# Guided Trial/POC Guidelines

The POC process must include a clear definition of the criteria by which the prospect will evaluate/measure the platform. The criteria should be approved in advance by the relevant stakeholders (for the prospect) involved in the decision-making process (beyond the testers and other teams that would use the tool as well).

Commitment of all stakeholders will contribute to the success of the POC/Trial as well as the successful implementation of the platform in the organization.

Before starting the POC it is very important to understand the following from the prospect:

* What is driving the evaluation of Transifex as a solution provider?
* What are the pros and cons that affect the work of the team on a daily basis in the existing process?
* Set the expectations of the expected next steps once POC/Trial is successfully completed
  + Does this POC/Trial end in a commitment to sign with us?
  + What would on-boarding look like if the prospect does sign on with us?

## POC/Trial ground rules

Proof Of Concept, should be viewed as a way for you as the seller to prove that our platform/solution is the best fit for meeting the requirements/needs of the prospect. It is important to make sure that the prospect views it the same way. The Transifex team will be spending time, energy, and resources on giving the prospect free access to the proposed solution in efforts to demonstrate how Transifex will make sure the prospect is successful.

Guided POCs are for legitimate, expected buyers or those who are evaluating multiple solutions as part of the decision process---not people who are still on the fence about making a change.

## Rules of the POC/Trial

The prospect should understand that although they are able to conduct a free 15 day trial themselves, we are offering more structured and assisted POCs for prospects that are looking to follow best practices and get a jump start on implementing the desired/proposed solution to solve their needs.

The purpose of a proof of concept should be very specifically outlined:

* The customer refuses to buy the platform/solution without trying the product first, and has a valid reason for needing to validate the way the product works
* The customer agrees that they expect to buy at the conclusion of the POC if the success criteria is met.

The rules are as follows:

* Ideally we want to have DM buy-in before starting a POC:
  + Never grant a POC to a champion without having DM buy in.
    - You need some assurance that you’re working with the person who can sign the contract, or at the very least, this person is committing that the decision maker is ready to move forward if the POC is successful.
* Never do a POC to prove ROI - only to prove functionality/capability
  + You should never allow ROI to become part of your POC success criteria.
    - A few weeks isn’t nearly enough time to predictably prove anything.
  + On the other hand, if your prospect simply wants to confirm the product is easy to use, needs buy-in from other team members, and that the functionality advertised works as promised, that’s a different story- that’s totally fine.
* Prospect must agree to success criteria before starting a POC/Trial
  + Before you launch a proof of concept, you and your prospect should sit down and map out the exact things they’re looking to test.
    - Make a checklist together- if the following things are true, the prospect should agree that they plan to purchase at the conclusion of the POC.
* Customer must agree to a project plan with success criteria, timed milestones & stakeholders
  + We should share a GSheet with key milestones of the POC, and which stakeholder owns them.
    - This will allow us to catch the moment where the POC has gone off track (if it does)
    - It means that the mini milestones that have been set up haven't been met, and we can pinpoint who was supposed to own that item.
  + If we establish ahead of time how big a proof of concept is, prospects will value it more and be more respectful of the project plan.
* The rules don’t change for “bake offs”
  + There is a certain style of POC that is referred to as a “bake off.”
    - This means a prospect will be actively comparing our product to our competition, and picking a winner based on the results.
* POC must result in a decision---go or no go
  + The customer should agree that when the POC ends, they’re either signing a contract, or you’re both going to agree that this is not the right solution.

# POC/Trial Process

The following activities are areas that need completion as part of the POC/Trial:

* Set a reasonable time frame for completion of the POC/Trial.
* Set up the end-to-end platform/solution flow that the prospect wants to test, it could be more than one end-to-end flow.
  + It is important not to choose a very complex e2e workflow, but make sure it covers the main functionality of the platform/solution and the main needs of the prospect.
  + The goal here is to see how the platform/solution handles the e2e process of the workflow.

## Define POC/Trial Criteria

* Define the criteria for a successful POC/Trial.
  + Important to choose criteria worthwhile for your needs and to best evaluate the platform/solution.

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| Criteria | Priority | Comments/Notes |
| Criteria One | High | Must meet inorder to consider a success |
| Criteria Two | Medium | Should meet inorder to consider a success |
| Criteria Three | Low | Not critical but would be a nice to have |

* + Things to consider when defining the criteria:
    - Be sure to have a variety of criteria:
      * Business and Editorial capabilities/functionality
      * Technical capabilities/functionality
      * Potential costs that the platform/solution may bring with it(ex: translation costs)
      * Training cost.
* It is highly recommended to schedule a meeting with the relevant stakeholders to present to them the selected criteria and gain agreement on the metrics that will be tracked
  + During the meeting we will go over the meaning of each of the selected criteria.
  + It is important to hear all opinions.
  + The criteria could be updated after the meeting according to meeting conclusions.
  + An additional goal of the meeting would be to agree on which end-to-end flow needs to be selected for POC.
    - This will ensure that we are on the desired path before the start of the POC, as well as earn additional “commitment” to the process by stakeholders.

## Starting the POC/Trial process

### First stage

* Start working on the identified workflows of the end-to-end platform/solution flow
  + This can be Transifex building out the necessary pieces of the solution, without the prospect
    - **Project(s)** - Create and setup the necessary project(s), including any settings and configurations necessary for the desired flow
    - **Integrations** - setup and installation of necessary/key integrations for the desired flow

### Second stage

* Test the implemented solution from start to finish, make necessary adjustments/enhancements.
* Schedule an internal meeting to present the results and answer any questions about the platform/solution and the proposed implementation.
  + Live session(s)
  + Recorded Session(s)

### Final stage

* Build presentations and demonstrations supporting documentation to provide to prospects.
* Schedule a concluding meeting with relevant stakeholders to view POC results, answer the questions and decide about the platform/solution.

# Post POC/Trial

The following activities are areas that need completion as part of the POC/Trial:

* All captured notes, prospect feedback, learnings should be updated in the open opportunity page(win or lose) to ensure closed loop feedback to our Product and CSM Team.

-What if prospect needs more than a 14-day period for trial?

-What if prospect refuses to engage in our “handholding” process?

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