OpenShift as an application platform
DISCOVERY AND QUALIFICATION GUIDE

What is this?	This guide will help you apply MEDDPIC to initiate conversations, and discover and qualify opportunities for OpenShift as an application platform.
How and when to use this?	Use this guide to gain an understanding of the customers challenges and goals in order to progress the conversation around adopting OpenShift as an application platform.
Goals:	1. Identify whether the customer has an existing App Platform strategy (what is it/what are they using), and build an appropriate approach for your specific account. 2. Pinpoint whether the customer understands OCP's differentiation vs. other Kubernetes offerings. 3. Determine what workloads are being prioritized for optimization. 4. Discover the customer's cloud strategy (which hyperscalers, applications, migration strategy) and map to their approach. 5. Provide content that is consistent with the MEDDPICC methodology that is Red Hat's standard for opportunity qualification, AND will help you complete the MEDDPICC scorecard in Red Hat sales cloud.

METRICS

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

Questions to consider

- Has the customer established metrics that are specific to their organization and are they willing to share them with you? If not, why not?
- Does the customer have a business value associated with the application estate in use at their company?
- Has the customer calculated the cost of assembling a DIY application platform on top of barebones Kubernetes that can be used to compare the cost of acquiring OpenShift and using it as an application platform?
- Does the customer know the downtime costs of applications in production?

Successful qualification is:

- We have a full understanding of what the customer hopes to gain from an application platform, and the metrics they will use to measure success.
- We understand the customer's overall goals in relation to an application platform, and have identified their top goals which may include items like the following:
  - Getting useful applications in the hands of users in a timely manner that run securely and at scale
  - Respond faster to market demands and improve customer interaction and retention with applications
  - Respond faster to competitive pressures
  - Shorten time from innovation to execution
  - Optimize assets, both people and equipment
  - Reduce operating costs for applications
- You will be in a position to quantify what the customer will gain from OpenShift as an application platform with real numbers, and consistent with the business value guidance provided in the sales play.

Ask these questions to qualify metrics:

- What is the amount of time it takes for you to get from application ideation to applications in production?
- How long does it take for you to respond to competitors inventing new business models and customer engagement models? How much has a slow response to competitive pressures cost your business in the past?
- How long does it take for you to respond to regulatory changes and what is the impact if you don't respond fast enough? How much has delays in responding to regulatory changes cost your business in the past?
- What are the opportunity costs associated with your technical resources focusing on managing infrastructure and tools instead of building applications?
- How much of your operating costs is associated with maintaining and operating an overly complex infrastructure?
- What kind of ROI would you need to see associated with a switch to a consistent development and automated management experience across private, public, and hybrid cloud environments?
- What would the cost be of a security breach to any of your applications?

Listen to (metrics you can sell to):

- Reducing data center costs by providing choice on where to run applications across private, public, and hybrid cloud environments—with options for fully managed cloud deployments.
- Costs reductions associated with simplifying infrastructure without compromising stability, security, and compliance.
- Ability to provide a consistent development and automated management experience across private, public, and hybrid cloud environments.
- Ability to convert older, cumbersome Java applications to modern and new cloud native Java–across cross private, public, and hybrid cloud environments.
- Ability to build new cloud native Java applications–across cross private, public, and hybrid cloud environments.
- Ability to build new AI applications, and add on AI capabilities to existing applications across cross private, public, and hybrid cloud environments.

IDENTIFY PAIN

Goal: Identify the reasons for change (pain, challenges) and pain points

Questions to consider

- Customer has a DIY application platform that has grown to a point where it is showing weaknesses and excessive cost characteristics.
- New applications or updates take weeks or months to get into production, with unacceptably high failure or error rates.
- More than half the applications deployed today are custom built. Building an application platform to meet all or most developer needs is more challenging than the customer's staff is able to take on.
- The current application platform is exceeding allocated budget as usage scales up.
- Application availability is not meeting business goals, and is causing a negative impact on the bottom line.
- Business, competitive, or regulatory deadlines are not being met which has a negative impact on the business.

What does success look like?

- Pace of application innovation changes for the positive and keeps pace with the needs of the business.
- Applications can be reliably deployed across cloud properties or on-prem running securely and at scale.
- Applications are developed cost effectively and meet ROI requirements.
- Developers are able to focus on coding rather than managing a platform
  - DevSecOps best practices are a use by all developers
- Critical deadlines that force changes (i.e. a deadline, like a product EOL such as CentOS, or time sensitive regulation or market change) are being met and reducing negative impacts to the business.
- Customer understands their pain points and can articulate them
- YOU can articulate and demonstrate the benefits of OpenShift as an application platform to help the customer overcome their pain points.

Ask these questions to qualify pain points:

- Are you able to create & modify applications at the pace your business requires? How long does it typically take to deploy app updates?
- Have you run into problems creating and running applications across different cloud providers and on-prem?
- How much developer time is spent managing infrastructure and tools?
- How well is your infrastructure meeting stability, scalability, security, and compliance requirements?
- What risks does your organization face by not integrating security into the cloud native software supply chain?
- What vulnerabilities or security weak points have you identified in your software delivery pipeline?
- What risks or opportunity costs do you face by failing to modernize your Java apps and traditional infrastructure?
- How do you think your competitors have a competitive advantage over you through the applications they provide to users and the speed they deliver those applications from ideation to usage?
- Do you already have an application platform in place, and if so, what challenges and problems are associated with it? If yes, what vendors have you used to assemble your existing application platform?
- Do you have the skills in house to build AND maintain an application platform
- What is the opportunity cost of developers being forced to do tasks other than creating applications?
- How flexible is the application platform you currently use to change component solutions when needed?
- How hard is it for you to manage the application platform and applications across cloud properties, each with different management tools and requirements?
- How error prone and time consuming is the process of provisioning environments for developers to use, and applications to run in?
- How many different vendors do you need to work with to troubleshoot and resolve application platform issues?

Listen to (pain points you can sell to):

- Need applications to run on top of an increasingly hybrid infrastructure in

	the public cloud, datacenter, or at the edge without limitations to any single environment ● Need a full-stack application development and delivery platform for new or existing apps to enable consistent, agile development with high visibility and management across a hybrid environment but lack the budget and skills to take on a DIY effort to meet the challenge. ● Some applications are stuck on specific cloud properties because they use services that aren't transportable to other clouds. ● Customers' existing application platform is too rigid and they can't easily swap out solution components. ● The customer has "trust" issues with the DIY platform sources. ● Managing Kubernetes worker nodes means customers must manage the Linux VMs that provide those nodes, in each cloud provider environment. ● Managing multiple versions of Kubernetes is expensive and error prone. ● The customer lacks an automation strategy and platform to reduce error rates and time associated with provisioning and running applications.

CHAMPION

Goal: Identify the person who wants Red Hat to win and is favorable to the Red Hat solution

What does success look like?

- 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
- Personas to potentially pursue as a champion:
  - Business Leader who may hold a title such as CIO, CTO, CRO, CISO, CDO, COO, or line of business leader
  - IT Operations - VP of IT, VP of Infrastructure, Director or Managing Director of Operations
  - Developer - Principal Engineer, Senior or Lead Software Engineer, DevOps Engineer

Ask these questions to qualify the champion:

- Which teams or leaders are involved in making decisions about the organization's application platform?
- Are you close to the decision makers? And to their influencers?
- How does our solution align with your professional goals in the customers' organization?
- Have you ever tried using OpenShift and the other Red Hat subscriptions that when used in combination make up an application platform? How was your experience?

Listen to:

- Enthusiasm, positive speak about Red Hat, excitement about the potential for Red Hat.
- Indications that the person has credibility and influence in the customers' organization

DECISION CRITERIA

Goal: Knowing how the prospect/ customer makes decisions

- The driving factors behind the prospects' buying decision.
- Understand what the prospect wants.
- Establishing trust and helping the prospect refine selection criteria for an application platform

Decision Criteria - Questions to consider

- What would make the customer choose Red Hat?
- What else can you do to justify the purchase/ highlight ROI?

What does success look like?

- You understand their thinking process so you can tailor your pitch to highlight the prospects needs & wants and address their pain points.

Ask these questions to discover the decision making criteria:

- Who is responsible for these types of decisions?
- What do you need & want from an application platform?
- What criteria will you use to evaluate OpenShift as an application platform?
- Does your organization consider any third-party analyses, such as reports by Gartner or Forrester, to help form decision criteria and select vendors?

Listen for:

- Need to burn down committed spend on AWS
- Need to increase usage of AWS and Azure cloud properties to meet discounting agreements
- Existing Red Hat customer with positive history of subscription value.

	● Additional, but more general decision criteria that are relevant to the customer decision. ○ Budget size ○ Value - Security/Compliance, Support/Downtime, Upgrades/Updates ○ Cost - Operational Costs (not purchase cost) ○ Feature/Function - Risk Management, Update Automation, Vendor Certification, Support Roadmap, Compliance Requirements

DECISION PROCESS

Timeline

- Typical buying process, timelines & time frame.

What does success look like?

- You are able to use your champion's relationship with the economic buyer to meet the conditions surrounding timeline and approval process
- We understand who makes what decisions, who is influencing them, and the overall decision process.
- We understand and can address objections from influencers and decision makers that can derail the deal.
- The customer details their typical buying process & expected rollout date.

Ask these questions to discover the decision making process:

- What is your typical buying process?
- What timeframe for purchasing?
- When does the solution need to be implemented or rolled out?
  - Is there a critical deadline associated with the date?
  - How long will it take to develop the solution ahead of this date?
- Why do you need to purchase by this date exactly?Is there a critical deadline associated with the date?
- Who are the decision makers? Do they align with the economic buyers you have identified? (e.g. Procurement, Infra Manager, Infra Architect)
- Can anyone overrule decision makers?
- How will the decision be made? (e.g. RFP, PoC, Proposal)
- How will the project be funded? (annual ops, discretionary)
- When will the decision be made? (critical event, budget cycle, external audit)

- A buying process could look like this:
  - Handover meeting with appropriate sales persona. (Solution architect for product demo etc.)
  - Request a Discovery Session from Red Hat Services / Consulting
  - 60 Day trial + Feedback on trial
  - Proposal with stakeholders
  - Negotiation of proposal - T&C/ Pricing
  - Procurement evaluation
  - Sign-off by economic buyer (final decision maker)
  - PO sent to Red Hat.

COMPETITION

Competition is a significant risk factor when it comes to securing and closing a deal.

- Most organizations are already using or at minimum aware of cloud hyperscaler Kubernetes offerings from AWS, Microsoft Azure and Google. These fall far short of a full application platform, but are often appealing based on cost and familiarity. Communicating OpenShift's significant advantages is crucial to winning most opportunities.
- Other application platform competitors offer a small portion of the application platform, such as Github, MuleSoft, Redis, and other niche functionality vendors. Few will offer a large scope of functionality that can rival OpenShift as an application platform.
- Assess the possibility of customer buying from AWS, Azure, or another cloud provider who also offers application services to integrate with applications
- If the customer is a heavy VMware user they may be considering Tanzu for an application platform.
- Understand the customer consumption model for these competitors (e.g. unlimited use, consumption commits) to determine cost competition

Ask these questions to discover who we are competing with:

- What tools and frameworks do your developers use to create applications?
- What cloud providers are you running applications on and what is the scope of cloud services have you integrated with your applications?
- Do you currently run any Kubernetes solutions, either DIY, or cloud provider offerings? What are these used for, and how widely?
- How many of your applications are stuck running in virtualized environments and how are you implementing virtualization?
- Do you integrate many of your systems together and how are you getting that integration to work?
- What other solutions are you considering?
  - Why are you considering that solution?
  - What features within that solution are important to you?
  - What features within that solution might go unused?
  - Have you been able to clearly define how that solution will help you solve your business problems and meet your success metrics?

What does success look like?

- You know who are our potential competitors, and what the customer is valuing in them (brand recognition, pricing, feature, time frame deadlines, etc.).
- You identify if anyone within the decision process is championing the competitor solution.
- You are able to convey just enough of the benefit (1 or 2 points) of using a Red Hat solution to get an in-person meeting/solution demo, POC etc.
- If the customer is already doing business with them, you need to understand their strengths and weaknesses, and use them in your favor.

ECONOMIC BUYER

Goal : Identify who the ultimate decision maker is - the person who signs the final contract.

- Identify who the ultimate decision maker is.
- Is there more than one decision maker?

Potential Personas

- Business Leader who may hold a title such as CIO, CTO, CRO, CISO, CDO, COO, or line of business leader
- IT Operations - VP of IT, VP of Infrastructure

Economic Buyer - Questions to consider

- Who is the decision maker?
- Is there anyone else involved in the final decision?

What does success look like?

- We know who makes the ultimate economic decision and have validated their pain points.
- We know who influences that person.
- The prospect would ideally provide their budget, or at least an indication that they have a budget in mind.

Ask these questions to qualify the economic buyer:

- Who makes decisions to acquire an application platform?
- Are there budgetary thresholds and how do they align to the corporate ladder?
- Do they have a budget? What is the budget? If not, can they get from other areas within the organization?
- What factors affecting TCO beyond initial price are you taking into account?

Listen to:

- The point of contact has advised who the decision maker is, perhaps there are committees that make the final decision.
- The point of contact has also provided the contact details of the ultimate decision maker/s.

PARTNERS • Which partners does the prospect currently work with? • Do they have a preferred partner? **What does success look like?** • We identify the partners that can influence the account and provide services if need be.	**Listen to:** • 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.