

## **Ansible Sales Play**

### **DISCOVERY AND QUALIFICATION GUIDE**

#### **What is this?**

This guide will help you to discover and qualify opportunities around having a strategic conversation on automating the enterprise using Ansible. When the following questions are properly answered, the opportunity is ready to move to the next stage in the pipeline.

#### **How and when to use this?**

Use this guide to gain an understanding of the customer's challenges and goals in order to progress the conversation around implementing RH Ansible Automation Platform (AAP) for IT infrastructure automation. The ultimate call to action is to set up the next meeting with an extended audience. For example, the prospect would indicate if they require a demo or trial or perhaps they are familiar with Red Hat's solution and would like to move directly to a handover meeting with the sales leader.

#### **Goals:**

Identify business challenges and position Red Hat AAP as a trusted partner and thought leader for enterprise IT automation

### **METRICS**

#### **Goal : Identify what the customer wants to gain & future needs**

##### **Questions to consider**

- How does the customer measure the successful implementation of a modern automation environment?
- What are the bottom-line effects of a successful automation environment?

##### **Successful qualification is:**

- We understand the customer's desired future state in terms of security, reliability, support, operational efficiency, TCO.
- The customer has outlined the benefits that matter most to them (save time, boost productivity, accelerate revenue, reduce repetitive non-value adding labor).
- You will be in a position to quantify what the customer will gain from moving to RHEL with real numbers

#### **Ask these questions to qualify metrics:**

- Can you describe your ideal infrastructure environment?
- What operational metrics would you want to use?
- How do you calculate operational costs?

#### **Listen to (metrics you can sell to):**

- Cost of downtime/Downtime Frequency/Length
- Greater flexibility
- Less re-work and IT expenditure
- Decreased time-to-market
- Compliance and Risk Dashboards
- Incident Closure Times/Recovery time
- TCO, Operational Cost

<p><b>IDENTIFY PAIN</b></p> <p><b>Goal: Identify the reasons for change (pain, challenges) and pain points</b></p> <p><b>Questions to consider</b></p> <ul style="list-style-type: none"> <li>• What is the customer's automation strategy and how does it relate to their cloud strategy</li> <li>• Among priorities, How would customer rank automation of IT infrastructure</li> <li>• What benefits could be achieved with an IT automated infrastructure ( ex: as a solution to overcome manual processes related to disparate IT environments)</li> </ul> <p><b>What does success look like?</b></p> <ul style="list-style-type: none"> <li>• We have qualified enough pain points that <ul style="list-style-type: none"> <li>a) imply the need for automation with the customer b) motivate the customer to adopt automation/better their existing automation strategy,</li> <li>c) you understand their pain points and can link them to using Red Hat Ansible as a potential solution</li> <li>d) let us progress to the next meeting.</li> </ul> </li> </ul>	<p><b>Ask these questions to qualify pain points:</b></p> <ul style="list-style-type: none"> <li>• What are the major challenges of your organization?</li> <li>• How important is having the ability to raise support tickets and have dedicated SLAs for your software? If Yes/No, Why?</li> <li>• How important is IT automation for the success of your business?</li> <li>• What is an example of a planned or unplanned downtime event recently?</li> <li>• Does friction arise between teams due to differences in standards or lack of governance?</li> <li>• How do you see automation enabling your ability to focus on innovation?</li> </ul> <p><b>Listen to (pain points you can sell to):</b></p> <ul style="list-style-type: none"> <li>• Lack of internal resources to support</li> <li>• Resistance to change, prioritization, restrained budgets</li> <li>• Price (free vs paid), Access (free download &amp; install, cloud access)</li> <li>• Vendor Certification, Security Compliance, Support Quality/Timeliness,</li> <li>• Support Life, Inhouse Skills, Features (LivePatch, Tools)</li> <li>• Upgrade/Update Challenges, Build Process</li> <li>• Timeline, Critical Event</li> </ul>
<p><b>CHAMPION</b></p> <p><b>Goal: Identify the person who wants Red Hat to win and is favorable to the Red Hat solution</b></p> <p><b>What does success look like?</b></p> <ul style="list-style-type: none"> <li>• Identify and build a relationship with a person/s who is supportive and enthusiastic about Red Hat and has influence and respect in the customers' organization</li> <li>• Personas to potentially pursue: <ul style="list-style-type: none"> <li>○ Infrastructure Manager/IT Operations Manager</li> <li>○ DevOps/Automation Manager</li> <li>○ CISO</li> </ul> </li> </ul>	<p><b>Ask these questions to qualify the champion:</b></p> <ul style="list-style-type: none"> <li>• What tools of automation have you used so far? What worked and what has not?</li> <li>• How does our solution align with your professional goals in the customers' organization?</li> <li>• Have you ever tried using RH Ansible or other Red Hat software? How was your experience?</li> </ul> <p><b>Listen to:</b></p> <ul style="list-style-type: none"> <li>• Enthusiasm, positive speak about Red Hat, excitement about the potential for Red Hat.</li> <li>• Indications that the person has credibility and influence in the customers' organization</li> </ul>
<p><b>DECISION CRITERIA</b></p>	<p><b>Ask these questions to discover the decision making criteria:</b></p> <ul style="list-style-type: none"> <li>• Do you have any preferred partners/commitments that are considered</li> </ul>

<p><b>Goal: Knowing how the prospect/ customer makes decisions</b></p> <ul style="list-style-type: none"> <li>• The driving factors behind the prospects' buying decision.</li> <li>• Understand what the prospect wants.</li> </ul> <p><b>Decision Criteria - Questions to consider</b></p> <ul style="list-style-type: none"> <li>• What would make the customer choose Red Hat?</li> <li>• What else can you do to justify the purchase/ highlight ROI?</li> </ul> <p><b>What does success look like?</b></p> <ul style="list-style-type: none"> <li>• You understand their thinking process so you can tailor your pitch to highlight the prospects needs &amp; wants and address their pain points.</li> </ul>	<p>when setting the decision criteria?</p> <ul style="list-style-type: none"> <li>• When looking for a new, reconfiguration or expansion of your automation solution or cloud deployment, how are you evaluating the solution?</li> <li>• What do you need &amp; want from an automation solution - whether it be security, compliance, upgrades, analytics, time saving, etc.?</li> </ul> <p><b>Listen to:</b></p> <ul style="list-style-type: none"> <li>• Budget size</li> <li>• Value - Security/Compliance, Support/Downtime, Upgrades/Updates</li> <li>• Cost - Operational Costs (not purchase cost)/ committed spend with hyperscaler</li> <li>• Feature/Function - Risk Management, Update Automation, Vendor Certification, Support Roadmap, Compliance Requirements</li> </ul>
<p><b>DECISION PROCESS</b></p> <p><b>Timeline</b></p> <ul style="list-style-type: none"> <li>• Typical buying process, timelines &amp; time frame.</li> </ul> <p><b>What does success look like?</b></p> <ul style="list-style-type: none"> <li>• You are able to utilize your champion's relationship with the economic buyer to meet the conditions surrounding timeline and approval process</li> <li>• We understand who makes what decisions, who is influencing them, and the overall decision process.</li> <li>• The customer details their typical buying process &amp; expected rollout date.</li> </ul>	<p><b>Ask these questions to discover the decision making process:</b></p> <ul style="list-style-type: none"> <li>• What is your typical buying process?</li> <li>• What timeframe for purchasing?</li> <li>• When does the solution need to be implemented or rolled out?</li> <li>• Why do you need to purchase by this date exactly?</li> <li>• Which stakeholders are involved with new/expansion of automation initiatives?</li> <li>• How will the decision be made? (e.g. RFP, PoC, Proposal)</li> <li>• How will the project be funded ? (annual ops, discretionary)</li> <li>• When will the decision be made? (critical event, budget cycle, external audit)</li> </ul>
<ul style="list-style-type: none"> <li>• A buying process could look like this: <ul style="list-style-type: none"> <li>■ Handover meeting with appropriate sales persona. (Solution architect for product demo etc.)</li> <li>■ 60 Day trial + Feedback on trial</li> <li>■ Proposal with stakeholders</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ Negotiation of proposal - T&amp;C/ Pricing</li> <li>■ Procurement evaluation</li> <li>■ Sign-off by economic buyer (final decision maker)</li> <li>■ PO sent to Red Hat.</li> </ul>
<p><b>COMPETITION</b></p> <p><b>Competition is a significant risk factor when it comes to securing and closing a deal.</b></p> <ul style="list-style-type: none"> <li>• Specific features, use cases</li> </ul>	<p><b>Ask these questions to discover who we are competing with:</b></p> <ul style="list-style-type: none"> <li>• What other solutions are you considering?</li> <li>• Why are you considering that competitor solution?</li> <li>• Why is that feature within that solution important to you?</li> </ul>

<ul style="list-style-type: none"> <li>• Paid vs free, TCO vs TCA</li> <li>• Technical support , tickets , SLAs</li> </ul>	<ul style="list-style-type: none"> <li>• What is the business problem that you intend to solve using the solution?</li> </ul>
<p><b>What does success look like?</b></p> <ul style="list-style-type: none"> <li>• You know who are our potential competitors, and what the customer is valuing in them (brand recognition, pricing, feature, time frame deadlines, etc.).</li> <li>• You identify if anyone within the decision process is championing the competitor solution.</li> <li>• You are able to convey just enough of the benefits ( 1 or 2 points) of using a RH solution to get an in-person meeting/solution demo, POC etc.</li> <li>• If the customer is already doing business with them, you need to understand their strengths and weaknesses, and use them in your favor.</li> </ul>	
<p><b>ECONOMIC BUYER</b></p> <p><b>Goal : Identify who the ultimate decision maker is - the person who signs the final contract.</b></p> <ul style="list-style-type: none"> <li>• Identify who the ultimate decision maker is.</li> <li>• Is there more than one decision maker?</li> </ul> <p><b>Economic Buyer - Questions to consider</b></p> <ul style="list-style-type: none"> <li>• Who is the decision maker?</li> <li>• Is there anyone else involved in the final decision?</li> </ul> <p><b>What does success look like?</b></p> <ul style="list-style-type: none"> <li>• We know who makes the ultimate economic decision and have validated their pain points.</li> <li>• We know who influences that person.</li> <li>• The prospect would ideally provide their budget, or at least an indication that they have a budget in mind.</li> </ul>	<p><b>Ask these questions to qualify the economic buyer:</b></p> <ul style="list-style-type: none"> <li>• Who makes decisions on automation related to IT infrastructure?</li> <li>• Are there budgetary thresholds and how do they align to the corporate ladder?</li> <li>• Do they have a budget? What is the budget? If not, can they get from other areas within the organization?</li> <li>• What factors affecting TCO beyond initial price are you taking into account?</li> </ul> <p><b>Listen to:</b></p> <ul style="list-style-type: none"> <li>• The point of contact has advised who the decision maker is, perhaps there are committees that make the final decision.</li> <li>• The point of contact has also provided the contact details of the ultimate decision maker/s.</li> </ul>
<p><b>PARTNERS</b></p> <ul style="list-style-type: none"> <li>• Which partners does the prospect currently work with?</li> <li>• Do they have a preferred partner?</li> </ul> <p><b>What does success look like?</b></p> <ul style="list-style-type: none"> <li>• We identify the partners that can influence the account and provide services if need be.</li> </ul>	<p><b>Listen to:</b></p> <ul style="list-style-type: none"> <li>• Identify with the prospect if they already have partners they are working with, or if they have a preferred partner in mind. You should also be able to indicate that we can refer them to a partner within our ecosystem that meets their location.</li> </ul>