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Transition Vision

“We Love It – But How Are We Going To Get There?”

Which vendor will get the business?

Suppose you are looking at buying a new car... You've completed all of your research, comparisons and test drives, and have reached your decision. You've even determined what color, interior, packages and extras you want. You are all ready to buy!

You drive to a car dealership, walk in, and are greeted by a salesperson. You say, “I'm ready to purchase a new XD-100 sedan – I even saw the specific model with the trim and package I want on your lot. All I need to do is to trade-in my old Zephyr to use the money to help with the purchase.”

The salesperson says, “Terrific! Simply go ahead and sell your old car. Once you have that done, come back and we'll get you set-up with your new car.”

You leave, discouraged, because you don't really want to invest the time and energy to sell your old car. You've never done it before and don't know how.

You visit a second dealership...

As with the first dealer, you see the exact car on their lot – ready to go. You walk into this dealership, are met by their salesperson, and again say that you are all ready to purchase. “All I need to do is to trade-in my old Zephyr to use the money to help with the purchase.”

This second salesperson says, “Very good. Simply give us the keys and pink slip to your old car. We'll give you fair value for it – right out of the Bluebook – and we'll handle all of the documentation and transfer paperwork. We'll also take care of the taxes and Department of Motor vehicles registration process. And, you can immediately apply the trade-in value to your new purchase, right now. You can leave here in less than an hour in your new XD-100 sedan.”

Which dealer will get your business?

Clearly, the second dealer made it easy for you to make the transition from your current situation to the vision you have in mind of driving off in your new car.

The same principle applies in the world of software. Vendors who can successfully create a vision of how customers can transition from their current situation to their desired Solution will enjoy significant advantages over vendors who do not. In competitive situations, if everything else is equal, a strong Transition Vision can make the difference between winning and losing the business.

Creating a Transition Vision

Once a customer is comfortable with a proposed Solution – the set of specific capabilities they feel they need to address their Critical Business Issues (CBI’s), it is time to explore and discuss how the customer expects to implement and deploy their envisioned solution into production use. While some customers may have a proscribed process to accomplish this, most don’t and nearly all customers would appreciate guidance from the vendor on how best to achieve a successful deployment.

One tool to help with this process of building a Transition Vision is known as a Sequence of Events. This is a brief listing of the key tasks that need to take place, including the responsible players, start and end dates, and relevant “go – no/go” decision points. It is a simple version of a Gantt chart.

A Sequence of Events, used in a discussion with the customer, helps build a Transition Vision with the customer’s participation. It demonstrates the vendor’s experience in other, similar situations and helps the customer define a workable plan to achieve their desired objectives. Here’s an example:

<u>Item</u>	<u>Start</u>	<u>End</u>	<u>Responsibility</u>	<u>Complete</u>
Meeting to Define General Sequence of Events	4/1/08	4/1/08	Customer Business and Technical Leads; Professional Services	✓
Define Deployment Objectives, User Deployment Waves and Timing	4/2/08	4/8/08	Customer Business and Technical Leads; Professional Services	✓
Pre-Installation Review – Go/No Go	4/12/08	4/12/08	Customer IT; Professional Services	Go
Installation and Admin Training	5/3/08	5/5/08	Customer IT; Training	✓
Data Loading/Migration	5/5/08	5/7/08	Customer IT; Professional Services	✓
Configuration/User Provisioning Creation and Testing	5/5/08	5/7/08	Customer IT; Professional Services	✓
1 st Wave User Training	5/10/08	5/11/08	Customer Technical Lead and Users; Training	✓

Roll-out to 1 st Wave Users	5/10/08	5/11/08	Customer IT and Users; Professional Services	
Evaluation of 1 st Wave Implementation	5/24/08	5/28/08	Customer Technical Lead and Users; Training, Professional Services	Go / No Go
Changes to Provisioning, Training	6/1/08	6/5/08	Customer IT, Customer Technical Lead; Training, Professional Services	
2 nd Wave User Training	6/10/08	6/11/08	Customer Technical Lead and Users; Training	
Roll-out to 2 nd Wave Users	6/10/08	6/11/08	Customer IT and Users; Professional Services	
Evaluation of 2 nd Wave Implementation	6/24/08	6/28/08	Customer Technical Lead and Users; Training, Professional Services	Go / No Go
Changes to Provisioning, Training	7/1/08	7/5/08	Customer IT, Customer Technical Lead; Training, Professional Services	
3 rd Wave User Training	7/10/08	7/11/08	Customer Technical Lead and Users; Training	
Roll-out to 3 rd Wave Users	7/10/08	7/11/08	Customer IT and Users; Professional Services	
Evaluation of 3 rd Wave Implementation	7/24/08	7/28/08	Customer Technical Lead and Users; Training, Professional Services	Go / No Go
Summary of Deployment Status Meeting; Discussion of Future Applications and Deployment	8/7/08	8/7/08	Customer Business and Technical Leads; Professional Services	

How Do Demos Impact Transition Vision?

Demonstrations are the primary vehicle for communicating what good things your software provides to customers – and the use of demos extends well beyond a traditional sales process.

Demos are often an important part of building and communicating a Transition Vision into a customer's organization. While the customer's business and technical leads may have seen the specific capabilities they want in the vendor's offering, it is likely that many of the target users and other players have not. Demos may be used (or required!) to generate interest in the target user community – to create “pull” for deployment by the users themselves.

The same Great Demo! principles of “Do the Last Thing First” apply in these deployment demo situations, just as they do in the sales process. Users want to know what good thing the software will do to help them in their day-to-day tasks and processes.

Who will deliver these demos? They may come from the vendor's team – training, SC's, professional services – and they can also come from members of the customer's organization. Customer trainers, IT staff, lead users, power users and day-to-day users may execute demos to others, in both formal and informal situations. Sometimes the most compelling demos occur when one user says to another, “Hey, take a look at this...!”

Contemplate providing these communities with templates for delivering demos, particularly to specific end-user groups, to clearly show the value provided to these end-users right at the beginning of the demo: “Do the Last Thing First”. These deployment demo templates serve as another key component of a Transition Vision.

Transition to Sale

Vendors that successfully build Transition Visions with their prospects do enjoy higher success rates in sales. The Sequence of Events and deployment-oriented demos are tools that help this process – and differentiate your organization from the competition.

How well does your organization accomplish these activities today?

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