John Mancini, President -- AIIM

Changing Market Opportunities and Exploding Opportunities in Document Management

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The Global Community of Information Professionals

AIIM provides public and private training = AIIM.org/training
AIIM provides research & benchmarking = AIIM.org/research
AIIM provides on-line and in-person events = AIIM.org/events

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How to Sell Document Management Solutions

From Reactive to Proactive Solution Selling

$695 non-members
$595 AIIM members

FOUNDATION
- Why Document Management?
- Document Management features and functions
- Impact of Mobile and Cloud Computing
- Selling Enterprise IT in the Age of Consumer IT
- Competitors and obstacles

IDENTIFY OPPORTUNITIES
- Spotting opportunities in different vertical and horizontal processes
- Identifying prospects
- Identifying decision makers and stakeholders
- Strategies for getting their attention including social media and referrals

ENGAGE CUSTOMERS
- Challenger opening
- Establish credibility and value
- Offer unique perspectives and insights
- Demonstrate importance to their business
- Anticipate objections and how to handle them

MAXIMIZE THE OPPORTUNITY
- Scope, demo, proof of concept, pilot
- Handle requests for additional functionality
- Identify professional services opportunities
- Gain agreement and ask for the order

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New Business Models and IT Demands

Opportunities Abound

6 Things to Focus on in Making the Sale

What should you do Monday?

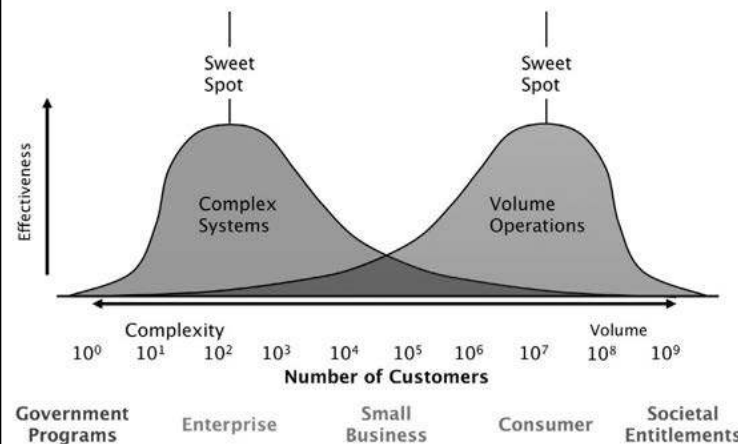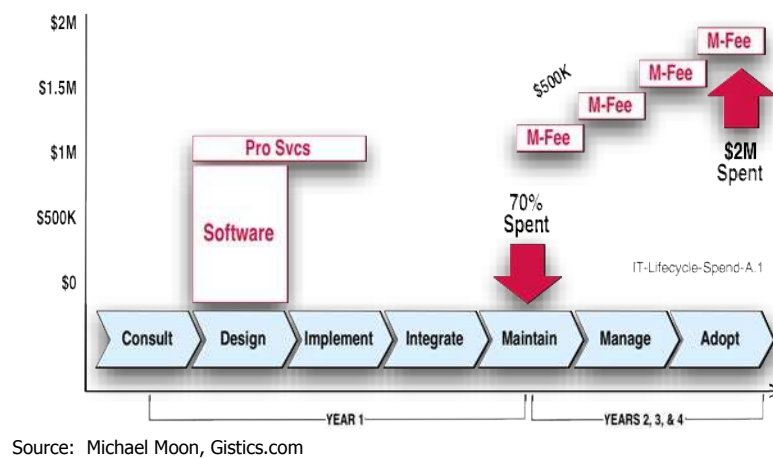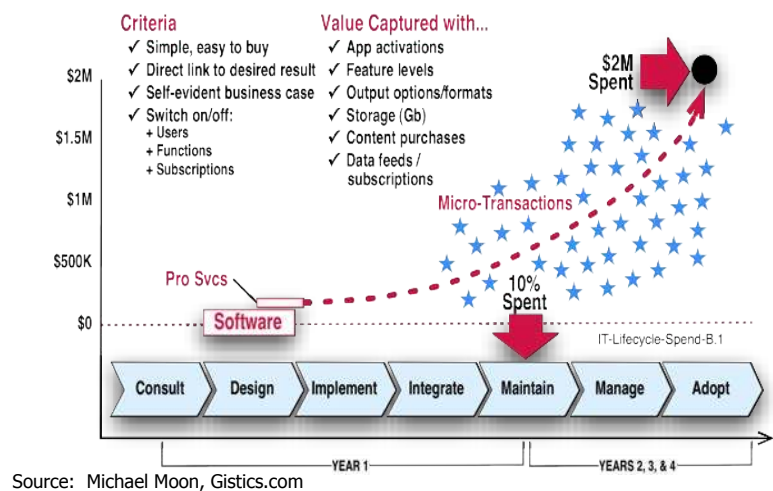## Two Business Architectures
Complex Systems vs. Volume Operations

Sweet Spot

Sweet Spot

Effectiveness

Complex Systems

Volume Operations

Complexity

Volume

10^0 10^1 10^2 10^3 10^4 10^5 10^6 10^7 10^8 10^9

Number of Customers

Government Programs

Enterprise

Small Business

Consumer

Societal Entitlements

Figure 3.2

IT Volatility

How do "left hump" companies make money?

Source: Michael Moon, Gistics.com

How do "right hump" companies make money?

Source: Michael Moon, Gistics.com

Tablet Shipments =
Surpassed Desktop PCs & Notebooks in Q4:12, < 3 Years from Intro

Global PC (Desktop / Notebook) and Tablet Shipments by Quarter
Q1:95 – Q1:13

Platform Volatility – from Mary Meeker, KPCB

Global Units Shipped (MMs)

—Desktop PCs —Notebook PCs —Tablets
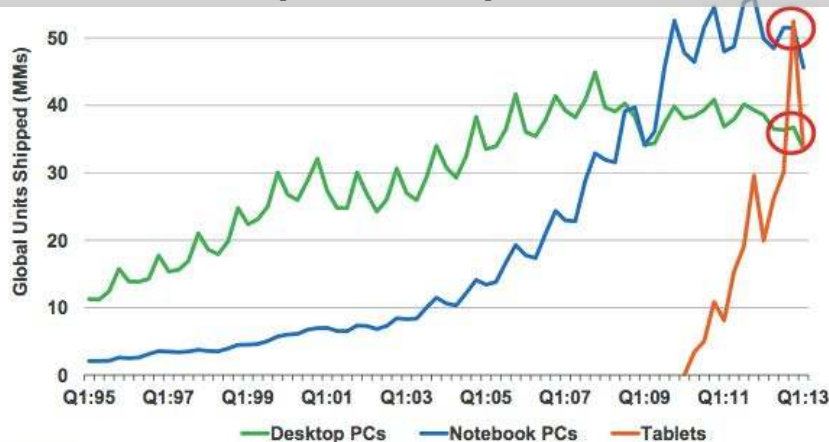
KPCB

Note: Notebook PCs include Netbooks.
Source: Katy Huberty, Ehud Gelblum, Morgan Stanley Research. Gartner. Data as of 4/13.   45

"Almost half of CEOs feel IT should be a commodity service purchased as needed."

"Almost half of CEOs rate their CIOs negatively in terms of understanding the business and understanding how to apply IT in new ways to the business."

"Only a quarter of executives feel their CIO is performing above his or her peers."

"57% of the executives expect their IT function to change significantly over the next three years, and 12% predict a *complete overhaul* of IT."

Professional Volatility
   Survey by HBR, Economist, CEB, Intel, TNS Global

Source: "The IT Conversation We Should Be Having," HBR Blogs

A buyer migration is in motion…

Is/Current	Will Be/Future
IT focused on cost reduction.	IT focused on value creation.
Senior Execs tech oblivious.	Senior Execs tech aware.
Complexity guarantees security.	Simplicity guarantees security.
Mobile & social differentiators.	Mobile & social are features.
Systems bought with CAPEX.	Systems bought with OPEX.
Pure tech skills = value.	Tech skills *in context* = value.

New Business Models and IT Demands

Opportunities Abound

6 Things to Focus on in Making the Sale

What should you do Monday?

"In 42% of organizations, the volume of paper records is still increasing, compared to 34% where it is decreasing."

"59% of organizations have to deal with multiple styles of legal jurisdiction and data privacy regulations. 18% have struggled with a universal information governance policy due to this."

"In over a third of organizations, electronic records-keeping practices are not aligned with those for paper."

Gartner -- "…information is no longer just a business byproduct or business performance fuel – IT and business leaders regularly mention information as one of their most valuable assets, but fail to value or manage it like one."

Opportunities Abound – From AIIM Research

New Business Models and IT Demands

Opportunities Abound

6 Things to Focus on in Making the Sale

What should you do Monday?

1 -- Adopt a Challenger mentality.

- What can I tell you about your business that you don't already know?
  - Provoke the customer
  - Offer unique insights
  - Educate the customer
  - Tailor the message to the opportunity
  - Take control of the sale
- Start with education, not a product pitch.
- Keep in mind most sales lost to "not now," not a competitor.

2 -- You Need to Be Out There.

- "A recent Corporate Executive Board study of more than 1,400 B2B customers found that those customers completed, on average, nearly 60% of a typical purchasing decision—researching solutions, ranking options, setting requirements, benchmarking pricing, and so on—before even having a conversation with a supplier."

3 – Keep it Simple.

4 -- Focus on the business, not IT.

- IT spending: flat to slight growth
- Business spending: more significant growth
- Business needs to solve problems
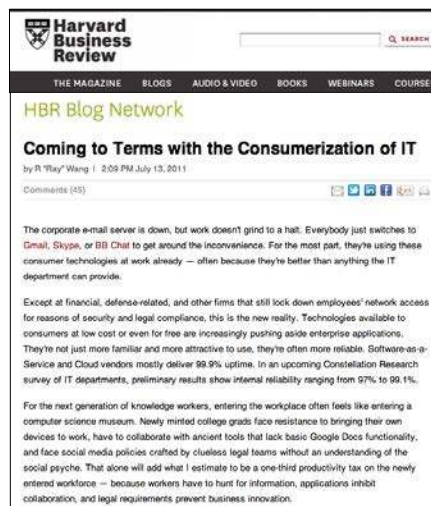
5 – Make it Real.

Focus on the impact of poor information management on process cost and effectiveness.

For example…

– HR – High cost of compliance-intensive processes -- hiring, firing, benefits, records

– Sales – Lack of access to latest collateral, incomplete customer information, inability to share best practices

– Finance – Poor financial controls, lengthened payment cycles, audit complexity

– Key mobile use cases -- Traveling executives – Across the firewall collaboration – underserved departments – field operations

New Business Models and IT Demands

Opportunities Abound

5 Things to Focus on in Making the Sale

What should you do Monday?

Become a trade member of AIIM and use most of our stuff (including presentations) for free.

And position your company within the user community as a trusted authority.

CERTIFIED
INFORMATION
PROFESSIONAL

Use AIIM Training and our CIP Certification to
demonstrate the competency of your people – and
help them become domain experts.

…And we do it online and in-person

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