Standardize on Red Hat Enterprise Linux Sales Play
DISCOVERY AND QUALIFICATION GUIDE

What is this?	This guide will help you initiate conversations on, discover, and qualify opportunities for standardizing on Red Hat Enterprise Linux. When the following questions are properly answered, the opportunity is ready to move to the next stage in the pipeline. A one-pager summary of this guide will be available soon, focusing on the first stages of the sales cycle.
How and when to use this?	Use this guide to understand the customer's challenges and goals to progress the conversation around moving to Red Hat Enterprise Linux. 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:	Sales Goal: ● Identify opportunities to move customers to Red Hat Enterprise Linux and tell a strong, coherent Red Hat Enterprise Linux upsell story. Strategic Goals: ● Identify customer's Linux strategy and where they are in the journey. ● Identify workload environments primed for RHEL (dedicated offerings supporting critical workloads - SQL and InterSystems). ● Discover pockets of non-RHEL usage and target (CentOS and other Linux distributions. ● Identify customer's cloud strategy (which hyperscalers and workloads), and target with RHEL on Cloud.

METRICS

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

Questions to consider

- What other OSs are they using, and what do they value in them?
- How are they currently managing your systems?
- What compliance regulations metrics are they subject to?
- Do they understand the value of moving those to Red Hat Enterprise Linux?
- Which of their critical and mission-critical workloads can run on Red Hat Enterprise Linux?

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?
- How do you secure and optimize your critical workloads?

Listen to (metrics you can sell to):

- Cost of downtime/downtime frequency/length
- Compliance and risk dashboards
- Incident closure times/recovery time
- TCO, operational cost

Successful qualification is:

- We understand the customer's desired future state in terms of security, reliability, support, operational efficiency, and TCO.
- The customer has outlined 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 Red Hat Enterprise Linux with real numbers.

IDENTIFY PAIN

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

Questions to consider:

- **If on CentOS Linux:** Are you aware CentOS Linux EOL is June 2024? How ready are you to run workloads in production and development after EOL?
- What are the business needs you have for a server OS and how do those affect your bottom line?
- What value are your current server operating systems giving you?

What does success look like?

- We have qualified enough pain points that
  a) imply urgency in the customer (If CentOS Linux, support is ending in June 2024)
  b) motivate the customer to migrate,
  c) you understand their pain points and can link them to their current OSs
  d) let us progress to the next meeting.

Ask these questions to qualify pain points:

- What are the operational requirements for their Linux workloads?
- How is your experience using different OSs for running workloads in production? Do you experience any skill gaps? How do you face that?
- How important is having the ability to raise support tickets and have dedicated SLAs for your software? If Yes/No, Why?
- How do you ensure upgrades/maintenance support for your applications?
- What is an example of a planned or unplanned downtime event recently ?

Listen to (pain points you can sell to):

- Lack of internal resources to support and skill gaps
- Price (free vs paid), access (free download & install, cloud access)
- Vendor certification, security compliance, support quality/timeliness,
- Support life, in-house skills, features (LivePatch, tools)
- Upgrade/update challenges, build process
- Timeline, critical event

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:
  - Infrastructure Manager/IT Operations Manager
  - Critical Application Owner
  - CISO

Ask these questions to qualify the champion:
- Are you close to the decision-makers? And to their influencers?
- How does our solution align with your professional goals?
- Have you ever tried using Red Hat Enterprise Linux or other Red Hat software? How was your experience?
- Would a no-cost Developer Subscription allowing you to use Red Hat products for personal use help you feel more comfortable supporting our products?
- Are there any Red Hat enablement or materials you'd need to support those internal discussions?

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

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DECISION CRITERIA

Goal: Knowing how the prospect or customer makes decisions
- The driving factors behind the prospects' buying decision.
- Understand what the prospect wants.

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 prospect's needs & wants and address their pain points.

Ask these questions to discover the decision-making criteria:
- Who is responsible for these types of decisions?
- Who decided to use or standardize on your current OS?
- What do you want & require from an operating system solution - whether it be security, compliance, upgrades, analytics, time-saving, etc.?

Listen to:
- 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 utilize 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.
- 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?
- Why do you need to purchase by this date exactly?
- Who are the decision makers? (e.g. Procurement, Infra Manager, Infra Architect)
- 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.)
  - 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.
- Understand the platform landscape (Windows, other Linux variants, on-prem vs. cloud)
- Assess the possibility of customers moving from Linux to Windows.
- Awareness and opinion of other Linux distributions such as Rocky, Alma, Oracle Linux, Ubuntu, etc.
- 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 other solutions are you considering?
- Why are you considering that competitor solution?
- Why is that feature within that solution important to you?
- What is the business problem that you intend to solve using the solution?

What does success look like?
- You know who are Red Hat's 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? **Economic buyer - Questions to consider:** ● Who is the decision maker? Who manages the budget? ● 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 operating systems decisions? ● 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 needed	**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. ● Learn to what degree does the input and recommendation of the partner influence their decision