li> <li>- Developed and delivered Sales Force Training (webinars, classroom, podcast)</li> <li>- Deal “War Rooms”</li> </ul>	<b>H</b> <b>Business plans</b> (for Territory, for Channel Partners etc.) <ul style="list-style-type: none"> <li>- MDF (marketing budget) - management)</li> </ul>	<ul style="list-style-type: none"> <li>- Pipeline management and business forecast</li> <li>- Win – loss analysis</li> <li>- Market share and other KPIs</li> </ul>

# Market Research and Competitive Analysis

## Methods, Processes and Objectives



# Competitive Assessment – Gap Analysis

## Objective

Understand competitive positioning of the company to support marketing, sales and (future) product management in

- Building differentiated marketing message
- Closing gaps in portfolio and feature sets of offerings if identified
- Supporting sales with competitive information to properly position the company strengths and prepare to deal with potential objections
- Support strategy definition and business planning

## Approach

- Define comparison parameters, scoring scale and weighting criteria's (What to compare?)
- Collect required data and information
- Build consistent comparison matrix (How to compare?)
- Analyze and synthesize observations
- Develop recommendations for management (strategic) marketing, sales and product management (operational and tactical)
- Present the research and recommendations to respective target audiences

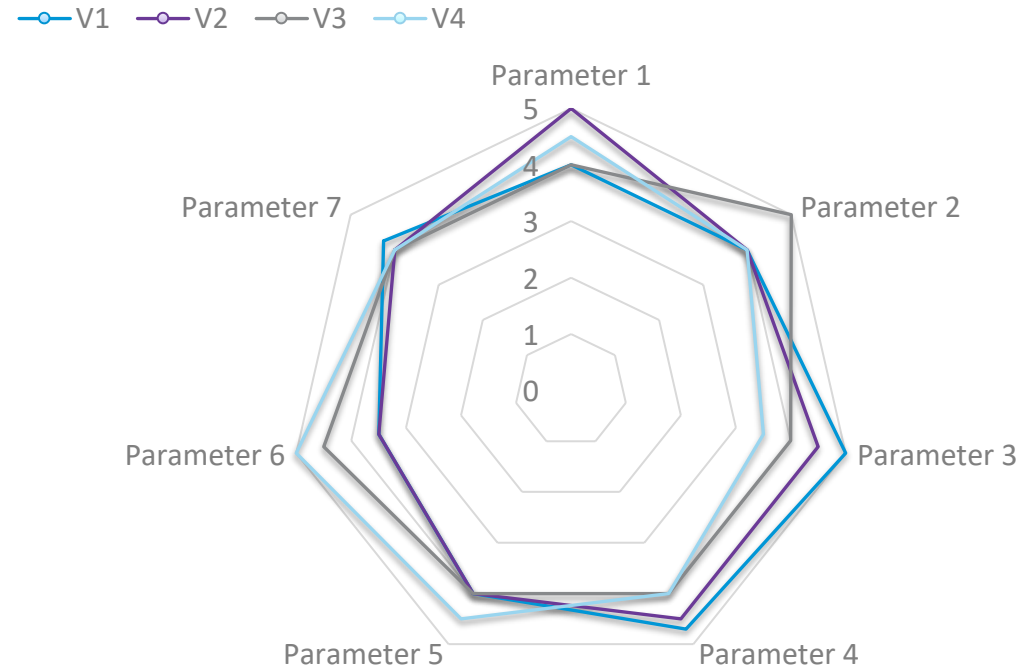


Figure 2. Aggregated competitive analysis, V = Vendor

Catego	Portfolio category 1	Portfolio category 2	Portfolio category 3	Portfolio category 4	Portfolio category 5	Portfolio category 6	Portfolio category 7	Portfolio category 8	Total
Max. score	0,50	0,25	1,00	1,00	0,50	1,00	0,50	0,25	5,0
Vendor 1	0,50	0,25	0,75	1,00	0,50	0,50	0,25	0,25	4,0
Vendor 2	0,25	0,19	1,00	0,50	0,50	1,00	0,25	0,25	3,9
Vendor 3	0,50	0,19	1,00	0,50	0,50	0,50	0,50	0,25	3,9
Vendor 4	0,50	0,19	1,00	0,50	0,50	0,50	0,50	0,25	3,9
Vendor 5	0,50	0,19	1,00	0,50	0,50	0,50	0,50	0,25	3,9

Figure 1: Detailed competitive analysis for vendors portfolio as one of the parameters to measure competitiveness

# Improve future RFP win rate by xx % in FY XX

**Objective:** Improve the future win rate for (Solution name) RFPs by at least XX% in FY XX

Project owner: Zbigniew Smierzchala; Sponsor: (Name); Organization: (XXX)

Contributors: (Names)

## Problem statement

- The probability to win an RFP which has been influenced is significantly higher as a probability to win an RFP which has been influenced by competition

## Objectives

- Understand the buyers roles which involved entities (IT, LoB, Procurement) play in the buying process
- Understand vendor selection criteria outlined in RFPs
- Identify common software requirements (functional and non-functional requirements (NFR))

## Business Impact

Improve the conversion rate for (Solution name) opportunities in direct sales motion by at least XX% in FY XX

- Product improvements based on feedback to current and future product management about customer requirements
- Improved RFP - influencing sales material
- Suggestions how to systematically capture VoC outlined in RFPs requirements in the future

Project start –  
(Date)

We are here –  
(Date)

Project ends –  
(Date)

Define objective and  
scope

Collect data

Develop an evaluation  
matrix

Identify root causes

Assess and prioritize  
root causes

Develop and  
implement plans to  
address root causes

# Improve Value Proposition Messaging for software solutions

**Objective:** Improve the deal win rate by at least XX% by developing a strong, consistent, uniquely differentiating and easy to understand value proposition message for solutions business.

Project owner: Zbigniew Smierzchala; Sponsor: (Name); Organization: (XXX)  
Contributors: (Names)

## Problem statement

- Sales teams use different slides format and content in customer engagement
- The content is often very technical e.g. not easy to understand and doesn't focus on customer outcomes

## Goal statement

Develop consistent , easy to understand and compelling value proposition message which focuses on **customer outcomes**

Develop **templates** for elevator pitches

Assure **implementation** of the templates by product owners and communication to the field

## Business Impact

Consistent, easy to understand and compelling value proposition message will help to improve deal win rate by at least XX%

Project start –  
(Date)

Project ends–  
(Date)

Define objective and scope

Understand Best Practices for Building Strong Value Proposition Message

Understand customers criteria for vendor- and solutions selection

Gather data and input from Subject Matter Experts

Develop compelling and consistent value proposition message

Develop Templates and align with Product managers

Test and Define communication strategy

Publish on SharePoint and Communicate to the field



# Offering name

Headline reflecting customer benefits

D

One of the outcomes of the Improve Value Proposition project was a **Elevator Pitch Template**, which was used by future product managers to provide a consistent, uniquely differentiating and easy to understand value proposition message for their offerings


Customer  
pain points

“**Difficult** to find and access  
needed info quickly”

“Too much xxx—  
**inefficient**, takes space”

“Challenges in meeting  
**regulatory** requirements”

Offering 
<ul style="list-style-type: none"><li>• Key statements</li><li>• Key statements</li><li>• Key statements</li></ul>

Outcomes 
<ul style="list-style-type: none"><li>• Increase productivity by up to 50% making documents easier to find and share</li><li>• Reduce physical space savings by up to 8% shifting to electronic filing systems</li><li>• Improve customer response time by 6 times capturing documents at origin</li><li>• Invest on capture and see a return in less than 18 months</li></ul>

## Headline 2

# Improve Conversion Rate for Opportunities (1)

**Objective:** Improve the conversion rate for (software solution) opportunities in direct sales motion by at least XX% in FY XX

Project owner: Zbigniew Smierzchala; Sponsor: (Name); Organization: (XXX)  
Contributors: (Names)

## Problem statement

- The significant amount of (Solution name) opportunities in the funnel is NOT translated into revenue

## Goal statement

- Identify the root causes for the current poor conversion rate
- Assess and prioritize the root causes
- Develop an action plan how to remove the identified issues which cause the poor conversion rates

## Business Impact

Improved conversion rate for (Solution name) opportunities in direct sales motion in (XX) will result in increased revenue

Project start –  
(Date)

We are here –  
(Date)

Project ends –  
(Date)

Define objective and scope

Define methods to collect and analyze data

Collect data ,  
Conduct interviews

Identify root causes

Assess root causes

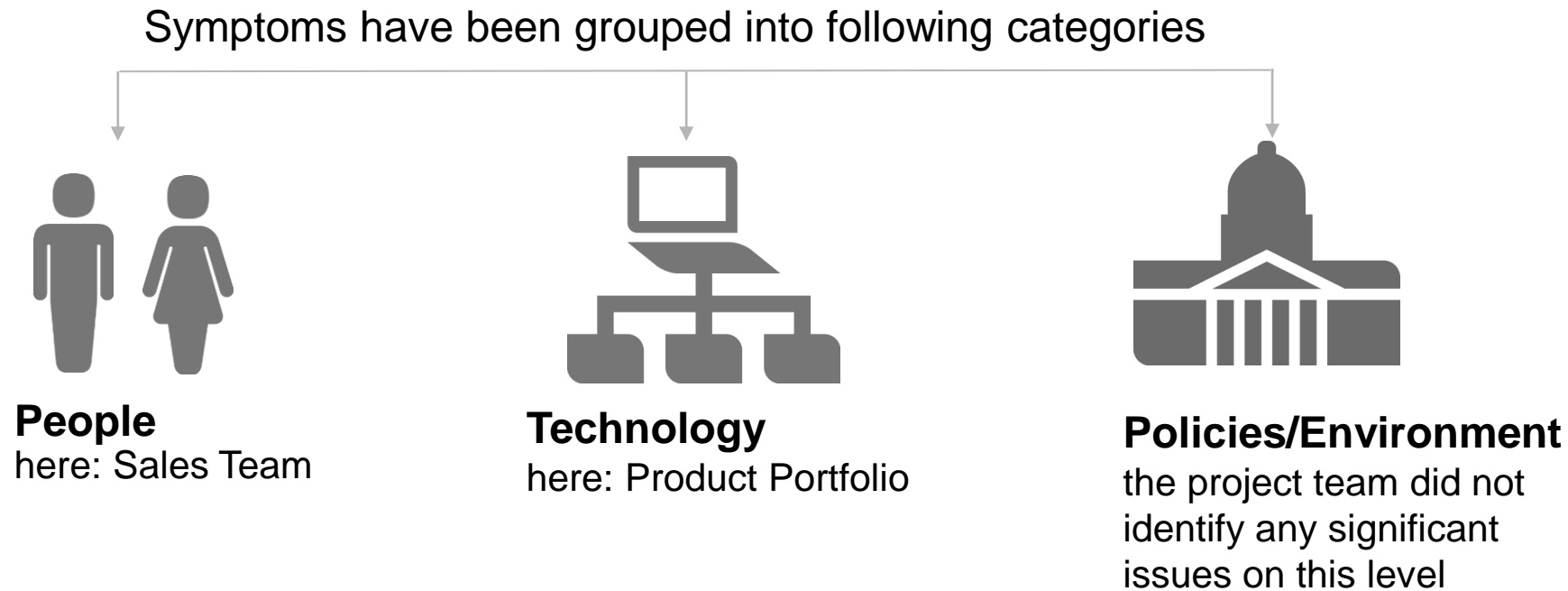
Develop and implement plans to address root causes

# Improve Conversion Rate for Opportunities (2)

## Applied method: 5-Why Analysis\*

Step 1: Identify the main **symptoms** based on input from sales management

Step 2: Interview sales teams. By asking "Why?" five times, successively, delve into a problem deeply enough in order to understand the ultimate **root cause**.



\* See <http://www.moresteam.com/toolbox/t405.cfm>

# Improve Conversion Rate for Opportunities (3)

## Sales (People) Interview

Why a significant number of deals in the funnel is NOT translated into revenue?

Main symptom

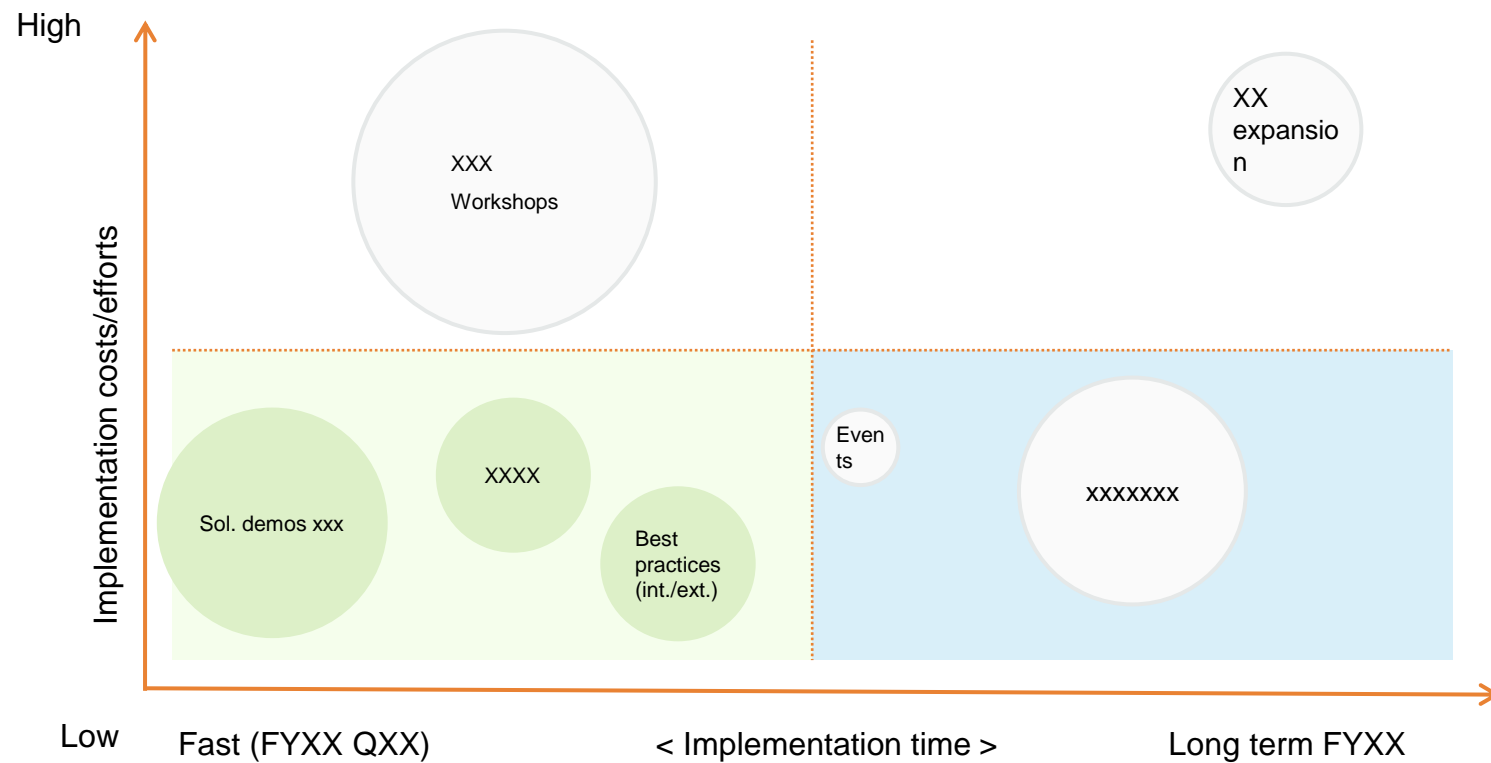
1- Why?	Answer 1: Main symptom
2- Why?	Answer 2
3-Why?	Answer 3
4-Why?	Answer 4
5-Why?	Answer 5: Root cause

Root cause

# Tactical action plan for a defined sales initiative (example)

Owner: Name (Title)		Date: XXXX	Fiscal Year: XX	Organization: (Insert name)	Expected Completion: Insert name
<b>Goal: Achieve K\$ revenue with (product name) in (= market segment)</b>					
Objective:	No.	Tactic:	Sub Owner	Performance Measure & Time Scale (by Qtr)	
Build a robust funnel for <b>(product name)</b> and achieve \$ revenue in FYXX	1	Account mapping with ...	XYZ	Joint account list (by date) X# of joint opportunities exist and being pursued, FYXX xxx	
	2	Account mapping with ....			
	3	Create awareness ...			
	4	Training on ..			
<b>Measure</b>					
XX M\$ revenue in FYXX XX M\$ in pipeline by end of FYXX	5	Include RPA solutions in Account planning in (insert country)			
	6	Leverage appropriate partner and (vendor name) events in order to create awareness and generate leads ...			
	7				

# Sales initiatives prioritization matrix (example)



## Quick wins (short term actions)


- Improve communication around existing demo capabilities
- Standardize best practices sharing practice and improve communication
- Promote xxx

## Long term actions

- Improve xxx workshops execution
- marketing to develop an event strategy and contact specific messaging
- „Expansion“ is expected to leverage existing initiatives

# Business Plan


## Published article based on experience with business planning



MARKETINGSALESSERVICESRESOURCESPAF

### Blog

#### How to build a business plan for a successful partnership

📅 28-Jan-2020 08:23:00 / by Zbigniew Smierzchala 

Tweet

**How to build a business plan as a foundation for a successful partnership - a quick guide for software vendors**

[DigitalDoorway](#)

Module1: Executive Summary - **WHY** the partnership makes sense

Module 2: Joint objectives and value proposition - **WHAT** the partners want to achieve by combining their resources

Module 3: Joint Marketing and Go-To-Market-Plan outlining **HOW** partners want to achieve the objectives

Module 4: **Control** - HOW to measure and control the progress

# Go-To-Market & Technology Insights

## Published articles (samples)

### Go-To-Market Insights

Zbigniew Smierzchala posted this

...



Customers tell you what they want, but are you paying attention?

Zbigniew Smierzchala on LinkedIn

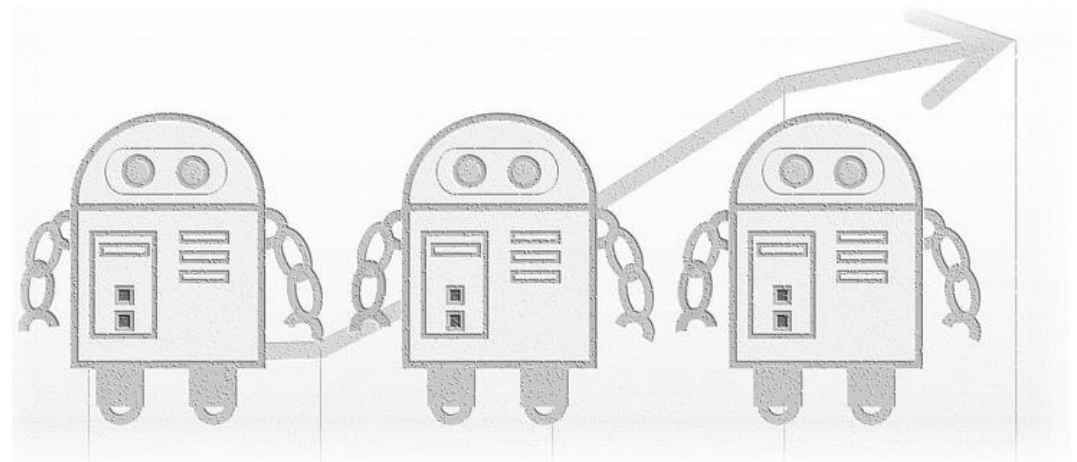
February 14, 2020

[digitaldoorway.eu/blog](https://digitaldoorway.eu/blog)

### Technology insights

Zbigniew Smierzchala posted this

...



RPA as a spearhead for Intelligent Process Automation

Zbigniew Smierzchala on LinkedIn

December 11, 2019

[Linkedin.com](https://www.linkedin.com)



**Thank you!**

---