

Discovery & Situation Slides

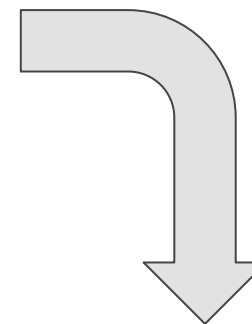
O **que** nós vendemos na OutSystems?



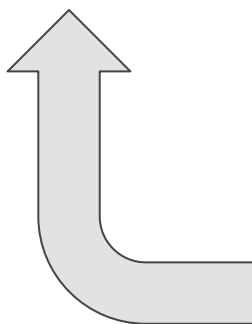
**Valor para o
Negócio**



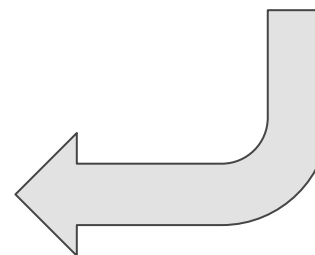
TEMPO



Agilidade



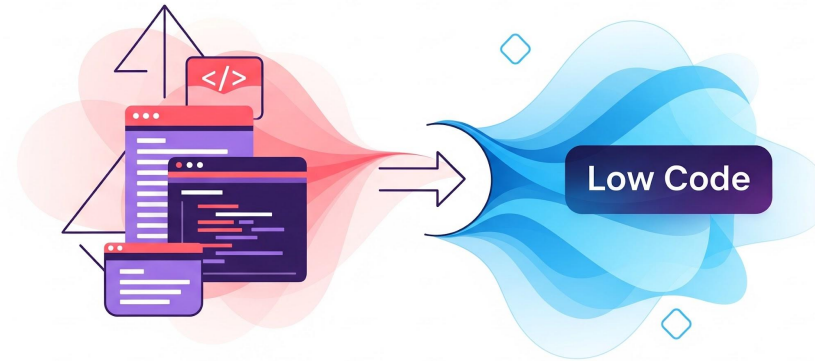
Time to Market



Qual é o **custo** do tempo que vendemos?



Financeiro



Mudança de
Paradigma

Roteiro para uma oportunidade **vencedora**

10% Developing Champion

Encontrar pessoa visionária **aberta à mudança de paradigma**

25% Discovering Challenges

Encontrar desafios de negócio onde a **Agilidade e Time to Market** trazem **valor tangível para o negócio**

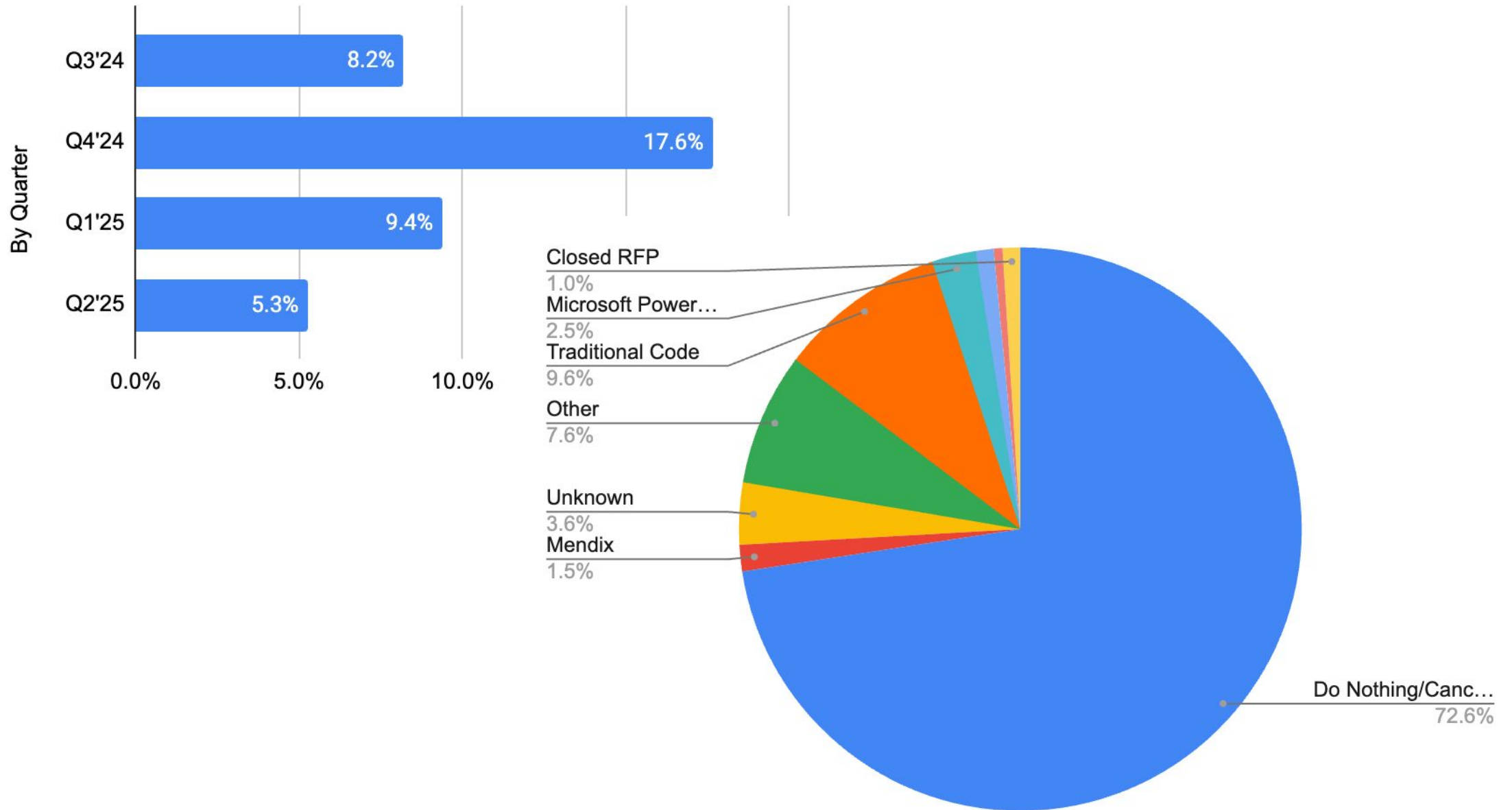
50% Proving Capabilities

Validar o **fit de escopo e requisitos** e convencer equipe do prospect a **adotar novo paradigma**

75% Proving Capabilities

Business case fechado e projeto validado trarão **alavanca para negociação**

Win Rate inconsistente, "Do Nothing" maior competidor



AI Analysis: Contributing to "Closed Lost"

- **Primary Reason for Loss:** The most common reasons for a deal to be lost were **Business Decision** and **Pricing**, suggesting that many opportunities are not lost to a direct competitor but due to internal factors or budget constraints. **Or failing in proving a business case – OS is not expensive for the right app**
- **Competitor Outcome:** The most frequent outcome was the customer deciding to **Do Nothing/Cancel Initiative**, indicating that a large number of deals were lost because the customer chose not to move forward with any solution. **Or keeping the status quo! (Traditional dev, existing COTS / LCAP, etc.)**
- **Pain Points:** The most significant pain point for "Closed Lost" opportunities was dealing with **legacy systems**.
- **Decision Criteria:** Key decision criteria focused on **integration** and **cost**.
- **Process Hurdles:** The **Decision Process** often involved **POCs** and various **approvals**, suggesting that these stages were a significant challenge to overcome.

AI Analysis: Contributing to "Closed Won"

- **Key Differentiator:** The primary factor for winning a deal was the platform's ability to offer a **fast time to market** and **development speed**. **Remember what we are selling: Time!**
- **Winning Metrics:** The most important metrics were **cost** and **revenue**, indicating that the platform's value proposition needs to clearly demonstrate financial benefits. **Clear value is key**
- **Winning Capabilities:** The most sought-after capability was **integration**, which was also a key decision criteria for "Closed Lost" opportunities, suggesting that a strong and demonstrable integration capability is a crucial factor in winning deals.
- **Initiatives:** The data highlights a trend towards building **portal** applications.
- **CBI:** The data for "Closed Won" opportunities also mentioned **legacy systems**, similar to the "Closed Lost" group, which indicates that while it's a pain point, the ability to effectively address it is a major factor in winning the deal.

Situation Slide

What it is

A **summary slide** at the beginning of a presentation or demo to **set the context** and **align with the customer's needs and expectations**.

Purposes:

- Demonstrate **understanding**
- Confirm **alignment**
- Establish **relevance**



Guidelines

Job Title/Industry	Person / Persona
Critical Business Issue	<p>This person's top-level challenge – often best expressed as a quarterly, annual or project-based goal or objective that is at risk.</p> <p>How are you measured? How will you know, at the end of the year, that you have been a success? If you are on track to achieve your objectives, or you have no need or desire to change your trajectory, then you don't have a Critical Business Issue.</p>
Problems	<p>The prospect's Problems or Reasons that cause the higher-level outcomes.</p> <p>What makes it a problem today – what is making it hard to achieve the goal or objective – how are they doing things today, what is the impact?</p>
Specific Capabilities	<p>What specific capabilities does the customer need to solve their problems, from the customer's perspective?</p> <p>These will be mapped to OutSystems features and part of the Proof Plan Include the Use Case / 1st app</p>
Delta/Value/Impact	The tangible value associated with making the change (customer's numbers).
Critical Date / V.R.E	<p>A date by when the customer needs to have a solution in place (and why)</p> <p>Typically an application Go Live date</p>

There is no deal without a **CBI**,
Value and **Critical Date**


The Proof Plan App


Designed to bridge the gap between the information needed on the 25% and 50% stages that are not capture on SFDC or any other system, aiming to:


- **Standardize** the presales process
- Provide clear guidance on the **information required at each stage** of an opportunity
- Help **identify blind spots** in ongoing opportunities.
- **Centralize** presales information in a single, standardized format
- Increase **visibility** and **transparency** into the presales status of opportunities


<https://federated.outsystems.net/notes>

Open

ERP Integration 

Grupo Pão de Açúcar 

SA: Rafael ielo 

Stage: Negotiating Proposal (75%) 

Opp Close Date: Aug 26 2025

Closed

14 Feb 25

First Meeting Contact

Closed

13 May 25

Partner PoC Alignment

Closed

5 Jun 25

One day PoC in loco

Closed


23 Jun 25

Customer's Decision

Open

19 Aug 25

Final Annoucement




Overview

25% Discovering Challenges

50% Proving Capabilities

TAR Readiness

Summary 

Modernize legacy systems (mainframe/Adabas) and improve user governance and integration workflows, especially around SAP, without impacting the user experience. The company is exploring platforms to support ERP development and integration within a secure, maintainable environment.

✓

Aug 11, 2025 11 5 AM by Rafael ielo


Waiting for Final Annoucement to reveal the winner

✓

Jun 26, 2025 3 59 PM by Rafael ielo

Partner sent prices to customer.

Enter status or next steps



Discovery

Dores e Métricas (Qual é o Problema de Negócio?)

CBI / Problems / Initiatives, Metrics / Pain

1. **Sobre o problema:** "Quais desafios específicos você está enfrentando com seus sistemas atuais? Quais são os maiores pontos de dor para sua equipe e clientes?"
2. **Métricas de sucesso:** "Quais são as principais métricas que você usará para medir o sucesso deste projeto? Como uma nova solução impactará a produtividade da sua equipe, a receita e o custo geral?"
3. **Urgência:** "Existe um prazo específico ou um evento significativo impulsionando a necessidade de uma solução? Se você pudesse resolver apenas 1 de seus problemas nos próximos 3 meses, qual seria?"

Avaliando o Cenário Competitivo

Competitors / Alternatives

1. **Alternativas:** "Que outras soluções ou alternativas você está considerando, e quais são os principais pontos fortes e fracos de cada uma na sua perspectiva?"
2. **Desenvolvimento interno:** "Qual é a capacidade de desenvolvimento interno (# devs, usam parceiros, etc.)? Você está considerando construir uma solução internamente com código tradicional? Quais são os prós e contras percebidos dessa abordagem?"
3. **Pontos fortes do concorrente:** "Você já possui outra ferramenta de Low Code? Quais são as principais capacidades que você está procurando que podem não ser atendidas por outras plataformas?"

Entendendo o Processo de Tomada de Decisão

Decision Process / Decision Criteria / Economic Buyer

1. **Orçamento e Aprovação:** "Qual é o seu orçamento para este projeto e quem detém a autoridade orçamentária? Qual é o processo de aprovação para este tipo de investimento?"
2. **Tomadores de Decisão:** "Quem são os principais stakeholders e tomadores de decisão neste projeto, e qual é o critério principal deles para uma solução bem-sucedida?"
3. **Cronograma de Avaliação:** "Qual é o cronograma para tomar uma decisão final? Haverá um RFP ou outro processo de avaliação formal?"

Thank You