

Autodesk Sales Plays

COMPANY
Autodesk

TIMELINE
6 months

ROLE
Learning Experience Designer

SERVICES
INFORMATION ARCHITECTURE UI & UX DESIGN

AUTODESK | ACS Sales Play Library

Sort by Product All Sales Plays Autodesk Unified Platform Assemble BuildingConnected ProEst Pipe

Autodesk Unified Platform

- B** PRODUCT Autodesk Build Positioning Value of Efficiency and Common Data Environment Go to Play Open New Tab
- D** PRODUCT Autodesk Docs Organize, distribute, and share files on a single, connected document management platform Go to Play Open New Tab
- T** PRODUCT Autodesk Takeoff Winning More Business with Quality, Accuracy, and Collaboration Go to Play Open New Tab
- C** PRODUCT BIM Collaborate Document Control and Field Reports Go to Play Open New Tab

B D C WORKFLOW Bridge Expansion and Collaboration Across Hubs with Autodesk Build, Docs, and BIM Collaborate Go to Play Open New Tab

D WORKFLOW ISO 19650 Autodesk Docs now includes workflows to support compliance with ISO 19650 - a global design and construction standard Go to Play Open New Tab

BuildingConnected

← All Sales Plays > BuildingConnected

Competition

TOP COMPETITORS View all battlecards

- SmartBidNet**
 - Web-based bid management software designed for general contractors to manage subcontractor data, prequalify subs, share project docs and send invitations to bid
 - Acquired by Construct Connect in May 2018
- iSqFt**
 - Has been in the industry for a very long time
 - Typically cheaper than BuildingConnected
 - Has an old database of subs and 'Plan Room' for projects so GCs can find work easily
 - Has a qualification tool but not as sophisticated as TradeTapp's qualification tool
- Pantera**
 - Cloud-based bid management solution that caters to general GCs, subs, retailers, suppliers
 - Licenses are cheaper than BuildingConnected

← All Sales Plays > Bridge

Bridge

CALL PLAN Bridge Sales Play Intro

Value Drivers

AFTER SCENARIOS Key Sales Requirements

- Centralized data - Data centralized in a single source of truth

POSITIVE OUTCOMES Reduce duplication / rework

← All Sales Plays > Bridge

Bridge

CALL PLAN Bridge Sales Play Intro

Pain Points to Listen for

BEFORE SCENARIOS Key Sales Requirements

- Siloed data - data siloed and scattered across multiple tools and projects

NEGATIVE CONSEQUENCES Rework & disconnected data - duplicate information and lack of a single source of truth

Autodesk B

← All Sales Plays >

CALL PLAN The Ideal Customer

Key Sales Requirements

UNCOVER BUYER SITUATION

← All Sales Plays >

Autodesk B

CALL PLAN The Ideal Customer

Key Sales Requirements

UNCOVER BUYER SITUATION

ABOUT THIS PROJECT

The Autodesk Construction Solutions (ACS) sales play library is a one-stop-shop interactive guide for ACS sales teams to find everything they need to engage with prospects and successfully close a deal.

TARGET USERS

Sales representatives, especially those who are new to their role, use the ACS sales play library to prepare for discovery calls with prospects. Examples of information they can find in the sales play library during their preparation include:

- The right type of customer to target for every ACS product
- The typical pain points that can be solved by ACS products
- What makes ACS products valuable and better than competitors

PRIMARY TARGET USER

	<p>Jessica Business Development Representative (BDR)</p>	<p>GOALS</p> <ul style="list-style-type: none">• Getting their foot in the door• Create new business opportunities by prospecting new clients and engaging with existing customers• Identify customer pain points and need for the proposed product• Identify any potential or existing competitors for opportunity• Transition qualified opportunities to their AE• Gain thorough understanding of all ACC products and the construction industry <p>CHALLENGES</p> <ul style="list-style-type: none">• Prompting the client/prospect to uncover more pain points• Needing to pivot between different products and sales strategies while engaging with the customer• Difficult to find a good cadence for properly preparing for sales calls• Continuously improving industry knowledge while performing daily tasks• Determining which sales resource is the most updated version• Keeping up with constantly changing internal processes and tools used• Doing her research on the customer and product within siloed pages and third-party applications <p>BEHAVIORS</p> <ul style="list-style-type: none">• Has a product or sales initiative in the back of her mind• Would often jump to the product-specific sales discovery questions section of the app• Opens and jumps between multiple apps and intranet pages to look for discovery questions• Has a notes page open with a template list showing what information she needs to extract from the call	<p>Business Development Representatives (BDRs)</p> <p>BDRs open up the opportunity by engaging with the potential customer / prospect and identifying the need for the product. They are expected to try to get in deep and find out how much money the prospect may be losing using their current system.</p>
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SECONDARY TARGET USER



Andrew
Account Executive (AE)

GOALS

- Lead a more in-depth conversation with new clients or existing customers, and get a deeper understanding on their business and pain points
- Be able to quantify what "good" looks like for clients and demonstrate how our products would yield those outcomes
- Supplant competitors using various sales strategies and initiatives
- Work together with BD to approach sales opportunities
- Gain thorough understanding of all ACC products and the construction industry

CHALLENGES

- Uncovering and getting a deeper understanding on the consequences of the clients' pain points
- Quantifying the consequences experienced by clients on a business-level
- Steering the conversation away from giving the product demo that most customers would expect
- Fighting the anxious reaction to move on once he uncovers one pain point to fill out in the CRM
- Getting out of the comfort zone of sealing smaller deals to targeting and closing bigger deals

BEHAVIORS

- Aren't as eager to utilize internal sales tools and resources as BDRs
- Familiar with the typical personas in construction and the industry
- Has a notes page open with a template list showing what information he needs to extract from the call

Account Executives (AEs)

AEs are expected to gather a lot more information by doing an in-depth discovery call on the prospect's pain points. During these discovery calls, they will also establish the desired positive business outcomes together with the prospect and align them with the relevant ACS product capabilities.

STAKEHOLDERS

Sales enablement managers, use the ACS sales play library as a way to reinforce sales best practices and their ideal sales methodology to sales reps.



Samuel
Sales Enablement Manager

GOALS

- Reinforce the company's sales methodology and best practices within sales teams
- Develop a repeatable sales methodology and quantify the impact of using that methodology
- Help BDRs and AEs increase their sales wins through various trainings, webinars, and 1:1 coaching sessions
- Consistently update and create training materials depending on sales team performances
- Identify gaps where BDRs and AEs may struggle and provide coaching to help them improve

CHALLENGES

- Enforcing sales best practices among sales teams while avoiding micromanaging
- Demonstrating how sales best practices can be applied to different sales reps' workflows and situations
- Bridging the gap between product marketing messaging, which is designed to attract, and in-depth discovery in sales, which aims to offer a more tailored, holistic solution
- Shifting the mindset from "what am I selling for?" to "what am I solving for?"

BEHAVIORS

- He is constantly creating new sales initiatives and strategies to stay in line with the current industry trends
- Uses internal sales tools such as the sales play library to reinforce sales best practices that are in line with his methodology
- He is always looking for new ways to measure the teams' progress
- Occasionally evaluates internal training content to identify areas that require more training

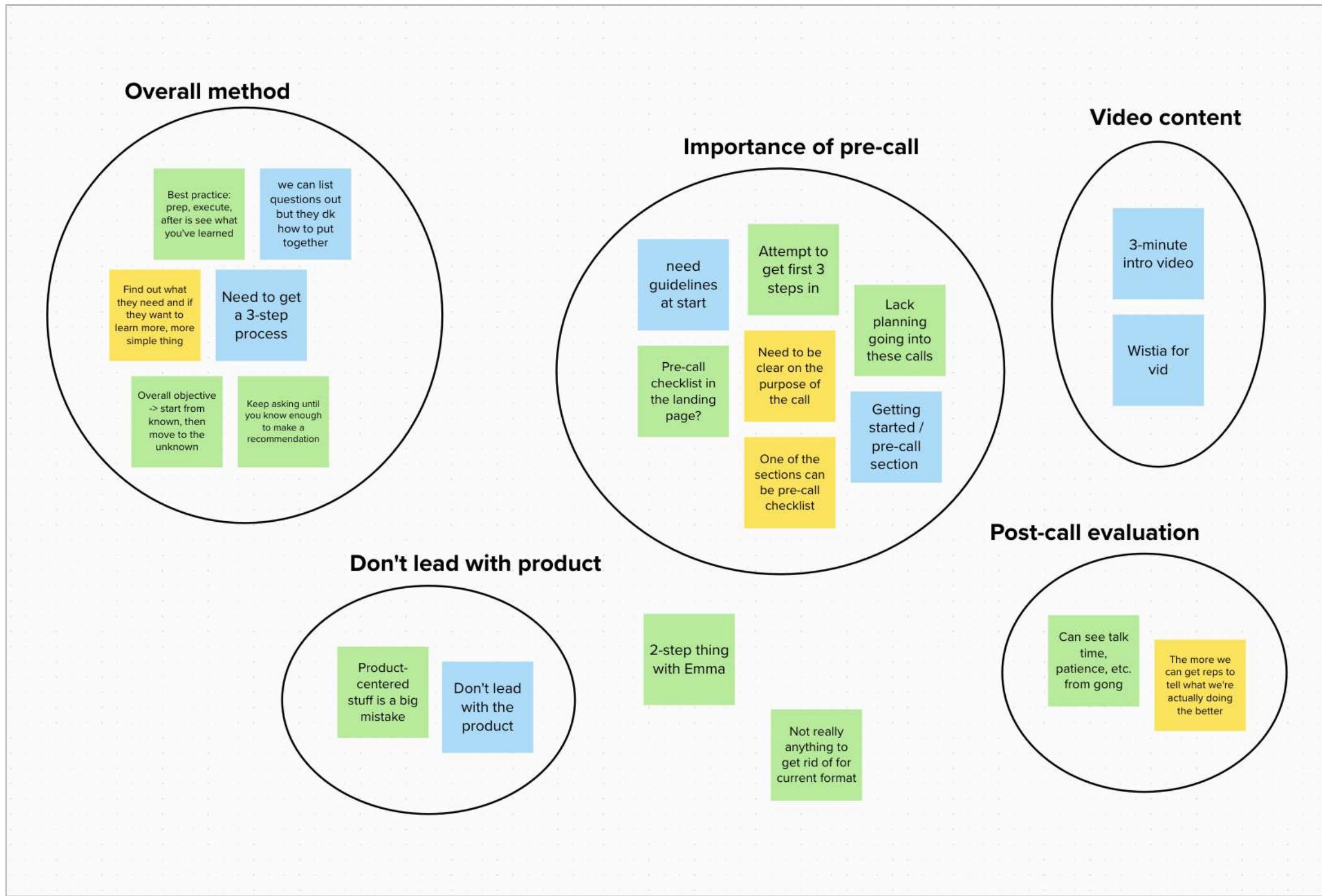
Sales Enablement Managers

Sales enablement managers are responsible for creating guides on sales best practices and reinforcing them through training sessions, 1:1 coaching sessions, internal sales tools, and many other resources.

BREAKDOWN OF PROBLEM

Although we have a lot of useful internal content, sales reps get overwhelmed and become unsure where to start.

As a result, sales reps have trouble engaging in a conversation with the prospect, not sure what their takeaway should be. They either just end up giving a demo and settling for a way smaller deal or they lose out on it because they don't have proper understanding on what kind of customer to target.



To kick off the project, I met with 2 sales enablement managers. Using the current sales play library version as reference, we discussed sales reps' common behaviors and mistakes during sales calls observed by managers.

Using this info as a reference, I took note on potential changes for the sales play library and drew some common themes from the discussion in an affinity map.

Current Product Sales Play

The screenshot shows the Autodesk ACS Sales Play Library v1 interface. At the top, there are Autodesk and SE logos, followed by the text "ACS Sales Play Library v1". On the right side of the header are a help icon (?) and a home icon (house).

Sales play intro seems like an afterthought or lower in importance because it's placed here but it's actually very important to start with right company and personas

Strangely the "resources" section stand out the most from this section even though it's the least important part of all the content.

Autodesk Build

Type of Play
Positioning Value of Efficiency and Common Data Environment

Right Company
Owners, General Contractors, Subcontractors

Right Personas
Project Engineers, Supers, CIO, VP of Ops/Const., Foreman, Project Manager

Resources
[Autodesk Build Product Page \(One Team Source\)](#)
[Autodesk Build Sales Cheat Sheet \(One Team Source\)](#)
[Autodesk Build Product Deep Dive \(One Team Source\)](#)

What to Know What to Say

Value Drivers **Pain Points** **Differentiation**

Value Drivers

After Scenarios

- Reduced costs from safer projects
- Reduced claims
- Consistency of project scope and process to deliver project on budget/time
- Accurate project status information
- Increased quality / Decreased warranty cost

Positive Outcomes

- ✓ Higher, consistent, predictable profitability
- ✓ Reduced exposure to litigation
- ✓ Win more work with new and repeat customers
- ✓ Enhanced market reputation
- ✓ Reduced safety incidents

Even though we did value-selling initiative, having "Value Drivers" as the first thing reps see when they click on a product sales play doesn't guide reps on how to start. No one should lead with this on a sales call.

Design Goals → Ideation

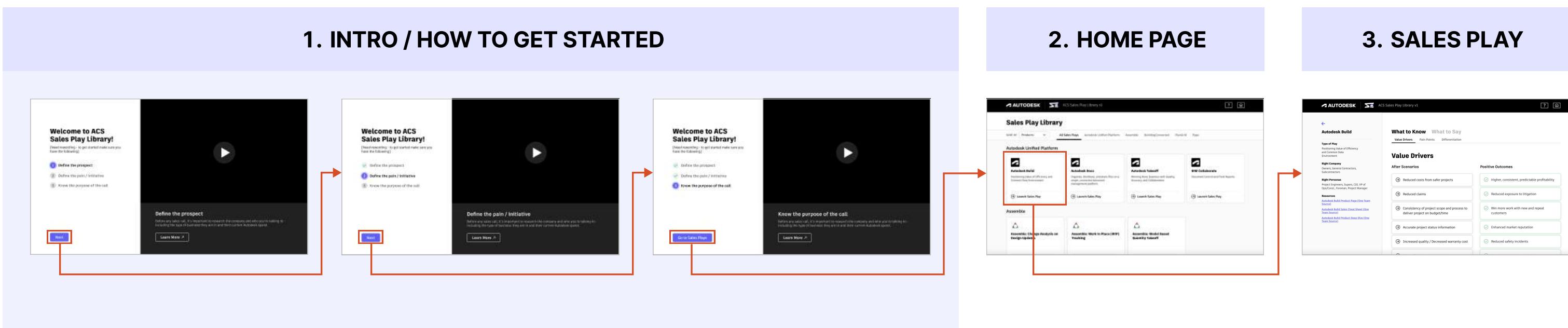
To summarize, this sales play library update should focus on two things:

- 1** Have a clear first step that guides sales reps on starting their call prep using the app.
- 2** Reinforce sales best practices in an intuitive way to help sales reps perform better in sales calls over time.

With these two goals in mind, I created initial concepts including a “how to get started” section as well as a proposal for a new IA that has the proper sales methodology baked into it.

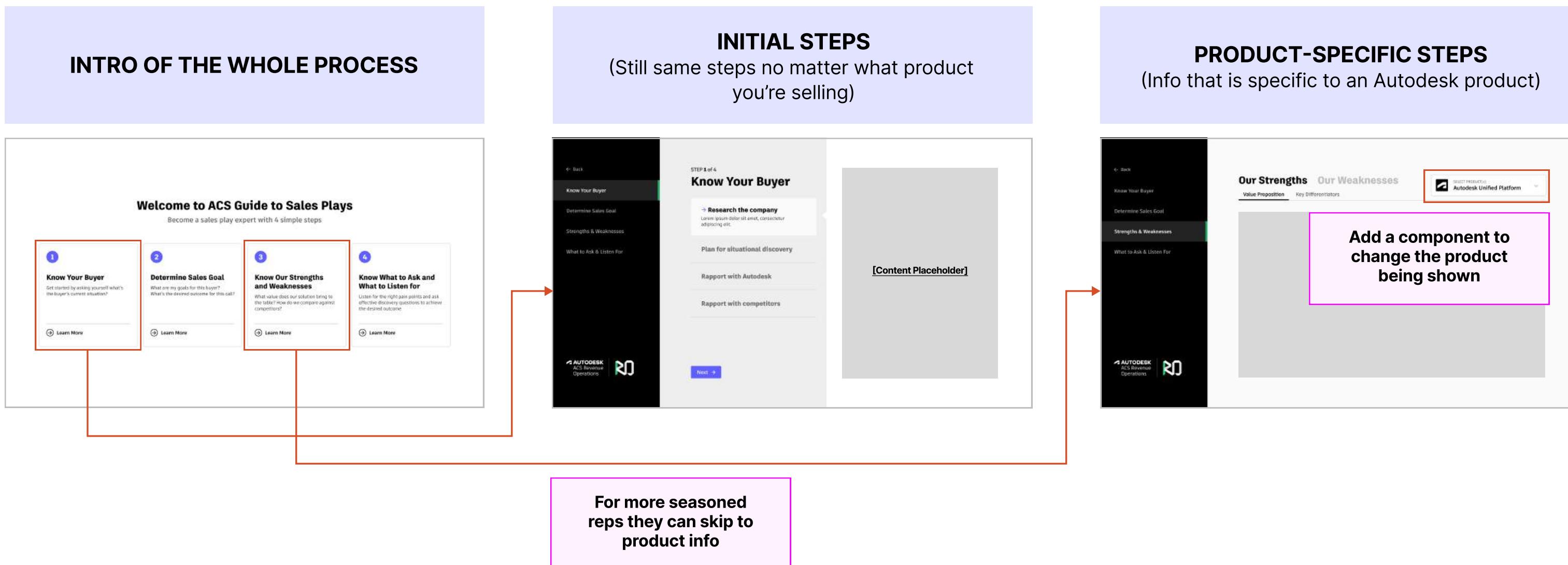
“How to Get Started” Section

We have plenty of sales training content already, so I thought it would be neat to utilize them as an introduction / guide for users to get the most out of the sales play app.



Newer reps could especially benefit from something like this, to ease them into our content. However, after time passes they will definitely stop engaging with this introduction so the app itself needs to be able to keep reinforcing the best practices and prevent bad habits from coming back.

I created an alternate flow for reps to be able to jump to certain steps, for example jumping to product-specific info instead of going through the first two steps again that applies no matter what product sales play they're trying to use. This concept also involved changing the navigation structure of our existing sales play.

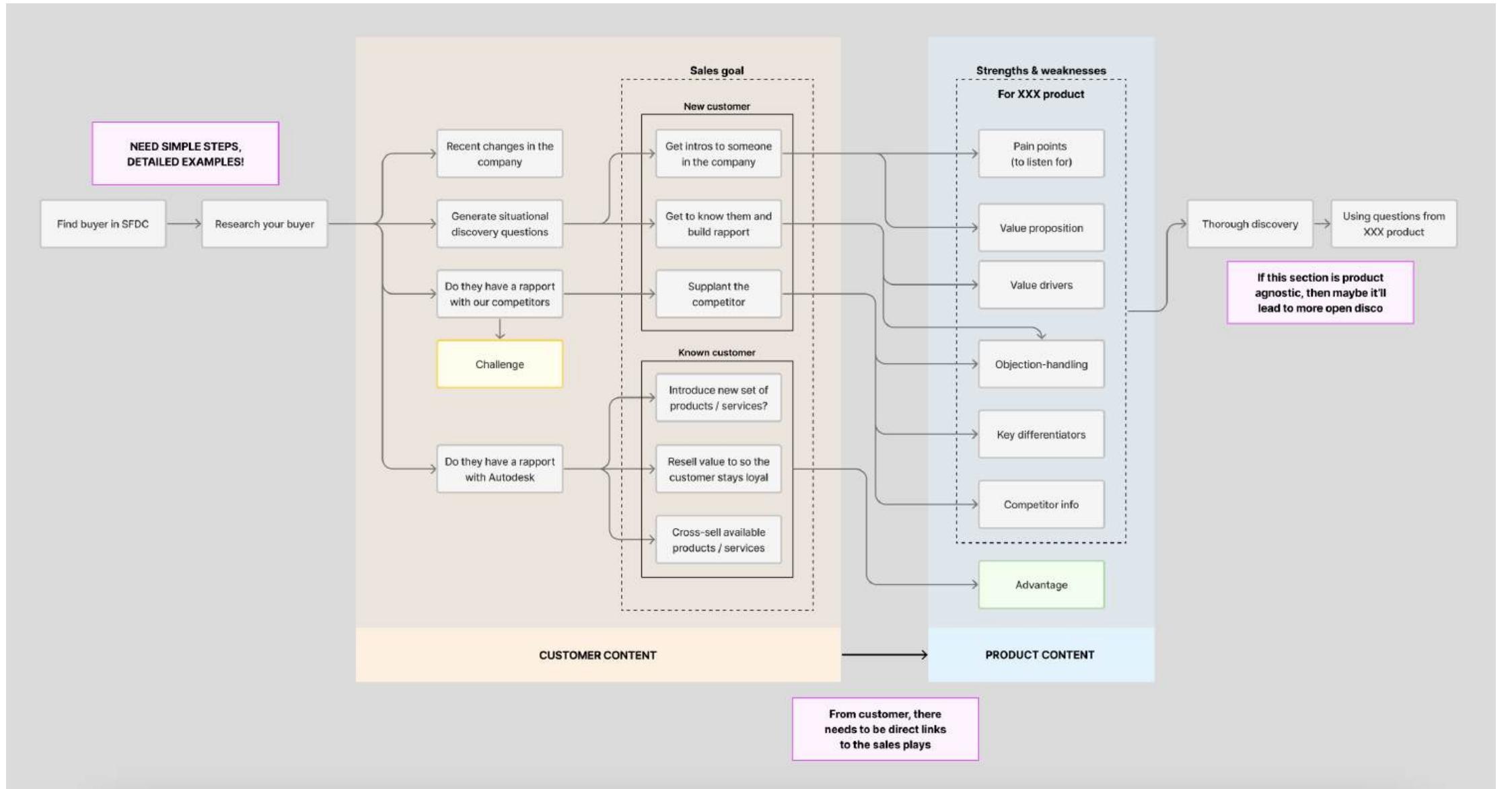


However, after evaluation none of these concepts work. The first flow would just end up being a guide that gets skipped, while the second flow is very unintuitive.

- Even if some steps apply to all products, reps come into the app with a product or sales initiative in mind, so they'll most likely try to look for a product first as the first step.
- Adding a component such as a drop-down to replace the product info being shown goes against the users' mental model of a "sales play", users might not realize which product the content is referring to in the last 2 sections / steps.

Proposed New Info Architecture

After discussion with sales managers, we agreed that our sales best practices need to be baked into the IA, even if some sections would have the same information across multiple product sales plays.



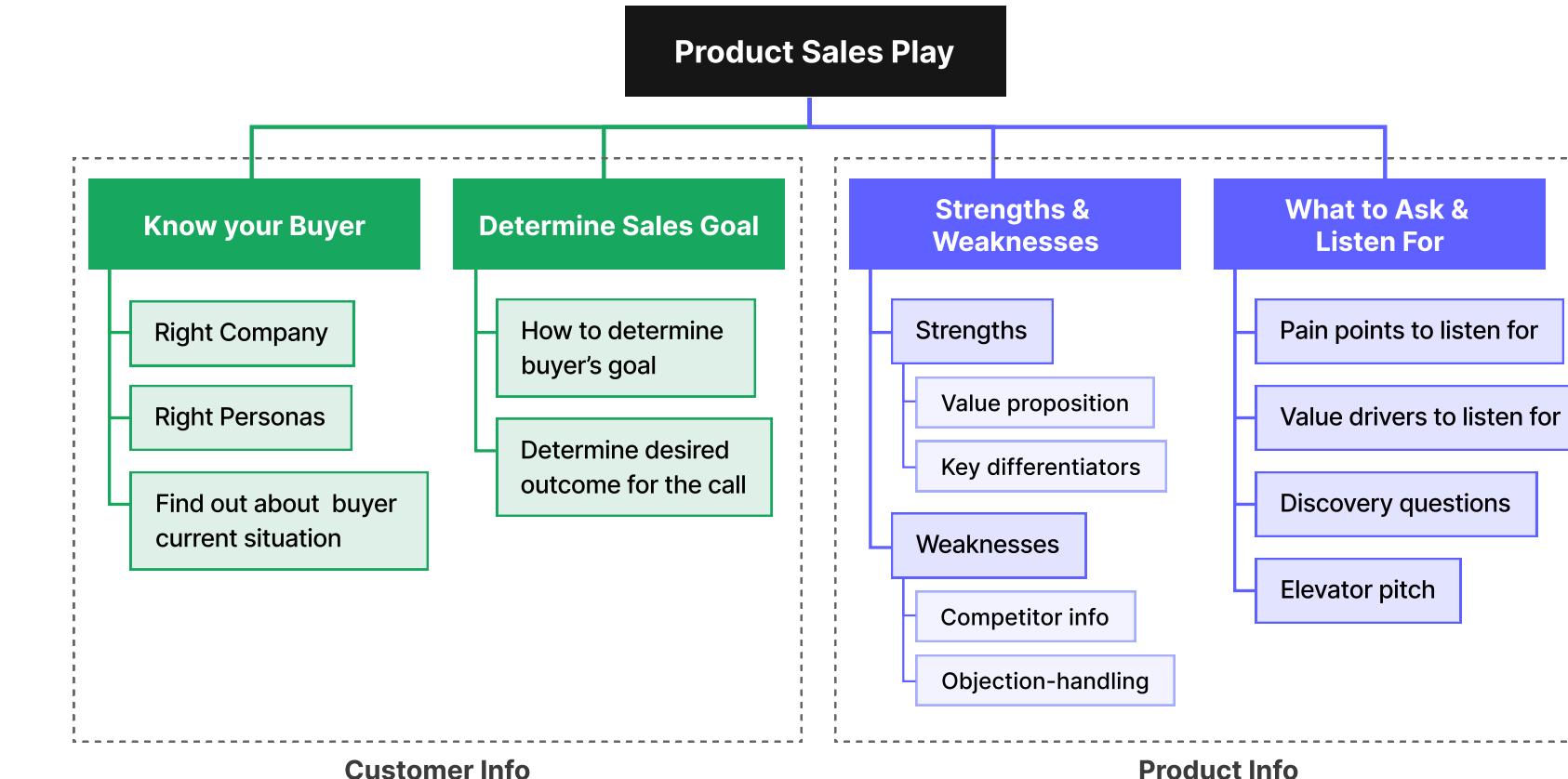
To address this methodically, I started by mapping out how a sales rep would prepare for a discovery call in an ideal world, using the sales play library app. I took into account some courses and PDF guides the sales managers referred me to.

Based on this artifact, I was able to create a new IA that got great feedback from the sales managers. The new IA worked better in guiding users through the process instead of just showing content.

Old IA



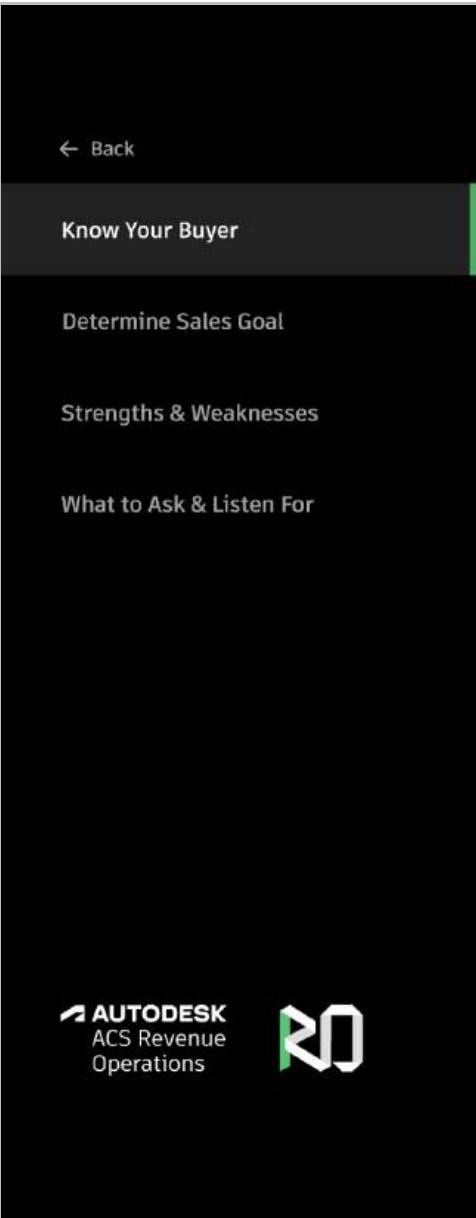
New IA



NOTE: More directional / step-by-step approach instead of dropping content on users.

To further reinforce sales best practices, the sales managers suggested implementing some examples of these best practices being put to use, as our team found in the past that reps are good at learning from examples.

General format



Navigation / steps

Example of winning against a competitor

EXAMPLE

Head-to-Head with Procore results in a Triple Bundle with Avison Young

- Client signed a three-year contract with their purchase of the triple bundle of Preconstruction, Operations & VDC Construction with a total contract value of \$33,199.99

WHAT WE DID WELL

Joe identified a few internal champions within Avison Young who wanted to invest more in technology and prove more value for their owners and investors

POSITIVE OUTCOMES

Internal champions like Director of Preconstruction and Director of Technical Ops began selling on our behalf

[Learn More ↗](#)

EXAMPLE

Head-to-head Win over Aconex and Procore with Diriyah

- Won contract: \$188,576 USD, 1 year contract
- Products Bought: Autodesk Docs, Autodesk BIM Collaborate x 200, Autodesk Build 5000 x 250
- Competitor: Aconex and Procore

THE CHALLENGE

Aconex is the common data environment solution for certain stakeholders since they're known for more sophisticated CDE workflows in the Middle East.

OUR SOLUTION

We shifted the conversation to what Autodesk does better, such as end-to-end integration throughout the entire project lifecycle, etc.

[Learn More ↗](#)

Sub-navigation / sub-steps

Example of sales win

This “sales win examples” format was also well-received because it showed a good hierarchy of information. However as I created more iterations and refinements and tried to incorporate this layout into different pages, I realized this format doesn’t always work depending on the page content.

Layout 1

STEP 2 of 4

Determine Your Sales Goal

Autodesk Build

Know Your Buyer

Determine Sales Goal

Strengths & Vulnerabilities

Well-planned Discovery

AUTODESK ACS Revenue Operations RO

SALES GOAL EXAMPLES FOR AUTODESK CUSTOMERS

- Resell our value so the customer stays loyal
- Introduce a new set of products and services
- Cross-sell available products and services

REAL-LIFE EXAMPLE

Sellen & Lydig Construction Paid Pilot Win

- Contract type: Build Paid Pilot
- Total ACV for pilot: \$15,000 (Sellen) + \$6,000 (Lydig)
- Competitor: Procore, Vista

CONTEXT

Both General Contractors are current Autodesk customers with design as well as with BuildingConnected and Pipe.

WHAT WE DID WELL

We built rapport by using pre-existing CSM check-ins to stay deeply connected on their broader construction needs and challenges.

POSITIVE OUTCOMES

Next →

Content

Layout 2

STEP 3 of 4

Strengths & Vulnerabilities

Autodesk Build

Know Your Buyer

Determine Sales Goal

Strengths & Vulnerabilities

Well-planned Discovery

AUTODESK ACS Revenue Operations RO

Value Proposition **Elevator Pitch** **Differentiation**

After scenarios

- Reduced costs from safer projects
- Reduced claims
- Consistency of project scope and process to deliver project on budget/time
- Accurate project status information
- Increased quality / Decreased warranty cost
- More effective project turnover

Positive Outcomes

- Higher, consistent, predictable profitability
- Reduced exposure to litigation
- Win more work with new and repeat customers
- Enhanced market reputation
- Reduced safety incidents
- Increased on-time completion
- More control over the process

Content

Layout 1

The screenshot shows a user interface for 'Autodesk Build' under 'Autodesk ACS Revenue Operations'. The sidebar on the left lists navigation items: 'All Sales Plays', 'Autodesk Build' (selected), 'Know Your Buyer', 'Determine Sales Goal' (selected), 'Strengths & Vulnerabilities', and 'Well-planned Discovery'. The main content area is titled 'STEP 2 of 4 Determine Your Sales Goal'. It includes a 'SALES GOAL EXAMPLES FOR AUTODESK CUSTOMERS' section with bullet points: 'Resell our value so the customer stays loyal', 'Introduce a new set of products and services', and 'Cross-sell available products and services'. Below this is a 'REAL-LIFE EXAMPLE' section about 'Sellen & Lydig Construction Paid Pilot Win' with details like 'Contract type: Build Paid Pilot', 'Total ACV for pilot: \$15,000 (Sellen) + \$6,000 (Lydig)', and 'Competitor: Procore, Vista'. A 'CONTEXT' box notes that both General Contractors are current Autodesk customers with design as well as with BuildingConnected and Pipe. A 'WHAT WE DID WELL' box states: 'We built rapport by using pre-existing CSM check-ins to stay deeply connected on their broader construction needs and challenges.' A 'POSITIVE OUTCOMES' box states: 'Both customers were transparent about challenges with Procore and Vista, which helped expose new opportunities for ACC expansion.' A 'Next →' button is at the bottom.

PROS:

- + Clearer, easier navigation
- + Single-column of content makes content feel more focused

CONS:

- Minimal space for content
- Need to scroll back and forth to cross-reference content

This screenshot is identical to the one above, showing the same navigation, content structure, and examples for 'Autodesk Build' under 'Autodesk ACS Revenue Operations'. The main content area includes sections for sales goal examples, real-life examples, context, what was done well, and positive outcomes, all presented in a single column layout.

Layout 2

The screenshot shows the 'Strengths & Vulnerabilities' section of the Autodesk Build Sales Play. The left sidebar includes 'All Sales Plays', 'Autodesk Build' logo, 'Know Your Buyer', 'Determine Sales Goal', 'Strengths & Vulnerabilities' (highlighted in green), 'Well-planned Discovery', and 'AUTODESK ACS Revenue Operations' logo. The main content area is titled 'STEP 3 of 4 Strengths & Vulnerabilities' with tabs for 'Value Proposition', 'Elevator Pitch', and 'Differentiation' (underlined). The 'After scenarios' and 'Positive Outcomes' sections are displayed in two columns, each with a red border.

After scenarios	Positive Outcomes
④ Reduced costs from safer projects	✓ Higher, consistent, predictable profitability
④ Reduced claims	✓ Reduced exposure to litigation
④ Consistency of project scope and process to deliver project on budget/time	✓ Win more work with new and repeat customers
④ Accurate project status information	✓ Enhanced market reputation
④ Increased quality / Decreased warranty cost	✓ Reduced safety incidents
④ More effective project turnover	✓ Increased on-time completion
	✓ More control over the process

The screenshot shows the 'Differentiation' section of the Autodesk Build Sales Play. The left sidebar is identical to Layout 2. The main content area is titled 'STEP 3 of 4 Strengths & Vulnerabilities' with tabs for 'Value Proposition', 'Elevator Pitch', and 'Differentiation' (underlined). It displays 'KEY DIFFERENTIATORS' and 'COMPETITORS' sections, both highlighted with red borders.

Project Management Competitors ↗	
Competitor Strengths	How Autodesk Build Compares
- RFIs and Submittals	✓ Equally capable RFI and Submittals
- Strong integration to Procore Financial Management	✓ Integration with Autodesk Cost
	✓ Mobile-friendly app for the field
	✓ Native design-authoring
	✓ BIM capabilities
	✓ Data ownership

Cost Management Competitors ↗	
Competitor Strengths	How Autodesk Build Compares

PROS:

- + More space and flexibility for content
- + Easy to cross-reference related content, e.g. after scenarios & positive outcomes

CONS:

- Minimal space for content
- Need to scroll back and forth to cross-reference content

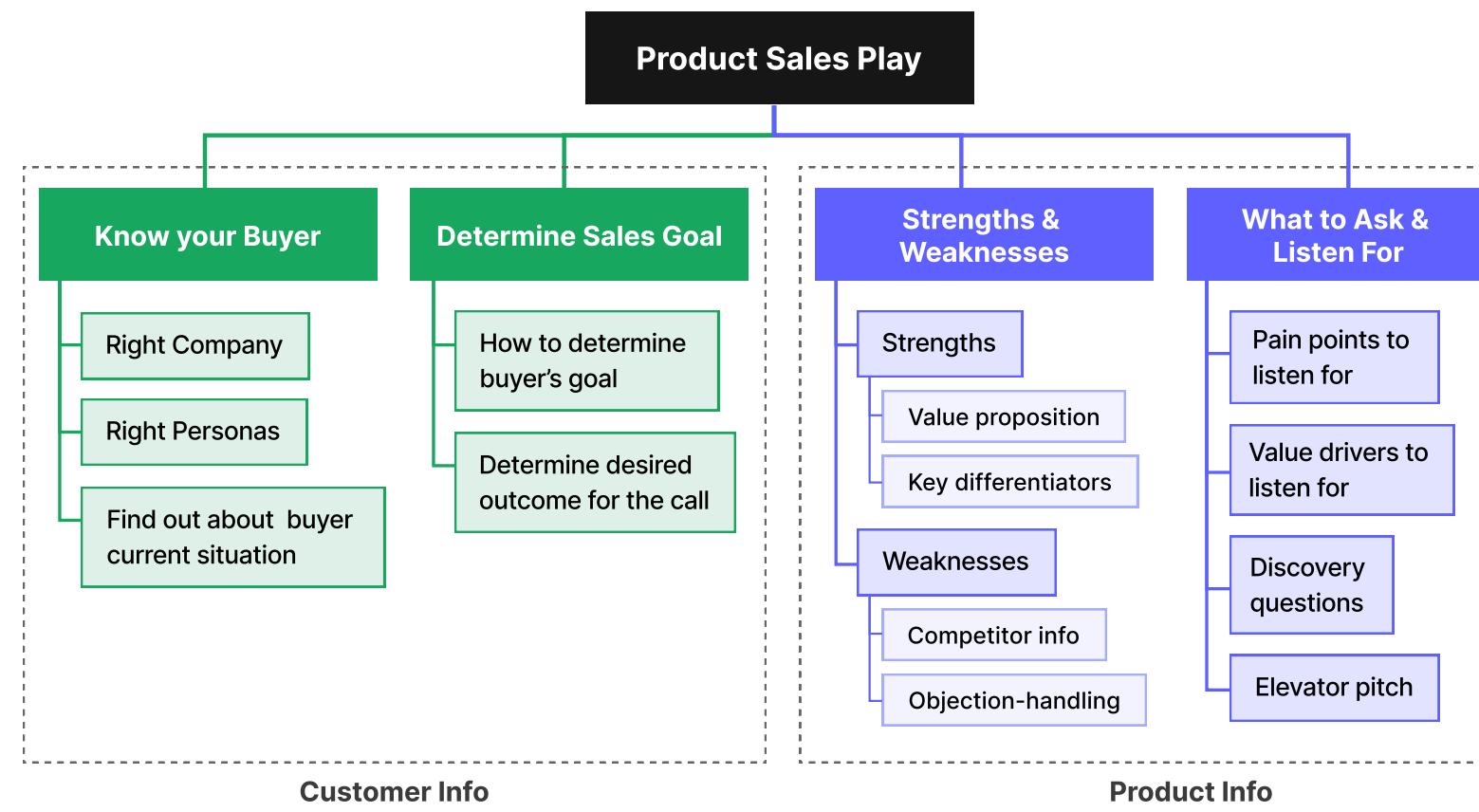
Ultimately layout 2 was better suited for our content and sales reps' preferences. Sales reps often need a quick reference to content, such as discovery questions and differentiation against competitors, so having 2 columns and less scrolling would be beneficial during a call with a prospect in addition to prepping for a call. Moreover, the amount, detail, and sub-categorization content can vary depending on which product sales play is being shown.

Final Iteration Before Testing

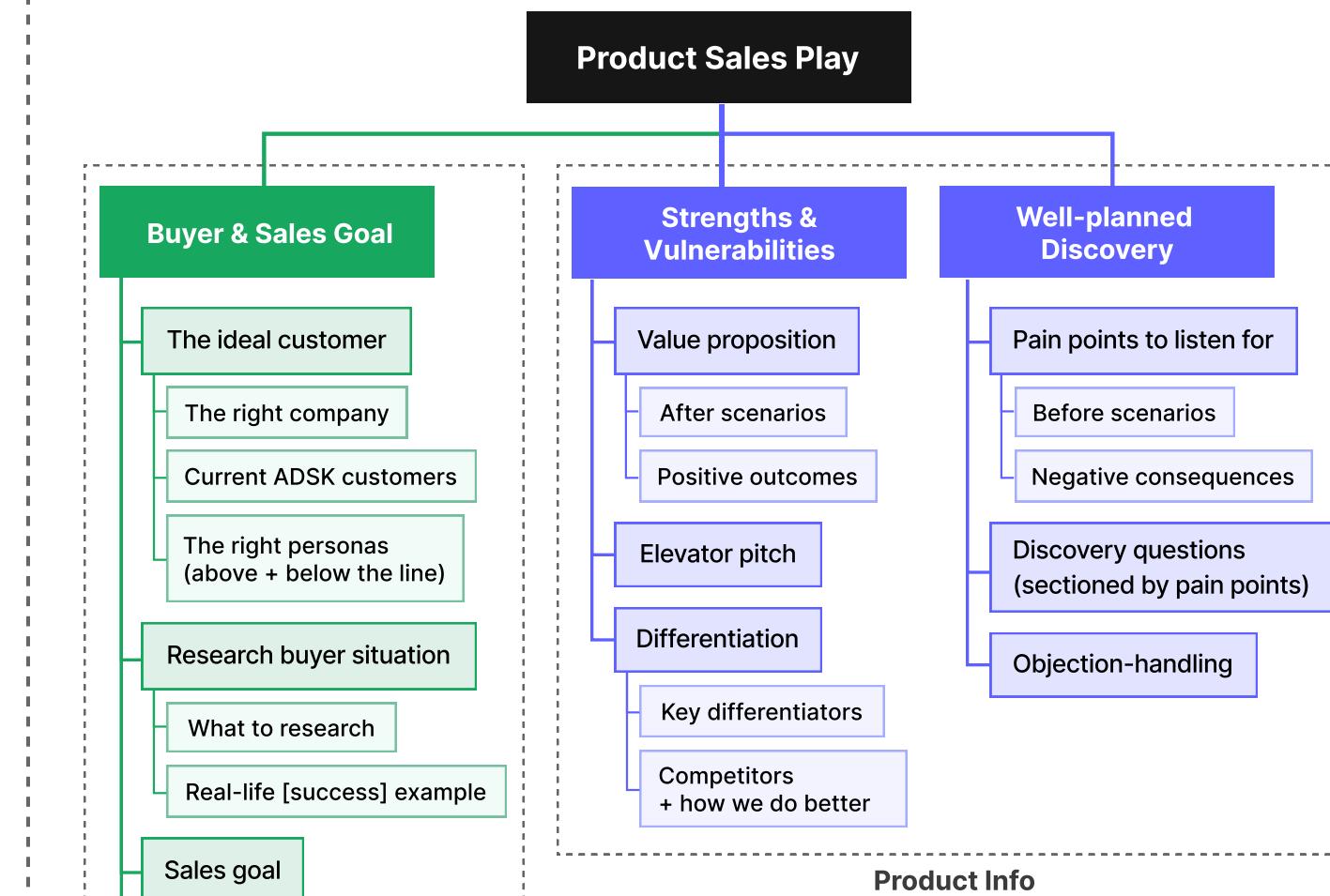
In the process of finalizing the design of each page in the product sales play template and reviewing the mockups together with sales managers, we noticed the redundancy of the first two sections. Determining a sales goal for the call is very dependent on the type of prospect, both of which need to be the first step in prepping for a call, so it makes sense to combine these two sections.

Next, reps should internalize product strengths before doing their discovery call and uncovering the prospects' pain points so these two sections should still be separate. With this in mind, I updated the IA again and applied it to the final prototype.

New IA



New IA 2



NOTE: Desired outcome and buyer's goal always has the same over-arching sales goal.

The screenshot shows a mobile application interface for 'Autodesk Build'. At the top, there's a navigation bar with 'All Sales Plays' and the 'Autodesk Build' logo. Below this is a dark sidebar with sections like 'Buyer & Sales Goal', 'Strengths & Vulnerabilities', and 'Well-planned Discovery'. The main content area has a header 'STEP 1 of 4' and 'Know Your Buyer'. It includes tabs for 'The Ideal Customer', 'Research Buyer Situation' (which is selected), 'Sales Goal', and 'Intro E-mail'. The 'Research Buyer Situation' tab contains several cards:

- WHAT TO RESEARCH**
 - Recent changes at their company
 - Recent changes in their industry
 - Research their competitors
 - Find the right person to talk to
- REAL-LIFE EXAMPLE**

Triple Bundle with Avison Young

 - Won contract: \$33,199.99
 - Products bought: Preconstruction, Operations, VDC Construction Bundle
 - Competitor: Procore
- CONTEXT**

Avison Young watched other local firms in their industry leveraging tech as a competitive advantage in their businesses and knew they needed more support to achieve these outcomes.
- WHAT WE DID WELL**

We were able to identify a few internal champions within Avison Young, who wanted to invest more in technology.
- POSITIVE OUTCOMES**

Our internal champions like their Director of Preconstruction and Director of Technical Operations began selling on our behalf.

FIXED: The fixed section has a lighter background color and shadow to make it seem elevated and higher in the hierarchy, to put emphasis on key points.

SCROLLING: The background color is slightly darker with no shadow around cards. Supplementary information is scrollable, allowing users to cross-reference key points on the left side with details on the right side.

Visual Design

Visually, I focused on highlighting the core content to subtly place it higher in the hierarchy than the supporting details.

STEP 1 of 4

Know Your Buyer

The Ideal Customer Research Buyer Situation Sales Goal Intro E-mail

THE RIGHT COMPANY

Above the Line

- Owners
- General Contractors
- Subcontractors

Below the Line

- PlanGrid Customers
- BIM 360 NG Customers
- BIM 360 Classic Customers
- BIM 360 EMEA Customers

STEP 2 of 4

Strengths & Vulnerabilities

Value Proposition Elevator Pitch **Differentiation**

COMPETITORS

Cost Management Competitors

PROCORE	<ul style="list-style-type: none"> ✓ Single source of truth, administration & place to log in ✓ Connected data, workflows, and teams ✓ 3 in 1 - cost, project, and field capabilities ✓ Centralized document management ✓ Predictive insights, cross-project risk analysis ✓ Best in class mobile experience
AUTODESK Build	<ul style="list-style-type: none"> • Strong RFIs and Submittals • Strong integration to Procore Financial Management

Project Management Competitors

PROCORE	<ul style="list-style-type: none"> ✓ Equally capable RFI and Submittals ✓ Strong integration with Autodesk Cost ✓ Easier-to-use, mobile-friendly app for the field ✓ Native design-authoring and BIM capabilities ✓ Ability to own your data
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1 of 4 - PROCORE Drag —>

STEP 3 of 4

Well-planned Discovery

Pain Points to Listen for **Discovery Questions** Objection-Handling

Disconnected Data

- How do you make sure all teams have access to the information they need?
- What problems have you faced due to outdated project documents?

Disconnected Field Teams

- What negative consequences do you have to face if your team accidentally works from outdated documents?
- How much extra costs can you expect if you need to do rework?

Risk Mitigation

- How do you make sure you're aware of all potential risks at all your projects?
- How can you proactively manage risks that can impact schedule, quality, safety and costs?

Delays

- What challenges do you face with keeping your projects on schedule?
- What do you think are the most critical project management practices to avoid delays?
- What's the financial impact of delays?

Rework

- What do you think are the typical root causes of quality issues?

STEP 2 of 4

Strengths & Vulnerabilities

Value Proposition Elevator Pitch Differentiation

AFTER SCENARIOS

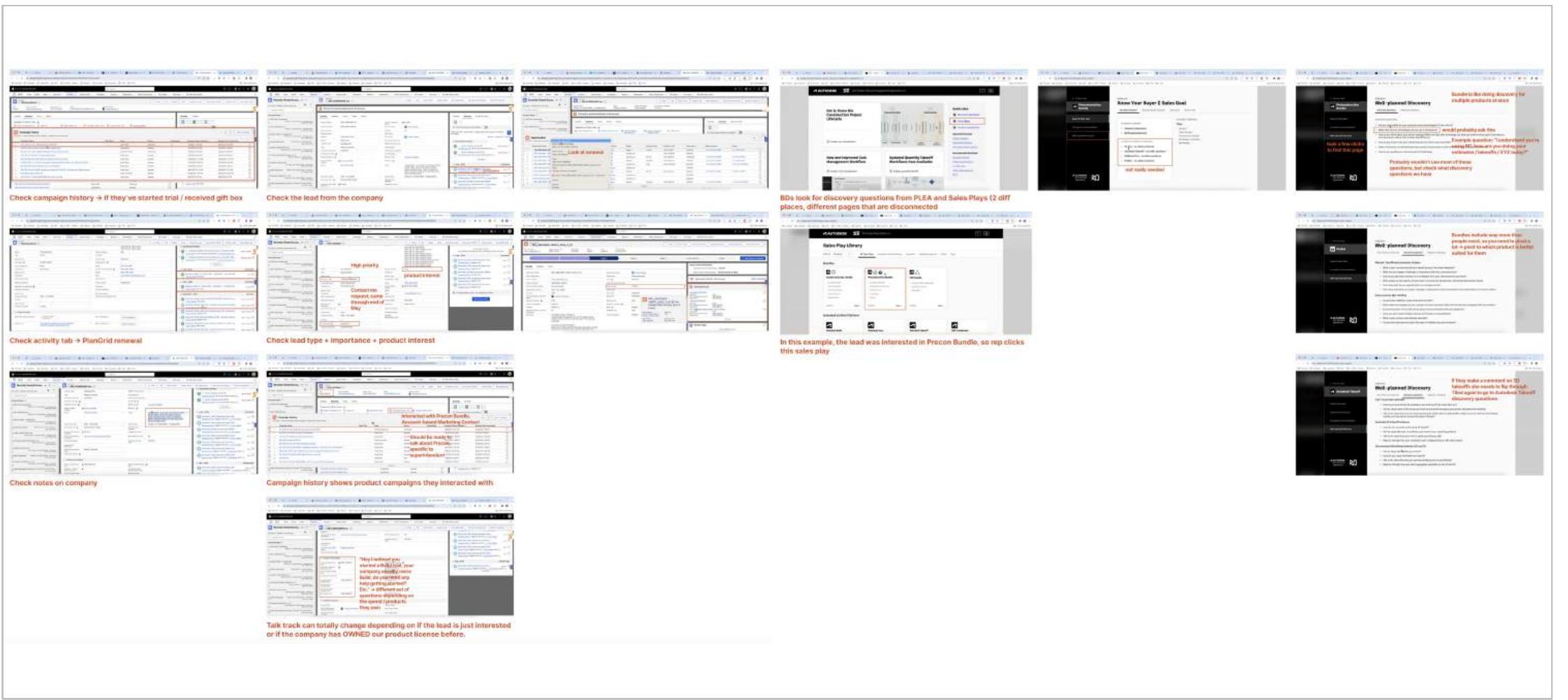
→ Reduced costs from safer projects	POSITIVE OUTCOMES
→ Reduced claims	<ul style="list-style-type: none"> ✓ Higher, consistent, predictable profitability
→ Consistency of project scope and process to deliver project on budget/time	<ul style="list-style-type: none"> ✓ Reduced exposure to litigation
→ Accurate project status information	<ul style="list-style-type: none"> ✓ Win more work with new and repeat customers
→ Increased quality / Decreased warranty cost	<ul style="list-style-type: none"> ✓ Enhanced market reputation
→ More effective project turnover	<ul style="list-style-type: none"> ✓ Reduced safety incidents
	<ul style="list-style-type: none"> ✓ Increased on-time completion
	<ul style="list-style-type: none"> ✓ More control over the process

Template can also accommodate for single-column scrollable content where all the content are on the same level in the hierarchy.

User Validation

We published this version to monitor user engagement and I followed up with end users in the meantime to see if this new version works for their needs. I asked 2 BDRs and 1 AE to walk me through their process of preparing for a call using our digital tools and resources.

From the user engagement data, we were able to see that although overall usage increased, users didn't really spend as much time on the first section. After compiling my user interview notes, I realized our "directional" approach needed to be more aligned with the current prospect engagement process, even if it's much closer to the sales methodology than the very first version.



User Journey

I compiled my interview notes and screen recordings into a rough journey map that represents the typical process of engaging a prospect using our sales play library app along with other available tools.

Looking at the user journey map and interview notes, I was able to make **key observations** that prompted me to take a step back before rushing to make final design changes.

KEY OBSERVATIONS

The screenshot shows a user interface for a 'Preconstruction Bundle' sales play. On the left is a vertical sidebar with a dark background containing the following items:

- All Sales Plays
- Preconstruction Bundle** (highlighted)
- Buyer & Sales Goal
- Strengths & Vulnerabilities
- Well-planned Discovery** (highlighted with a red box)

The main content area has a light gray background. At the top, it says 'STEP 1 of 3' and 'Know Your Buyer & Sales Goal'. Below this are four tabs: 'The Ideal Customer' (underlined), 'Research Buyer Situation', 'Sales Goal', and 'Intro E-mail'.
The 'The Ideal Customer' tab is active, displaying the following content:

- THE RIGHT COMPANY**
 - General Contractors
 - MEP Subcontractors
- CURRENT AUTODESK CUSTOMERS**
 - BC Pro + no other products
 - Autodesk Takeoff + no other products
 - BidBoard Pro + no other products
 - ProEst + no other products
- THE RIGHT PERSONAS**
 - Titles**
 - Estimator
 - Project Manager
 - Preconstruction Manager
 - Bid Manager / Coordinator
 - Risk Manager

Nested navigation drawbacks

It took a few clicks for users to look for desired pages. For example, in this image users tried clicking on several pages to look for “discovery questions” until they found it nested under “well-planned discovery”.

Cards look clickable

Users thought the cards were clickable. In fact, after observing it more they look more clickable than the sub-navigation tabs.

KEY OBSERVATIONS

The screenshot displays two main sections of the Autodesk Construction Cloud interface. At the top, an 'Opportunity' card for 'REN_ABICOMPA-136072_2023_11_01' is shown, detailing account information like 'Account Name: ABI COMPANIES Inc.', reporting total ACV of 'USD 7,419.67', and a 'Billing Date' of '11/5/2023'. The opportunity stage is 'Stage 3' (Renewal). Below the opportunity card is a horizontal progress bar with stages: Stage 3 (highlighted in blue), Stage 4, Stage 5, 'Console Add-On', and 'Closed'. A red box highlights the 'Mark Stage as Complete' button at the end of the bar.

The main content area shows a 'Contact' record for 'Chris Shilkett'. The contact's title is 'Superintendent' and their phone number is '(813) 466-9784'. A red box highlights the 'Lead Type' field, which is set to 'Contact Me Request'. The contact has a 'Product Interest' of 'ACC'. A red box highlights the 'Act Now Date' field, which is set to '5/31/2023'. The contact's email is listed as 'cshilkett@abiinc.com'. On the right side of the contact card, there is a section titled 'product interest' with a list of activities from June 2023, including various outreach and communication events. A red box highlights the 'product interest' section.

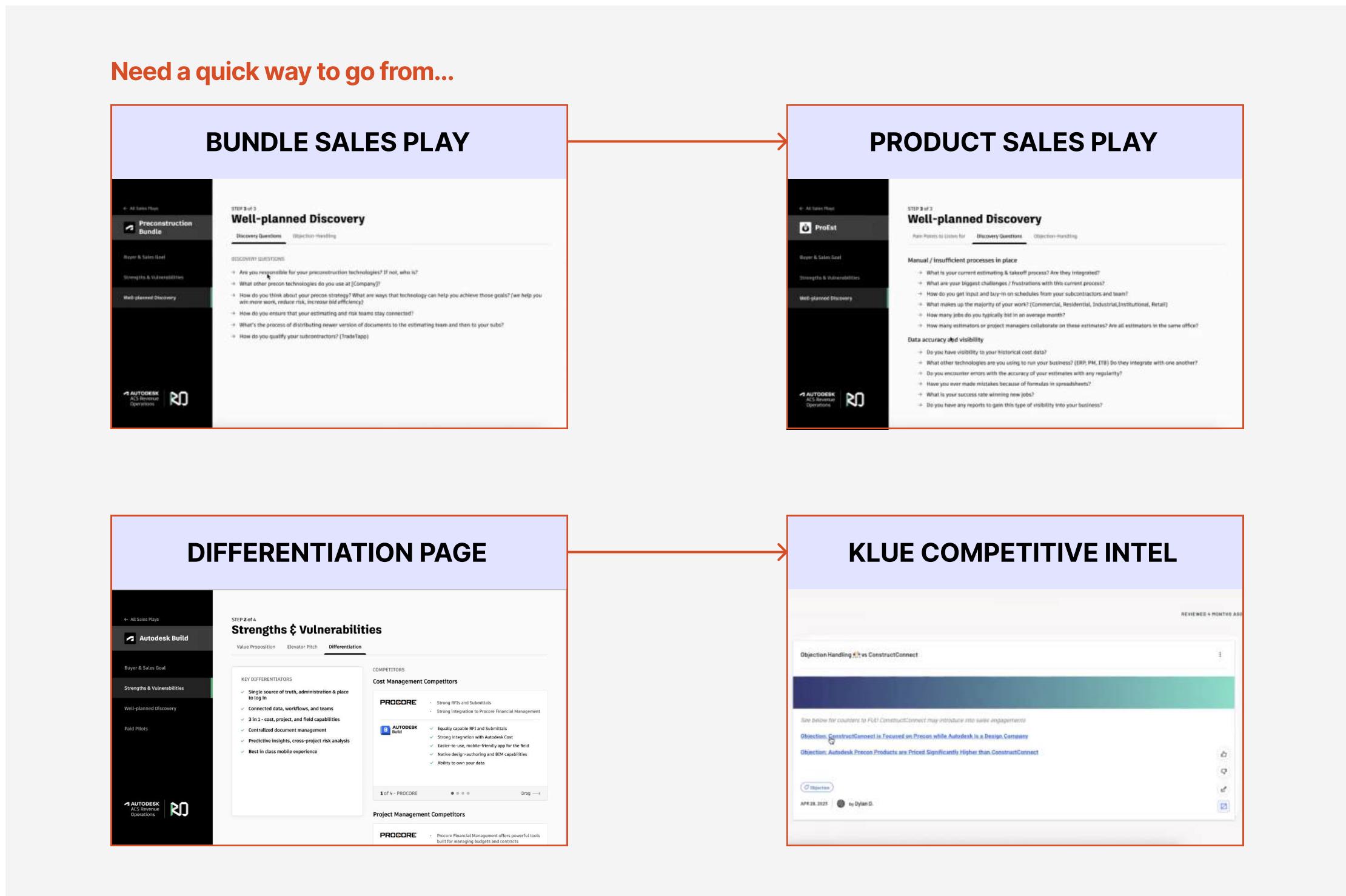
On the left side of the interface, there is a sidebar titled 'Recently Viewed Accounts' which lists several other company names and their locations. A red box highlights the 'High priority' section of this sidebar.

Overlaid on the contact card, there is a large red text message: 'Contact me request, came through end of May'.

Taking SFDC into account

Salesforce.com (SFDC) is a big part of a rep's workflow. The start of their call prep depends on what info is available on SFDC, and they are required to input info in SFDC that needs to be acquired from the discovery call with the prospect.

KEY OBSERVATIONS

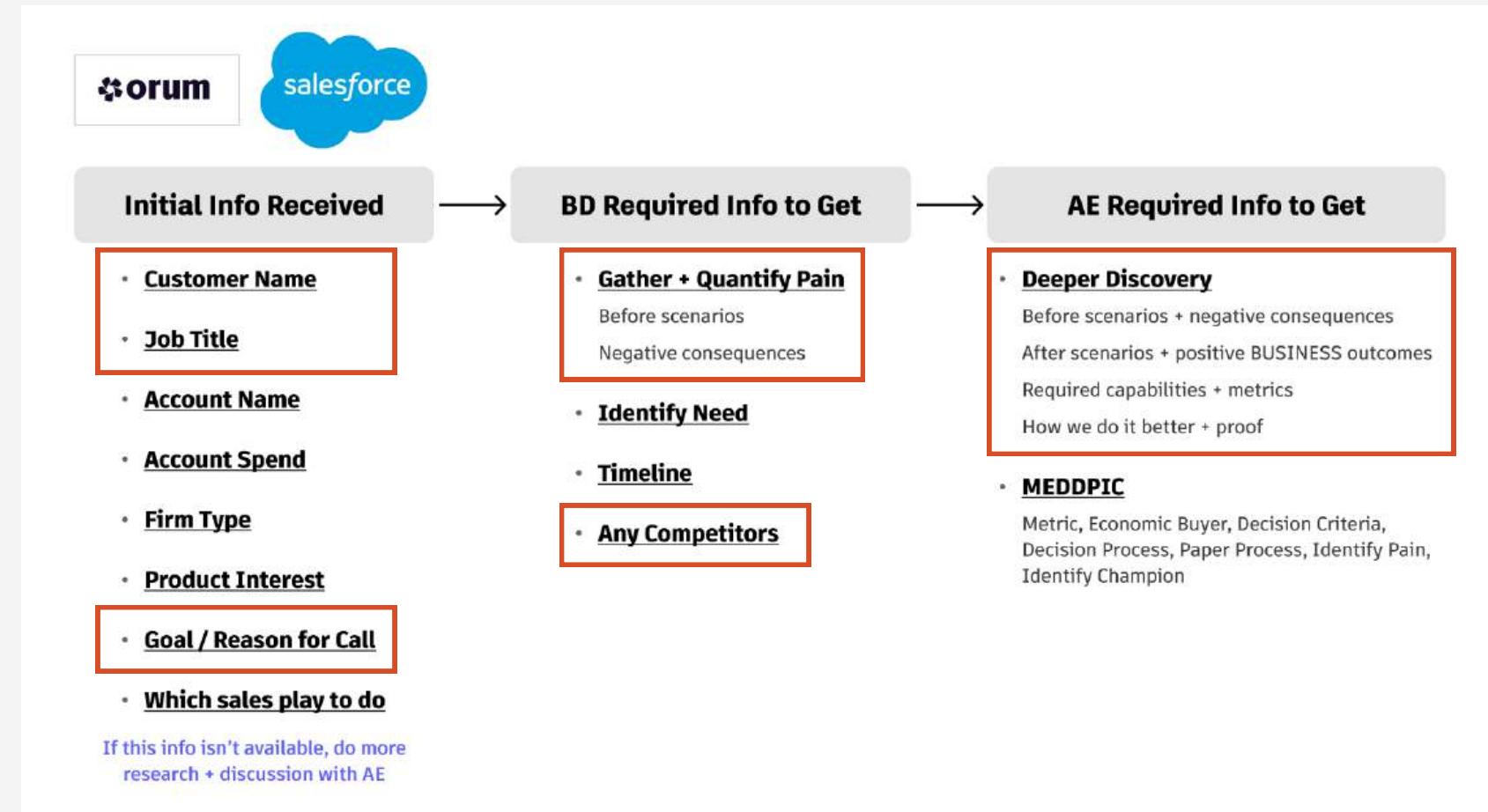


Reps go in and out of product sales plays during calls

We didn't really consider that reps use this app to reference content during calls with prospects, not just before the calls. They also do not just stay in one product sales play but they would pivot between different products depending on how the discovery call is going.

Reps also navigate to other sites outside the sales play library app, such as Klue - a dashboard that they recently started using specifically for competitive intel, or customer case studies.

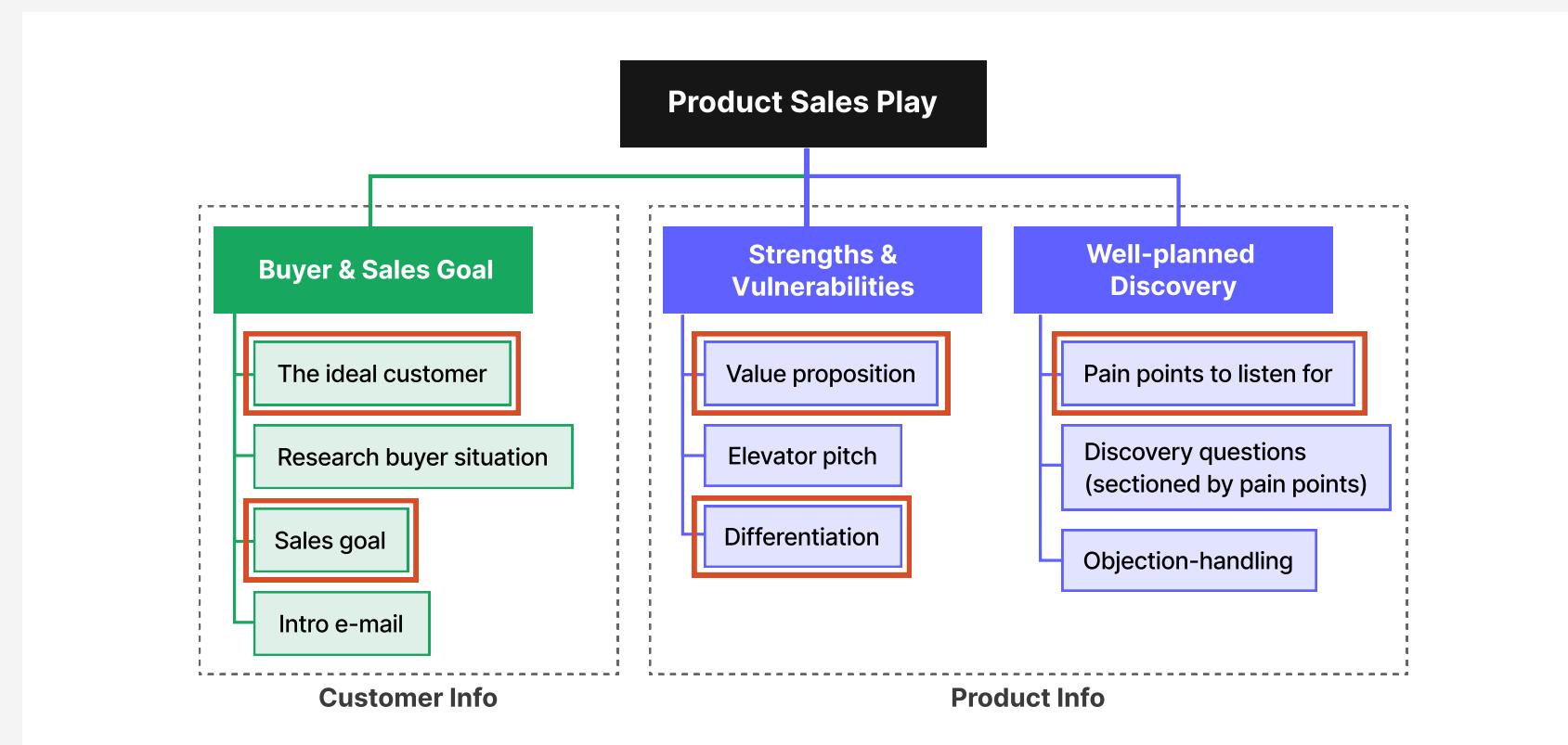
CURRENT CUSTOMER ENGAGEMENT PROCESS



Customer engagement process IRL vs. Current IA

When comparing this flow of information with the IA, I can see the disconnect in some parts. For example, value proposition comes before pain points in the IA, while in the actual process BDRs need to identify the prospect's pain points and put it in SFDC before proposing the solution in the next stage of the engagement process.

MOST RECENT IA VER.



Final Updates

1 Remove research buyer situation and sales goals pages

- Users don't resonate with this because they rely more on SFDC and Orum (prospecting tools) for this information.

2 Replace "sales goals" with key sales requirements

- This will help users know what "blanks" in the call plan they need to fill out which will be covered by the next sections.

3 Switch the positions of "pain points" and "value drivers"

- Identifying pain comes right after identifying the prospect in the engagement process, anything related to value proposition or solution comes much later.

4 "Value drivers", "elevator pitch" and "objection-handling" comes last

- Proposing a solution comes later after reps have a deep understanding on the prospects' pain points and need for the product.

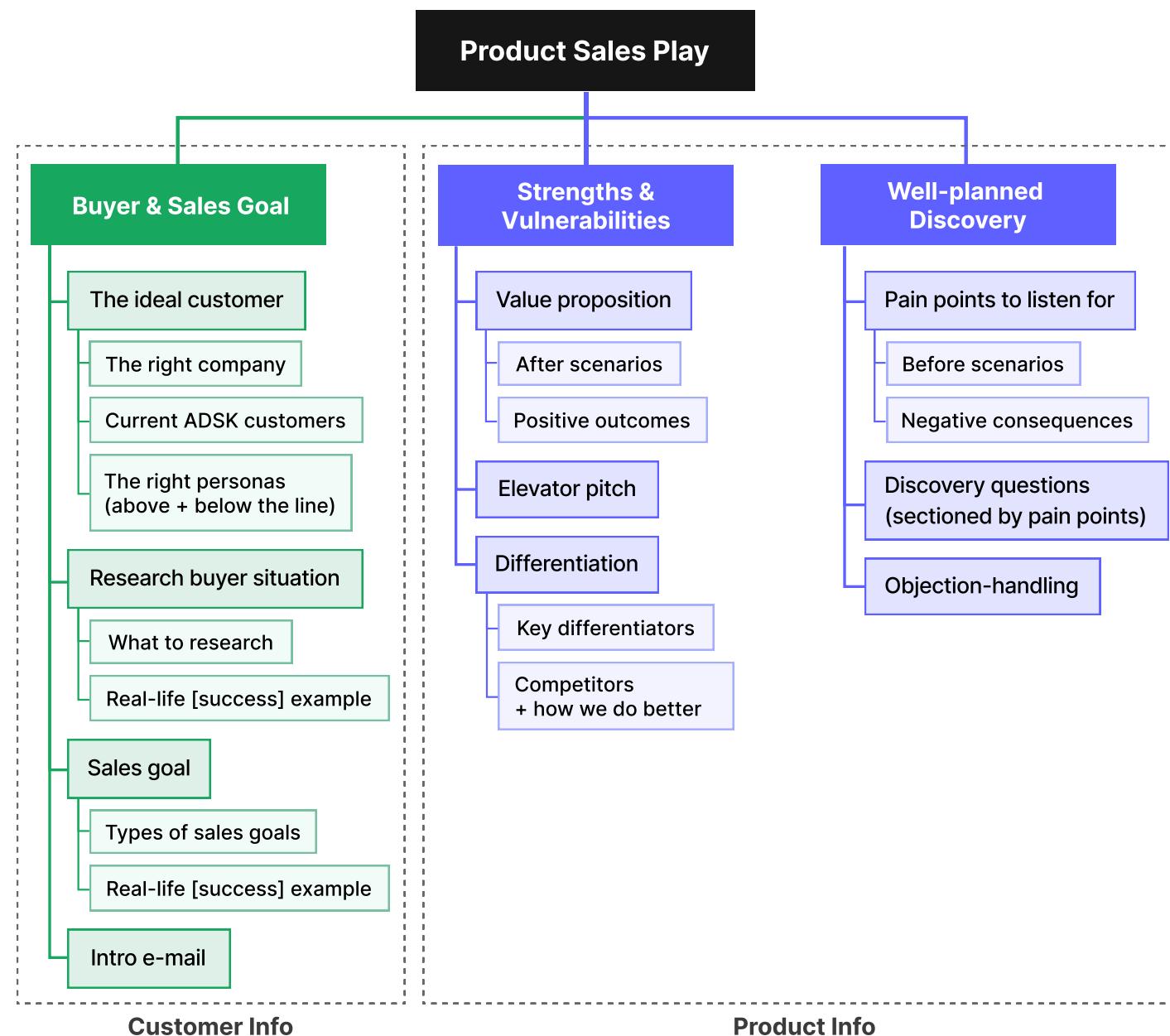
5 Add a "required capabilities" section

- A commonly used sales strategy where sales reps agree on a set of capabilities that are needed to bring positive business outcomes for the prospect as part of proposing the solution.

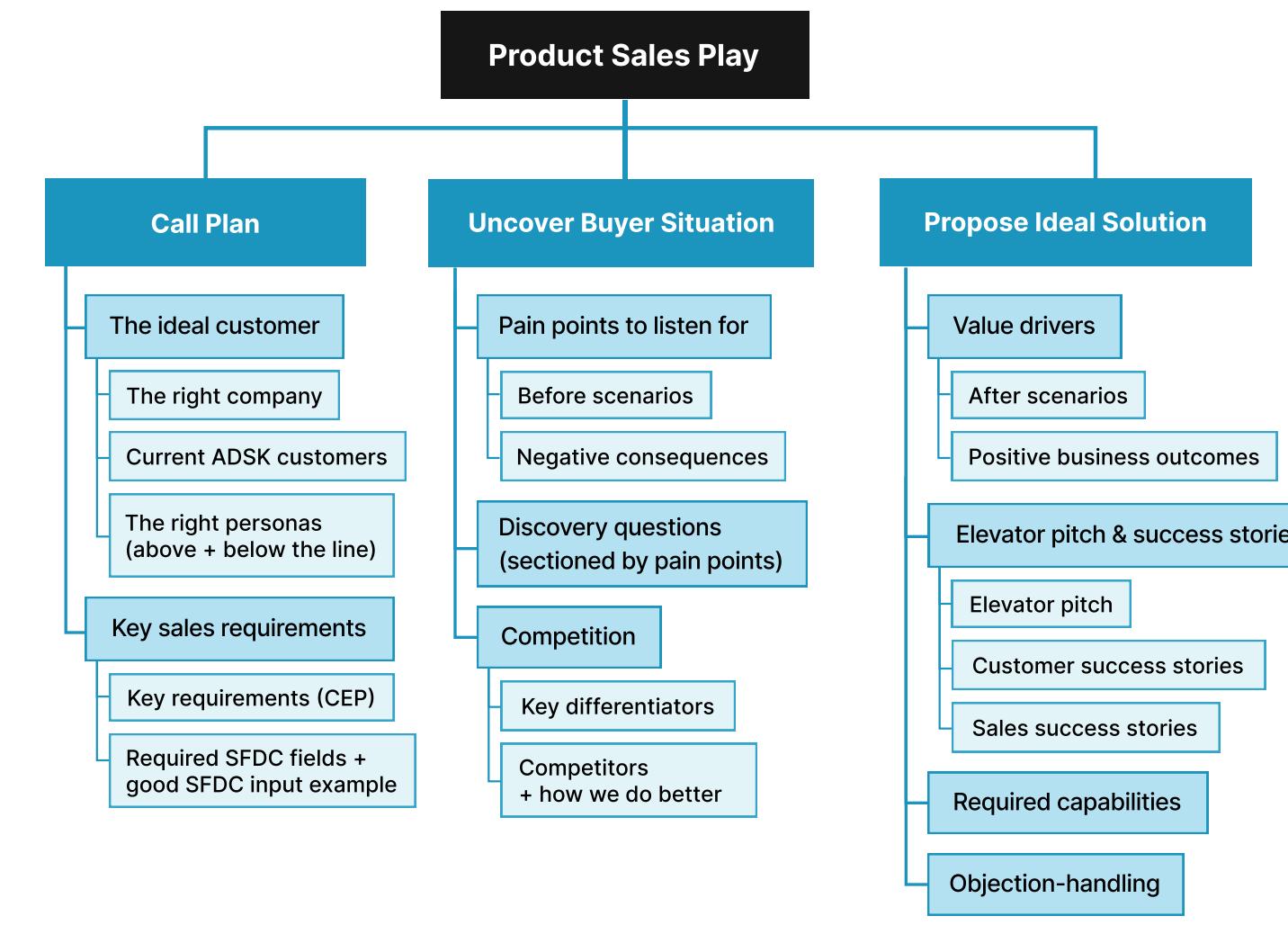
6 Add customer success stories or case studies

- Reps value customer success stories more than internal sales success stories because they can share it with customers and they already have enough resources for good sales examples such as Gong call recordings or coaching webinars.

New IA 2



Final IA



Final Design

Navigation is no longer nested, but uses sub-headers instead which keep all tabs visible at all times. This also frees up space for page content. Cards also no longer use shadows to avoid users seeing them as clickable elements.

The screenshot shows a dark-themed web page for a 'Construction Operations Bundle'. At the top, there's a navigation bar with a back arrow, a link to 'All Sales Plays', the current page title 'Construction Operations Bundle', and a help icon. On the left, a vertical sidebar lists sections: 'CALL PLAN' (with 'Construction Bundle Intro' selected), 'Key Sales Requirements', 'UNCOVER BUYER SITUATION' (with 'Pain Points to Listen for' and 'Discovery Questions' listed), 'Competition', 'PROPOSE IDEAL SOLUTION' (with 'Value Drivers' and 'Elevator Pitch & Success Stories' listed), and 'Objection-handling'. The main content area has a title 'The Ideal Customer' and several sections: 'THE RIGHT COMPANY' (listing 'General Contractors (Primary)', 'Subcontractors (Secondary)', and 'Owners (Secondary)'), 'CURRENT AUTODESK CUSTOMERS' (listing 'PlanGrid customers not using Build' and 'Build, PlanGrid, BIM 360 customers not using Pype'), 'PRODUCTS INCLUDED' (listing 'Autodesk Build', 'Autodesk Docs', and 'Pype'), 'THE RIGHT PERSONAS' (with two sections: 'Above the Line' listing 'VPs, CIO', 'Operations Executives', and 'Project Executives / Directors', and 'Below the Line' listing 'Project Managers', 'Construction Managers', and 'Site Leaders').

← All Sales Plays > Construction Operations Bundle ?

Construction Bundle

CALL PLAN

Construction Bundle Intro

Key Sales Requirements

UNCOVER BUYER SITUATION

Pain Points to Listen for

Discovery Questions

Competition

PROPOSE IDEAL SOLUTION

Value Drivers

Elevator Pitch & Success Stories

Objection-handling

The Ideal Customer

THE RIGHT COMPANY

- General Contractors (Primary)
- Subcontractors (Secondary)
- Owners (Secondary)

CURRENT AUTODESK CUSTOMERS

- PlanGrid customers not using Build
- Build, PlanGrid, BIM 360 customers not using Pype

PRODUCTS INCLUDED

- Autodesk Build
- Autodesk Docs
- Pype

THE RIGHT PERSONAS

Above the Line

- VPs, CIO
- Operations Executives
- Project Executives / Directors

Below the Line

- Project Managers
- Construction Managers
- Site Leaders

← All Sales Plays > Autodesk Build

B Autodesk Build

- CALL PLAN
 - The Ideal Customer
 - Key Sales Requirements**
- UNCOVER BUYER SITUATION
 - Pain Points to Listen for
 - Discovery Questions
 - Competition
- PROPOSE IDEAL SOLUTION
 - Value Drivers
 - Elevator Pitch & Success Stories
 - Required Capabilities
 - Objection-handling

Key Sales Requirements

REQUIRED INFORMATION

- ✓ Define prospect
- ✓ Gather and quantify the pain and need
- ✓ Engage deeper discovery
 - Before scenarios and negative consequences
 - After scenarios and positive outcomes
 - Required capabilities and metrics
 - How we do it better with proof points
- ✓ MEDDPIC
 - Metric, Economic Buyer, Decision Criteria, Decision Process, Paper Process, Identify Pain, Identify Champion

AMER CUSTOMER ENGAGEMENT PROCESS
**For Autodesk Employees Only*

- CEP Mid-Market *
- CEP Territory Sales *
- CEP Named Accounts *

MEDDPIC GOOD EXAMPLES

M - Metric
Profit Margins and Overhead

D - Decision Criteria: Political
Trudy is signer but they have a board that needs to meet to get sign off, Jason presented to the board and they want to move to Build AB (Need to sell them on Pype so they parity with what they have) but need to figure out the process with ESOP

D - Decision Criteria: Business
If account based will be more cost effective than paying for subs licenses each time + change order time. How will they go about putting these licenses on a bid, with it user based there is a clear number behind it.

D - Decision Process
“The roadblock isn’t as much about price/package type as it is navigating the enormous amount of ongoing changes inherent to the ESOP transition, and adding this as an additional item to work through.”

P - Paper Process
Learning what that will look like as they switched to ESOP beginning of January

Key Sales Requirements Page

Added key sales requirements page with a list of required information on the left side and examples of good SFDC inputs on the right side. Content uses language from our standardized customer engagement process documents and links directly to them.

BuildingConnected

CALL PLAN

The Ideal Customer

Key Sales Requirements

UNCOVER BUYER SITUATION

Pain Points to Listen for

Discovery Questions

Competition

PROPOSE IDEAL SOLUTION

Value Drivers

Elevator Pitch & Success Stories

Required Capabilities

 Autodesk | 

Competition

KEY DIFFERENTIATORS

✓ Builders Network

- Largest crowd-sourced network of over 1.5M construction professionals

✓ Custom bid forms and bid leveling

- Compare bids, plug numbers to easily edit values, collaborate, and find the best bid

✓ Unlimited bid invitations and projects

✓ Electronic bidding, NDAs, sealed bidding

✓ Vendor qualification

- Qualify subs with automated risk assessments via integration with TradeTapp

✓ Integration with Autodesk Docs and Autodesk Build

✓ Integration with Bid Board Pro

TOP COMPETITORS

[View all battlecards](#)

SmartBidNet

- Web-based bid management software designed for general contractors to manage subcontractor data, prequalify subs, share project docs and send invitations to bid
- Acquired by Construct Connect in May 2018

[View in Klue](#)

iSqFt

- Has been in the industry for a very long time
- Typically cheaper than BuildingConnected
- Has an old database of subs and 'Plan Room' for projects so GCs can find work easily
- ✗ Has a qualification tool but not as sophisticated as TradeTapp's qualification tool

[View in Klue](#)

Pantera

- Cloud-based bid management solution that caters to general GCs, subs, retailers, suppliers
- Licenses are cheaper than BuildingConnected

OTHER COMPETITORS

- [Procore](#)

- [Pipeline Suite](#)

- [Bid Mail](#)

- [PlanHub](#)

[See All Competitor Battlecards](#)

Competition Page

Cards on the right size summarize competitor info and links to more information and strategies in the Klue competitive intel platform.



B Autodesk Build

CALL PLAN

The Ideal Customer

Key Sales Requirements

UNCOVER BUYER SITUATION

Pain Points to Listen for

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Competition

PROPOSE IDEAL SOLUTION

Value Drivers

Elevator Pitch & Success Stories

Required Capabilities

Objection-handling



Elevator Pitch

Autodesk Build delivers a broad, deep and connected set of field execution and project management tools for builders in a single software platform that is easy to deploy, adopt and use.

Build provides an environment where information sharing and workflows are both tightly-controlled and highly-configurable.

Customer Stories

Sales Success Stories

CUSTOMER SUCCESS STORIES

[View all](#)

[How Atomatic Mechanical Saved \\$75,000 with Autodesk Build](#)

"Autodesk Build eliminates the gray areas taking the subjective out of what we're doing and making our work more objective."

- Jack Fitzgerald, Executive Vice President



- Firm type: Specialty contractor
- Revenue: \$55 million
- HQ: Arlington Heights, IL, US

[How Atomatic Mechanical Saved \\$75,000 with Autodesk Build](#)

"Autodesk Build eliminates the gray areas taking the subjective out of what we're doing and making our work more objective."

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- Firm type: Specialty contractor
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[S. M. Wilson & Co. Drives Project Efficiencies by Connecting 1,455 Users](#)

1,455 stakeholders using Build 80% increase in RFI productivity 5 - 6 days saved reviewing RFIs



- Firm type: General contractor
- Revenue: \$200 million
- HQ: St. Louis, MO, US

[See All Build Customer Stories](#)

Customer Stories

Sales Success Stories

INTERNAL SALES SUCCESS STORIES *

[View all](#)

*For Autodesk Employees Only

[Competitive Knockout of Letsbuild leads to 5-year Account-based Autodesk Build Deal with Vanhout in Belgium](#)

- Ensure buy-in at the C-level: Engage top management early on to ensure alignment of vision and support for the implementation.
- Appoint a Customer Success Manager for the pilot: Their role is essential in ensuring the pilot's success and building a solid relationship with the customer.
- Build trustworthy relationships: Trust is crucial in overcoming challenges and maintaining long-term partnerships.

[3 Year Journey Toward Digital Transformation Results in H2H Build Win vs Onsite and Aconex with Redcon in MENA](#)

- Put Customer Vision First by exploring client business outcomes and CPIs. One of the outcomes the customer shared in the very beginning was having paperless projects which allowed Autodesk team to build the right promise around it.
- Look Forward. Think about the future strategically together with the customer. Redcon Construction did not need cost workflows; however, positioning cost was the turning point in the final competitive comparison as Onsite could not offer cost management capabilities.
- Earn the Customer's Trust. Identify customer digital maturity first and introduce new workflows and technology stack gradually. This is going to build a long-term relationship based on trust and putting customer interests first.
- Do not be Afraid of the Competition, try to understand how the client perceives you and the competition. Because Redcon trusted Autodesk, they shared that Onsite was offering a 50% discount.

[See All Sales Success Stories \(INTERNAL\)](#)

Pitch and Success Stories

Included relevant customer success stories or case studies related to the product, which are valued by sales reps because they can often talk about them to prospects in addition to sales success stories.

The screenshot shows a sales play interface for 'Autodesk Build'. The top navigation bar includes links to 'All Sales Plays' and 'Autodesk Build'. On the right, there's a help icon (a question mark inside a circle) and a back arrow icon.

The main content area has a title 'Required Capabilities' and a sidebar on the left with the following sections:

- CALL PLAN**
 - The Ideal Customer
 - Key Sales Requirements
- UNCOVER BUYER SITUATION**
 - Pain Points to Listen for
 - Discovery Questions
 - Competition
- PROPOSE IDEAL SOLUTION**
 - Value Drivers
 - Elevator Pitch & Success Stories
 - Required Capabilities** (This section is currently selected, indicated by a grey background)
 - Objection-handling

The 'Required Capabilities' section contains a list of management tools:

- Field Collaboration >
- Project Management >
- Document Management >
- Cost Management >

The 'Field Collaboration' item is expanded, showing its details:

Field Collaboration

- Standardized quality and safety inspections: ensure that your entire team is maintaining quality & safety standards from any device, anywhere.
- Central gallery: capture what's happening in the field and share it with stakeholders in a central gallery.
- Centralized issue management: access all design, quality, and safety issues from one place.
- Progress tracking: document, visualize, and report on construction progress to reduce uncertainty and miscommunication (*private beta for February GA Launch*)

At the bottom of the sidebar, the Autodesk logo is visible.

Required Capabilities Page

Product capabilities that are more concrete than value drivers which would help reps in the solution proposal stage.

The screenshot shows the Autodesk ACS Sales Play Library interface. At the top, there's a navigation bar with the Autodesk logo and a search bar labeled "ACS Sales Play Library". Below the navigation bar, there's a "Sort by" dropdown menu set to "Persona" with options like "Product", "Company", and "Persona". A secondary dropdown menu is open under "Persona", showing "Architects" as the selected filter. The main content area displays four product cards:

- Autodesk Build** (PRODUCT): Positioning Value of Efficiency and Common Data Environment. Buttons: "Go to Play" and "Open New Tab".
- Autodesk Docs** (PRODUCT): Organize, distribute, and share files on a single, connected document management platform. Buttons: "Go to Play" and "Open New Tab".
- Bridge** (WORKFLOW): Expansion and Collaboration Across Hubs with Autodesk Build, Docs, and BIM Collaborate. Buttons: "Go to Play" and "Open New Tab".
- ISO 19650** (WORKFLOW): Autodesk Docs now includes workflows to support compliance with ISO 19650 - a global design and construction standard. Buttons: "Go to Play" and "Open New Tab".

Home Page Filtering

Added the ability to filter product sales plays by company and persona to target, which helps sales reps to choose the right product sales play depending on the prospect profile.

Learning Outcomes

For this project, a lot of my focus was centered around getting the right template and navigation for our content. If I were able to revisit this project again, I would have explored the ability to expand on the content - for example showing a tooltip with more information when clicking on an industry term. More importantly, discovering the gaps between the user or sales reps' needs and the managers' vision was eye-opening. As it turned out, there was a disconnect between the ideal sales process managers wanted to encourage with the actual process users go through, which was only apparent after testing, making this project a valuable learning experience on advocating user needs to stakeholders.

Thank you for reading!

AUTODESK | ACS Sales Play Library

Sort by Product All Sales Plays Autodesk Unified Platform Assemble BuildingConnected ProEst Pipe

Autodesk Unified Platform

- Autodesk Build**
Positioning Value of Efficiency and Common Data Environment
 - Go to Play
 - Open New Tab ↗
- Autodesk Docs**
Organize, distribute, and share files on a single, connected document management platform
 - Go to Play
 - Open New Tab ↗
- Autodesk Takeoff**
Winning More Business with Quality, Accuracy, and Collaboration
 - Go to Play
 - Open New Tab ↗
- BIM Collaborate**
Document Control and Field Reports
 - Go to Play
 - Open New Tab ↗
- Bridge**
Expansion and Collaboration Across Hubs with Autodesk Build, Docs, and BIM Collaborate
 - Go to Play
 - Open New Tab ↗
- ISO 19650**
Autodesk Docs now includes workflows to support compliance with ISO 19650 - a global design and construction standard
 - Go to Play
 - Open New Tab ↗

BuildingConnected

← All Sales Plays > BuildingConnected

Competition

TOP COMPETITORS

SmartBidNet

- Web-based bid management software designed for general contractors to manage subcontractor data, prequalify subs, share project docs and send invitations to bid
- Acquired by Construct Connect in May 2018

View in Klue

construct connect

iSqFt

- Has been in the industry for a very long time
- Typically cheaper than BuildingConnected
- Has an old database of subs and 'Plan Room' for projects so GCs can find work easily
- Has a qualification tool but not as sophisticated as TradeTapp's qualification tool

Pantera

- Cloud-based bid management solution that caters to general GCs, subs, retailers, suppliers
- Licenses are cheaper than BuildingConnected

View in Klue

Autodesk

Bridge

← All Sales Plays > Bridge

Value Drivers

CALL PLAN

Bridge Sales Play Intro

Key Sales Requirements

UNCOVER BUYER SITUATION

Pain Points to Listen for

AFTER SCENARIOS

- Centralized data - Data centralized in a single source of truth
- Historical records - Information easily shared with historical record

POSITIVE OUTCOMES

- Reduce duplication / rework
- Improve cross team collaboration
- Save time

Bridge

← All Sales Plays > Bridge

Pain Points to Listen for

CALL PLAN

Bridge Sales Play Intro

Key Sales Requirements

UNCOVER BUYER SITUATION

Pain Points to Listen for

BEFORE SCENARIOS

- Siloed data - data siloed and scattered across multiple tools and projects
- Lost and broken data - sending via email or other tools that become outdated or hard to find

NEGATIVE CONSEQUENCES

- Rework & disconnected data - duplicate information and lack of a single source of truth
- Wasted time - having to search and find information

Autodesk

Autodesk

← All Sales Plays >

CALL PLAN

The Ideal Customer

Key Sales Requirements

UNCOVER BUYER SITUATION

Pain Points to Listen for

Autodesk

← All Sales Plays >

CALL PLAN

The Ideal Customer

Key Sales Requirements

UNCOVER BUYER SITUATION

Pain Points to Listen for