

Cloud Software Group

**Account
Technical
Strategist**

December 2022

	Competency	Description	Gaining Skills	Solid Skills	Mastered Skills
Execution and Strategic Planning	1 Account Management	<ul style="list-style-type: none"> Develops, executes and tracks short- and long-term account objectives, customer goals and action steps Familiar with data and subjective inputs and their relation to broader business performance Identifies, evaluates and communicates with customer stakeholders 	<ul style="list-style-type: none"> Monitors account performance against milestones and deadlines with minimal assistance Research top accounts' technical stacks for additional opportunity. Compile analysis and make recommendations to sales rep 	<ul style="list-style-type: none"> Consistently uses data-driven inputs to set goals and measure progress against both customer goals and supplier objectives Assists sales rep prioritize customer needs, lay out a technical account plan in support of priorities Respond to sales rep account planning cycle as requested 	<ul style="list-style-type: none"> Aligns client strategic objectives to supplier business priorities with account planning activities Incorporates cross-functional inputs to account planning, obtaining necessary resources and commitments Uses account plan as roadmap for all account activities, accurately forecasting time and resources needed to accomplish projects
	4 Managing Risk	<ul style="list-style-type: none"> Identifies risk in account relationship, opportunity and retention potential Calculates risk vs. reward Assesses and mitigates risk to meet customer goals in alignment with supplier objectives 	<ul style="list-style-type: none"> Identifies straight-forward risks associated with specific account strategies and solutions Evaluates risk in order to identify best workable solution given customers technical environment and constraints Identify basic points of vulnerability 	<ul style="list-style-type: none"> Identifies risks and threats associated with specific account strategies, solutions and other more complex account factors in order to identify best workable solution given customers technical environment and constraints Consults with Account Executive rep in preparation for customer discussion of risk mitigation Demonstrate an ability to appropriately assess risk for adjacent (non-CSG) components of the solution 	<ul style="list-style-type: none"> Makes prompt, clear decisions that may involve tough choices or considered risks Proactively anticipates risk in order to reduce likelihood of unintended consequences of actions Accepts responsibility for outcomes of decisions Analyzes outcomes to mitigate future risk Possesses and apply in depth security knowledge to evaluate and prioritize risks
	Internal Relationship Management	<ul style="list-style-type: none"> Builds trust and consensus among stakeholders within sales and broader supplier team Translates plans into clear team-based activities across internal and supplier stakeholders Recognizes appropriate internal resources to best serve key accounts Supports colleagues and other supplier stakeholders 	<ul style="list-style-type: none"> Demonstrates credibility and integrity in action and follow-through with internal and supplier stakeholders. Effectively collaborates with internal colleagues and supplier stakeholders to drive adoption and consumption Efficiently engages appropriate resources to serve key accounts 	<ul style="list-style-type: none"> Proactively communicates and collaborates clearly and confidently with internal and supplier stakeholders Independently gets right people involved and builds necessary support to move projects forward Builds trust to drive action among internal and supplier stakeholders to drive adoption and consumption Drives team efficiency and performance by mentoring new team members 	<ul style="list-style-type: none"> Consistently builds consensus for best practice ideas, ensures everyone knows what they need to do and why it is important Elevates account retention and growth to an organizational priority, to drive adoption and consumption Identifies and consults on stakeholder needs, goals and priorities and conveys to internal team and suppliers Nurtures commitment to key account program value in broader organizational context When connecting stakeholders with others inside the organization, ensures that all parties understand the importance of the connection and its part in the broader strategic plan

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Product and Industry Expertise	Product/Solution Knowledge	<ul style="list-style-type: none"> • Knowledge of product/solution features and benefits, strengths and limitations • Familiarity with implementation challenges • Technical knowledge and operational guidance 	<ul style="list-style-type: none"> • Demonstrates base knowledge of product/solution features and benefits, strengths and limitations • Shares insights into low-complexity implementation challenges 	<ul style="list-style-type: none"> • Has thorough understanding of how full suite of product and Alliance Partners Products work together and what business problems they solve • Understands and mitigates product/solution limitations and challenges for customers 	<ul style="list-style-type: none"> • Effectively communicates product features and benefits specific to customer's customized requirements • Leverages strong knowledge of product portfolio to proactively address potential customer objections and stands up our offerings against competition without appearance of doing so • Feeds customer input back into product development teams for enhancements
	Industry Expertise	<ul style="list-style-type: none"> • Knowledge of emerging trends in customer's industry • Forecast abilities for near-term industry trends • Familiarity with governmental laws impacting industry 	<ul style="list-style-type: none"> • Familiar with emerging trends in customer's industry and applies them to sales motions • Awareness of governmental laws impacting industry 	<ul style="list-style-type: none"> • Demonstrates strong knowledge of customer's industry in current timeframe • Stays up to date with evolving industry trends through company and industry learning • Effectively consults to customer in making mutually beneficial business decisions in-line with industry trends 	<ul style="list-style-type: none"> • Proactively searches for and engages in specialized trainings and certifications to be best-in-class responding to industry shifts • Goes beyond learning about large-scale, mainstream industry trends to getting acquainted with nuanced industry developments with potential long-term impact to customers and industries • Leverages strong, long-term networks and connections within industry/market to benefit organization and customer
	5 Solution Building	<ul style="list-style-type: none"> • Customer needs diagnosis • Initial solution assembly • Liaison between customer and product development team 	<ul style="list-style-type: none"> • Effectively serves as liaison between customer and product development team • Identify and map customers technology problems to single solution and a business outcome (1:1:1) • Articulate value proposition of all solution for general purpose 	<ul style="list-style-type: none"> • Understands scope and limitations of solution capability • Thoroughly identifies and analyzes customer's stated and underlying needs to map multiple technology solutions • Leverages technology systems to keep track of customer needs to anticipate and inform solution design • Articulate value proposition of all CSG solutions + Alliance Partners 	<ul style="list-style-type: none"> • Assembles best-fit solutions based on product capabilities and compatibilities that are aligned to customer business needs and objectives • Proactively identifies nontraditional/novel opportunities for customers to use supplier's products • Comfortable combining disparate products into creative solutions that fulfil unrecognized opportunities • Interpret technical problems into specific business problems and quantify business value using business value tools
	2 Customers' Business Success	<ul style="list-style-type: none"> • Possesses customer-first, future-oriented sales focus • Contextualizes insight and advice to offer unique perspectives on customer business • Delivers commercial insight 	<ul style="list-style-type: none"> • Engages in customer-first conversational behaviors (active listening, building rapport, establishing trust) • Can contextualize low complexity customer needs and offer simple advice/solutions • Brings industry insight to customer conversations 	<ul style="list-style-type: none"> • Lays out a vision for how customer can improve their business in concert with supplier, provides evidence of ROI • Presents a path for business improvement uniquely facilitated by supplier's solutions, always ties insights back to our unique strengths in marketplace • Engages in dialogue with customers, constructively creating tension to help customer learn something new 	<ul style="list-style-type: none"> • Consistently shares newsworthy insights about market, educating customer on new issues and outcomes, helping them avoid potential landmines and introducing relevant ROI drivers not previously considered • Prioritizes customer's business success over making short-term sale • Consistently steers conversation to supplier's unique differentiators while maintaining a 'customer-first' orientation

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Business Development	6 Customer Relationship Management	<ul style="list-style-type: none"> Builds long-term strategic customer relationships Gains access to key stakeholders in buying group Understands customer engagement preferences through all touchpoints with different teams — not just sales. 	<ul style="list-style-type: none"> Build positive relationships with customers Overcomes gatekeepers and gains access to key stakeholders within customer organizations, Understands ways in which each customer prefers to engage and acts accordingly 	<ul style="list-style-type: none"> Builds positive relationships, within and outside customer organization, to drive business performance by networking and influencing effectively Works comfortably and confidently with customer's senior leaders Provides customer with resources needed to leverage these new touchpoints effectively 	<ul style="list-style-type: none"> Maintains deep understanding of customer stakeholders' political and personal dynamics Comfortable challenging senior leader assumptions by adopting a Sense-Making approach to help navigate information uncertainty and ensure customer improvement
	3 Communication and Presentation	<ul style="list-style-type: none"> Communicates and presents effectively in virtual and in-person settings Links customer business priorities to supplier value proposition Interacts with comfort and demonstrates on-feet thinking skills with stakeholders 	<ul style="list-style-type: none"> Researches and prepares for customer meetings, conversations and presentations Structures meetings, presentations effectively to influence stakeholders, drive deals forward Demonstrates basic use of presentation tools Can explain basic, but not complex technical, problems and situations 	<ul style="list-style-type: none"> Effectively communicates and presents opinions, information and key points in a variety of mediums, in-person and virtually Responds quickly and effectively to needs of customer stakeholders, and to their reactions and feedback follow-up Delivers insights convincingly and with authority Demonstrates solid command of presentation tools in presentations Can explain complex issues, covering all aspects of a problem 	<ul style="list-style-type: none"> Properly interprets verbal and physical cues to gauge customer reaction and interest Diagnoses when customer is unclear and ensures comprehension, handles potential and current objections to seller advantage Comfortable working off-script Strong command of presentation tools that drive conversation towards customer value High ability to defuse negative communication and challenging situations
	Sales Innovation	<ul style="list-style-type: none"> Creatively advances stuck deals forward Proactively identifies deal blockers and develops strategies to overcome and prevent such stalls Efficiently manages sales pipeline 	<ul style="list-style-type: none"> Develops and applies strategies to overcome stalled deals Ask basic technical discovery questions to customer in order to uncover potential for further opportunity 	<ul style="list-style-type: none"> Consistently engages with customer to address medium to high complexity concerns Proactively consult with sales rep to link technical opportunities and drive customer towards particular solutions aligned to overall customers business strategy for complex solutions 	<ul style="list-style-type: none"> Fosters team climate that encourages innovation and creative solutions Leads in-depth customer technical consultation to discover detailed technical requirements for high complexity opportunities and grow current deals Conduct both technical and business challenges/strategy discovery in customers vernacular
	Leveraging Individual Value Drivers	<ul style="list-style-type: none"> Identifies wide range of customer stakeholders involved in individual deals Understands distinct motivations and drivers for relevant stakeholders involved in deal Adjusts deal value proposition language and messages to different stakeholders 	<ul style="list-style-type: none"> Demonstrates understanding of stated motivations and drivers of relevant stakeholders Shows flexibility in value proposition language and messages when dealing with different stakeholders 	<ul style="list-style-type: none"> Develops a distinct strategy for engaging critical stakeholders on specific deals Consistently demonstrates an ability to link supplier capabilities to specific, individual stakeholder objectives Is comfortable including stories or more qualitative aspects to a commercial conversation 	<ul style="list-style-type: none"> Highly adaptive in-the-moment to stakeholder preferences Uncovers underlying stakeholder motivations Incorporates natural sense of urgency to appeal to both rational and emotional concerns of customer stakeholders Quickly assesses stakeholder influence and diverts attention accordingly

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Business Development (continued)	Business Acumen	<ul style="list-style-type: none"> • Demonstrates knowledge of customer's business, current macro- and microeconomic trends, industry trends and potential new business opportunities • Comfortably leverages relevant data and examples specific to customer and industry • Articulates customer's business model, key cost drivers, growth paths and value proposition • Uses sales systems and tools to prospect, forecast and move deals forward 	<ul style="list-style-type: none"> • Leverages relevant data and examples specific to straight-forward customer need • Articulates our value propositions based on customer's business model, key cost drivers, and growth paths • Inputs data into sales systems and tools according to process requirements • Use information gathered on competitors to support sales rep to manage objections 	<ul style="list-style-type: none"> • Demonstrates knowledge of customer's industry and competitors in context of current market climate • Uses information on competitors to manage customer objections for maintaining customer status quo • Able to accurately forecast future business • Inputs and mines data in sales systems and tools according to process requirements for opportunity management 	<ul style="list-style-type: none"> • Makes connections between broader economic factors and customer's growth path or value prop that better position supplier's capabilities • Easily articulates how supplier offering can impact specific customer financial or performance metrics • Comprehensive understanding of product cycle from product/solution development to go-to-market strategy • Proactive use of systems and tools to anticipate customer needs and manage overall portfolio • Leverage complimentary technologies to enhance compete strengths
	Objection Handling & Negotiation	<ul style="list-style-type: none"> • Qualifies and quantifies impact of maintaining status quo or pursuing competitors' solutions • Focuses on value before financial terms • Defers price-based conversations 	<ul style="list-style-type: none"> • Defers price-based conversations in favor of value-based conversations • Quantifies value in terms of resolving a low complexity problem or need, or costs of inaction • Uses relevant evidence/examples to address customer's concerns 	<ul style="list-style-type: none"> • Quantifies value in terms of resolving an unrecognized problem or need, or costs of inaction • Empowers customers to understand and appreciate supplier's key account value proposition relative to competitive solutions • Uses relevant evidence to alleviate customer's concerns 	<ul style="list-style-type: none"> • Tactfully acknowledges and defers price conversations until value is fully agreed upon • Comfortably navigates complex negotiations, expanding number of negotiables to maintain leverage • Recognizes when a deal is unprofitable or unlikely, and is willing to walk away
	Deal Progression	<ul style="list-style-type: none"> • Advances purchase decision without rushing customer • Uses Mobilizer customers to move deals forward • Demonstrates understanding of deal's progressive actions tagged with appropriate timelines 	<ul style="list-style-type: none"> • Effectively navigates buying process with customer, addressing customer concerns in timely manner to keep deal progressing • Proactively prepares for next actions in deal progression tagged with appropriate timelines 	<ul style="list-style-type: none"> • Rallies internal resources to ensure deal momentum • Collaborates with customers to define next steps, coaches customers through buying process • Leverages key stakeholders and mobilizers to drive action between sales calls 	<ul style="list-style-type: none"> • Consistently enables key stakeholders, mobilizers to drive actions between sales calls • Seamlessly involves key customer stakeholders (and overcomes blockers) through proactive leadership towards consensus building

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Technical Acumen	Technical Solutioning	<ul style="list-style-type: none"> • Analysis of customer's technical requirements • Demonstrate Proof of Concept • Design and Implement technical solutions for customer utilizing a full view perspective of business technology 	<ul style="list-style-type: none"> • Conduct a basic pre-defined, pre-scripted demonstration in self-contained environment e.g. Demo Center • Describe architecture for single product solution" • Builds simple, single product POCs for customer evaluation 	<ul style="list-style-type: none"> • Independently prepare and lead demonstration in both self-contained environment and customer Infrastructure • Describe architect for mid complexity solutions from full suite of product family in order to solve customer business needs • Builds complex, multi CSG products POCs for customer evaluation 	<ul style="list-style-type: none"> • Same + conduct demos for customers with competitor products within their infrastructure • Support marketing events, build highly specific/customized demos for big customers • Describe high complexity solutions from full suite of product family and partner, (if appropriate) solutions in order to solve customer business needs • Conduct Executive Briefing for high value customers • Builds complex, multi CSG productas well as partner product POCs for customer evaluation
Additional	Emotional Intelligence	<ul style="list-style-type: none"> • Uses and manages one's' own emotions in positive ways to show self-awareness and self-management • Exhibits personal accountability in relationships and business operations • Demonstrates awareness of social awareness and manages relations with others with empathy, effective communication and conflict resolution 	<ul style="list-style-type: none"> • Demonstrates self awareness and manages emotions under moderate stress • Demonstrates empathy and responsiveness to others' emotions with positive attitude towards colleagues and customers • Promotes collaborative environment among colleagues 	<ul style="list-style-type: none"> • Accepts ownership for leadership and effectiveness of organization • Demonstrates positive attitude and self awareness of how they're coming across to others • Encourages self-awareness in others toward greater accountability and better outcomes across organization • Remains resolute in challenging circumstances, consistently seeks common ground to mitigate differences wherever feasible to make progress • Acknowledges own mistakes; asks for feedback 	<ul style="list-style-type: none"> • Consistently demonstrates positive can-do, overcome-any- barrier attitude. Willing to engage management to find answers. • Willingly accepts ownership for leadership and effectiveness of organization; looks for ways to make a difference • Coaches others to instill a sense of accountability; uses ownership as a way to empower people towards greater results • Focuses attention on determining what can be done to make progress rather than on why it can't be done or blaming others for problems • Acknowledges own mistakes and limitations; seeks and accepts constructive criticism learn lessons for ongoing growth in challenging circumstances

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ROLE SAMPLE

OVERALL CATEGORY	Competency	Description	Gaining Skills	Solid Skills	Mastered Skills
	List competency here	Description of Competency across all skill and behavior levels	<ul style="list-style-type: none"> • Demonstrates general, practical knowledge of behaviors • Applies competency in the simplest situations • Requires close and extensive, frequent guidance 	<ul style="list-style-type: none"> • Demonstrates thorough understanding of behaviors, can describe their impact, and provide advice to others • Applies competency in somewhat difficult situations • Requires occasional guidance 	<ul style="list-style-type: none"> • Demonstrates excellence in systematic practice of behaviors, and serves as a motivator, role model and influencer to others. • Viewed as innovator and informal leader, resource and mentor to others • Consistently applies competency in complex situations