

Blue Coat Systems Channel Engineer

Jump Start Guide

# About the Jump Start Guide:

The Blue Coat *Jump Start* Guide will familiarize you with the Blue Coat organization and resources, rapidly engaging you in the Blue Coat sales process and deliverables.

The engineers are the critical factor for creating business value to prospective customers and engaging the customer in effective processes that leads to closing the sale. Engineers must generate credibility during each interaction, becoming the Trusted Advisor during the sales cycle.

Blue Coat creates and extends learning opportunities to engineers that are part of the sales cycle. However, keep in mind that you are expected to aggressively pursue learning opportunities that enable you to become an effective member of the sales team. This guide will help you focus your time and energy mastering the foundational organizational and technical skill sets for your role.

Timeframes in this document are for guidance only. You are encouraged to move through the materials as quickly as you feel comfortable.

Finally, we hope you continue your learning and build on your product and customer knowledge, adding incrementally to your success.

## Plan Completion Expectations:

* Technical proficiency with Blue Coat:
  + Demonstrate deep technical understanding of product functionality
  + Lead whiteboard sessions around product architecture
  + Explain customer use case scenarios
  + Drive the customer technical validation process
  + Troubleshoot problems and think creatively
  + Conduct comprehensive and compelling product demonstrations
  + Show effectiveness in training channel partners how to position, demonstrate, sell, install, and maintain product.
* Sales Proficiency with Blue Coat:
  + Demonstrate thorough understanding of how to work constructively with account Managers, field engineers, customers, partners, and peers
  + Describe the lifecycle of Blue Coat, including the interaction with customer support and training
  + Describe Professional Services offerings

Weekly Objectives

# Weeks 1-2: Introduction

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| **Goals for Weeks 1-2** | | |
| **Activities/Results** | | **Resources** |
|  | **Review the HR New Hire Checklist and make sure office and administrative resources have been set up.** |  |
|  | **Meet with your Manager to discuss and review the Jump Start Program, key resources and expectations:**   * Go over Blue Coat key sales tools & resources * Discuss Organizational Overview   + Refer to the corporate and local organizational charts   + Discuss roles and responsibilities |  |
|  | **Review Blue Coat Sales Resource Links including key intranet sites, online sales resources, and SalesForce.com.** |  |
|  | **Schedule no less than 3 observational calls with an experienced member of the SE team. Review appropriate sales and learning materials prior to the call. List of customers:** |  |
|  | **Schedule introductory meetings with the assigned Territory Account Managers and engineers identified with your Manager.**   * Identify key accounts, prospects, and strategy |  |
|  | **Review process to get software and hardware for POCs.** |  |
|  | **Review support escalation process** |  |
|  | **Review area channel relationships and schedule no less than 5 introductory meetings for your next two weeks. List of partners:** |  |
| **Peer Coach Assigned by Hiring Manager** | | |
|  | **Assign peer coach to new hire. Peer coach responsibilities are:**   * + Designated to assist with questions   + New hire should “practice” skills sessions with his/her peer coach |  |

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| **Week 1-2 Skills Training** | | |
|  | **Obtain necessary training materials and schedule training for the next available courses:**   * **Blue Coat Certified Proxy Administrator (BCCPA)** * **Blue Coat Certified Proxy Professional (BCCPP)** * **Blue Coat WAN Acceleration Administrator (BCWAA)** * **Blue Coat WAN Acceleration Professional (BCWAP)** * **Blue Coat Reporter Training** * **Blue Coat Director Training** * **Blue Coat Anti-Virus Training** |  |
|  | **Review available white papers and technology primers** |  |
|  | **Deliver pitch appropriate for a customer to Manager:**   * + 10 minute presentation on Blue Coat   + 10 minute summary of solutions Blue Coat has to offer   + 20 minutes for feedback from the team |  |

# Weeks 3-4: Developing the Foundation

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| **Goals for Weeks 3-4** | | |
| **Activities/Results** | | **Resources** |
|  | Meet with Your Manager   * Discuss what you’ve learned to-date about Blue Coat vision, strategy, solution messaging and product functionality/capabilities |  |
|  | Blue Coat Partner and Channel   * + Review channel program   + Understand channel strategy for the product portfolio  1. Partners impact on technical certifications 2. Product mix and solution delivery |  |
|  | Review Technical Validation Process   * + Review options for POC   + Describe POC Team responsibilities |  |
|  | **Shadow no less than two POCs** |  |
| **Weeks 3-4 Skills Training** | | |
|  | **Continue review of available online learning resources, including datasheets, webinars, and performance briefs** |  |
|  | **Week 3: Demonstration**   * + 30 minute demonstration   + 30 minute whiteboard architecture discussion |  |

# Weeks 5-12: Skills Development

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| **Goals for Weeks 5-12** | | |
| **Activities/Results** | | **Resources** |
|  | **Complete the available learning materials and classes** |  |
|  | **Schedule trip to work with Technical Support Team.** |  |
|  | **Complete mock POC**   * Scenario and equipment to be provided by manager |  |
|  | **Continue Partner introductions and visits.** |  |
|  | **Review progress with Manager and Peer Coach.** |  |

Account Call Worksheet

Customer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sales Rep: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |
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| PRE-CALL DISCUSSION |  |
| What’s the purpose of this visit? What does Blue Coat want to accomplish? |  |
| What action do you want the customer to take at the end of the call? |  |
| How will you reinforce value during on the call? |  |
| POST-CALL DEBRIEF |  |
| Were the objectives made clear to the customer? |  |
| What (if any) additional objectives did the customer have? |  |
| What pain points did the customer reveal? |  |
| What was the Blue Coat value discussed regarding those needs/pain points? |  |
| Did the questions follow a needs-analysis format? |  |
| Was the presentation customized to the buyers need? |  |
| How did you respond to the customer’s objections? |  |
| Did you ask for something from the customer? |  |
| What did you learn from sales call? |  |
| Where there open issues/questions that you own? |  |
| FOLLOW UP |  |
| Open issues/questions addressed in a timely fashion? |  |
| Are we calling on the right level? |  |
| What needs to be done next? |  |
| When? |  |
| Who else needs to be involved? |  |
| Salesforce.com updated! |  |
| ACTIONS TO BE TAKEN | DATE OF NEXT CALL |
|  |  |