

The HLS Playbook for AE's and SE's

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Playbook for Manufacturing Prospects

1. Medical Device Prospects

Account Management Needs

Medical Device Manufacturers are builders of highly configurable products. These products can and usually do take days or even weeks to configure for a specific customer. Each Product is typically Made to Order (MTO) meaning that when a quote is accepted, those specific instruments or machines are made specifically for them.

These prospects engage their clients in long, involved sales cycles – similar to High Tech cycles, and will use Opportunities to manage these sales cycles and interactions.

Our Prospect's Account Reps will strive to be on site with their clients often, but will also spend some time in the office. Who to visit (and how often) is mostly driven by Opportunities, but road trips need to be productive so using **Maps** can help (see below). The decision about how to visit can be built on pending Opportunities, total sales volume and client support issues.

Our Prospect's Account Managers are typically responsible for new Lead Generation but likely have a Marketing Team around them who are driving potential leads to their Website and engaging with them with White Papers and other content. These are complex machines, and so education is likely the first step in the sales cycle, even if that happens without the rep. That said, visiting qualified leads will be an important step in the process, it's just that the qualification is likely the creation of an Opportunity.

How can we help?

- Using base Salesforce Views we can show data regarding last visit, Open Opportunities, Opportunity Size and targeted Close Date
- Using **Maps** to help Account Reps to find new business while on the road could also help. Seeing early stage Opportunities nearby, qualified leads, or other records could give the Rep a more quality road trip.
- Mobile experience could be important – especially for Lead Management and Opportunity updates (similar to you being on the road and updating Opportunities as you leave clients). This sales cycle will feel very familiar to you as a Rep. And in these kinds of sales cycles, there are a ton of next steps that happen after a visit.
- Using base activity management and mobile experience, we can record trip outcomes, record next steps, and track basic expenses like mileage or meals. For Prospects in our space, we shouldn't get too technical in the beginning (Concur) so keep it simple.
- Opportunity Management will be a key component to Medical Device Manufacturers. These are long and complex Sales Cycles – often requiring multiple engineering drawings, configuration capture and Implementation plans.
- Finally, workflows and approvals can help our prospects to alert and confirm trips, outcomes or Opportunities for their leads and customers.



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Data Analysis Needs

Data analysis from ERP is not always a pressing needs with Medical Device Manufacturers, however, some of our Medical Device Prospects will also sell the materials that are used in the machine and in that case, ERP Integration can be important. Think of a company that makes anesthesia machinery, and sells the tubing and replacement batteries as consumables for the machine.

However, writing BACK to ERP could be a huge advantage. If we go to all the trouble of building out a complex Quote (See below) if we can send those details back to ERP to create the Sales Order, that could dramatically reduce the data entry requirements for the client.

If the system is a newer ERP (Microsoft GP, SAP, NetSuite, etc.) we can use the system API to send Sales Orders TO ERP.

How can we help?

- With **HealthCloud**, we could integrate to their ERP and pick up critical information.
- **Mulesoft** is a possibility, but the pricing typically removes the tool as a possibility. We can and have used Middle ware to do the integration, BUT, in our opinion, we are better served writing APEX code to do the integration. *We believe that we can do most integrations for between \$12K and \$15K one time (not counting the rest of the project)*. Middleware such as [Jitterbit](#) or [Informatica](#) can START at \$20,000 a year.
- And by using this information in Salesforce Reports and Dashboards, we could deliver this analysis to the Account Reps' pocket. They can use this information to analyze sales by Product, by time (This Year/Last Year), by category – really anything we can get from ERP. We can do Gross Margin Analysis if the cost of goods can be sent in the integration, we can analyze product mix if the category can be sent. Really anything they want to see, if they can get us the data, we can draw at the account level, and then for the company/rep/time period
- And using API's if available, we can write Sales Order data back to ERP when Quotes are Won.

Quote Preparation Needs

Quoting and Opportunity Management can be a huge advantage to clients like this. Most of our Medical Device Prospects build highly configurable quotes for customers, highlighting custom builds for products, product options and service items such as Maintenance or Implementation.

If the prospects do quoting in a spreadsheet, we want a copy of that. **CPQ** is almost always a fit for these customers, but we will need to understand how complex the quoting function is. Key to scoping (and pricing) these kind of **CPQ** projects are:

- Bundles – how many configurable products are there? And how different are they?
- Documents – does the prospect have different documents they deliver in the Sales Process? Quote? Proposal? Maintenance Agreements? Understanding the volume and complexity of these documents can be key



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In addition, customers may want to see multiple versions of a quote before deciding which way to go. **CPQ** gives us the ability to manage this.

Project Needs

Many Medical Device Prospects have an implementation component to the sales process. This can be handled by in house PM's or by outside Partners or contractors.

The complexity of a project can vary from a simple tracking mechanism (Shipped, installed, configured, complete) to a multiple level project with several milestones and tasks. Digging into this complexity will determine the scope of the Project Piece and as a result to overarching costs.

How can we help?

- We can build out a Custom Project function, or add one of the free tools (Milestones PM). If the project needs are really complex, then we may want consider moving towards a Task Ray implementation, although that adds time and cost. At the very least, getting Project users on board *should add users to the license count.*

Customer Support Needs

The typical Medical Device Prospect will have a maintenance function that could represent a significant source of revenue for the company. These maintenance needs can be handled in multiple ways - from in house service reps, to field service reps to contractors or partners. If the prospect schedules, tracks and bills for these service calls, **FSL** is a good candidate for them.

How can we help?

- We can help to build out **FSL** for the Prospect. Usually for the size of prospects we are dealing with, we will be replacing a Spreadsheet, or a White board, so a simple approach can be a huge improvement on the existing function.
- BUT, we need to understand that while spreadsheets are a mess, and don't give clients any meaningful data, they sure are easy to manipulate! We need to start at the beginning, drilling into the prospect that this will be an **ENORMOUS** change for the field techs and their dispatch users.
- Framed properly, and getting buy in from the prospect early, we can transform their Field Service function using **FSL**. However if we sell it as an easy to install panacea, we will be in trouble almost immediately.

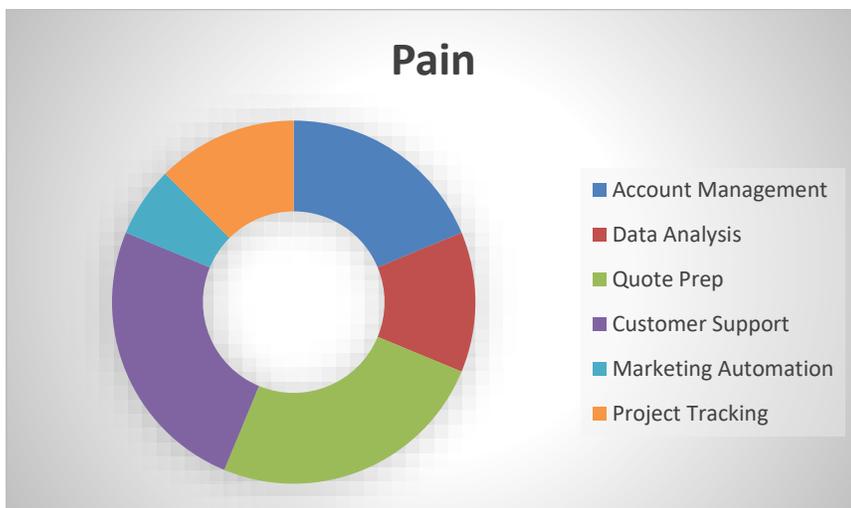
Marketing Automation Needs

Marketing for these kind of customers is more face to face and person to person than digital. That said, they are probably delivering or would like to deliver educational information about their products to customers. Getting a prospect to self-identify in order to download a White Paper would give our Prospect a leg up in turning the prospect into a Customer.

When a Lead Self Identifies, we can use the Pardot connection to send that to Salesforce, assign the lead to a Rep and have them qualify the lead. We can also build Drip campaigns for leads who self-identify – sending them periodic updates or white papers, or whatever the Prospect can come up with. **NOTE –the Prospect will need to be in a position to create this content. We won’t be able to do this for them, but if the Content is available, we can help deliver that content to the leads.**

Understanding the Need

We call this the “Rotation of Neglect”! Which of these business process is the most important initially? Knowing the biggest pain point can help us to determine the initial approach, AND can help us with future Opportunities with the Prospect once they become a client:



Scoping Questions

- ◆ Are you doing ANY CRM activities? (Tracking Calls, etc.) If so, how? (CRM, Spreadsheet, Outlook).
- ◆ How do you decide when (and who) to Visit? Is there any data analysis when trips are scheduled?
- ◆ How do you report meeting outcomes? How do you communicate next steps? Do you need other resources to help? (Event coordinators, category managers, etc.)
- ◆ How do you track, Manage and move Sales Opportunities forward?
- ◆ How much of your business is New Clients vs Existing Clients
- ◆ How do you quote new products for existing customers? What is the process? Who is Involved from your side?
- ◆ Do you sell both Equipment AND consumables related to that Equipment?
- ◆ If so, how are each of the Sales Processes Managed?
- ◆ How do you quote new products for Leads? What is the process? Who is Involved from your side?
- ◆ What is your ERP System?
- ◆ How is your product configured? Do you identify optional products or configurations independently?
- ◆ Do Optional products or configurations change the price of a product?
- ◆ How do you identify new Leads? How do you engage with them?



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- ◆ Do you engage in Digital Marketing with your customers or Leads? If not, is this a priority for 2020?
- ◆ Do you provide (or sell) Maintenance on your products?
- ◆ How is that Maintenance Provided?
- ◆ Do you have Field Service Reps who make Service calls on your product?
- ◆ Is this a Profit Center for your firm?
- ◆ What kind of data do you need on the road? Is the data in ERP? Outlook? Spreadsheets?
- ◆ How do you collaborate within the company? (Quip, Chatter, etc.)
- ◆ How do you assign Accounts and/or Leads? Is there a geo distribution?
- ◆ If a Rep leaves, how do you “Institutionalize” the account relationship history? (I bet they don’t!)

Challenges and Risks

- ◆ Quoting using CPQ is at a minimum a \$15K project. Integration (if necessary) is between \$12K and \$15K. FSL can be anywhere from \$15K to \$25K, so a full on solve all your problems, change the way you do business project for a Medical Device manufacturer can EASILY be over \$50K. We should walk into these projects with an understanding of the complexity and try and find the MOST painful point with the Prospect, and try to solve for that (first).
- ◆ Are we high enough? Most of these clients in our space have 1 or 2 people at the top who make all of the decisions. We need to make sure they are with us right from the beginning.
- ◆ A VP at Salesforce has an ingenious way to handle this. Make the first meeting after the Prospect is qualified to you a “**CXO/VP Introduction**”. Hold out for this meeting and don’t proceed until we get it. At the meeting, we do a broad overview of Salesforce as market leader, an explanation of CRM (sometimes the customer doesn’t know). This meeting also sometimes tells the prospect what we don’t do. For instance, we don’t do EMR! We don’t do Practice control, we don’t do Finance!
- ◆ Is the client mature enough? Sometimes we see clients who do this work in Spreadsheets. They are desperate to get away from this, and they know that staying on spreadsheets or QuickBooks is a limiting decision, but they don’t have the money, resources, or processes to make the move from those tools to Salesforce.
- ◆ If the upfront costs are prohibitive, or if the prospect does not have the resources to commit to such a big project, it’s probably time to part friends. Clients who take on this much change are a **GREAT candidate for CSAT issues** later and potentially Carve Backs...