

UiPath Sales Process

| Customer Buying Process | Recognize Pain | | Define Requirements & Evaluate Solution | | | Evaluate Proposal | | Negotiate and Close | |
|------------------------------|---|---|---|--|---|---|--|---|--|
| Salesforce Stage | Lead BDR Opportunity Deal Registration | 01. Discovery | 02. Business Qualification | 03. Technical Qualification | 04. Proposal | 05. Negotiation | 06. Closed Won Pending | 07. Closed Won Booked | |
| Default Forecast Category | OMMITED | DISCOVERY (Push out of CQ by week 3) | UPSIDE (Not in forecast) | UPSIDE (Not in forecast) | UPSIDE (In forecast if "Qualified" is checked) | COMMIT (In forecast) | COMMIT (In forecast) | CLOSED (In forecast) | |
| Opportunity Type | New Business, Upsell | New Business, Upsell | New Business, Upsell | New Business, Upsell | New Business, Upsell | New Business, Upsell, Renewal | New Business, Upsell, Renewal | | |
| UiPath Roles | Sales Marketing / Demand Generation BDR Partner Team | Sales Sales Engineer Partner & Partner Team Professional Services Global Value Engineering RFx Team | Sales Sales Engineer Partner & Partner Team Professional Services Commercial Desk Global Value Engineering Executives Industry GTM | Sales Sales Engineer Partner & Partner Team Professional Services Commercial Desk Executives Industry GTM | Sales Sales Engineer Partner & Partner Team Professional Services Commercial Desk/ Deal Hub Global Value Engineering Executives Geo Finance Finance Operations Legal Customer Success | Sales Sales Engineer Partner & Partner Team Professional Services Commercial Desk / Deal Hub Executives Geo Finance Finance Operations Legal Customer Success | Sales Deal Hub - OM | Sales Sales Engineer Deal Hub - LM Finance Operations Customer Success | |
| MEDDPICC | | <ul style="list-style-type: none"> • Customer pain identified • Champions & coaches confirmed • Competition understood | <ul style="list-style-type: none"> • Customer success metrics defined • Decision process understood and validated • Economic buyer confirmed with budget | <ul style="list-style-type: none"> • Customer success metrics defined • Decision criteria validated for a UiPath win | <ul style="list-style-type: none"> • Procurement (paper) process, signatories, & timeline confirmed with customer including if PO Mandatory | <ul style="list-style-type: none"> • Understand the 3 Why's • Why do anything? • Why UiPath? • Why now? | | | |
| Activities/ Qualification | <ul style="list-style-type: none"> • Action and qualify all inbound leads • Territory research • Prospecting & outreach • Outbound call campaigns • Partner campaigns • Social media outreach • Sales qualifies and dispositions lead status | <ul style="list-style-type: none"> • Create Salesforce opportunity • Conduct discovery call (with or without Sales Engineer/PS) • Identify high level & value drivers (run self-service value calculator) • Identify timeline & budget • "Before scenarios" identified • Develop strategy • Engage partner • Execute NDA if needed • "Know Your Customer" Understand existing MSSA contract, subscriptions, ARR, etc.. | <ul style="list-style-type: none"> • Define positive business outcomes • Define required capabilities • Define what processes to automate • Perform initial demo(s) • Introduce executive sponsor • Model ROI and financials via an assisted Outside-in • Present business case • Begin solution validation w/SE • Begin MSSA/MPA negotiations • Deal size estimated (Billings / iARR amount) | <ul style="list-style-type: none"> • Understand technical requirements • Prove required capabilities (e.g.: POV) • Validate products, solutions, configuration • Confirm technical win • Create rollout plan | <ul style="list-style-type: none"> • Economic buyer & UiPath executive sponsor aligned • Determine licensing and pricing • Final config quote built • Present compelling proposal w/ROI (with Global Value Engineering) • Pricing presentation • SOW presentation (if applicable) • Present mantra with metrics • Primary quote accepted • Partner Involvement is correct (where applicable) • Close plan defined with customer to support close date | <ul style="list-style-type: none"> • Renewal opportunity starting stage • Pricing and legal negotiations completed • SOW signed (if PS included) • Receive required order documents (order process & 8-point checklist) • Create implementation plan • Confirm rollout plan • Initial internal customer handover meeting (AE/SE/CSD/CSM) • Close plan defined and validated with customer to support the close date | <ul style="list-style-type: none"> • Order documents verified | <ul style="list-style-type: none"> • Finance checks order documentation • Invoice sent • License keys issued • Final internal handover data collected, and meeting conducted (AE/SE/CSD/CSM) • Customer portal access is available | |
| Customer Verifiable Outcomes | <ul style="list-style-type: none"> • Agrees to BDR qualification call • Agrees to discovery call/meeting with sales rep | <ul style="list-style-type: none"> • Agrees to next steps • Agrees to business imperatives • Commits to invest time | <ul style="list-style-type: none"> • Agrees to PBO's & required capabilities • Understands "How We Do It" • Defines positive business outcomes | <ul style="list-style-type: none"> • Participates in solution validation (e.g.: POV) • Provides proof points • Signs off on Ramp plan • Understands "How We Do It Better" | <ul style="list-style-type: none"> • Provides verbal or written confirmation that UiPath is selected | <ul style="list-style-type: none"> • Agrees to close plan • Issues PO (or signs quote) • Negotiates and signs MSSA (if required) | | | |
| Tools & Collateral | <ul style="list-style-type: none"> • Lead To Opportunity Highspot • Salesforce.com • LinkedIn • Zoom Info • Outreach | <ul style="list-style-type: none"> • How to Create an Opportunity • Commercial Policy • Partner Ops HighSpot • Sales Playbooks • Pipeline Health Playbook • MEDDPIC Deal Qualification • Industries & Departments • Professional Services Go-To-Market Offering Portfolio • Opportunity Qualifier • RFx Library • Online Value Calculator • Insider Program (for existing customers) • Value Negotiation Field Guide • Account Plan (SFDC/Quip) • Action Tracker (SFDC/Quip) • Vision Book (Link) | <ul style="list-style-type: none"> • Commercial Policy • Rollout Plan • Virtual Innovation Lab • Solution Validation Framework and Technical Win • Value Engineering Assisted Outside-in Assessment • Sales Engineering Request (Vivun) • Account Plan (SFDC/Quip) • Action Tracker (SFDC/Quip) • Demand Book | <ul style="list-style-type: none"> • How to Create a Quote • Commercial Policy • Ordering Info • Customer References Highspot • Executive Sponsor Highspot • Account Plan (SFDC/Quip) • Action Tracker (SFDC/Quip) • Close Plan Template • Value Engineering Collaborative Value Assessment • Success Plan • Account Plan (SFDC/Quip) • Action Tracker (SFDC/Quip) | <ul style="list-style-type: none"> • Commercial Policy • Ordering Info • Sales to CS Onboarding Handoff Deck • Executive Sponsor Highspot • Account Plan (SFDC/Quip) • Action Tracker (SFDC/Quip) | | <ul style="list-style-type: none"> • Sales to CS Onboarding Handoff Deck • Customer Portal Access Instructions | | |

