How to Sell Intelligent Information Management

A 2-day training class in how to sell Capture, ECM, BPM and InfoGov solutions to a new breed of buyers

The objective of this 2-day training course is to grow your Capture, ECM, BPM, and InfoGov sales by educating your sales force and business consultants about how to best identify and engage business leaders for selling solutions. Each class is customized based on your offerings and/or target markets.

Learning objectives:
- Identify more opportunities for selling solutions
- Engage stakeholders and demonstrate business benefits
- Establish a solid business case for buying your solution
- Grow your solution business

The training course has just been updated for 2018 and includes the latest AIIM buyer research from its 193,000 community members. It also includes non-public research such as:
- Market research among 200+ Finance, Accounting and Procurement professionals identifying sales opportunities in procurement, accounts payable, accounts receivable, etc. Learn who to target, how to establish a business case, and how to meet their business and IT requirements.
- Market research among 120+ HR professionals identifying paper intensive processes and opportunities for selling solutions. Learn how to identify and engage possible customers.
- Best practices for selling solutions identified from 250+ IT solution providers. Learn from the best performing solution providers how to reduce sales cycle, how to win the deal, and how to reduce the implementation cycle.

89% of trained solution providers report that AIIM training made them more effective at identifying opportunities and engaging stakeholders. Sample feedback from some of the course attendees:
- *"One of the best training sessions I have attended in a long time. Useful and powerful information, critical to what we are trying to accomplish"* **– ECM Director**
- *"The combination of course content and dynamic presentation made this training one the best I have experienced"* **– National Enterprise Account Manager**
- *"Very informative within the 2 days. Other classes should follow this procedure"* **– Government Account Manager**
- *"Brilliant! Recommend this course to anyone selling ECM"* **– Solution Consultant**
- *"Thanks again for one of the most engaging, enjoyable and quality training sessions I have ever been involved in"* **– Sales Manager – Major Accounts, Government and Education**
- *"Best course I have attended in my 2 years at …."* **–Marketing Manager**

Selling Solutions to a New Breed of Buyers

We are seeing a massive change in how organizations identify, procure, and implement solutions.
- **The need for digital transformation** – 68% of staff think business-at-the-speed-of-paper will be "unacceptable in just a few years' time. 46% consider the biggest since productivity improvement for most of their business process is to remove the paper.
- **Target business leaders to grow your solution business** - 87% of AIIM solution providers think the growth in IT spending is coming from the business buying IT, not IT staff buying IT. The best performing sales reps engage line of business leaders before they know they have a problem. They are becoming business advisors, not IT navigators or explainers.

- **Educate your sales force in how to identify and engage business leaders** - What stops sales staff from meeting their solution sales targets is according to AIIM research; 1) the inability to identify and qualify new prospects (24%); and 2) Inability to establish a business case for change (36%). It's NOT about having too many products to know (7%) or poor sales skills (5%).
- **Offer assessments to establish a solid business case** - The average deal size is USD 50-99k, and 40% of customers buy ECM to replace paper processes. 40% buy it to replace legacy ECM.

AIIM will provide you with a thorough understanding of three ways to spot an opportunity for selling solutions in different markets.

- **Horizontals**: Finance (AR, Financial Close Process, AP, Procurement & Purchasing, Contract Management); HR, etc.
- **Verticals**: Banking (Lending, Audit/Compliance, Fraud Investigations, Card Services, Check Processing), Insurance, etc.
- **Problems**: Paper processes; email workflows; and legacy ECM

The Importance of a Solid Business Case

We have over the last few months analyzed the cost of paper-based processes, e.g. in Finance & Accounting:

	More than $10	More than $20	More than $60	Median	Mean
Invoice in Accounts Payable	78%	65%	21%	$21 - $30	$31 - $40
Invoice in Accounts Receivable	79%	61%	22%	$21 - $30	$21 - $30
PO in Procurement & Purchasing	82%	66%	22%	$31 - $40	$31 - $40
Contract in Vendor Management	84%	71%	24%	$31 - $40	$31 - $40

Source: AIIM, N=201

We have also analyzed the business benefits of implementing Capture, ECM, InfoGov, and/or BPM. Below are

some of our findings from 400+ organizations:

- **Automation** – Improve productivity of administrative staff by **33.5%** (in average) with using work-flowed scanned forms and documents
- **Control** – Reduce legal costs, fines and damages by **25%** (in average) by applying best practice procedures to records management, security and e-Discovery
- **Engagement** - Improve customer service levels and response times by **32.2%** (in average) by providing immediately access to all customer related and case-related information that you hold
- **Insights** - Improve productivity of professional staff by **30.9%** (in average) by ensuring they can find internal information and documents as quickly and as easily as they find information on the web.

AIIM will educate you in how to demonstrate the value of your solutions using AIIM market research and case studies. Your staff will learn how to spot an opportunity, engage the prospect, and demonstrate the value of your solution. AIIM can also easily customize the course content to match your sales methodology.

Course Agenda

2-day face-to-face class with max 20 attendees

Day 1: 0900 – 1700

1. The Need for Digital Transformation
2. Technology Offerings
3. The Sales Process
4. Identifying Opportunities

Day 2: 0900 – 1700

5. Engaging Decision Makers
6. Establishing a Business Case for Change
7. Handling Objections
8. Setting Targets

The class includes the following resources:

- Attendee workbook
- Research slides for educating colleagues, prospects, and customers
- Battle cards for identifying opportunities and pain points

It takes time to change behaviors, which is why you should also look to AIIM to provide ongoing education for your staff. Below are some recommendations for changing turning hardware guys into solution challengers:

- Monthly sales targets with weekly status calls
- Additional battle cards for identifying and engaging business leaders
- Leaderboard with prices
- Monthly brown-bag lunches to discuss target markets and stakeholders
- Vertical and horizontal use cases and success stories

Online Resources

All attendees get 24/7 unlimited access to AIIM's online ECM Specialist self-paced course modules, supporting materials, and the exam for 6 months. Students get 3 attempts to pass the exam to earn the ECM Specialist designation.

Course feedback from previous attendees:
- 98% found the course content to be excellent, good, or satisfactory
- 89% of trained solution providers say AIIM training made them more effective at identifying and engaging prospects
- 78% of trained solution providers say AIIM training made their staff more effective at demonstrating how their solution matches the customer requirements

Instructor
Atle Skjekkeland, AIIM SVP www.linkedin.com/in/skjekkeland/

"Working with Atle is like working with a MENSA Navy Seal - failure is not an option. He adds sparkle and hope to every initiative he undertakes." **Thornton May, Futurist, Author, Educator.**

"He's one the most forward looking people in the business and deeply understands the trends in our industry like few others. Perhaps most importantly though, he's a go-getter and is excellent at activating successfully on a strategic agenda." **Dion Hinchcliffe, 7Summits, InformationWeek, ZDNet.**

"I have known Atle for about 5 years. During that time, he revived the fortunes of AIIM in EMEA, sponsored many worthwhile events there. We had him as a speaker at several Gartner conferences and his presentations were very well received, and highly rated. Atle is knowledgeable, likable and motivated, especially skilled at getting people to work together." **Debra Logan, Gartner.**

About AIIM
AIIM is the global community of information professionals. We provide the education, research, and certification that information professionals need to manage and share information assets in an era of mobile, social, cloud, and big data. Founded in 1943, AIIM builds on a strong heritage of research and member service. It was AIIM and some its members that first introduced the term Enterprise Content Management (ECM) in the 90s, and AIIM has over the last few years run task forces with industry CXOs and experts like Geoffrey Moore to identify the future of ECM.

AIIM has developed an effective practice that can help you transform your sales force. Our offerings include:
- **Identify Market Opportunities** - Get help identifying opportunities and value propositions for a vertical or horizontal market. We just identified document technology adoption levels and cost of paper-based processes in Finance, Accounting, Procurement, and HR. Schedule a 2-day planning session to identify opportunities, value proposition, demand generation, and sales enablement.
- **Identify How to Improve Your Solution Business** - Get help establishing an effective organization for selling solutions. From comprehensive consultation with 250+ IT solution providers, we have identified how to best manage sales staff, reduce the sales cycle, make it easy for customer to buy, and reduce the implication cycle. In a brief assessment, we can identify how you can grow your solution business.
- **Train Sales in How to Identify & Engage Possible Customers -** Get help training your sales and business consultants in how to identify and engage new customers. We have previously developed custom sales courses for IBM, Oracle, HP, and Konica Minolta. Our custom sales training for Oracle's first ECM solution helped them meet their annual sales target by 150% in Europe. Schedule a 2-day course to get started on your path to success.

"If you work with your organization's information or collaboration resources and technologies, you'll surely find AIIM a treasure trove of resources." **Andrew McAfee, Professor and author, Enterprise 2.0 and Race Against the Machine**

"AIIM has a unique perspective on all things Content. Technology, trends and customer adoption patterns are changing so rapidly that it is becoming impossible to keep on top of what is important to us - how will our customers adopt new technology in applying content to their business. AIIM has the community reach, interaction with vendors and ability to ask the questions that matter, which has allowed us to understand how content will be deployed, who will be responsible and how does it apply to critical business processes in the enterprise. No one else has been able to provide this industry perspective". **John Newton, Chairman and CTO, Alfresco**

"The feedback from course attendees has been fantastic. On top of the comments provided in the Course Evaluation Sheets, I've had many sales people come up to me (or even phone me) to tell me that it is the best training that they have ever received, not only in our company, but also in other similar organizations that they have worked in. See below for some of the written feedback as transcribed from the Course Evaluation Sheets:

- *"Most engaging training seminar I have attended."*
- *"One of the best courses I've been on."*
- *"Well worth the time and effort."*
- *"This course is an absolute must for anyone involved in the Information Management industry."*
- *"Provides and essential basis for building on ECM sales platform."*
- *"Highly recommended."*
- *"Great course, gave me a good understanding of the ECM strategy."*
- *"Very informative and good for anyone new into ECM solution selling."*
- *"Very useful, engaging, great course."*
- *"Atle was a very passionate trainer with and in depth knowledge on the ECM and the market globally."*
- *"Fantastic"*
- *"This course was brilliant. Even old information was re-phrased to be more relevant."*
- *"Fantastic introduction on how to sell ECM."*
- *"Brilliant."*
- *"Well worth attending. Delivered well and great content."*

Mike Dooner, Marketing Manager, Konica Minolta Australia – a leading reseller of Kofax and Opentext in Australia

Fees

Price is US$ 3,800 / Euro 3,300 per day for 5-20 attendees. Each attendee will also get complimentary access to the online ECM Specialist course and exam worth US$ 595 / Euro 450 per person.

You will in addition be liable for the trainer's travel, accommodation, transfers and ancillary expenses. Provide a suitable training venue with PC projector and flip-chart/whiteboard and WiFi access for the trainer.