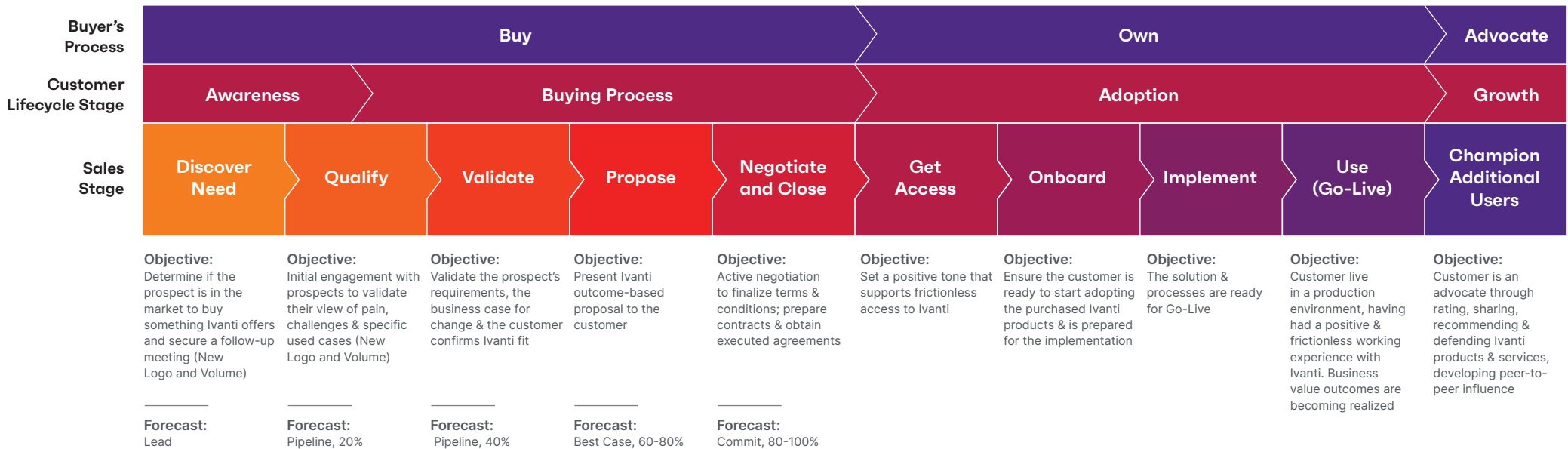




Selling the Ivanti Way

Our Command of the Sale methodology equips sales teams with a Customer Engagement Model (Sales Process) and Customer Engagement Process (Customer Lifecycle Journey) to qualify, progress, and close sales opportunities consistently, ensuring customer success. This is not new, but rather a refreshed approach, with defined entry/exit criteria that is aligned to the customer's buying process and ensures success beyond the sale through owning and becoming advocates of Ivanti solutions.



Objective

Determine if the prospect is in the market to buy something Ivanti offers and secure a follow-up meeting (New Logo and Volume)

 Forecast: Lead

Sales Tools and Collateral

[6sense](#)

[LinkedIn Sales Navigator](#)

[Outreach](#)

[Salesforce](#)

[Value Framework](#)

[Value Negotiation Field Guide](#)

[Zoom Info](#)

Activities

BDR:

- Conduct prospect research
- Explore/Qualify for: pain, compelling event, required capabilities, desired outcomes, existing project, project owner/decision maker
- Act on MQLs within 24 hours: qualify lead, set meeting, create opportunity
- Introduce Account Manager on the introduction call
- Coordinate cross-sell prospecting activities on existing accounts with AM

Account Manager:

- Introduction call with BDR
- Coordinate cross-sell prospecting activities on existing accounts in close collaboration with BDR
- Identify leads for partner nurture

Partner:

- Partner led motion= Qualification
- Partner to contact the Account Owner and coordinate next steps
- Partner demand generation

Criteria and Customer Verifiable Outcomes

Ivanti Internal Exit Criteria:

- [MQL actions within SLA](#)
- Account Manager engaged
- Meeting set, opportunity created and reassigned to Opportunity Owner
- Sales accepted lead

Customer Verifiable Outcomes:

- Customer has agreed to first meeting and further discovery

Qualifying Questions

1. Walk me through why you feel this account is a good target for us. What is your hypothesis about how we can drive value?
2. Based on your research, what are the compelling events, business drivers, challenges and risks that would compel the prospect to take your call or meeting?
3. Have we had any prior contact or engagement with this account? If so, who did we speak with and what was the outcome of the conversation?
4. Do you have an understanding of the role your contact plays in the buying cycle?
5. Does the customer have a budget?

Objective

Initial engagement with prospects to validate their view of pain, challenges and specific used cases (New Logo and Volume)



Forecast: Pipeline, 20%

Sales Tools and Collateral

[Analyst Reports](#)

[Customer 360 Reporting](#)

[Customer Testimonials](#)

[Salesforce](#)

[Highspot Use Cases](#)

[Value Framework](#)

[Value Negotiation Field Guide](#)

Activities

Account Manager:

- Conduct prospect pre-call research
- Conduct initial discovery in partnership with SE: Uncover buying motive, determine viability of the opportunity, target MEDDPIC components (especially pain, metrics, decision criteria, economic buyer, champion and competition)
- Identify, develop and test Champion
- Explore for funding and course (who/function)
- Triangulate opportunity with Economic Buyer priorities and PBO's
- Start to map the political landscape: EB, Champion, Stakeholders and any crossover
- Understand Partner Landscape
- Understand the Services Landscape (Entp only)
- Position the Ivanti story according to insights gained from discovery
- Assess 3 Negotiation Questions and manage customer anchors
- Accept or decline opportunity after meeting in 48 hours
- Identify, qualify and confirm opportunity creation and potential Ivanti solution
- Internal note: Ensure lead source is accurately reflected on the opportunity (to be confirmed who this can be done for BDR credit)

SE:

- Support initial discovery
- Identify potential Ivanti solution
- Only schedule demo once exit criteria are met to move to the next stage (per uncovered MEDDPIC)
- Determine additional technical/SME Ivanti or Partner resources needed

Sales Specialist: (Entp only)

- Early account planning for broader opportunities
- Identify competitor traps to set based on Decision criteria

Partner Sourced:

- Partner registers opportunity

Ivanti Internal Exit Criteria:

- Identified relevant stakeholders
- Assess opportunity risk and initial Go or No-Go decision
- If applicable, Partner is identified, engaged, and registered the opportunity
- Opportunity created in Salesforce with completed: [MEDDPIC assessment](#) (EB, Pain, Comp) and Opportunity Manager

Customer Verifiable Outcomes:

- Customer has agreed to further meetings to identify proper solution to meet business challenges
- Customer has shared critical business problem (metrics/PBO's)
- Introduction to additional stakeholders and/or Economic Buyer
- Customer or Partner has agreed to include Ivanti in RFP/RFI or requests additional solution context

Qualifying Questions

1. Describe the biggest business problems the customer is trying to solve. Describe what's in it for them.
2. What are the quantified impacts of these problems? What is the course of the customer's budget?
3. What formal Decision Criteria have we identified?
4. After identifying the pain, who are the likely competitors in this space? Is there an incumbent solution?
5. What is your plan to begin multi-threading in the account?
6. Have we identified Anchors to use and prepared Give/Gets?

Objective

Validate the prospect's requirements, the business case for change and the customer confirms Ivanti fit



Forecast: Pipeline, 40%

Sales Tools and Collateral

[Mutual Activity Plan](#)

[Salesforce](#)

[Value Framework](#)

[Value Negotiation Field Guide](#)

Activities

Account Manager/Partner:

- Summarize and confirm what you heard from the Customer (across multiple contacts and stakeholders)
- Support and validate the customer's business case for the initiative (customer's ROI, TCO, etc.), perform BVA as applicable
- Test and validate that the Economic Buyer agrees on the business value, priority and urgency
- Create and execute Anchoring strategy to influence Decision Criteria favorable to Ivanti (and set traps for competitors)
- Show potential solution options ([Multiple Options Template](#))
- Confirm customers Decision, Paper Processes and timing
- Collaborate on Mutual Activity Plan (EB or Champion)
- Seek out and participate in Deal Reviews/Coaching
- Refine sales and negotiation strategies, review with Champion as appropriate
- Identify need for additional Ivanti and Partner resources, introduce them appropriately
- Work with ASM/Partner to Scope the most likely solution, including services, and draft SOW for customer review and value
- Draft pricing to review with the customer and engage Deal Desk as necessary
- Go or No-Go: Send back for additional discovery/nurture, execute sales strategy

SE:

- Demonstrate technical fit (deep dive, demonstrations, etc.)
- Triangulate sales strategy

Sales Specialist: (Entp only)

- Align sales strategy with competitive landscape (including Do Nothing), customer PBO's and Ivanti Differentiators

Criteria and Customer Verifiable Outcomes

Ivanti Internal Exit Criteria:

- Completed [MEDDPIC assessment](#) with Go or No-Go Decision, update Relationship Mapper
- Completed Mutual Activity Plan, including close plan
- Determine the approximate price of the solution and assess it against budget

Customer Verifiable Outcomes:

- Customer confirms the business value of the initiative and Ivanti fit for the defined outcomes
- Customer requests proposal

Qualifying Questions

1. Has a meeting with the Economic Buyer happened? Has the front-line manager met the EB?
2. What does the Procurement process look like? When do we want to start engaging with them? How do we plan on utilizing our Champion to aid the Procurement process?
3. Have we validated the Mutual Activity Plan with the customer? Who have you triangulated this with??
4. How have you updated your Negotiation Strategy- Anchors and Give/Gets?
5. Have we validated the customer's Required Capabilities and the PBOs?

Objective

Present Ivanti outcome-based proposal to the customer



Forecast: Best Case, 60-80%

Sales Tools and Collateral

[Mutual Activity Plan \(with Close Plan\)](#)

[Negotiation Strategy Template](#)

[Salesforce](#)

[Value Framework](#)

[Value Negotiation Field Guide](#)

Activities

Account Manager/Partner:

- [Develop and present a proposal](#) to all relevant stakeholders including:
 - Summary of customer situation,, desired PBO's and Decision Criteria
 - Aligned Ivanti solution (Multiple Options)
 - Validation
 - Custom SOW (as necessary)
 - Competitive matrix
 - ROI
 - References
 - Quotation
 - Expiration Dates
- Confirm understanding and ensure readiness for customer's legal, security, privacy, and procurement processes
- Complete the Negotiation Strategy Template, review it, and attach it to Salesforce
- Upload proposal to Proposal Library
- Manage customer view of proposal, decision process, and timeline of the review process
- Next steps/meeting and timelines are confirmed and agreed with the customer

Criteria and Customer Verifiable Outcomes

Ivanti Internal Exit Criteria:

- Proposal presented to key stakeholders/Economic Buyer with buy-in, including budget confirmation
- Proposal attached to Salesforce opportunity and uploaded to Proposal Library
- Next steps confirmed with the customer

Customer Verifiable Outcomes:

- Customer initiates the formal buying process with mutually agreed-upon timeline
- Champion confirms that all proposal requirements have been met
- Procurement and/or Vendor Management has met with the Ivanti team
- Customer acknowledges Mutual Activity Plan progress and reconfirms path to close

Qualifying Questions

1. Have we presented the Multiple Options slide? What was the feedback?
2. Have we met with Procurement or Vendor Management and identified next steps?
3. Have we walked through the close plan and verified a close date with the customer, procurement, and buying center?
4. Has the customer committed all resources to move forward (legal, marketing, IT, etc.)?
5. Is there anything that would prevent the customer from signing?

Objective

Active negotiation to finalize terms and conditions; prepare contracts and obtain executed agreements



Forecast: Commit, 80-100%

Sales Tools and Collateral

[Salesforce](#)

Activities

Account Manager/Partner:

- Finalize agreement and execute Close Plan
 - Lead and manage negotiation process with customer stakeholders around procurement, security, privacy and legal
 - Internal management/Deal Desk discussions on Gives/Gets and approvals as required
 - Submit the Executed Agreements to order management
 - Follow up with the customer to
 - Thank customer and reinforce value they will receive from Ivanti solution
 - Set expectations for immediate next steps
 - Introduce Success Team (CSM, Project Manager, etc.)
- Engage executive sponsor "Thank You"
- Ensure Salesforce is up to date

Criteria and Customer Verifiable Outcomes

Ivanti Internal Exit Criteria:

- **The order has been accepted/processed**
- Exec sponsor meeting scheduled
- Thank you note sent

Customer Verifiable Outcomes:

- Signed contract/order
- Customer introduces us to the team driving the user journey to include stakeholders, sponsors, platform owners, project and implementation teams

Qualifying Questions

1. What challenges are we likely to encounter when it is time to get the final signature?
2. What is the customer's best alternative to a negotiated agreement?
3. Have we agreed to a cadence of contact ahead of time with the customer and Procurement to align with the close date?

Objective

Set a positive tone that supports frictionless access to Ivanti

Sales Tools and Collateral

[Eloqua](#)

[Licensing Portal](#)

[Salesforce](#)

Activities

Order Management:

- Welcome email and license keys are sent to the customer, sales team and Partner

Account Manager:

- Check access is confirmed and troubleshoot as needed

Criteria and Customer Verifiable Outcomes

Ivanti Internal Exit Criteria:

- If the license delivery SLA is breached, alternative action is taken
- Confirm that the customer has access

Customer Verifiable Outcomes:

- Customer confirms access within access SLA
- If access SLA is breached, alternative action is taken and customer confirms a satisfactory resolution

Qualifying Question

Are there any issues with the customer getting access?
If there are, what are we doing to resolve?

Objective

Ensure the customer is ready to start adopting the purchased Ivanti products and is prepared for the implementation

Sales Tools and Collateral

[Salesforce](#)

[Planhat](#)

Onboarding Decks:

- Customer Onboarding Deck (New Logo)
- Customer Onboarding Deck (New Product)

Programmatic onboarding email campaign

KB articles "Getting Started"

Activities

Onboarding process driven per customer segmentation (Digital, Hub, Assigned CSM Accounts)

Customer Success (Hub/Assigned CSM):

- Onboarding meeting with the business team
 - Introduction to the Ivanti Community, Innovators, Support, Advantage Learning and Renewals
 - Include Ivanti Account team inc. Partners as required
 - Partner resources engaged, informed and leveraged
 - Confirm desired business outcomes and value measurements
 - Complete Technical Onboarding Steps
 - **Complete onboarding checklist with customer**

Account Manager (No CSM or Hub Assigned):

- Onboarding meeting with the business team
 - Introduction to the Ivanti Community, Innovators, Support, Advantage Learning and Renewals
 - Include Ivanti Account team inc. Partners as required
 - Partner resources engaged, informed and leveraged
 - Complete Technical Onboarding Steps
 - Confirm desired business outcomes and value measurements

Criteria and Customer Verifiable Outcomes

Ivanti Internal Exit Criteria:

- Onboarding guidance completed, validate customer can engage with Support, Services, Partners and renewals
- Customer Success has documented and agreed upon customer's desired business outcomes and value measurements. Info documented and agreed (V2MOM)

Customer Verifiable Outcomes:

- Confirm access to key resources
- Confirm readiness for implementation

Qualifying Questions

1. How would you describe the status of the onboarding process? Would the customer describe it any differently?
2. Have we agreed upon the onboarding success metrics we will measure?
3. Are there any red flags surfaced in the onboarding that might create a risk to time to first value?
4. Have all relevant members of our team been briefed and ready to engage with the customer (including out exec sponsor)?
5. How are we planning to continue to engage with the Economic Buyer post-onboarding?

Objective

The solution and processes are ready for Go-Live

Sales Tools and Collateral

[Advantage Learning](#)

[Mavenlink \(now Kantata\)](#)

[Planhat](#)

[Salesforce](#) (Support tickets and Opportunity Manager)

Customer Onboarding Dashboard

NPS Tooling

Activities

Ivanti Services/Subcontracted Partner:

- Services Kickoff Meeting within agreed upon SLA
- Customer conducts Training/Advantage Learning
- Ensure delivery against the SOW
- Provide updates to the Account Team on implementation progress
- NPOS Survey Completion (tactical)
- Where applicable, invoke escalation processes

Self-Implementation:

- Self-serve training

Account Manager/Customer Success:

- Attend Services Kickoff Meeting
- Review the progress of implementation
- Join cadence meetings

Criteria and Customer Verifiable Outcomes

Ivanti Internal Exit Criteria:

- Solution deployed and ready for production

Customer Verifiable Outcomes:

- Confirm readiness for Go-Live

Qualifying Questions

1. How is the implementation going? Is the customer satisfied with the progression?
2. How does our preferred schedule of cadences align with the customer's preferences? Have they agreed to the schedule?

Objective

Customer live in a production environment, having had a positive and frictionless working experience with Ivanti. Business value outcomes are becoming realized

Sales Tools and Collateral

[Planhat](#)

[PowerBI](#)

[Salesforce](#)

[Value Cloud](#)

[Innovators Community](#)

Datalake

NPS Tooling

Programmatic adoption email campaign

Programmatic renewals campaign

(working in alignment with 1:1 outreach from renewals)

KB resources- product documentation and discussions

Activities

Account Manager:

- Owns and manages collaboration and account planning across all Ivanti; Partner resources engaged and leveraged

Account Manager/Customer Success/Partner:

- Conduct regular in-person Customer Business Value sessions incorporating value to date and mapping future needs to Ivanti product solutions
- Conduct Account Nurturing Campaigns
- Act on product usage analysis and EWS alerts
- NPS Survey completion (tactical and strategic) and follow up
- Initiate and manage Red Account process

Advocacy:

- Design and run RUGS, Focus Days and User Groups

Customer Success:

- Conduct the following: Success plans, Save plans, Maturity Assessments, Capability Workshops, Internal Success Stories

Customer Success Scale (consider separate motion)
- Services: engage with Customer and account teams in additional implementation phases
- Renewals: Renewals process
- Support: [Escalation Management](#)

Criteria and Customer Verifiable Outcomes

Ivanti Internal Exit Criteria:

- Successful renewal initiated
- All purchased products are deployed
- Completed and validated Mutual Success Plan (Named CS Accounts only)

Customer Verifiable Outcomes:

- Customer confirms realized initial value from Ivanti solution as per defined value drivers
- Customer agrees to become an advocate

Qualifying Questions

1. What are the main value realization updates and insights we need to share in:
 - Champion and Economic Buyer cadence calls?
 - Business reviews with key stakeholders?
 - Internal Ivanti team briefings?
 - Our Exec Sponsor?
2. Have we identified cross-sell and solution maturity opportunities?
3. What capabilities should we introduce on the next QBR?
4. Are there any threats emerging (both to consumption levels and from competitors)?
5. How will you continue to identify, develop and test other Champions in the account?

Champion Additional Users

Objective

Customer is an advocate through rating, sharing, recommending and defending Ivanti products and services, developing peer-to-peer influence

Sales Tools and Collateral

[Capability Workshops](#)

[G2](#)

[Gartner Peer Insights](#)

[Highspot](#)

[Planhat](#)

[Ivanti Advocates Playbook](#)

[Sprout Social](#)

[Trust Radius](#)

[Value Cloud](#)

Value Hour

PRM

Activities

Account Manager/Customer Success/Marketing:

- Share proof points and other customer stories to incentivize customers to join the [Ivanti Advocates Program](#)
- Assess continued value realization, allowing customers to defend value internally
- Involve customers in multiple marketing campaigns to drive advocacy, case study creation, events and participation in user groups
- Measure customers digital interaction (e.g. support, community, etc)
- Facilitate customers contribution to Gartner Peer Insights, G2, Trust Radius reviews
- Continue facilitating Give/Gets- Incentives for customer advocates (e.g. product access, trainings, etc)
- Cross-sell and Up-Sell activities
- Continued capability and maturity assessments
- Alignment of product roadmap with customer's future requirements

Partner:

- Share proof points and other customer stories to incentivize customers to join the [Ivanti Advocates Program](#)
- Encourage customers contributions to Gartner Peer Insights, G2, Trust Radius reviews
- Involve customers in multiple marketing campaigns to drive advocacy, case study creation, events and participation in user groups
- Cross-sell and Up-Sell activities
- Continued capability and maturity assessments for select partners
- Nominate customers for [co-branded Customer Success Stories](#)

Criteria and Customer Verifiable Outcomes

Ivanti Internal Exit Criteria:

- Customer NRR growth directly or indirectly

Customer Verifiable Outcomes:

- Rates it: Completes 3rd party peer reviews
- Shares it: Shares their experience with others via marketing content, or engage in events
- Recommends it: Customer shares their experiences of their solution and suggests it to others through the Ivanti Advocates Program
- Defends it: Defends solution internally, talking to value

Qualifying Questions

1. Has the customer agreed to participate in the Ivanti Advocates Program? If not, what will we do to ensure they will?
2. Walk me through our plan to grow our relationship and new value opportunities with this customer.