HansaWorld University

Sales Theory
Training Material

HansaWorld Ltd.
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INTRODUCTION

This document is not a sales course but a compilation of some HW ideas regarding sales. This material includes notes, articles and previous sales materials made by several HansaWorld managers.

The goal has been to create a guide to sales people but also to any employee in HansaWorld that is interested in understanding our sales process.

This guide it is not intended to be a sales guide per se, sales skills and sales practice will be develop using other ways or tools. Nevertheless, this guide will help sales consultants to be more successful and for the ones that do not belong in a sales department, will prepare them to face an opportunity in a similar way as our trained sales consultants.

UNDERSTANDING OUR CUSTOMERS AND HANSAWORLD RULES

What are Customers Buying from Us? What are We Selling and Offering?

Intro

When buying products you do not only acquire the product itself but also get other elements with your purchase.

Customers are never buying just the products but solutions to ease their pains and problems. Every sales is unique because every customer has their own problems. The larger the customer, the more unique the solution gets. It is very important to understand the potential customer's business processes, how they perform and how can we can increase efficiency in their business. Our product unique selling points (USP) forms the basis to improve our customer's efficiency.

What do we offer? What do they buy?

Examples:

- Mainly we do not only sell service and software, but also a long-term relationship with the customers.
- Provide international support

Now, add the non-conventional elements related to what we are selling and what customers are buying from us.

Exercise:

Place the people in groups of 3 and make them List What Concepts Customers are buying from us or we are trying to sell them. One example can be ” Future Safety ”.

Then mention them and write them in 3 columns *Company, Product, Services,* so than they can better understand the role of the different areas of the organisation.

Concepts:

ERP (product itself) Business Software

Right to Use our licenses

Support

Software Maintenance and updates

Consultancy

Implementation

Training

Solution

Added Value like suggestions, experiences, guidelines

Trust

Efficiency

Quality

Service

Professional way of working

Support from International Group

Image and Status (we are users of a world class product)

Project Management

Confidentiality in the exchange of information between parties

Tailor Made possibilities

Long Term Relationship

Future Safe and High Tech

Experience (local, regional and international)

Well-Trained Staff

Best Practices

Cases Studies, References, Success Stories

Flexibility

Integration

Suitable Price

Advise

Company Values, policies, and moral

Project

Return On Investment

Business Intelligence

Time Savings

Dreams, we're working with you in building the company of your dreams.

HansaWorld always offers more advantages to its customers. HansaWorld has created a new department specifically dedicated to develop training material and improve trainings for out employees and our customers.

Our Development team is constantly working to integrate new functionalities and features to our products, like Internet Services, Web Shops, Stock Management, CRM, Multi-company, Multi-language, etc.

Elements Grouped By Company, Product, Services

This will provide an idea how the different departments in HansaWorld interact to satisfy our customers' needs

Company	**Product**	**Services**
Image and Status	Ease of Use	Support & Maintenance
Trusted	Integration	Confidentiality
Best Practices	Flexibility	Customisation
Case Study/References	Stability	Trainings
International Support	Accurate Information	Implementation & parameters
Future	Technology	Local & International Support
History	ROI	Project Management
Values	Best Practices	Business Intelligence
Compromise	Updates	Staff Experience
Strong Partner	Tailor Made (HAL) & Reporting	Professionality
Long Term Relationship	Price	Price
Success Stories	Technology	Local Presence
Financial Position	Efficiency	
HansaWorld University	Vertical Modules, Web Shop	
Quality	Internet Services	

Following is a short list with the top elements that people usually take on consideration while taking a decision when they buy an ERP System the first time .

1. Ease of Use
2. Functionality
3. Integration
4. Efficiency (ROI)
5. Support

6. Track Record (References + Case Studies)
7. Future Safe (Scaleability)
8. Price
9. Local Partner Support
10. Difficulty of Implementation
11. Possibility to Customise

By the second time a company acquires an ERP system, the list of priorities change, mainly there is a tendency to value more the services and support provided by the vendor or distributor.

Other elements that become important:

1. Experience
2. Project Management
3. Staff Profile
4. Risk Evaluation
5. Possibility to Maintain & Support their own system
6. Developing Tools
7. Compatibility with existing hardware.

SALES PROCESS AND ANALYSIS

Getting to know your customers

Factors that play a role when managers decide on buying software

There are some obvious factors that play part in an ERP solution decision from a manager or group. Those are needs, features, benefits, price, time, and more. But there are some hidden factors that you need to be aware of and therefore you should address these factors during the sales process.

For some people a particular concept like Control is more important than others, depending on the personality and experiences of the individual.

The concepts we will list will be present in a decision makers mind but with varying levels of priority.

Those concepts tend to contradict each other and add complexity to the sales process.

Control/Disorder

Situation generated from changing ERP and procedures. Managers are at the same time understanding that the new system will bring control (information, access groups, approvals, defined workflows) but at the same time they understand the whole process will bring disorder (changes, fear, users not getting used to the new system, more work at the beginning). We can explain that with services and consulting from our experts we will make the change easier. Once the implementation is complete they will reach much more control over their business.

Modern/Obsolete

with current, previous and new technology. This is a concept that is always present. My old system is obsolete; the new system has to be modern. Are my procedures and workflows also modern? Is my hardware as modern as the new system? They used to depend on a local programmer or a company that did not manage to evolve according to new technologies.

Competence/Incompetence

from customer's own staff. This concept is always present. Will the customer's staff be ready for the new technology? Some employees are competent will cope with the change, while some others aren’t. We have to provide answers for the ones that are ready (competent) and the ones that will need special care and more training. We can talk about education, material, web manuals, support.

Satisfy Needs or Create New Ones.

The new system will satisfy some needs but also create new ones. All these concepts have a positive and a negative side and the customer will them up against each other all the time. Some solutions generate new needs, like a larger IT department, stronger hardware, a database manager, etc.

Commitment/No Commitment

to the project from both staff and the supplier

Flexibility/Non Flexibility

to adjust to the company situation. Will the new solution adapt to the company or vice versa? How flexible is it? How flexible can we as the customer be?

Management Personality and how that affects the IT Decision

It is very important to consider that there are many people participating in an ERP decision, for example, the General Manager, Section/Department Managers, Accountants, some users and even advisors.

Decision Makers have different interests and personalities, they will ask different questions, and will need an answer according to their position, their interests and also their personalities.

Lets consider some examples

Decision Maker Personality	Interests	MKT Actions = Approach
Optimistic/ Positive Ideas	Prove Benefits and ROI (Return on Investment)	Discuss how much the new system can help them grow. Explain how easily they will reach higher levels of efficiency.
Innovator	Acquire latest technology	Lead the technological race & beat competitors. Talk about WAN, Web,VOIP, Internet Services, Nokia, the technology race, etc.
Insecure	Friends that recommend proves	Warranties, prove it's safe, backup procedures, stability. Show them case studies, reference lists, talk about our experience. And if needed, book a visit to a reference customer.
Hard to please - Unsatisfied	They doubt and are confused about IT.	They may also be scared of new technologies and be suspicious about them. They think new technologies are not

		for them and that World Class solutions are way too advanced for them. They usually preferred in-house solutions. Talk about Web Manuals, telephone support, new updates, access groups, and encrypted information on the web, firewalls, etc. When we provide answers do not make them feel they are slow to understand. We need to prove them how easy is to get all the benefits from our solution.

Different aspects from a manager's personality that participate in an IT decision.

Technology Readiness

During the process you need to determine and understand how ready the customer is to adopt technology. This is referred to as Technology Readiness (TR). The success during the sales process and implementation process depends on how ready the customer is to adopt and accept technology in their company. Once you have determined the TR of the customer you will understand how to proceed. Your sales process will be affected by the time you have to invest in the sales process, the complexity during the possible implementation, the level of the discussion that might arise with the customer, and more important you will understand what is the best plan to execute in order to win the case.

The TR will depend on many factors like country culture, knowledge, attitude, installed software and hardware, education, experience, etc.

Exercise: a. How customers are taking decisions?

Exercise: 10 minutes.

Write down how you think our potential customer goes about when searching to purchase an ERP system. What does the potential customer do before taking the final decision?

- Search on the web
- They make a list of requirements and send them to potential suppliers to get answers
- Ask friends and colleagues
- Check relevant magazines
- Try out some product online demonstrations

- Participate in meetings with potential suppliers
- Attend exhibitions
- Turn to Advisors (Accountants, Consulting Firms)
- Find out what their competitors are using

The way in which customers look for ERP systems differs from one country to another. It is important to understand that the marketing plan /actions that will be adopted will be determined by the decision factors n the particular country and will not necessarily be the same in neighbouring countries.

IDENTIFY AND BUILD THE NEED FOR UNIQUE SELLING POINTS

Concept of Need

The concept of Needs is often used to refer to things that people "must" have. They are often contrasted with wishes; which are more discretionary.

Most of the time our potential customers have a certain predefined mindset of what they need. It is important during our sales process that we drive and feed the needs of our potential customers with our Unique Selling Points (USP’s) and build on our USP’s

Need identification is one stage in a personal selling process. In this stage the salesperson takes a qualified prospect through a series of question and answer sessions in order to identify the requirements of the prospect. During this process, the salesperson will attempt to help the buyer identify and quantify a business need or a "gap" between where the client is today and where they should be in the future.

It is important to take a proactive role in determining the needs of the customer and the direction they should take. It is important that the questions asked and answers given are relevant to our unique selling points. The aim is to create a big gap between their existing system and potential competitors compared to our unique selling points.

From this procedure the salesperson is able to come up with a proposal, suggesting various products/services that will suffice the need as confirmed by the prospect and also advise on additional actions (for example on needs not presented by the prospect).

Usually there are emotional and rational needs that participate while taking a decision, the emotional factor has a larger influence in the decision making process.

Why and How to build and generate more needs related to our Unique selling points?

We believe our solution is wider and better than the ones offered by out competitors. We also believe that in most of the cases, customers do not really know what they need, or they only have a partial idea of their total requirements.

If we manage to meet more unique needs, most of our competitors will fail in providing a solution to them. Thanks to the fact we have many unique selling points (cost/benefit), it is most likely that we will increase our chances to fight against less competitors. And at the end of the process, we will be the customers' choice.

By working harder on identifying and building the needs related to our Unique selling points, our solution will be more suited and offer wider functionality to the customer. The customer will end up using our Unique selling points in a natural way, which should result in more happy customers.

You'll have to work with questions like**: What? Why? How?**

In order to identify the need (what?), explain the possible solution and the reasons why this is a plausible option (why?); also don't forget to explain the way it will come true (how?)

There are many occasions when customers are not sure about their needs or even have a wrong concept of their requirements.

For example, a customer won't tell us that we need integration with Nokia devices, because they have never seen it before and therefore will not know if it is possible or not. You need to work at building the need for our Unique selling points.

However, the question remains…

How can we build/generate more needs related to our unique selling points?

The funny side of the story is that the needs are in the customer's company; nevertheless, the customers staff members will not necessarily have identified the needs or even be aware of them. You just need to assist the customer in identifying their needs and stress the importance of addressing them; you can even present a value for an unsatisfied need (or a cost).

- The advice here is:to build the need for our unique selling points as early on in the sales process

- to agree with the potential customer that we have the same basic functionality as our competitors, however during the sales meeting we will focus on additional USPs that we can offer.

- to assure them that we can very easily replace their existing system early on in the sales process.

- Instead of spending days with several employees going over their detailed requirements and make long lists of what the customer need, we should demonstrate as early as possible our Power Demonstration highlighting our Unique Selling Points and getting the customer interested in our unique selling points.

Our standard Powerdemo covers very many of the customers original questions and address most of their concerns about the product. However in bigger cases its difficult to avoid addressing customer specific questions and this can be done after the Power Demo, as the questions will be

In most of the sales cases, our potential customer will be interested and hooked on one or more of our unique selling points. But in some cases even though we have managed to get the customer interested in our USP's, there might still be reservations that we need to address in order to close the case.

Reservations should be addressed, but very often some of the reservations take several days. Where possible, the reservation handling should be done as Pre-Analysis.

Once you have let them know the world of possibilities within HansaWorld, you can ask them to estimate the average cost of being inefficient; for example ask the sales manager to estimate the value of having an integrated CRM system and group calendar for the sales force.

Remember that the higher cost of not working at 100% capacity because of their current restrictions, the higher the chance of reducing profitability if they do not acquire every single feature you showed during the presentation.

If you were successful in building the needs for our unique selling points, you'll have the knowledge that you're no longer competing with another 10 or 15 providers. So far in the process, you're almost alone in the road to win the case.

Also, post-sales feedback will be more rewarding. A few months from now, when you call your new customer and ask how they feel, you'll probably will get positive replies of how our solution changed their company and the system has provided much more than they expected or thought they could achieve, as a result of having sold them what they needed as opposed to what they thought they wanted.

What are the most common needs that bring customers/decision makers to us or to agree on a process with us?

- The Efficiency Quest

Looking for efficiency (administration, financing, sales force) and lower costs

- From Chaos to Order.

Something has gone wrong with the previous system, and if the pains are too strong then they are seeking a cure. They would not normally start the process until something goes really wrong.

- Market Competition

Competitors are buying new systems and they try to imitate (copycat)

- Standardising

Set standard procedures and routines of working

- Pressure

Pressure from advisors, banks, accountants, government

- Technological Strategies

Get the best from new technologies and be ahead of your competitors

- New Administration

New managers bring in new systems.

The three reasons Why?

There are three major reasons why companies undertake ERP:

1. To integrate financial data.

As the manager tries to understand the companies overall performance, he or she may find many different versions of the truth. Finance has its own set of revenue numbers, sales have another version, and the different business units may each have their own versions of how much they contributed to revenues. ERP creates a single version of the truth that cannot be questioned because everyone is using the same system.

2. To standardise business processes.

Companies often find that multiple business units across the company make the same widget using different methods and computer systems. Standardising processes and using a single, integrated computer system can save time, increase productivity and reduce head count.

3. To standardise Human Resource (HR) information.

Especially in companies with multiple business units, HR may not have a unified, simple method for tracking employee time and communicating with them about benefits and services. ERP can fix that.

Sexy Selling Points and ERP +

What are sexy selling points for us?

A Sexy Selling point is a remarkable functionality within our product or services that differentiates us from our competitors, providing us with competitive advantages during the sales process. When performing a comparison with a competitor you have to consider country specific situation, because it differs from country to country. When the sexy selling point is unique in your market, we call them USP Unique Selling Points.

ERP + is a concept we like to use in order to state that our product is an ERP with many more additional and unique features, not often found in other ERP system.

Key Selling Point: It is highly recommended that the sales consultant prepare a previous selection of the sexy selling points that he/she will be using during the meetings with the prospects, taking into account a group of them that will be attractive to the type/kind of industry of the prospect.

This way you can generate a Top 10 USPs list always to mention.

Exercise

a. Exercise: 45 min Interactive Activity.

Trainer and participants will work together to identify a complete list of Sexy Selling Points from our product HW Enterprise and the others.

- Ease of Use
- Continuous Development (long background).
- Cross Platform (Linux, Mac, Apple, others).
- Customer and Supplier Status Reports.
- Contact Relationship Management (customer, supplier, dealer, guest).
- Document Management/Attachments.
- Drag & Drop.
- Drilldown – Records.
- Drilldown – Reports.
- Email (external Gateway).
- Mail Shots to run marketing campaigns and alerts.
- Forms Editor.
- Graphical Resource Planning.
- Group Calendar (many persons in one activity, check colleagues calendar).
- HAL, Hansa Application Language.
- Interface - Friendly Easy to Use and Learn.
- Fax Server (Mass Mailing).
- Mobile & Mobility
- SmartApps

- Business Communicator
- Real-time Bar-coding.
- Multi-level Object Analysis.
- Multi-window Technology.
- Multi Language (over 28).
- Multi-company (all in one database, easy to share registers and to consolidate).
- Stability.
- Tested and Tried (thousands of customers worldwide with many realities and requirements satisfied) Compilation of best practices worldwide.
- All in One solution (ERP, CRM, Web, Mobile, Internet Services, Verticals, etc)
- Integration.
- Nokia Communicators.
- Parallel Reporting.
- Personal Desktop
- Pocket PC and PDA version.
- Real-time Reporting (over 300 standard reports, over 1000 possible results).
- Report Generator.
- Security (for viruses, hackers, internal use, encrypted data on the web).
- Shared Registers (between companies).
- Skype Integration and VOIP.
- Internet Services (Transaction Server).
- Touch Screen Interface.
- UNICODE Support.
- User Defined Fields.
- TCO Low Total Cost of Ownership (Our solution is very efficient, a customer does not need to invest ten times more in order to be ten times more profitable). Good value for money.

- Web Server and Web Portal and Web Shop.
- Wide Area Networking.
- Workflow Management.
- Scalability.
- Electronic Conferences.
- Auto Update of HAL Client.
- Business Alerts.
- Business Intelligence possibilities.

b. If you want to understand the USP relevant for you as a sales person, you can compare the previous list with 2 or 3 Competitors in your local market.

Therefore, this list will be "localised" to your country.

There are 3 types of competitors:

World Class like ours [SAP, Microsoft Dynamics, Exact, Infor Global's acquisition of SSA Global (has Baan in its portfolio) and Systems Union (SunSytems)]

- Regional (Visma)
- Local (country specific)

Another classification of competitors is:

- TIER 1 (SAP)
- TIER 2 (MS, Sage, Epicore, Exact, Visma, Aggresso)
- TIER 3 (1C, SAF, others) Usually Locals

HansaWorld is facing competition from three different types of competitors

The first group is the big software vendors like SAP and Microsoft Dynamics serving customers of the enterprise level. Still, they are not an immediate risk, as their solutions are well suited to the enterprise level but not for medium sized companies.

The second group of competitors is Software vendors of the same size that also concentrate on the mid market. HansaWorld is competing against them with their USPs, getting an advantage over their competitors.

The third group of competitors is composed of small, local companies. However, they are facing the risk of expansion and internationalisation. They cannot survive as local companies, so they are forced to internationalise, which is a huge risk for small companies. Many of the local software vendors have already been driven out the market; and the bigger vendors have already acquired some of them.

Where do we get the information about our competitors?

- Internet (be careful with the information you gather while surfing the net, not everything you read there is true).
- Market Research.
- Cases and Prospects we won or loose.
- Head Hunting.
- Product research.
- Business Partners of the Competitors

Matrix: Comparison

Sexy Selling Point	HansaWorld	Competitor 1	Competitor 2	Competitor 3
Multilanguage	X	X	-	X
Mobile	X	-	X	X
Business Alerts	X	X	X	-
Multi-Platform	X	-	X	-
Salaries & Payroll	-	X	X	-

3.2 Benefit of the Feature

> "Benefits are advantages and functionalities that customers' get if they use these features listed in the Sexy Selling Points"

Now, take the list from Sexy Selling Points and work on finding the real benefit for the customer's business. This is the kind of discussion we need to have in order to be ready to talk to the customer about

BENEFITS rather than features, especially with customers not so skilled in IT and ERP.

Features	Benefits
Personal Desktop	Time Saving, Access to operation or reports in one step
Document Management	Shared information and easy access
Drill Down	Interrogate information and speed
Nokia Integration	Mobility, ready to go on line all the time, reply and create
Multilanguage	Beware: For most of the companies this is not a benefit but a feature, if you try to present this to a company that doesn't have this need, you risk to loose credibility as a sales consultant.
WAN	Like the former case, this is a benefit only for companies with the need to log in at distance.

OUR SOLUTION FOR THE NEEDS - INTRODUCTION TO THE COMPANY AND PRODUCTS

Company Profile

HansaWorld provides integrated business solutions including financials, ERP, CRM, e-Business, retail (POS), production and hotel.

Founder Karl Bohlin first established HansaWorld in Sweden in 1988. The group employs around 300 staff in a strong network of daughter companies and distribution partners in Europe, Latin America, Africa, Asia and the Middle East.

Experienced local product managers adapt the products according to local laws and business practice.

The products are available in 28 languages and work with almost all computer and operating systems.

The vast majority of the 70,000 HansaWorld installations are for small and medium sized businesses, but also many subsidiaries of large international companies.

How do we impress people when we present our company?

- We are global (stable world wide representation).
- Dedicated to efficiency.
- Smart enough to offer optimised solution (for the mid market).
- Ahead of the technology race
- More flexible (because of our size).
- We're global but also locals (because our distribution policies, local PMs, local Staff, own by our company, its important to mention that we are not relying on 3rd parties).
- Years of international and global experience.
- Best Practices (international experience and mid market experience)
- The company takes serious and careful decisions regarding technology

How to place the position of HansaWorld?

Ours is an easy to use solution, competitively priced and less complicated. We make a difference by providing the right solution for most companies in a very efficient way.

If a company wants to be 5 times more profitable, it won't necessarily mean that they need to invest 5 times more in ERP. We are a smart solution; the customer invests in us less than with most of our competitors, but they achieve more, because our solution is optimised and leads to the best return for their investment.

We are on the customer's side, and we are a future safe solution; which makes us the best option both now and in the future, helping them grow their business.

We have been selling mainly to mid market organisations, so we have always offered totally integrated solution in one package with the right fit for the mid market.

Business Idea

Our business idea is to provide business information system and closely related services, to all sizes and types of business and state institutions. We concentrate on standardised solutions but to satisfy customers specific requirements, we also do the customisation as well.

What do we do?

HansaWorld provides Efficiency, Knowledge and Best Practices acquired within our implementations around the world; all of them available in one business solution.

HansaWorld aims to develop Multiple Best Practice Software. This means that the software will support several commonly used methods for business processes out of which the customer might be able to choose the one that provides a better fit to his/her company.

The best practices can be strongly different across industries and also across countries. Therefore, HansaWorld is not only supporting the most commonly used best practices but have enhanced their software to also support business practices of specialised industries.

HW integrates the best practices of several countries and several industries. This is the main difference to the best practices software of our competitors who only support the most commonly used method and thereby force the businesses to adapt their business processes to this method.

"The challenge HansaWorld is facing is the increased competition within the mid market. HansaWorld's challenge, and at the same time our competitive advantage is, that we were already successfully competing in this hard- fought market for many years. We also produced an established network of customers and business partners"

What marketing strategy do we apply?

- We base our efforts on building Long Term Relationship with our customers.
- WOM Word of Mouth is very important for us and many sales were made because we were recommended by an existing customer.
- We do follow Bigger Players marketing strategy along with the market tendency.
- We write or place ad's in specialised magazines (for Managers or for IT).
- We participate on relevant exhibitions.
- We believe in, support and work actively with partners.
- We run campaigns to reach our target leads.

An Insight into the HansaWorld Marketing Style

1. We always endeavour to building Long Term Relationships with our customers.
2. We aim to develop and retain happy customers.
3. We participate in relevant exhibitions (the motivation with the competitors is check them and scare them, we always check the trends in the markets, and we build relations)

Exercise

With this exercise you will gain trust in yourself while talking about and presenting the company.

Write down a presentation of the company and of your position within it. Now get out of the classroom or salon and go to the street, if it's an avenue with a lot of traffic it will be better.

To start the exercise you need to work in pairs, one of the people cross the street/avenue to the other side. Now both people have to say their respective speech.

The pressure of having people looking directly at you will improve your confidence.

ERP, CRM and our products (software)

ERP

ERP is an acronym for Enterprise Resource Planning. As the name indicates ERP is about managing resources and planning, however, ERP is primarily about the Enterprise. It is designed to integrate all departments and functions across an organisation onto a single computer system that can serve all the different departments' particular needs. It combines all of the administrative elements into a single, integrated software program that runs off a single database so that the various departments can share information and communicate with each other more efficiently.

Enterprise Resource Planning (ERP) integrates core business areas such as manufacturing, distribution, financials and human resources. ERP is often implemented in companies together with process-oriented organisation or Supply Chain Management (SCM). In order to manage the information-flow of such structures new IT-systems are generated – known as ERP-Systems. IT-systems of this kind allow managers from all departments to look vertically and horizontally across the organisation to see what others are or are not accomplishing. It attempts to integrate all departments and functions across a company onto a single computer system that can serve all those different department's particular needs. ERP-systems also implement and automate business processes, putting them into a useful format that is standardised across the corporation and between their suppliers and customers. ERP-systems capture data about historical activity, current operations and future plans and organise it into information people can use to help develop business strategies.

Enterprise resource planning software is an integrated software package that unites several of the most important demands needed to run an enterprise, like administration, customer resource management, finances, human resources, logistics (transport, distribution, etc), planning, production, sales, etc. and in case of a multinational company this is possible on a worldwide scale (enabling people communicate on a global scale over the 5 continents) using e.g. -distributed computing and being multilingual.

History of ERP

The history of ERP can be traced back to the 1960’s, when the focus of systems was mainly towards inventory control. Most of the systems software was designed to handle inventory based organisations in traditional inventory concepts. The 1970’s witnessed a shift of focus towards MRP (Material Requirement Planning). This system helped in translating the master production schedule into requirements for individual units like sub assemblies, components and other raw material planning and procurement. This system was involved mainly in planning the raw material requirements.

Then, in 1980’s came the concept of MRP-II (Manufacturing Resource Planning), which involved optimising the entire plant production process. Though MRP-II was initially an extension of MRP to include shop floor and distribution management activities, during later years MRP-II was further extended to include areas like Finance, Human Resource, Engineering, and Project Management etc. This gave birth to ERP

(Enterprise Resource Planning), which covered the cross-functional coordination and integration in support of the production process. The ERP as compared to its ancestors included the entire range of a company's activities.

However, it has been within the last five years that ERP has really taken off and seen record revenues by the software companies. In the past, ERP software was used to number crunch and schedule manufacturing processes. Management was not using ERP to its full potential. Today, ERP is the foundation of businesses domestically and globally. It is used as a management tool and gives organisations a great competitive advantage.

Future of ERP systems

There is enough software out there to keep a company running. What we are lacking is a solution where the chosen software would be 100 per cent useful to and employed by the company. To improve this situation, customers need to have a better picture of their information processes and also be ready to restructure these processes and get used to buying support. Software producers, on the other hand, need to be able to offer more integrated solutions that would be adequate to the customer's needs.

Internationally the main trends are the reducing cost of software, the growing importance of information and its contents, technological racing, globalising and concentration on vertical markets.

In the near future the software producer also becomes a co-coordinator of the exchange of information, where information means 'transactions between companies'.

The developers will adapt the software to a certain extent to serve the customer's company as well as possible, at the same time the customer will have to adapt their business processes according to the best practice method, as the software no longer support individual methods

- The total number of business software vendors will decreased as a result of the consolidation process. In the more developed regions of the world, there are few developers to start from scratch on their own with classic business software systems. Instead, there are consulting companies, who offer their customers 'Lego-type' solutions based on some large business software system.

- This has become possible thanks to the massive changeover to the Service Oriented Architecture (SOA) based development, as a result of which systems will be much more compatible with each other than they are today.

- Direct data exchange between companies' business information systems is widespread (today's electronic and paper invoices will be replaced by XML messages).

- Business analysis solutions have replaced classic reporting devices wherever possible.
- Integrated vertical solutions form part of the standard functionality of all larger business software packages.
- Use of mobile computing (WiFi, laptops, PDAs, smart phones) increases.
- Use of ASP – buying business software solutions as services – increases.

CRM

Customer Relationship Management (CRM) includes the methodologies, technology and capabilities that help an enterprise manage contact (customers, suppliers, partners, guests) relationships. The general purpose of CRM is to enable organisations to better manage their customers through the introduction of reliable systems, processes and procedures.

HansaWorld CRM concept

CRM should be integrated as ONE solution with ERP. Most of the processes of CRM cannot be separated as concept from the ERP or business solution. Our offering is the natural solution and approach on how to deal with CRM, that's why we are ERP+.

For us CRM is about communication, sharing information, complete status with all aspects involved (commercial, financial, services and support, contacts).

Because we offer all this functionality, we have a unique CRM offer

We have all the essential functions of stand-alone CRM systems, integrated with the ERP in one solution.

HansaWorld Products

We introduce our products after the benefits discussion because customers are primarily focuses on needs and benefits rather than features we have.

HansaWorld Enterprise

HW Enterprise is designed for large and medium sized companies but is suitable for businesses of any size. The typical installation size goes from 10 to 100 users; but as a fully scaleable solution this can be suitable for one to many hundreds of users. HansaWorld Enterprise comprises of over 45 modules and functions that make it suitable for almost all business types.

HansaWorld Express

Also known as HansaWorld SMB, HansaWorld SBE, HansaWorld MVU and FirstOffice Platinum (Latin America Market).

This is a local product available in a single language for up to 10 users. HansaWorld Express offers a range of modules, functions and features that meet with local market needs and which are available at a competitive price. Product offerings will differ in each country.

Most of our HW Express products are vertically oriented, to provide a better-priced solution with same quality as Enterprise to industries like Service, Production, Rental, Job/Projects, or Hotels. Some countries have most of those products because they have reference customers in every industry they offer a HW Express Product, an interesting market to direct marketing campaigns and a need to offer a better price solution than Enterprise.

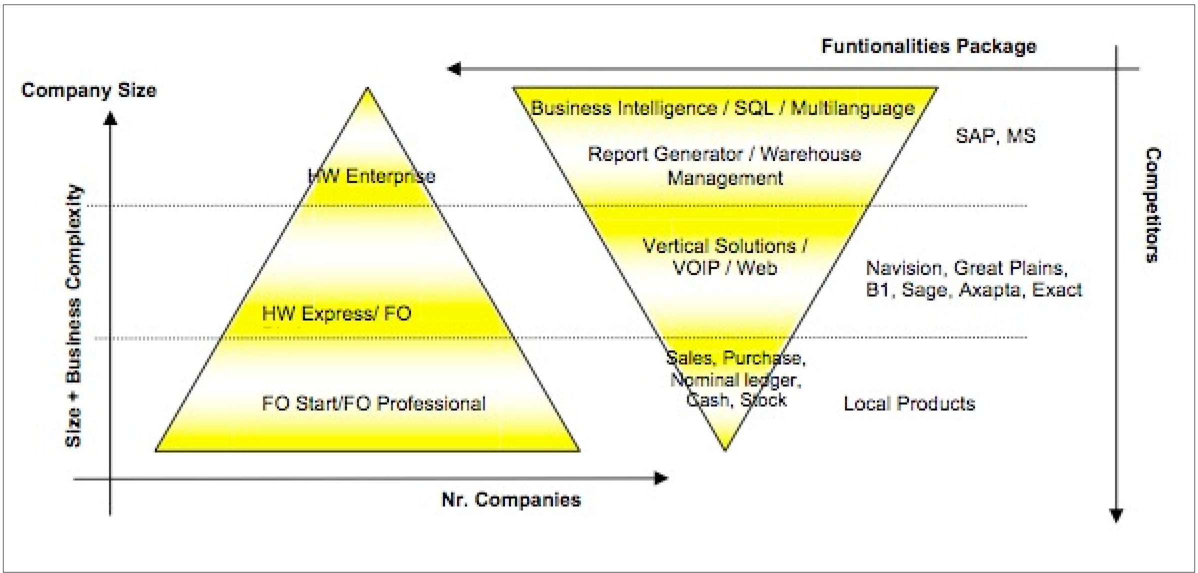
HansaWorld FirstOffice Professional and Start

A basic accounting package for small/home offices.

Simple – User-friendly interface, easy to use, easy to upgrade & update.

Powerful – complete package, integrated, multiplatform, everything you need in one package.

Enjoyable – auto transactions.



The "Product Presentation"

Introduction to Powerdemos

Powerdemos are "tried and tested" methods to demonstrate our product to our potential customer. Powerdemos are structured and presented to highlight our unique selling points in the shortest possible time frame and to keep the potential customer interested and impressed with our product. Powerdemos are designed to be simple, clear and to the point. Most of our staff can present our Powerdemos with continues training and practice.

Suggested steps to present the product.

How to make a Power Demo?

Always set Goals and use the Script.

Demonstrate Ease of Use

Explain the main window (Master Control) as 6 areas. Personal, Company, Routines, Registers and Personal Desktop and Upper Menu (File, Edit, Record, Windows)

Open Reports and put it to one side. Change Module and explain that the reports list and the register change according to Module, but the rest is the same.

Every operation can be done by clicks of the mouse or key combination.

Data Entry

Data entry in HansaWorld Express/HansaWorld Enterprise is 3 mouse clicks away. (Demonstrate by clicking on Select Module>>Quotations>>Quotations register>>New)

Everything that's used regularly is just 2 clicks away - links are created on the Personal Desktop. (Demonstrate how you can open Customers, Invoices, Quotations, and Customer's Statistics report from your Personal Desktop).

"Mr. Customer, can you imagine having faster access to any part of your system.

I assume this is the fastest shown by any vendor"

Show quick data entry by duplicating an existing quotation.

Multi-Window

You can have multiple windows open from different parts of the system. Let's say you are busy running a Customers Statistic report and customer phones in to ask about an order status not delivered yet.

Usually you will have to close all windows and go to the sales area in your software.

Run the "Profit and Loss" report from Nominal Ledger Module >>Reports (or from your Personal Desktop). Then place the 'Profit and Loss' report on the side and run a Customer Status from Register>> Customers>> highlight Customer>> Operations>> Customer Status.

Discuss the sales order not delivered yet, but comment on the outstanding invoices, even create a new activity with the notes during the phone conversation. Then close the Customer Status report and go back to your Customers Statistic report. You demonstrate that you manage the enquiry from the customer in seconds without closing your previous job.

String Searching in Reports

For example, Open the Sales Ledger >> Reports >> Invoice Journal. Demonstrate how you can search any numbers or letters/names in the report. Also point out how quickly the report is created.

Drill - Down

Drill down is searching for additional information. Run Nominal Ledger>>Reports>>Profit & Loss on the screen. Demonstrate how you can drill down from the report, by clicking for example Sales account. Nominal Ledger report opens on the screen.

Demonstrate how you can drill down from the report to transaction, by clicking on the transaction number in the report. Demonstrate, how you can open an invoice that created the transaction, by selecting on the transaction>>Operations>>Open Subsystem record. Click on customer number field on the invoice and press F2 to open the customer record and check what price list they are using or Operations-Invoice Status and open a Receipt if any.

Competitors' products drill down to read only; purpose for drill down can also be to fix anomalies.

Access Rights

Make sure you have demo data set up with different access rights (in System>> Settings>> Access Groups and then allocate to person) and demonstrate by logging into the system as different users.

Unlike competitive products, HansaWorld product functions don't grey out if the person does not have access, they disappear from the screen altogether.

Personal Desktop

Demonstrate that Personal Desktop is Personal for every user, by logging in as different users, the personal desktop change.

You can create links on Personal Desktop for Registers, Reports, Customer records, Quotation records etc. You can add Notes and Files.

Attach the files - show how easy it is to open the file in HansaWorld Express/Enterprise. Slow down while demonstrating as this is super wow feature.

On computer you work with files daily – don't search for them or expose them to being lost - especially important files. The files you attach are encrypted and specially logged on the server.

You can show how to have one click away files, transactions, or even create Archives of Reports/Mails/Files.

Customer Record with Personal Desktop/Paperclip

Every record in HansaWorld Express/Enterprise has its own personal desktop/paperclip. Demonstrate it using Customer record. Attach for example a contract to the customer record and demonstrate how anybody can open it from there afterwards.

Drag and Drop

For this example select many items and drag and drop them in a quotation.

Excel Integration

Run an Invoices report and chose Excel. See the result when Excel opens.

Linking Records

Make sure you have entered a quote in the system and created an activity from the Quote>>Operations>>Create activity. Log there in the text field dates and examples of conversations you have had with customer.

Now demonstrate how you can open the quote and from the quote attachment. Open an activity and show the details you have logged about conversations relating to this specific quote with the customer.

You can also show how records are linking but Creating Sales Order from Quotation, and then Delivery and Invoice. You will see that the original record is attached to the following ones (delivery or invoice).

Task Manager

Everyone in the company has a to do list, in their head, on piece of paper, in Word etc. The flaw is that its 'single user system' and information is not stored and shared among people within the organisation. Much more affective is to have a multi-user system, where people can share the tasks, allocate tasks to each other, ensuring they are being done.

What happens if employee X or Y is sick. Your existing TO DO system can loose you business. In HansaWorld Express/Enterprise I can look at employee's X Task list and follow up the quote. You can also say something about business alarms.

CRM

As HansaWorld Express/Enterprise has integrated CRM, it allows for the company to get out not only the numbers about the customer (which products, how many in what time period customer has bought), but also tells a story about the customer (meetings, conversations, promises etc.) around the numbers.

Explain the communication button (phone, mail, chat, Skype, SMS). It is probably a good idea to send an SMS or business alert.

CRM & Mail Shots

Ask the customer, how long would it take them at present to create a mail shot to certain group of customers in certain area who have not bought a specific product of yours, but who might be interested and benefit from it.

They would need a report that shows which customers have not bought. They would need a report that shows in what areas they have not sold it.

They would need to enter all the e-mail addresses into Outlook or any other external e-mail system (after they have the reports).

1. CRM > Go to File>>Maintenance>>Add Class to Customers. Specify the same selections as in the above report. On the Add Classification field Ctrl+Enter and create new Classification, for example MAIL and with description Mail shot. Save the classification record. The classification will be put on the Add Class to Customers maintenance specification window. Run the maintenance.

2. Go to CRM>>Registers>>Letters. Create a new letter; select the classification you created on the Classification field. Demonstrate that you can use pre-set text, by going on Std. Text field and selecting with Ctrl+Enter standard text for the mail shot. Save the letter.

3. Attach a brochure to the letter.

4. Select on the letter>>Operations>>Letter list. This shows a list of customers who are going to get the mail shot.

5. To send the mail shot, select on the letter>>Operations>>Send E-mail. You can show the mails sent at Email Module, Queue Mails

WAN

During the presentation it might impress the customer if you can log in to the Internet and check your mails from your HansaMail account (web interface and using our client). Also check your calendar, resource planning or even chat with a colleague. This will impress the prospect even more.

THE PIPELINE CREATION AND PIPELINE MANAGEMENT

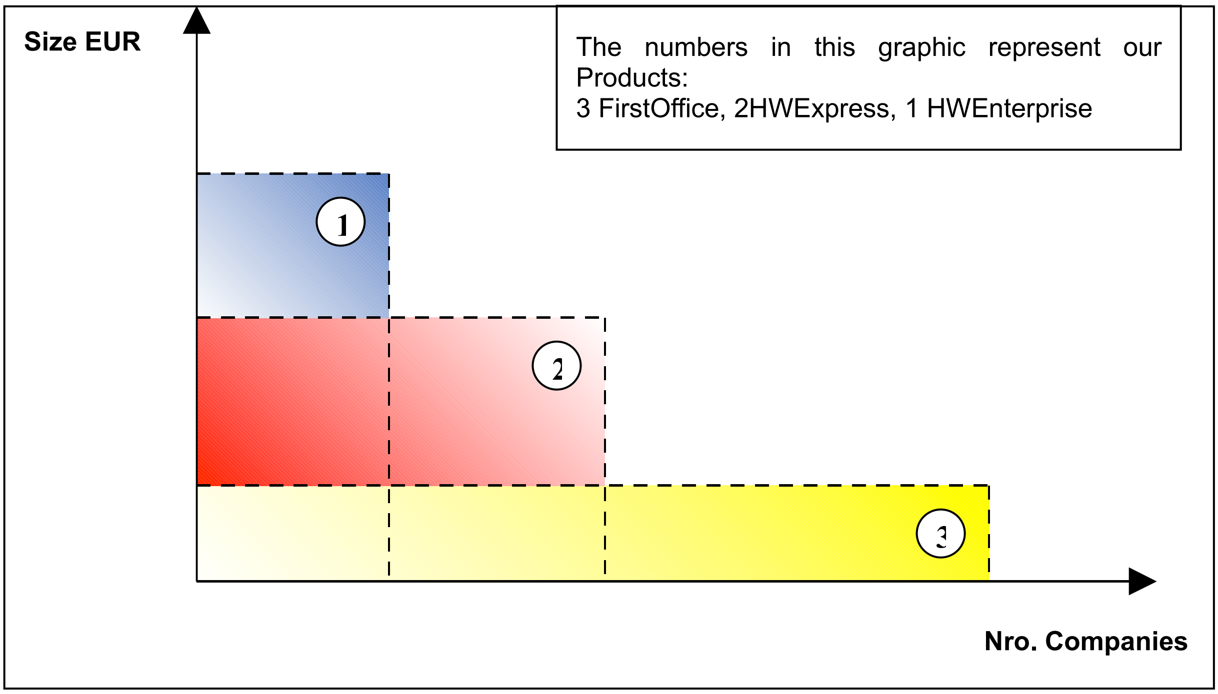
In this chapter we will analyse how to create a sales platform, identify potential leads, manage them, and some tips to build a successful activity.

The Sales Platform

Generally your Sales Platform is made of:

- Your Contacts.
- Affinity to specific industries (Products, Services, etc.).
- Focus areas in your country (vertical markets, i.e. rental, job costing, hotels).
- Case Studies.
- Local References.
- Developing and Growing Markets or industries (potential industries, business opportunities in your country that are growing).
- Dealers and distribution (their platform).
- Your local company strategy.
- Think about where you are strong!.
- Size of the Deals a sales person is able to handle.
- Set of skills from the sales consultant (also evaluate communication skills).
- Others.

In the following graphic you can see the relation between the No. Of Companies you contact and their impact in EUR, taking our products as a marker.



Types of Sales Consultants

There are 2 types of sales consultants: Farmers and Hunters.

Hunters like to go seeking new opportunities. Always looking for new frontiers and new projects.

On the other hand Farmers feel more confident working on the existing customer base. Usually, this is the case of our consultants and Key Account Managers.

As we mention, the sales platform has to be constructed considering our strengths; for example, case studies and references in the local market.

HansaWorld has over 70.000 customers and we provided solutions to over 100 industries. However, there are some industries where we offer more benefits than others.

Here is a list of some examples, for SMB's and bigger companies:

- Companies that want to increase effective use of IT by choosing better platforms/servers (e.g. IBM) or companies that run on Apple or Linux but could not find good ERP on the market.
- Companies with shared resources (e.g. employees, rooms and equipment), restaurants, hotels and all other companies that want to plan their resources. Modules: Resource Planning, Hotels.
- Service companies (e.g. car or computer service). Modules: Service Orders, CRM, Calendar, and Tasks Manager.

- Companies with simple production, where the cost of larger production systems exceed their possibilities. Modules: Production and Forecast.

- Companies that want to calculate time and costs of projects and jobs. Creative, Advertising, Design, Consultants. Module: Job Costing.

- Trade companies that want integrated accounting and logistics, with WAN possibilities and Offline Solutions. Modules: POS, Web, Warehouse Management and PocketPC.

- Companies that rent equipment, lease, or register subscribers - i.e. need to conclude contracts and prolong them on regular basis. Modules: Contracts and Rental.

- International Companies or companies with several offices. Modules: Consolidation, WAN, Multi-language, etc.

- Companies whose employees might want to access the system from anywhere in the world. Service Oriented companies. /'Mobile'

Hints for Creating Qualified Leads Lists

Terminology

Suspect – You have the contact details for a Potential Customer and are going through the process to evaluate the prioritisation and determine if you should meet with the potential customer

Prospect – After evaluating the suspect, you have determined that its worth meeting with the potential customer. After the first meeting, it should be decided if the Suspect becomes a Prospect. A prospect is a potential customer who is interested in our USP’s and are interested to continue talking with us after the first meeting.

Here are some ideas that will help you to generate warm lists of prospects and leads. Remember the conditions listed to build a sales platform, work only on lists where you have cases studies or local references, markets where we are strong.

(These results can be generated after a PRACTICE).

- Customers providing you with their client / supplier list.

- Exhibitions.

- Networking at events.

- Checking web downloads daily.

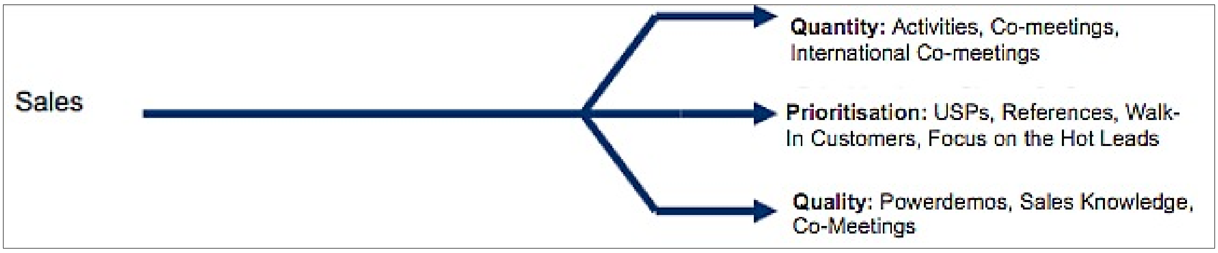
- During the meetings start the habit of always asking, "Do you know anyone else?".

- Online exhibitions.
- Auditors or Management Accountants.
- Support calls.
- Job Ads.
- Partners (hardware) customer databases.

SALES TECHNIQUES - Activity Management

The Fork

This sales technique is called the fork because of the shape of the result. Based on the Fork model all sales processes are the result of three core elements:



Quantity:

Quantity is not the most important factor. It is important to take quantity into consideration with the focus on Prioritisation.

Prioritisation:

The two most important points about Prioritising your Pipeline are:

- USP – Customers who are interested in one or more of our USP's
- References – Customers who are referred to us or we can refer them to one of our reference customers

Work with a senior sales consultant in your top 3 leads, get help from your colleagues, but also remember to prioritise the low hanging fruits (easy cases to close - easy money).

Sometimes, if you keep all your focus only in the biggest prospect, you risk loosing attention on the easy ones. It's possible that if the big prospect delays the decision or even chooses another competitor, you will realise that is too late to go to the easy ones and will end up empty handed.

Quality:

How to improve Quality? You will need to: Practice demo scripts, go to meetings with an assistant (sales assistant, a consultants, office assistant, another sales person), go to meeting with experts from other countries, work on a highly qualified leads database.

Pipeline Management

Pipeline: A pipeline represents your Future Sales, it’s very important that as a sales consultant you maintain a pipeline to assure your future sales.

Our pipeline should be represented in terms of prioritisation.

Them company rule is to sell to Walk-In customers that are interested in our USP’s and where they have either been referred to us or where we can refer them to one of our reference customers.

Walk-In customers are customers who either visits our web-site, calls to our office, call to our partners, visit our partners website or speaks to us at events, exhibitions or seminars.

If our pipeline is represented by Walk-In customers we increase the probability of closing the cases in the pipeline. The general rule of thumb is that if the Opportunity qualify for reference sales, we have already improved the probability with 50 %. If our potential customer is interested in one or more of our USP’s we increase the probability with 10-15 % per USP.

SALES MEETINGS (MEETING OUR PROSPECT OR EXISTING CUSTOMER)

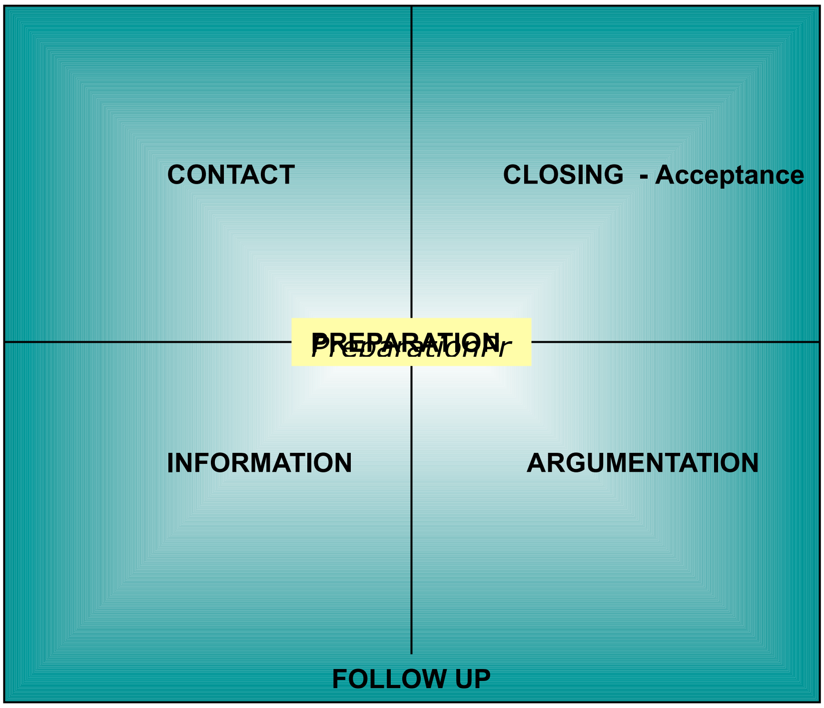
Why is the sales meeting so important? Why does direct communication with customer hold so much importance?

Because it matters in order to build trust and to create a relationship.

You have to be aware that the structure and the content of the meeting might differ between countries. The custom and perks that involve the development of a relationship in the Baltic's, West Europe like Italy or Portugal, Latin America or in Russia might be quite different depending on the cultural values of each place.

Meeting Structure:

Usually, the meeting structure is based on the following elements:



- Preparation
- Contact
- Information
- Argumentation
- Closing
- Follow Up

The "Argumentation" stage stands for "Selling" the Solution

Efficient meetings

Here is a list of tips and advise, that will help you to have the most efficient meetings with your prospects.

Preparation

During this stage it might be helpful to follow these tips:

- Always carry out some Research about the prospects you find interesting (look for reference for that contact – case studies, contact info available, also try to prepare a demo with data according to that industry. It will also be useful to have the name of the system they're currently using, in order to prepare in advance the battle cards we could use.)

- Follow up through phone calls to check if they agree with the agenda for the meeting.

- Get information from the web about the prospect, get some financial information about the status of the customer if possible, their history, their partners (maybe among them we have a customer).

Set the right mindset with the prospect before the meeting (both parties expectations about the meeting). Talk about the preparation of the meeting, ideal participants during the meetings, need of a projector and board, steps during the presentation, etc.

- Try to obtain information about the "decision making process", are you really talking to the manager that will take the decision or to the IT manager who is just information gathering?

- Time Scale

Some Tools and tasks to consider and prepare before you go to the meeting:

There are several tools that you can work with during the different stages of the meeting structure.

- Powerdemos: Always review and test the Powerdemo needed for each prospect before the meeting.

- Shadowing: (if required, you can always ask to see a case study with a consultant, and meet the project manager and customer before your meeting with the prospect. If this is not possible, you should ask the consultant about all the relevant information he can give you or attend the meeting with you).

- Reference Customer List:

Always keep it updated (your local and international reference list) as with the Case Studies (info required on the former, name of the company, name of the contact, phone and address, kind of business, version used, operative system, since they agree to be a reference customer).

- USP's and Your Country Focus Areas: Understand them (matching list).
- Battle Cards and USP's presentation vs. your competitors in the case (previous analysis to make the focus on the competitor).
- Co-Sales: In important meetings and if the team consider it relevant, you can invite an expert (from other country and with knowledge in a similar case), someone with the knowledge and experience that will increase the opportunity of closing the business and impress your prospect.
- Marketing Material (i.e. Brochures, Product Sheets, Case Studies, Reference List, Business Cards).
- Agree on an Agenda (topics that will be discussed)
- Your main goal is to get a second meeting, for this to happen you need to get positive feedback in the first meeting.

Getting Ready for the meeting

It is recommended that before you go to the first meeting (or even during the first presentation meeting) you consider all the advise given above. This knowledge will help you to get valuable information from the customer.

How to Use Reference Customers and Case Studies?

It's recommended that you present a list of our top reference customers, and case studies or at least comment about them. Remember always to ensure your list is correct and updated.

Reference Customers and Case Studies are used mostly to reassure prospects about our expertise in their industry. Doubt, Fear and Trust are very important to our potential customer. Most of the Doubt, Fear and Trust issues are addressed if and when our potential customer get referred to us by a friend, co-worker or business associate.

Some of our sales consultants have their own sales reference list that they keep updated all the time, this list is composed by 3 to 5 names, and they make sure of the status of the customer at all times.

How to Identify the Budget?

It is not so important to qualify and prioritise the opportunities based on their budget, but its recommend that you go to a meeting knowing in advance the budget of the prospect.

Some tips to get this figure are asking questions like:

- What system are you currently using? (Competitors prices are easier to detect this way)
- Have you been seeing other options? Could you tell us some of them?
- Direct Question, What is your budget? So we both don't loose time
- How much you budget to spend on IT this year?
- What is your annual Turn Over?
- How many users do you have on your current system?

How to Identify the Previous System?

- What system of software are you using for CRM ?
- Which architecture are you using?
- How many users are currently using the system?
- Can they log in using the Internet?
- What is your current email system?
- Do you have a Web Shop?
- What calendar system are your employees using? Is it integrated?

How to Identify the Decision Makers?

Always have on your mind that only on rare occasions is the decision to purchase made by just one person. In most situations there is a group of people involved in the buying process and they will be providing comment and criticisms.

Depending on the size of the organisation, decisions will be made by managers, CEO's or board members. You need to be prepared to identify who are the main people that will influence the final decision.

Maybe you'll need to talk to several board members before they make a decision.

It's suggested that you create interpersonal relationships between the main players in the organisation.

There can be three levels of decision-making:

- 'Economic buying influence': the decision-maker who can authorise the necessary funds for purchase.
- 'User buying influences': the people in the buying company who will use the product and will specify what they want.
- 'Technical buying influence': the `experts' who can veto the purchase on technical grounds

Once you identify the decision maker, ask yourself and the prospect, what do you have to do to have a meeting with this person.

How to Identify Competitor and/or No Decision?

It's vital to identify the competition as soon as possible, the term competitor will not always be referred to an outside factor, i.e. the competition might be the current system, the IT department of the prospect, or the situation where the prospect won't take a decision. As an outside factor, the most common is another product (international ERP, etc.)

Depending on each case you can take different approaches:

- In the case of a No Decision case (prospect refuses to make a final decision). You need to work on presenting him a report with the cost of not changing systems (loss of money due to bad debt management, bad stock control, late reporting, etc.) and the loss of opportunity (be more profitable, increase sales, integrate branches, etc).
- In the case of another product. You should present (not hand over) the battle card against this competitor.
- Also you can prepare a ROI to help you support your position and also slightly push ahead your lead into making a decision; remember to be careful while using the ROI (a complete explanation about the ROI uses in HansaWorld can be found in this document.
- If the delaying comes from the IT Department. You need to make them feel secure about the role that they will play during the implementation and support; make reference to the main tasks of the Project Leaders and if the situation demands, explain about HAL programming and the courses we provide.

Contact with the prospect

Contact before the meeting:

There are different kinds of material that you will be sending to a prospect; the formats could be PDF or the printed version. You have to be careful because customers tend to compare competitors' marketing material with ours and judge the solutions this way, but they are in essence different materials.

There is a small amount of things that are sold without marketing collateral, while delivering material you also have to explain the differences to the customer between our sales material and the products brochures.

> You cannot deliver the Marketing material and assume the customer will read it, be conscious that 5% of the people you send material will read through it, but most of the people including yourself tend to scan documents not read them

Marketing Material includes the following:

- Brochure
- Product sheet, relevant to the prospect. Also the service and support sheet
- Latest Newsletter
- Press Releases, if it is relevant for the customer
- Case Studies
- Local reference Lists (also international)
- Methodology of HansaWorld implementation process HIM

Contact During the Meeting

For the contact during the meeting, the following has to be considered:

- Try to make the prospect open up; your body language is quite important. Your goal is to win their trust!
- Work on a basis of 50/50 talking on both sides, do not talk all the time, you are there to gather as much information as you can. And remember that is essential to become comfortable with each other.
- Always try to go to meetings with a colleague.
- Invite Co Sales and Experts from other countries (pre-sale)
- Take notes from the meetings, so you can, at a later date, quote the customer words describing their pains and the cost or lost opportunity for not addressing them.

- We always try to go the first meeting knowing the customer's budget.
- You need to invest the time to get to know the prospect (ask about family, hobbies, etc. without being intrusive).
- Every mistake you make during the process decreases the trust of the prospect. So DO NOT LIE; if you don't know the answer to customer's question, admit it and tell him you will get back to him or get someone who knows to contact him.
- During group meetings it might help you to have Slide Presentation to introduce the Group, the local Company and the product. In some cases this presentation helps to build new needs at the customer side.

Practice & Exercise

This is a confidence exercise and the goal is to improve your communication skills. The work will be done in pairs.

Prepare some introduction lines for yourself, the company, the main ideas about our solution, and why you are in the meeting. Try to book a new meeting with the prospect based on your previous presentation and their basic needs.

Now, go out to an open space, it'll be better if it's a noisy area, and start the presentations. After a while change the roles with your partner.

How to get valuable information during the meeting

You should always be in control of the meeting and drive the meeting to get answers to questions that you ask. The questions that you ask should be relevant and should be building on our unique selling points.

It is important to listen to the customer when they speak and not to interrupt while they talk about their concerns and needs.

It's important that the prospect recognises their needs by themselves, and that they come to the solution.

The more defined their needs and current problems are, the better we are placed to offer bigger solutions.

Be prepared to calculate the cost impact of the problems they currently have, and compare them against the cost of the solution. Be careful in the way you explain these aspects to the prospect, you always have to quote the comments from the other members of the staff, and the cost you present should always be estimations based on the information you were given during the meetings with them.

The Art of Asking Questions

Always use effective questions to retain control of the sale.

There are three types of questions you should starting to be familiar with, so that you will begin to use them as a matter of course in your sales presentations.

Open Questions

An open question is a question that cannot be answered by a simple "yes" or "no". To remember how to frame an Open Question remember these words: What, Where, When, How, Why, and Who.

If you always start a question with one of these six words, you will be asking an open question and your prospect will need to elaborate on his answer, as it is impossible to offer a simple yes or no answer to an open question.

Directive Questions

Directive questions should be used to focus the prospects attention on some area where an agreement already exists. For example if you know that one of the prospects dominant buying motives was to save money, then you might ask "If we had a plan that would save you money, I guess you would be interested in it wouldn't you?"

Reflective Questions

A reflective question is one you should use if your prospect says something that you believe is illogical or unrealistic and you want them to see that too, without embarrassing them. For example, if the prospect were to say he would "never" do something or he will "always" do something, then it could be that it would be illogical and unrealistic to have said so if something outside of his control were to intervene.

The real value of the reflective question, is that it allows the salesperson to continue with the sale once the prospect has recognised that they might have been a little too "black and white"

The use of well thought out questions will accomplish four objectives:

1. You will acquire new facts

2. You will confirm known facts

3. You will get the prospect to focus on the problem

4. You will get the prospect to talk

It is through listening with understanding that the salesperson learns how he or she can add value to the relationship.

How to ask questions

Always ask questions in a "Counselling" and non-threatening manner.

When using questions to uncover areas where you can add value, always ask your questions in a friendly and non-threatening manner.

Prepare your questions ahead of time and then use the answers that you get to your questions.

Use questions to uncover opportunities to "Sell".

It is by listening with understanding that we learn how we can add value. Adding value is the difference between selling solutions and just making sales.

Avoid asking questions that are not relevant and most of all don't ask questions who's answers will lead you away from your objectives.

Never repeat an answer given to a question.

Avoid the temptation to offer an answer to one of your own questions.

Another common error that salespeople make is to ask a question and at the same time suggest an answer to their own question.

How to use answers?

Use answers given to earlier questions to frame new questions.

In a well structured questioning technique, you should make sure your questions flow from one area to another.

Offer an understanding comment after you have been given an answer.

Whenever you receive a satisfactory answer to one of your questions, show the prospect you both understand his position and by demonstrating you are listening with understanding, you will be advancing your relationship with the prospect and progressing the sale.

Pause Technique

Don't be a crocodile with big mouth and small ears. Learn how to listen to our customers and let them talk.

Active Listening

Be alert and look at the signals. Be flexible by responding to their signals. This is the art of asking the right questions too.

LISTEN - ask questions, listen attentively, make notes.

If you take notes of the problems the customers has stated during the initial conversation, you can always come back to them at the end of the presentations in order to make sure they were covered and in most of the cases, with a successful answer (example: in the product demonstration you show how this need is solved with our product).

Argumentation Phase

NASA (Needs Acceptance Solution Acceptance)

NASA is a sales technique based on four factor, these are explained following this lines. Although we do not use NASA as our sales method, we can still apply NASA to our Unique Selling Points. The NASA description below has been modified/adapted to improve putting the focus on our unique selling points

N – Needs

We tell the customers what they need, creating the need to satisfy requirements that were not visible by them until you showed him them. Considering the latter, the need doesn't represent what the customer wants to buy, but the need you have created.

A - Acceptance

It's of great importance to get the acceptance of the needs from the customer. Then you can move on the process. You can present a report or ask back during the meeting something like 'we agreed you need this feature in order to … is this correct?'

Discussions will get in the way if the first stage (needs) was not correctly covered.

S - Solution

Once the building of the needs process is over and the customer accepts the results of it, you can present the solution.

You will present our product, run some power demos, give a quotation to the customer, explain HansaWorld Implementation Methodology and get the acceptance from the customer that this is the solution they need.

If you have done a solid job of building the need and getting the acceptance, it won't be necessary to go too deep into the product demo; only run some power demos.

Trust was built thanks to your professionalism, interest and knowledge rather than your knowledge in the product you are presenting.

As a rule, The Larger the Case is, The Later You Show the Solution (Run a Power Demo)

A – Acceptance

In this stage the closing techniques and the final negotiations take place.

Meeting, Closing and Following up:

Always agree on a Next Step!

Agree on a Time Scale for the process (go live and estimate date to sign the agreement).

Make sure we are on budget and who the remaining competitors are at this stage of the process.

Ask their Opinion about the status of our relationship and their opinion about the process.

Leave the meeting with right notes regarding their needs, the solution purpose and the value of the solution.

Have clear idea, after the meetings, about the decision makers and their interests.

Internal Use: keep all the information integrated creating activities to follow up all the processes with the prospect. Activities for every meeting and phone conversation have to be entered in the system always making reference to the customer

If the meeting is about HW Express, you have to run an Express process. This might be the meeting structure, performed during the first visit:

- Contact.
- Power Point Presentation.
- Take notes of customer problems and needs.
- Run Power Demo.(Show USPs)
- Go back to problems how can they be fixed.

Practice: Need Building for our USP's Interactive Activity Role Play

Work in pairs. One will play as a customer and the other one as a sales consultant. Then change places.

The activity should follow this scenario: Customer has a problem with the control of sales people or with production or getting numbers from the system, each of the assistants should act according to his/her role, and develop the sales story.

Remember to take notes.

After 20 minutes of the activity, change the groups and play the same game switching roles. Once the Role Play is over, we discuss some feedback about the results.

Remember the focus should be to turn the customer's need into a focus point for our USPs.

Useful Concepts and Hints

Affinity and empathy" that it is developed between two people.

The relationship between two people is often based on subconscious and subjective assessments, rather than more tangible feelings. You might have heard someone say, "I feel really comfortable with that person, but don't ask me why, I just trust him or her". That is rapport and you cannot hope to sell to someone unless you have achieved it.

Remember people usually "Buy" from people they Respect and Trust.

Conversely, people do not make optional choices to buy from someone that they do not like and do not trust. To gain a person's confidence in your ability to deliver, base your approach on yourself.

People like honesty and openness in communications, keep away from "touchy" issues and don't say anything for the sake of saying it.

Show your integrity, if you do not know something, admit it and undertake to find out and get back to them. While it is said, "flattery rarely falls on barren ground" be very careful when offering compliments. It is too easy to appear to be shallow and condescending when passing a compliment.

More often than not, a positive perception is created by Manner, Understanding and "Chemistry"

In order that you can establish the level of rapport necessary to foster and maintain quality long-term relationships, you must understand the concept of fitting in with the other person's expectations. Body language, "chemistry" and a genuine sensitivity to care about how the person feels, is what it is all about.

Respect and Trust must be earned, it cannot be assumed.

Before you can expect someone who has never met you, to openly take you on face value and appreciate your honesty and integrity, you have to earn their respect by your words, actions and behaviour.

Show your genuine interest and appreciation for other people's point's of view and environments.

To develop genuine rapport you need to be a good listener, ask questions to uncover the prospects feeling's and ideas on matters and remember, a good salesperson is someone who people "buy from" not someone who "gets the order" no matter what.

Use friendly and non-threatening "Body Language"

Learn to relax your posture, show that you are comfortable in another person's environment and conduct your use of well thought out questions in a "counselling" manner rather than in a form of "interrogation".

Your Tools for Argumentation. How to make our solution more complete and better supported?

a. USP (Unique Selling Point) for this particular prospect

USP's type of sales. We need to spend time presenting them.

Sales to new customers should grow 40% and sales to existing customers about 20%.

How can you achieve those goals?

1. Create a USP list

2. Know by heart your top ten USP's

3. Have prepared a matching USP list for the vertical markets that you're interested into.

By the end of this stage a document similar to the one Solution Design, which is included in the project managing section (see reference in the annex)

b. Present a relevant case study and references

c. Present a report about the situation and needs you identified during the process

d. Cost / Value of our solution

Introduction to ROI - How to present it in a friendly way?

ROI is an acronym for Return on Investment.

The Return on Investment is measurable information about the returning of cost investment in a certain period of time through increased operational profits caused by investment.

You measure the ROI on a timescale, which is defined by the time of investment, the return of profitability and the return of investment.

How do you calculate it?

In order to calculate the ROI, you have to be able to calculate the current cost of certain operations. Then you'll be able to calculate the cost of the same operation powered by our solution. Both costs are usually calculated on monthly or weekly basis. You also need to know the value of investment, direct implementation costs and ongoing costs of maintenance.

Why is it important for the customers?

Nowadays, customers tendency is to invest in order to survive, however, the main principle ruling theirs decisions are related to give and get more in return.

The ROI is useful to convince the customers that the investment will be profitable.

Reasons for using/not using ROI

The ROI can be used as a key sales point, it is one of the hardest to present but at the same time it is the point with the longest term of survival.

Using ROI as a closing sale point, it might help to give the final push to the customer's decision.

ROI can also be a Sales Killer; don't use it in these situations:

- Never talk about a general ROI
- Don't use ROI through common USP's, the competitors will do the same.
- Don't present ROI if you don't have approximate calculations.
- Don't use ROI for customer business processes; you don't know about it.
- Don't use an example ROI from another customer, unless it resembles the current prospect.

How to use ROI as a discount killer?

As a golden rule, do not discount the price from the very beginning. However, try to be careful with it, giving a discount means less profit for us and not giving any might mean you risking loosing a deal. The answer about what to do is USE the ROI in order to defend the price.

While in a meeting try to approach the ROI through short stories as the following:

"I spoke with your manager from xx Department and according to him, there are losses that rises to xxx… in his opinion great part of this loss is caused by ………" (Here you can add your ROI.)

"The manager from the Sales Department: Our salesmen are not well controlled so the info related to customers is not reliable. If they will enter their activities we could improve out services by a figure of 5% monthly. "

A simple method to create similar examples with your prospects is to ask this kind of questions.

- Do you have any problem?

- What kind?
- How much does it mean to your section?

We do not express our opinion; we will be just quoting the references made by their own managers and staff. This way you are not compromised about it.

Sales people MUST hand to project managers any ROI key selling points, so that project manager will take special care to deliver it properly. This may be vital to defend a project that did not go well for customer (if the customer believes it anyway and argues about it).

All the work you do developing the ROI for the customer will be useful when you start writing the case study.

ROI key points

To convert a HansaWorld USP into a ROI you should match a certain USP with a customer process/need; then find a measurable principle in it, calculate it and prepare a description.

Remember that a USP is not a ROI; neither are the Focus Area, functionalities, modules or a Technology Feature.

How to Make a Quotation for Licenses, Maintenance and Support, Services and Project Management?

First of all you need to know the following:

Quotation/Proposal will be divided in three sections:

Licenses

HW guarantees the customer that they will be able to install the software on the server and clients machine. The license is for use by the customer but the customer does not buy the software. As a part of this agreement; the customer is given an enabler.

The Quotation should be made taking into consideration the type of business and the needs identified. The relation can then be made between customer needs and price list

Service

Our proposal should aim to quote a similar value in both, licenses and services. Remember that the relation usually is 1:1 or 1:2 with licensees, depending on depending on individual cases.

HansWorld University

Our proposal should contain a minimum number of one classroom training per user. Each user that buy's our software should be quoted for classroom training. The minimum number of seats is determined by each country, but the basic minimum requirement is to quote at least our standard beginners course for all users of our software.

Phases of the HansaWorld Implementation Methodology (HIM)

The HansaWorld Implementation methodology consists of a pre- project phase and 4 main phases:

Pre – Project

Analysis Phase

Build Phase

Implementation Phase

Live Phase

Pre – Project

The initial Pre-Project looks at your current working processes and helps you document your specific business requirements in order to identify the gaps between the standard solutions and your processes. To manage this there are two stages:

• Pre-analysis

In the Pre-Analysis phase a consultant will analyse your business processes against the standard HansaWorld Enterprise application and look for any differences between both.

• Project Scope

The project Scope is a document created from the findings in the pre-analysis.

Analysis Phase

There are two stages of the Analysis

• Project Design

The Project Design is the initial planning stage for your project, containing vital information about how your project will be run.

• Solution Design

The 'Solution Design' documents how you will use the HansaWorld Enterprise software to carry out your business procedures.

• Workshops: Consultants will document any difference in your working requirements compared to the standard HansaWorld Enterprise solution.

• Written Specification: A HansaWorld consultant can create a Solution Design document based on written procedure specifications which may already exist for your organisation.

Build Phase

Following the sign off of the Project and Solution Designs, your HansaWorld Enterprise system will begin to be 'built', with your customisations (if any) added to the standard software.

A test environment will be set up, on and off site, to enable your key users/project team, (by providing basic training to them), and your HansaWorld consultants to test your processes.

Implementation Phase

Once your HansaWorld Enterprise solution has been tested and accepted by your project team/key personnel, the new system needs to be rolled out to all your employees and tested.

While your employees are being trained on an in-house test system, you will work with the HansaWorld consultants to prepare your company for the Live Phase and performing activities like conversion of data from your old system, integrating 3rd party software if any.

This means reviewing the parameters and set up from the Build Phase, making sure that you are happy with these and then putting these and any operational data into the system you plan to run 'live'.

Live Phase

It is required for the Live Phase that you and your HansaWorld consultant set a specific date at which you will stop using your old system and will only use HansaWorld Enterprise system. A HansaWorld consultant will be on site for your 'Go Live' date, offering dedicated support and advice where required.

During the Live Phase

There are different elements that you should consider:

Maintenance and Support

Maintenance: Customer (Licensee has the right to get an updated version of our software, he might be able to download it from our web site free of charge. If he wants us to install the new version, he should request additional services. HW agrees to make a corrective maintenance).

Support: HW provides phone line support in a specific schedule of hours and days, this information is available from the site and you can contact your local HansaWorld office

The cost of these services is 25% of the total amount of the value of the licenses per year (check your local Price List) 15% for maintenance and 10% phone support.

Consulting and Trainings, Project Management

It is usually expected that we will assign 20% of the total amount of hours estimated for the implementation to the Project Management.

Customers should be made aware off other HansaWorld University courses for staff who did not manage to learn the product properly during the Test Phase.

Useful Tips when Quoting

- You should always have the correct and updated price list for your country; according to the product you're quoting (HansaWorld Enterprise, HansaWorld Express/FO Platinum, FO Professional).

- There is a set of key questions that will help you to prepare this quotation. It is recommended that you re-check the building needs process in order to see if you should add anything else.

Each industry may have a specific set of questions, however, for the most part they are general.

HansaWorld would expect the size of the system correspond to 1-5% of the company's annual turnover. Some competitors' aim for 2-5% of the customer's turnover.

Below is a list of factors you need to consider during the meetings so you can quote to the prospect:

- Timescale, related to services of training, project management (GQ)
- Number of Users (GQ)
- Be careful here, the # will depend on the business type. For example, named users will be preferred than concurrent users if the employees work in Finances, ADM, etc. In Hotels you might recommend concurrent users.
- Number of Companies, you need to check if the legal ID is the same for all of them or if it changes (GQ)
- Connection Availability (WAN, notebooks, cell phones), if so you need to consider WAN and pocket pc licenses (GQ)
- Internal Project Manager, if the company doesn't has the right person, they should hire one, otherwise the consulting time will be increased (GQ)
- Staff Level of Training, IT readiness, it will reflect on number of training hours scheduled (GQ)
- Budget (General Question – GQ)
- Customised documentation, is it needed or not (GQ)

- Development and customisation, if it is needed you would have to add programming hours. Maybe you can think about 1 hour per user. (GQ)
- Forms for printed documents, users will be taught on how to do it; however, if the prospect decides that they will be done by us, there will be an increase in the hours needed. (GQ)
- Migration of Data, what data will be migrated, will it be bases only (items, accounts, contacts) or also transactions (nominal ledger transactions or others like invoices). The standard budget considers a migration of the basic data. (GQ)
- Classroom training should be quoted during the Test Phase before testing starts. All end users should get the minimum number of classroom trainings in order to use the system in their particular department
- Classroom training should be quoted during the Live Phase. The Live Phase training can be either "Refresher Courses" or specific areas not covered during the Test Phase.
- Travel Costs, it's important to specify if the trainings will be held in their offices or ours. If the customer's place is out of the city, the transport costs should be included in the quotation.
- Education, always strive to sell training in our classrooms. We suggest you use this formula: 2 seats per user for First Certification level

Example how to build a quotation.

SOFTWARE LICENSE FEES

The following is an example of how a Software licence quotation should ideally look like:

HansaWorld UK Ltd

QUOTATION
90603

Quotation to	**Quotation Date**	**Customer No.**
Harvey Zuckman	11/09/2008	4429606
FirstTech	**Salesman**	**Valid Until**
2640 Hennepin Avenue So.	Stephen Jay	13/7/2008
Minneapolis	**Customer Fax**	**Payment Terms**
MN		7 Days From Invoice
55408		

Item	Qty	Description	Price	-%	SUM
322030	1	HW Enterprise Corporate Server	14,500.00	35.00	9,425.00
		Includes:			
		System, Server and Technics modules			
		Multi-site licence/wide-area networking			
		1 Print Server licence (requires separate server to use)			
		eCommerce engine			
		Customisation toolkit (HAL keys for reporting, interface changes and programming)			
		Electronic Conferences Engine			
		Limited Access			
		Massive Cache			
		1 company			
		More than 25 users			
321010	1	Accounts	1,400.00	35.00	910.00
		Includes Nominal Ledger, Sales Ledger, Purchase Ledger Module			
321020	1	Cash Book Module	900.00	35.00	585.00
321040	1	Fixed Assets Module	900.00	35.00	585.00
321110	1	Logistics	1,400.00	35.00	910.00
		Includes Sales Orders and Stock Modules			
321120	1	Purchase Orders Module	700.00	35.00	455.00
321130	1	Quotations Module	900.00	35.00	585.00
321150	1	Pricing Module	900.00	35.00	585.00
321190	1	Service Orders Module	3,600.00	35.00	2,340.00
321210	1	Contract Management Module	2,200.00	35.00	1,430.00
321220	1	CRM Module	1,400.00	35.00	910.00
321230	1	Group Calendar Module	700.00	35.00	455.00
321240	1	Task Manager Module	700.00	35.00	455.00
321290	1	Job Costing / Time Billing Module	2,200.00	35.00	1,430.00
321050	1	Expenses Module	900.00	35.00	585.00
321070	1	Resource Planning Module	3,500.00	35.00	2,275.00
321270	1	Electronic Conferencing	2,800.00	35.00	1,820.00
		Includes 100 Conferences			
321790	1	Events Booking Module	2,000.00	35.00	1,300.00

HansaWorld UK Ltd	Telephone:	+448451232732	Bank Acc.:	70468452
Davidson House	Fax:	+448451232739	Sort Code:	20-80-71
Forbury Square	E-mail:	uk@hansaworld.com	Bank:	Barclays Bank Plc
Reading RG1 3EU	Reg No:		VAT No:	GB872385594
United Kingdom				

HansaWorld UK Ltd

QUOTATION
90603

Quotation to
Harvey Zuckman

FirstTech
2640 Hennepin Avenue So.
Minneapolis
MN
55408

Quotation Date
11/09/2008

Item	Qty	Description	Price	-%	SUM
321660	50	Concurrent User Client Access Licence	1,700.00	35.00	55,250.00
321680	70	E-mail Client Access Licence	60.00	35.00	2,730.00
		OPTIONAL MODULES			
321390		External E-Mail (Pop3 & SMTP)	1,400.00	35.00	
321400		Fax Gateway (Outgoing)	1,400.00	35.00	
321520		Report Generator Module	4,000.00	35.00	
321550		Small Devices Client Access Licence, per small device	400.00	35.00	
321780		Business Alerts Module	700.00	35.00	

With best regards,

Total excluding VAT:	**85,020.00**
VAT:	
TOTAL:	**85,020.00**
	USD

HansaWorld UK Ltd
Davidson House
Forbury Square
Reading RG1 3EU
United Kingdom

Telephone: +448451232732
Fax: +448451232739
E-mail: uk@hansaworld.com
Reg No:

Bank Acc.: 70468452
Sort Code: 20-80-71
Bank: Barclays Bank Plc
VAT No: GB872385594

MAINTENANCE FEES

The following is an example of how a Maintenance fees quotation should ideally look like:

HansaWorld UK Ltd

QUOTATION
90604

Quotation to
Harvey Zuckman
FirstTech
2640 Hennepin Avenue So.
Minneapolis
MN
55408

Quotation Date
11/09/2008

Salesman
Stephen Jay

Customer Fax

Customer No.
4429606

Valid Until
13/7/2008

Payment Terms
7 Days From Invoice

Item	Qty	Description	Price	-%	SUM
322031	1	Maintenance HW Enterprise Corporate Server	2,175.00		2,175.00
321011	1	Maintenance Accounts	210.00		210.00
321021	1	Maintenance Cash Book Module	135.00		135.00
321041	1	Maintenance Fixed Assets Module	135.00		135.00
321111	1	Maintenance Logistics	210.00		210.00
321121	1	Maintenance Purchase Orders Module	105.00		105.00
321131	1	Maintenance Quotations Module	135.00		135.00
321151	1	Maintenance Pricing Module	135.00		135.00
321191	1	Maintenance Service Orders Module	540.00		540.00
321211	1	Maintenance Contract Management Module	330.00		330.00
321221	1	Maintenance CRM Module	210.00		210.00
321231	1	Maintenance Group Calendar Module	105.00		105.00
321241	1	Maintenance Task Manager Module	105.00		105.00
321291	1	Maintenance Job Costing / Time Billing Module	330.00		330.00
321051	1	Maintenance Expenses Module	135.00		135.00
321071	1	Maintenance Resource Planning Module	525.00		525.00
321271	1	Maintenance Electronic Conferencing	420.00		420.00
321791	1	Maintenance Events Booking Module	300.00		300.00
321661	50	Maintenance Concurrent User Client Access Licence	255.00		12,750.00
321681	70	Maintenance E-mail Client Access Licence	9.00		630.00
329999	1	Support 10%	13,080.00		13,080.00

With best regards,

Stephen Jay

Total excluding VAT:	**32,700.00**
VAT:	
TOTAL:	**32,700.00**
	USD

HansaWorld UK Ltd
Davidson House
Forbury Square
Reading RG1 3EU
United Kingdom

Telephone: +448451232732
Fax: +448451232739
E-mail: uk@hansaworld.com
Reg No:

Bank Acc.: 70468452
Sort Code: 20-80-71
Bank: Barclays Bank Plc
VAT No: GB872385594

ESTIMATED IMPLEMENTATION AND TRAINING FEES

The following is an example of how an Implementation and Training fees quotation should ideally look like:

HansaWorld UK Ltd

ORDER ACKNOWLEDGEMENT
90605

Invoice Address
FirstTech
2640 Hennepin Avenue So.
Minneapolis
MN
55408

Order Date
11/09/2008

Payment Terms
7 Days From Invoice

Customer Fax

Salesman
Stephen Jay

Customer No.
4429606

For Attention Of
Harvey Zuckman

Customer VAT Code

Item	Qty	Description	Price	-%	SUM
		ANALYSIS PHASE			
20101	16	Analysis Phase - Project Management	200.00		3,200.00
20102	40	Analysis Phase - Workshops	175.00		7,000.00
20103	60	Analysis Phase - Solution Design	175.00		10,500.00
20104	8	Analysis Phase - Consulting	175.00		1,400.00
		Subtotal, Analysis Phase			22,100.00
		BUILD PHASE			
20201	4	Build Phase - Project Management	200.00		800.00
20202	0	Build Phase - Specifications	175.00		0.00
20203	0	Build Phase - Development	200.00		0.00
20204	0	Build Phase - Testing	175.00		0.00
20205	0	Build Phase - Education	175.00		0.00
20206	16	Build Phase - Consulting	175.00		2,800.00
20207	0	Build Phase - Data Transfer	175.00		0.00
20208	8	Build Phase - Implementation	175.00		1,400.00
		Subtotal, Build Phase			5,000.00
		TEST PHASE			
20301	32	Test Phase - Project Management	200.00		6,400.00
20302	0	Test Phase - Education	175.00		0.00
20303	16	Test Phase - Consulting	175.00		2,800.00
20304	0	Test Phase - Data Transfer	175.00		0.00
		Subtotal, Test Phase			9,200.00
		LIVE PHASE			
20401	6	Live Phase - Project Management	200.00		1,200.00
20402	0	Live Phase - Consulting	175.00		

Order Confirmed:

Name, Surname: ______________________________

Signature: ______________________________

Allocated hours on this order acknowledgement are estimates. All actual time used will be invoiced.
By signing this I acknowledge the prices and agree to be bound by the Terms and Conditions overleaf.

HansaWorld UK Ltd
Davidson House
Forbury Square
Reading RG1 3EU
United Kingdom

Telephone: +448451232732
Fax: +448451232739
Reg No:
www.hansaworld.com

Bank Acc.: 70468452
Sort Code: 20-80-71
VAT No: GB872385594

1/2

page 2:

HansaWorld UK Ltd

ORDER ACKNOWLEDGEMENT
90605

Invoice Address
FirstTech
2640 Hennepin Avenue So.
Minneapolis
MN
55408

Order Date
11/09/2008

Item	Qty	Description	Price	-%	SUM
20403	0	Live Phase - Data Transfer	175.00		0.00
20404	0	Live Phase - Implementation	175.00		
20405	32	Live Phase - On-site handholding	175.00		5,600.00
20406	0	Live Phase - Education	175.00		0.00
20407	0	Live Phase - System Review	175.00		
20408	0	Live Phase- Specifications	175.00		
20409	0	Live Phase- Development	200.00		
20410	0	Live Phase- Testing	175.00		
		Subtotal, Live Phase			6,800.00
		TRAINING			
205051	50	Classroom training Beginners and Tips & Tixs Combo	500.00		25,000.00
205040	5	Classroom training Accounting	500.00		2,500.00
205210	10	Sales in HansaWorld Enterprise/Express	500.00		5,000.00
205200	10	Purchases in HansaWorld Enterprise/Express	500.00		5,000.00
205060	2	Classroom training Contracts	250.00		500.00
205070	10	Classroom training CRM	500.00		5,000.00
205100	5	Classroom training Job Costing	500.00		2,500.00
205140	4	Classroom training Resource Planning	500.00		2,000.00
205150	10	Classroom training Sales Ledger and Purchase Ledger	500.00		5,000.00
205170	2	Classroom training System Administrator	500.00		1,000.00
205090	2	Classroom training Form Design	250.00		500.00
205240	2	Classroom training Fixed Assets	500.00		1,000.00
205160	5	Classroom training for Service Companies	500.00		2,500.00

With best regards,

Total excluding VAT:	**100,600.00**
VAT:	
Total Value:	**100,600.00**
	USD

Order Confirmed:

Name, Surname: ______________________

Signature: ______________________

Allocated hours on this order acknowledgement are estimates. All actual time used will be invoiced.
By signing this I acknowledge the prices and agree to be bound by the Terms and Conditions overleaf.

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Pay Term for Licenses

In most cases licenses are paid for upfront. On a few occasions, we sell under rental or leasing agreements.

TERMS AND CONDITIONS

for services (check your local practice):

1. When we send a quotation for services, we attach an Order Acknowledgement. The Order Acknowledgement must be signed and returned to HansaWorld at least 7 days before the service is to be provided, in order to allow HansaWorld to schedule the consultant.

2. The customer may cancel the service in whole, or in part, up to 7 days in advance.

3. In large implementations, offices usually raise the invoice weekly in arrears on a Monday. So if a consultant work 24hs during a week, the visit is signed, then the next Monday we issue an invoice to the customer for the service during the previous week of 24hs total.

4. HansaWorld is entitled to invoice Travel Fares and General Expenses. This will be charge as a cost price paid. Estimated costs are to be listed in Order Acknowledgement.

5. The Minimum consulting charge is at our half date rate, for up to 4 hrs.

We will invoice the customer for the services before the service is provided or in running projects we invoice at the end of the week or month.

See UK Example for Terms and Conditions signed by the customer for Services

HansaWorld UK Ltd **ORDER ACKNOWLEDGEMENT**

Customer Name		For Attention Of	Order No
FirstTech		Harvey Zuckman	90605
Customer Telephone	**Customer Fax**	**Order Date**	**Our Reference**
		13/06/2008	Stephen Jay

Terms and Conditions

1. This Order Acknowledgement must be signed and returned to HW at least 7 days before the service is to be provided, in order to allow HW to schedule consultants appropriately.

2. The customer may cancel the service in whole, or in part, up to 7 days in advance. Confirmed bookings cancelled les than 7 days in advance will be charged at 100% of the fee in the event that HW fail to get another booking for that consultant that day. HW reserve the right to postpone the supply of the service in unforeseen circumstances (for example, illness).

3. HW's obligations regarding the service to be provided are limited to providing a suitably knowledgeable consultant at the agreed time and place, with the intention to work on the topic(s) specified in this Order Acknowledgement. The customer is aware that resolving the customer's specific issues may involve additional time over and above that estimated on the original Order Acknowledgement, particularly when the issues are complex. This is because the true nature of technical issues is often only determined during on-site consulting.

4. HW provides project management and documentation as a standard part of services offered. In many cases these will be provided at the customer's site; the customer will be advised if time is to be spent on these elements away from the customer's site.

5. In addition to the fee for the agreed consulting time, as set out in the Order Acknowledgement, HW is entitled to invoice the customer for the following:
   - Travel time to and from the customer, charged at 45p per mile or GBP 25.00, whichever is greater.
   - General expenses, like food and accommodation, for tasks that take longer than a single day. This will be charged at the cost price paid, and estimated costs are to be listed in advance on the Order Acknowledgement.

6. The customer should provide all information and co-operation that the consultant needs to provide the service, to ensure that the time used to supply services is as cost-effective as possible.

7. Because it is not our area of expertise, HW will not be responsible for any issues with the customer's hardware, software other than the Hansa program, or peripherals (e.g. networks, printers, tape backups, etc.). Similarly, HW staff may not be called upon to give accounting advice, and HW will not be held responsible for any accounting errors on the customer site. This applies before, during and after the supply of services.

8. Minimum consultancy is at our half day rate, for up to 4 hours consulting. More than 4 hours is charged at our full day rate, up to a maximum of 8 hours on site. Additional overtime is by mutual agreement only (the details of which should be documented).

9. By signing this order acknowledgement, the customer agrees to pay for the services received based on the Consultancy Sign Offs issued by HW and signed by the customer.

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HansaWorld UK Ltd	Telephone: +448451232732	Bank Acc:	70468452
Davidson House	Fax: +448451232739	Sort Code:	20-80-71
Forbury Square	Reg No:	VAT No:	GB872385594
Reading RG1 3EU			

Practice & Exercise

Create a quotation for this prospect.

Type of business: Sell and Repair Copy machines. The also rent copy machines and provide maintenance services.

Service Hour Price: 100 EU

Education Day Price: 300 EU per seat and we recommend 2 seats per user

1:1 relation btw licenses and services

+ 20% for Project Management

- 20% for Education (University)

Locations	2 stores
	1 POS in a mall
Number of users	15 concurrent
Companies	1
Specific Details	1 Department for service and repairs
Nr. Customers	100 customers -/+
Items	Close to 100
Suppliers	20
Price List use	Multiple Price Lists
Sales Force	5 salesmen travelling around the country
Project Manager	
Training	every user will be trained, attending 2 trainings each.
Web Activity	Not at present, not interested
Platform	Windows XP
Development Customisation	No
Document Customisation	No

Go Live Estimate Time	4 months from now

Based on the previous explanation, create a quotation for both licenses and services.

The Art and Science of Closing the sale

Closing the sale is the culmination of the sales process.

A decision to buy is not an automatic part of the sales process. Often making that final decision puts the prospect into a dilemma that some people would prefer to avoid.

They therefore sometimes need some help through the process so that they can be reassured they are doing the right thing and have made a "minor" rather than a "major" decision

The responsibility for this falls on the salesperson and sometimes they have to lead the prospect through the process in order for the sale to be culminated for the prospect's benefit.

Equally the closing phase of a sale; can also be quite daunting for the salesperson. Maybe it relates to the fear of getting a "no", many salespeople stumble at this final hurdle and find it very difficult to actually "ask for the order".

Check the Signals

You have to be very perceptive in order to catch the signals that the Prospect might be giving you. If you pay enough attention you will be able to recognise them and make it smoothly through this stage.

Physical Signals

- Relaxed body posture
- Face expressions are more comfortable; the prospect is no longer in the defensive.
- Smiling

Non Physical Signals

- Great interest in the offer
- Abstraction
- Request for advice

- Special Treatment
- New questions being asked
- Feel of ownership for the product or service
- Request of documentation
- Request for a trial

Closing Types

a. The Assumptive Close

The Assumptive Close is one of the easiest closes to use, because it simply assumes that everything is on track and the prospect is intending to buy. It is best employed by asking the prospect a question that would not be relevant if they were not going to buy. Something like; "Assuming we can get this plan underway in a week, who would you make responsible for its administration?" In this case if the prospect nominates a person to become responsible, they would be saying I am going to buy. At that point the salesperson should offer to "tidy up the paperwork" to get the order moving.

b. The Either or Close

An example could be "Well Mr. Prospect we have gone over all the benefits that you will receive once you have purchased this new xxx, tell me in addition to the xxx, will you be buying anything else?

A close using the either or strategy is employed by asking the prospect to make a choice of one of two alternatives. If the prospect says he will be purchasing, this would indicate a positive decision on their part.

c. The Summary Close

The summary close is the most interesting close of all, as it is the only close you will ever use that will be positively answered with the word "no".

To use a summary close you should openly list three or four benefits that the prospect has identified as their Dominant Buying Motive (DBM) and at the end ask if there is anything else they could want, to which a "no" will indicate they are ready to proceed with a decision to confirm their order. Again the salesperson should make this stage as easy on both parties as possible by offering to finalise the paperwork and get cracking with processing the order.

Closing Techniques

- Traditional, elaborate a direct question in order to get the commitment from the client.
- Order, you will use the order form as a co-action method and will start asking questions as if the sale has been closed.

- Half Nelson, you will need to turn the client's argumentation back to them. I.e. The prospect made an objection and this has to be reverted with a phrase like this - 'If it is compatible with this printer, will you buy it?'
- Plus, this closing technique considers that the closing has been reached and you offer the client an additional product.
- Partial Closing, sales person will help the client to take the main decision through helping him/her taking small decisions.
- Wellington, build a list of Pros and Cons to help the client to take the decision.
- Pass the Sale, if there had been frictions between the prospect and the salesmen; change the latter in order to accomplish the goal.

Hints and Advices

Always "Earn" the right to ask for the order.

The salesperson should always appreciate the prospect has the right to gather as much information as they need to put themselves in the position to make the buying decision. Asking for the order too early may give the prospect the impression that the salesperson is "pushy" and not interested in the prospect's point of view.

To test whether the time is right for the prospect to make their buying decision, the best method is to use a trial close. For example during the latter part of a sales presentation the salesperson might ask the prospect "if you were going to go ahead and make this purchase, have you decided where you would want it installed". In this way the salesperson has given the prospect an opportunity to comment on their thought process without necessarily being asked to make a final buying decision.

Use techniques that make it "easy" on the prospect to say yes.

Closing the sale is the return on investment for the salesperson and as we have already said, is not always an easy thing for either the salesperson or the prospect. By making it easy for the prospect to say yes, you are also making it easy on yourself.

Closing the sale should be a "Happening" not an "Event".

Finally, you should remember that the closing of a sale should be the outcome of a well prepared and presented sales presentation. It should just happen and not be something that takes on any form of significance in itself. When the prospect becomes a customer don't thank them, congratulate him or her for their fine decision and assure them you will follow up to make sure everything that has been promised will be delivered.

Tips to increase your closing rate:

Ways to improve our closing rate with prospects that are interested in acquiring an ERP solution.

1. USP-s type of sale – using 10 per case, minimum 4-5 per case

2. Use reference customers or case studies, relevant for the prospect

3. Quality of sales process – demo scripts

4. Sales/campaigns

5. Spend more time on building the need for our USP's (instead of just listening to what they want and then send a quotation)

6. You should never go to a sales meeting alone (take another expert, or a sales assistant, or consultant, or others)

7. Pre-qualifying the lead

8. Pre-sales – an expert who has done this type of sales before, add a consultant to a sales meeting

AFTER CLOSING THE DEAL

Recommend the customer to get ready for the workshops and analysis. In some cases it is recommended to send a Pre-Analysis Form to be completed by the customer.

It might also be recommended to send the document HIM HansaWorld Implementation Methodology and Project Design Template.

Give advise about hardware requirements, WAN settings, back up handling, preparation of data to be imported.

Agree on an agenda.

Get the sign off of the License Agreement and the Order Acknowledgement for the services.

Get the payment ASAP.

HOW TO SELL SERVICES

In this chapter we will analyse how to sell services to new and existing customers.

Selling Pre-Analysis

How and when to sell Pre Analysis?

We call pre-analysis sales any element of consulting or programming that is sold PRIOR the selling of licenses.

This is not an everyday occurrence, so mainly it will happen if:

- The customer doesn't have enough confidence for buying the licenses, but is close enough that he's willing to make a small expenditure in order to be reassured.
- Usually when a customer has paid for any services, they will end up buying the software.
- Neither the customer nor our staff has been able to determine whether there's a fit to the customer's requirements. There's the need for deeper analysis of their specific needs, and to document the impact of HansaWorld on them.

Selling Education

Why you should sell Education?

The most important aspects are related to reassurance and confidence along with proving a quality service. For example:

- User acceptance: the users need to be motivated by being taught how to use the system, so they'll appreciate its benefits over the previous system. As a result they become supportive of the implementation.
- Improved efficiencies: more automation, faster reporting, less management time required to supervise employees, full use of the software.
- Fewer errors: management time is freed up for focusing on productive tasks.
- Improved morale: reduced stress, fewer repetitive tasks (compared to previous system(s)), users realise their time is not being wasted, and become freer to concentrate on more productive tasks.

What types of education you can offer?

HansaWorld delivers the following education:

Standard classroom training. Pre-configured training modules, preset dates, given at our classrooms. This option is currently only offered for the core modules.

Standard training covers topics using demonstration data, in a scripted way. Standard documentation is available to support the course.

Selling Consulting

Why and What can you sell for Consulting?

There are many reasons for selling consultancy, for example:

- Improved efficiency: more automation, faster reporting, less management time required to supervise employees.
- Reduced implementation times.
- Reduced use of customer resources
- Increased success rate: consultants who know the software and similar companies will make fewer mistakes than customers who are not familiar with the software

Target Market – Who will receive the offer?

Our Target Market consists of two major groups: Existing and new customers. Both groups need to be addressed differently. How you can address them is described in greater detail during this chapter.

Existing Customers

Sales to existing customers are based on the companies Key Account Management (KAM). Please refer to our KAM Documentation for more details on selling to existing customers.

There're several consultancy packages that you can offer:

- Classroom Trainings is one of the easiest KAM topics to present and sell. Classroom training offers invaluable return on investment and our existing customers benefit from having their users certified to use the software.
- Health-checks, server-based system administration. Checks whether backups are running, assists with fine tuning of reporting and general performance.
- Process review - looks at processes, ensures best use of the system in each area.
- Updates, ensures proper testing, upgrades of HAL files (including proper documentation of the HAL files at the same time), can provide basic training on new features, as well as the implementation of the upgraded software.

- Documentation, customer-specific user guides, to reduce retraining costs.

- Management Reporting and Business Intelligence, looking at more efficient ways to produce required reports using internal and external tools (such as Excel Pivot Tables, MS SQL and Business Intelligence).

- On-site support - can be sold as a clip-card. For example, if you have a dissatisfied customer, you might consider selling a 5-visit clip-card for the price of 3 or 4 visits.

- Year-end support, getting a consultant in prior to the arrival of the auditors can reduce the overall audit bill (by considerably more than the cost of the consultant).

- Further projects - almost all customers can consider further HansaWorld modules, and consulting to ensure these modules are used most efficiently.

New Customers

While selling to new customers you need consider all the stages of the implementation process. You will see that while in the initial phases of the project, your proposal includes several services; however, there are two of them that will be present during all of the implementation, Consulting/Consultancy and Project Management.

a. Analysis Phase

- Project management: agreeing key deliverables, go live date, key responsibilities, project plan

- Education: of project team, covering standard functionality, and how the project will work (overview of the steps of the project)

- Consulting: analysis of customer's business, matching of customer requirements to standard features, agreeing settings and data rules.

- Data transfer specification

- Customisation specification

- Documentation of all aspects of the above, sign-off by the customer

b. Build Phase

- Project management: scheduling of resources, monitoring of whether the project is on time and on budget, keeping track of customer's deliverables, ensuring quality.

- Development of data transference routines.

- Development of customisations.
- Consulting: installation of software, settings, form design

c. Implementation Phase

- Project management: as for Build Phase
- Testing of data transfer routines, refining as required.
- Testing of customisations, refining as required
- Consulting: ensuring a test version of the software, complete configuration with customer, data and customisations, available for required training.
- Classroom Training: All end users should get classroom training before they start testing the software. The minimum amount of classroom training is 2 seats per user.

d. Go Live Phase

- Project management: as for Build Phase
- Education: of end users
- Data transfer

e. Post Go Live

- Consulting - on-site hand holding
- Continues Classroom Training

How can you sell the Project Management?

Remember that the Project Management is an extra 20% for all the services quoted.

Following these lines, there're some arguments that you can use in order to accomplish your goal:

- Reduced implementation time.
- Improved quality of implementation.
- Reduced stress
- Tighter control of costs.
- More effective handling of problems
- Better understanding of the success of the project.
- Risk reduction (you might want to add this as this is a major factor of customers taking project management – the reduced

risk of the project going badly and missing deadlines and go live dates)

AT CUSTOMER SITE

What can you sell at the customer site?

If a consultant goes to the customer to do a job, there is an opportunity to sell.

By talking to the users and checking the status of the use of the system you will find several opportunities to sell extra services and licenses.

How can you make happy customers?

- Sell additional licenses after analysing with the customers their current needs, it is important to show your customers that you're more interested in helping them than into obtaining economical profits.
- Present to the customers the new versions (offering version update packages).
- Sell services for better performance and shifting gear.
- Support.
- HW University (at least one seat per customer's user per year)

OUR PEOPLE AND SALES COMMUNICATION

Prime Sales Time:

In your country there is a period of prime sales time, this is usually the time in the day where managers you have to call are more focus and available.

This can be for example from 9 to 11 am and 1 pm to 3 pm. During prime sales time you should exclusively focus in contacting your customers instead of doing other type of tasks like preparing quotations, mails, doing admin, or studying. Weekly meetings should not be held during prime sales time.

How to defend your Prime Sales Time:

Book the Prime Sales time in your calendar, so that your colleagues immediately see that you will not be available during these hours

Focus exclusively on Sales calls and Sales meetings during these hours. Other tasks and admin tasks, that can not be delegated can be done in the remaining work hours of the day.

Phone Call Structure

Its important to have a proper structure when making calls to our potential customers. The call structure is not related to Cold Calling but any sales call to potential new ”Walk-In” customers.

a. Opener

Your Goal is to gain trust/build rapport

In order to accomplish these:

- Explain who you are
- Why you are calling?
- What you are calling about?
- Ask if it’s a good time to call

b. Opening Questions

Keep in mind that you have to show a non-threatening attitude. Go for simple but basic questions as:

- What is the current ERP or Accounting Software they are using?
- Are you happy with it? How long you have been using it?

- Try to understand the size of the company, number of employees, how many of them work in Admin, any branches?
- Ask relevant questions to understand what industry the prospect is in?
- What is the current platform, Windows, Linux, Mac?
- Budget. Time Scale, Who makes the decision?
- Talk about a relevant Case Study.

c. Next Actions

Depending on the information you are able to gather, you have 4 possible results that lead to the corresponding actions:

- No Action
- Send Information
- Agree for another Call
- Meeting

Consultants on the Phone

Main line:

How we can sell more on the main line?

It is important that the main line is picked-up by sales people. They can be consultants, sales assistants, and sales consultants.

- People need to know the phone system
- There has to be a discipline for registering the activities
- Always check the customer status
- The main line should ring in several places
- There should be a weekly basis sales topic to be offered to the customer that is calling.
- Find the way to make time with the customer for sales opportunities before you connect them to the people they were looking for.

Always starts the conversation asking the basic questions: who are you, from where are you calling, what is the topic, how can you help and turn this into sales call.

It is not allowed to call back on support issues. Do not promise to call back. If we do not call back, there will be lot of disappointed customers.

We are giving support to customers in order to give them a good service and in exchange to get good marketing and a positive value of the "word of mouth".

Our Support line:

How can we sell more on the support line?

1. Only consultants should do support
2. Consultants will work better with a preliminary schedule
3. The calls should be between 5 and 15 minutes, if the calls are longer, managers should find the reason.
4. The Customer Status report needs to be always on screen for many reasons; to check if the customer is up to date on his/her payments, to refresh on the kind of help this customer has received, and also to check who were the people who provided the aid.

Sales on Support

To be able to sell to the customer you have to gain the trust from the customer. This is important, because it is easier to convince them afterwards. While doing support, your main goal is to help customers, thereby get their trust.

You can sell:

- Education – classroom training, self - education material.
- Upgrades – fish for the things they need: functionalities, users.
- Updates – legal requirements - legislation, new features and benefits (like print preview, automatic enabler), easier to update in the future, if many versions changed too much. Improved version (bugs fixed), newer operation systems
- Service agreement – support on the phone, possibility to update.
- Consulting hours - services, like upgrade help, or how to install etc. Minimum 4 hours at a time.
- Extra users – it is always a good idea to ask how many users they have, or if they have any new employees.
- Value packs.
- Third party software – like salary software, bar code fonts.

- Internet Services

Type of Support Answers:

You might be able to provide a myriad of answers to a customer that calls the support line; however, almost all of your answers will fall in one of the following types:

1. Live with it

Despite how harsh this answer sounds to you, this is one of the most used. The customer should be explained in a constructive informed way that what they are asking for is not worth the time/effort to spend on their request unless they insist. And in most cases the customer will agree its not worth the time and effort and the best thing is to live with it.

One example might be a customer who calls and is upset that he can not change the icons on the Master Control. You might have to explain to him that everything is possible with HansaWorld at a price and that changing icons is something that the HQ development depart blocked with specific reasons.

In this example its better to explain to the customer: Live with it, not much we can do and not worth the time and energy to spend on this.

2. Consulting is needed

You have proved that indeed the customer needs one of our consultants on site to solve the problem more efficiently.

3. Education is needed

You might choose this answer by checking the customer status and finding out that the customer has hired new employees, is changing version, etc. Below is a example of how to start talking about education if your office has sent a mailshot about a particular course.

1. Ask the customer if they have received our mail with course plan for August and September. If they have not received anything, you should find out existing e-mail address and send the e-mail with training plan again.

2. If they would like to attend any training. Maybe they have some new employees, so you can offer them to attend Beginners training. Or you can offer Tips&Tricks training for experienced customers.

3. Tell about customer certification program. There are 3 certification levels available. To get the first one, customer has to attend 2 trainings - Beginners and Easy Reporting (if they have used the system for years, Brendan can give an approval that they can take Beginners test without attending the training).

4. Tell them where to find a list of our trainings and additional information about them on web (advise them to use Globe button on the Master panel to get to our web page)

4. Help, actual answers

Sometimes, the question itself is quite simple and short, so you will actually able to help someone.

INTRODUCTION TO THE FOCUS AREAS.

Why we create Demo Scripts and run power demos.

- We need to raise our individual CONFIDENCE so we believe we can deliver a solution. After we have reached that level, we are able to sell this confidence to out customers. The building of the script is to get CONFIDENCE.
- Reference Customers (to compensate what we are not able to achieve during our sales process with Arguments and Body Language).
- Competence (in order to assess if we can meet the competition regarding competence and features).
- Terminology (ability to talk to the customers and inside the company).
- Vertical markets (understanding where the functionalities works, i.e. we cannot sell the Rental module to any company that rents something).
- Efficiency

Focus Areas

Technology (which is not business specific) and Verticals.

We are aiming to have 3 reference customers per focus area in every country; therefore, we will have credibility. We are turning to sell what we have.

Other of our goals is to have as many licenses as the customer has computers . This is for us the Low Hanging Fruits

Focus Areas have been divided into two main areas: technology and vertical solutions.

Below is the list with a short comment, per focus area.

A. Technology

- Web Shop/Web Presence, improvements in the standard Web Shop, making it easier for the companies to connect with their customers.
- Electronic Conferencing and e-mail, including collaborative emails.
- Mobile Solutions, with HansaWorld SmartApps connect your company through your Nokia Smart Phone or any PDA using Microsoft Mobile 5 OS.

- Report Generator, customers can create their own reports by themselves.

- IP Telephony and integration with CRM, not only integrated with Skype, but also with telephone switchboards. Reducing telephony costs and improving efficiency. (Asterisk Technology).

- Microsoft SQL Server Solutions, this allows to extend SQL Reporting and Integration for customers with an SQL IT Strategy.

- Business Intelligence and Cube-Solutions, for graphic presentation, slice and dice, drilldown, etc.

- Management Accounting and Excel Integration, online reports, links to update charts and tables when running exportation, reports display directly in Excel.

- Transaction Server TX, improving the value of using HansaWorld by offering attractive services. The following options may vary according to the specific country: credit card payments, remote printing of Invoices, Electronic Invoicing, SMS services, credit info, and more.

B. Vertical Solutions (Vertical Markets)

- Point of Sale or Retail solutions (POS), online and off line options, support on touch screen interfaces, and speed in data entry.

- Job Costing and Resource Planning, integration of jobs/projects with invoicing, calendar entries connected with projects, mixed network capabilities, make our solution the strongest in the market. This can also be combined with web functionalities and mobile solutions.

- Hotels, for small and medium hotels, back and front office. Offering also Restaurant and mobile solutions.

- Restaurants, integration with our hotel solution, and can stand-alone. Support of PDA and Touch Screens.

- Service Order, the solution for companies selling and providing services for their products. This can be combined with mobile solutions.

- CRM and Contact Management completely integrated with the ERP, no need of 3rd party solutions.

- Rental, a solution connected with contracts, invoicing, accounts and stocks controls.

- Production, a solution connected with resource planner, purchasing, material requirement planning, accounts and stock

- Warehouse Management, a solution connected with Stock, Purchasing, Accounts and detailed stock reporting.

PARTNERS

HansaWorld offers a partnership program for various types of partners. Our aim is to extend our reach to offer quality solutions and services for our customers through our different partner channels. HansaWorld has a training programs for partners that wish to be part in our Partner Program.

We have the following types of partnerships:

Technology Partners

Nokia - as a member of Forum Nokia PRO Enterprise Zone, HansaWorld receives technical, business development and marketing support from Nokia. HansaWorld's mobile software runs real time on Nokia business phones.

Apple - since the first version in 1988, HansaWorld business software has supported the Mac operating system. When Apple switched to using Intel chips, HansaWorld software was ready to run native on the new processors.

IBM - HansaWorld software can be run on all IBM server platforms, giving customers a broad choice of reliable options. As an IBM Business Partner, HansaWorld is a member of Partnerworld, a worldwide program offering sales and marketing tools, skill building courses and technical support.

Skype - integration with Skype allows calls to be launched directly from HansaWorld software, making it easy to start and monitor sales or support calls.

Ubuntu - HansaWorld supports Ubuntu, which is a community developed linux-based free operating system.

Distribution Partners

HansaWorld is looking for Distribution Partners in countries where we are not represented yet.

We expect a Distribution Partner to:

- With our help localise and maintain the products
- Actively build a channel of sales partners
- Offer support and training for customers and partners
- Actively market HansaWorld products

We offer possibilities for local price lists to meet the expectations in your market. HansaWorld software is easy to translate to local languages and to adapt to local accounting regulations. You will also get professional support from our international team of consultants and from our sales team etc.

Stephen Jay and Brendan Peo are the main contact persons for Distribution partners.

Hardware Partners

HansaWorld offers a partnership program for selected Hardware Suppliers. Our aim is to jointly offer quality solutions and services for our customers to safely run their HansaWorld systems on.

HansaWorld has a training program for Hardware dealers that wish to be part of our Hardware Partner Program.

HansaWorld offers co-marketing possibilities for Hardware distributors that wish their products to be more clearly branded in the SMB segment.

HansaWorld offers hardware partnerships per region and depending on

- Quality of products
- Quality of local services
- Willingness to promote HansaWorld products in their own channel
- Marketing efforts towards the SMB segment

International Hardware Partners

- Apple Computer
- IBM
- Nokia

VARs – Value Added Resellers

HansaWorld offers a partnership program for Value Added Resellers. If you are a consulting company with many years experience of installing and supporting ERP in general and HansaWorld in particular you are likely to reach success within the HansaWorld VAR program.

HansaWorld offers training and certification in consulting, sales and programming, to enable you to offer our joint customers first-class service and advice.

The VAR program allows the partners to register their potential leads with us using our online cooperative CRM system.

HansaWorld offers discounts in recognition of the value for both HansaWorld and the customers that the certified specialists add.

The margins we offer partners under this program take into consideration skills, sales volume, marketing effort and brand loyalty.

We will provide your business with a new excellent set of "tools" to sell an all-in-one ERP system for the SME-market. With very strong unique selling points like mobility, WAN, 35 specialised modules, easy to install software etc. that will give you many new business opportunities.

You will have access to our reference customer program to provide security to your new customers and our competent partner support will ensure a good start for our partnership.

ODPs - Open Distribution Partners

HansaWorld offers a partnership program for IT and services companies wanting to complement what they are offering to their customers with accounting software or an ERP system that matching the other products in their portfolio.

Under this program there are no special demands of having trained or dedicated staff. HansaWorld will help with installation and support. The sales process will be a joint effort between the partner and HansaWorld.

The Open Distribution program allows the partners to register their potential leads with us using our online cooperative CRM system.

The margin we offer partners under this program take into consideration sales volume, marketing effort and brand loyalty.

Almost any company can be a partner. HansaWorld will complement what is lacking in sales skills and consulting skills with our trained staff working in our local distribution offices.

Open Distribution offers:

You will be offered a basic margin depending on what country you are based in, typically 15%. As your sales volume grow, your margin will increase, typically doubling if you manage to sell a system every second month. If you agree to do co-marketing efforts, you will get increased margin for a period. Special cases can be agreed where we might agree to higher margins, or the use of special prices.

If your company invests heavily into promoting products competing directly with HansaWorld, we are likely to offer a lower margin, maybe as low as 0%, or we will refuse to have you as a partner. If your company engages in software piracy or similar practices hurting the software market, we will refuse to have your company as a partner.

11. INTERNAL PROCEDURES

a. How to register a lead and customer information.

....

b. How to enter a Quotation for Licences, Maintenance and Services.

....

c. The Weekly sales meeting, the monthly Report.

....

12. MARKETING PRESENTATION

Brochure, Product Sheets, Adds, Stands, Brand use, Case Studies, etc

13. TIPS WHERE TO START ONCE YOU GO HOME

....

....

....

....

14. YOUR ACTION PLAN (COUNTRY MANAGER WILL CHECK THE EVOLUTION)

………………………………………………………………………………………

………………………………………………………………………………………

………………………………………………………………………………………

………………………………………………………………………………………

APPENDIX

Battles Cards and Sales Objections

Example of a Battle Card:

A. HansaWorld Vs Great Plains

IN BOTH GP AND HW

Customisation (Dexterity), .NET planned

Multi-windows (registers only)

Different language options (but each database is single language only)

Multi-company

Personal desktop

User-defined fields

Production, Contracts, Job Costing - but invoices raised don't end up in Sales Ledger(this statement is not true – invoices raised in GP job costing are automatically posted to the sales ledger)

Drilldown from registers

IN GP, NOT IN HW

Need for a system administrator (!)

Microsoft brand

IN HW, NOT IN GP

Continued development (no changes to Argentinean version in over 2 years)(This statement is not true – GP is continually being developed and will be until 2009 and supported until 2013)

Multi-platform (Windows/SQL only)

Customer status report

Drag and drop

Drilldown from reports (This is available from the FRX nominal ledger reports)

Integrated CRM (interface only)/SRM

Integrated Email (You can email directly from GP)

Graphical resource planner

Calendar

Configurable Forms (requires 3rd party products)(This is not true – all forms are configurable and do not need a 3rd party product)

Email shots (Outlook only)

Real-time bar-coding (3rd party only)

Multi-dimensional analysis (substrings on chart of account only)(They have analytical accounting but not to the level of HansaWorld)

Multi-windows including reporting(Great Plains is totally multi windows – this statement is not true)

Multi-language in same version

Consolidation (some talk of plans to release this)(Consolidation is available in Great Plains using the FRx reporting tool – this statement is not true)

Nokia

Parallel reports (largest reports run quite quickly, can take an hour, server is busy in most cases while such reports are running)(This statement is not true)

User-definable report generator (This statement is not true – there are three user definable report generators in Great Plains)

Functional Nominal Ledger report generator (e.g. Balance Sheet formatting for Argentina requires third party product) (This statement is not true – there is a fully functional nominal ledger report writer with full drill down from summary information to source document (scanned image)

Database security (e.g. can change SQL-based invoices)

Shared registers (users, access groups only)

Vertical modules (Hotels, Restaurant, POS, Rentals)

Skype integration

Touch screen interface

WAN (terminal server only)

Separate delivery step (stock decremented from Invoice)

B. How to Win over Navision

1. HW Future-safe: Navision will be discontinued; customers are forced to make a new implementation with un-experienced dealers. Dealers will acquire new knowledge, they lose time, and service level will fall. All 3rd party customisation will have to be re-written; new verticals have to be written. Insecurity of your investment, forced migration of technology

(costly!). Dealer's have had hard times after acquisitions of Great Plains and Navision. Future of Dynamics (rebranding creates confusion, investment protection plan might not work – in Solomon case price lowered significantly before calculating „protection plan").

2. HW offers lower TCO, better return on investments. Expensive implementations, Navision implementation might be 400% compared to cost of licensees

3. HWE has faster and simpler implementation: our solution is easy to learn and easy to use

4. HW offers full range of mid-market functionality that is totally integrated: HW binds together ERP, CRM, communications (e-mail, phones, etc), and web presence. Navision uses interfacing to Outlook, MS CRM, Business Portals, etc.

5. HW Quality assurance – all countries, one code

6. HW provides local support, for centralised multinational solutions. Microsoft is local, no proper support for multinationals

7. HW has more qualified and dedicated partners

8. No multi-platform, 100% dependent on Microsoft

9. HW has better WAN – most efficient communications protocol

10. HW has better communications features (Skype, SIP-phones)

11. HW has mobile solution

12. HW has Internet services

13. HW has more verticals in standard version: Hotel, POS, CRM, etc. Navision has most of verticals as 3rd party solutions

C. Sales Objections made by MBS Navision vs. HansaWorld

1. HW doesn't have a network of partners: so what? MBS supports dealers to employ their own Navision consultants, so they are weaker. We are aiming at quality – less, but more dedicated partners. Support is done via many partners, MBS is not supporting, HW is. Lot's of unprofitable dealers, trouble finding enough implementations. Many underutilised consultants because lack of implementations. Not competent people. HW has long-term relations.

2. HWE is for small companies. List of references, case studies (Cymot (4000 invoices, 100+ concurrent users), Promasidor, TOP customers in countries – get from CM-s).

3. HWE is good only for financial accounting: look at distribution, etc.

4. HWE has no good verticals: see product sheets. Reference customers. Manufacturing cases a la vs. VISUAL Enterprise (too complex, too hard

to get it up and running) – keep it simple – HWE is up and running in fraction of time compared to „verticals" and it has a lot better TCO.

5. HW company is small: we are very profitable, 65000 installations, 84 countries, 16 subsidiaries, different methods of marketing, growing very fast. Agile, reacting faster to changing needs. We have many dealers. Picture from yearly conference.

6. HWE installations have failed: there is risk in all implementation regardless of vendor, this is natural in ERP business. Proper ways of implementing, project management methods, management's involvement. Sometimes it is good idea to use external consultants for project management.

7. HWE is running on native database (unstable, crashes, can't handle large volumes). Many ERP's have this, look at Navision. HWE runs on MS SQL Server. Consider the costs (licensees needed).

8. Many HWE customers have switched to Navision: corporate policy, some functional needs we couldn't manage. Can't please everybody.

9. Too frequent updates, HWE puts in immature functionality, customers are guinea pigs: we bring more value by adding lots of new functionality, changes at controlled pace. We bring cutting-edge technology to our customers in a very reliable way. We are the first testers of our software (100- concurrent users, operating worldwide)

10. Customised installations hard to update: vice versa if compared to Navision, look at our HAL patch automatic updates.

11. HWE forces customers to update: nobody is a forced, only very old version. Current versions are updated at customer pace according to flexible deadlines. We support up to date versions, quality of support. Regular update is to be considered normal and planned-ahead procedure. (MBS discontinue support after two major releases – e.g. every three years! – so MBS NAV would force users to update more often than HW)

12. Mandatory maintenance fees: Most ERP companies demand it. Most ERP companies, who allow yearly fees to be skipped, demand them afterwards if customer wants to update. (It is very unusual for MBS to agree to wave the maintenance fee – all customers that I have worked with have had to pay maintenance as well as support fees)

D. Sales Arguments against SAP Business One B1

A. B1 is aimed at lower mid-range companies; we are aimed at all sizes of company up to upper mid-range (therefore we call sell more, and bigger, IBM boxes)

B. We are a more mature solution, properly tested, and working. Real impact of this is that we have more, and happier, customers, in key markets

C. We are doing or about to do things with technology that Business One cannot/will not be able to do:

- Transaction server (our own equivalent of .NET and web services, involving dynamic interaction with external data sources such as banks, credit rating agencies and EDI companies)

- Mobile use (including working from laptops, over dial-ups including GSM/GPRS, and working on handheld devices)

- IP telephony

- Unicode, for multinational implementations on the same server

D. Depth of functionality - we are tried and tested for true mid-sized companies, not smaller ones

E. SAP resellers claim that SAP is so big and powerful that whatever flaws there are in the software will be repaired over time.

- But, much depends on the core architecture. If this is flawed, nothing an owner does will perfect the software

- Large owners and cash injections are not the way to write a successful ERP package. Small teams led by strong visionaries have had much more success building strong product cores (for example, Navision as software made more progress before the take-over by Microsoft than after)

- the massive marketing investments made by these large companies lead in turn to huge losses, which will not be borne indefinitely.

HansaWorld has made a release of its software every 9 months. There is only one set of source code for all its products, and so the entire future of the company is wrapped up in the success of its flagship product, HansaWorld Enterprise. New features added in the last 12 months include support for Voice over IP (via Skype), automated warehouse management, a user-definable report generator, and significant enhancements to its supply chain management features. Profits for the last 8 months have exceeded 800k EUR, on turnover growth of around 15% - a growth level achieved almost every year since 1995.

F. B1 is an immature product

The first sales of HWE were made in 1988. There are over 64,000 implementations worldwide. B1 has only a small fraction of this number.

Examples of this immaturity are the lack of relatively basic functions such as:

- Real-time consolidation

- Automated inter-company transactions

- Fixed assets management

- FIFO accounting support

- Multi-warehouse

- Electronic invoicing etc.

G. B1 has a major weakness in manufacturing

The immaturity of B1 is particularly noticeable away from the core features for distribution companies that were part of Top Manage (the product SAP bought, that is now B1). For example, there are several significant weaknesses in B1's manufacturing offering:

- It is not yet released

- It is not part of B1's suite

All the manufacturing and service management modules in HansaWorld Enterprise have been in the software for at least 7 years. As a company, HansaWorld has extensive experience of manufacturing and service for SMEs, and the reseller suggested (if required) also has considerable experience of the SME manufacturing sector.

All the modules offered by HansaWorld Enterprise are written by HansaWorld, and are therefore part of a single, genuinely integrated solution.

HansaWorld also has many other vertical market modules, offering many more opportunities to sell to customers - and all the modules are within a single, integrated suite rather than being sourced from external companies.

H. Who has the experience to develop for SMEs?

SAP has 30 years of experience developing for larger companies. Its attempts to enter the mid-range market with mySAP failed, and as a result they needed to change tack and purchased Top Manage. The attempts with mySAP failed because the mindset required to sell, to develop, to implement and to support, smaller companies is totally different from larger companies. A large company approach is not suitable for SME software, as it tends towards over-complication, longer implementations, and higher cost of ownership (a key factor in the purchasing decision for SMEs).

HansaWorld has been developing, selling, implementing and supporting software for SMEs for 17 years. This year it won the award for the Mid-Range Package of the Year awarded by Accountancy Age.

J. What happens when you need changes to the detailed logic of a solution?

B1 offers customisation of field names and other interface issues such as resizing columns - indeed this is relatively quick. However, B1 lacks a customisation language to allow changes to underlying logic - users are locked in to an out of the box solution, which forces them to modify their business to fit the software, rather than vice versa.

K. B1 it is not related to SAP's MySAP.com or R/3 Enterprise

L. B1 product development division is in Israel and you have to go through Germany to get local changes into program.

M. SAP still has trouble-selling B1, lack of several solid references is one issue bothering, for example, Finnish SAP sales.

Other things :

- Object control in system is weak

- Problems with currencies (can be fixed now?)

- Form editor really difficult to use

- Reports looks nice in the Demo but in real life really difficult to modified/use

- WAN

- Weak partners / strong partners

APPENDIX 2: POWERDEMOSCRIPTS

Please refer to our Intranet for Powerdemo Movies