HANSAWORLD
UNIVERSITY

Mastering ERP Sales

A Comprehensive Guide to Selling Standard ERP to New Customers

October 2024

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INTRODUCTION

Welcome to HansaWorld's Mastering ERP Sales document, a comprehensive guide designed to equip our sales team and partners with the knowledge and tools necessary to successfully sell Standard ERP (SERP) to new customers.
At HansaWorld, we're always improving and innovating, and our sales approach reflects that. This guide covers every aspect of the sales process, from understanding our product's unique selling points (USPs) to executing effective sales techniques, engaging with customers, presenting our company and products, demonstrating Standard ERP, creating compelling quotes, and successfully closing deals.

This document is your go-to guide for everything related to sales. It guides you through the sales process with insights, techniques, and best practices to help you reach your goals. Each section serves as a standalone resource for quick reference. Together, they form a comprehensive guide that you should consult regularly to refine your approach and stay updated. Whether you are making initial contact or closing the deal, use this document as your go-to resource for mastering the details of selling Standard ERP.

IMPORTANCE OF ERP SALES IN OUR BUSINESS STRATEGY

Enterprise Resource Planning (ERP) sales are critical to our business strategy. ERPs are central to our offering, enabling businesses to streamline their operations, enhance productivity, and achieve greater efficiency. Successful ERP sales drive revenue, expand our market presence, and establish long-term customer relationships. Given the competitive nature of the ERP market, selling and implementing our Standard ERP (SERP) well is crucial for us to keep growing our market share. The following sections will detail the specific strategies, methodologies, and tools that will empower you to excel in this role.

ABOUT HANSAWORLD

HansaWorld, founded in 1988 in Sweden, has a rich history of innovation in business management software. Initially developed for Apple customers, our software quickly gained international traction and has been continuously improved to meet the evolving needs of businesses. Over the years, HansaWorld has introduced pioneering features like mobile ERP clients and multi-language support, positioning us as one of the leaders in the ERP market.

Over Three Decades of Innovation

With over three decades of experience, HansaWorld has been a pioneer in the ERP and CRM industry. We started with an accounting program designed for Apple computers, the first mainstream platform with a graphical interface. Our commitment to innovation allows us to offer cutting-edge technology that meets the evolving needs of modern businesses.

Global Presence, Key Markets, and Industries

SERP solutions are available in over 30 languages and are used by businesses worldwide. Our commitment to localized support extends beyond language, offering ready-to-use localizations, including integrations with local services for tax reporting and compliance. This ensures that our solutions not only meet language needs but also adhere to regional legal and financial requirements, making SERP a versatile and reliable choice for businesses globally. We serve a wide range of industries, such as retail, hospitality (hotels/restaurants), production, rental, and project management, showing the versatility of our offerings. Our global presence is supported by strategically placed offices and distribution partners, allowing us to provide effective localized support and services. This broad global reach not only improves our ability to serve different markets but also establishes us as a reliable and flexible partner for businesses of all sizes.

Technology and Versatility

One of HansaWorld's key differentiators is our proprietary programming language. This advanced technology allows us to offer a range of highly customizable business management software solutions. By leveraging our proprietary programming language, we ensure that our solutions are not only powerful and flexible but also capable of integrating seamlessly across various business functions. HansaWorld's technology supports various platforms, including Windows, macOS, Linux, Android, and iOS, ensuring accessibility and ease of use. Our continuous investment in research and development ensures that we remain at the forefront of technological advancements, providing our customers with cutting-edge solutions that drive efficiency and growth.

Commitment to Excellence

We're continuously investing in research and development to stay ahead and deliver the most advanced software solutions. Thousands of companies worldwide trust HansaWorld with their critical business information, benefiting from our integrated approach that eliminates the need for multiple disparate systems.

Recognition and Awards

Our innovative solutions have been recognized with numerous awards over the years, including the SIIA CODiE Awards for Best Artificial Intelligence-Enabled Content Solution and multiple Stevie Awards.

PART 1: UNDERSTANDING ERP

What is ERP? Definition and Purpose

Enterprise Resource Planning (ERP) is a type of software that integrates and manages core business processes, such as finance, human resources, manufacturing, supply chain, services, procurement, and others. The primary purpose of an ERP system is to provide a unified and continuously updated view of core business processes using a common database. ERP systems improve enterprise efficiency by managing and improving how business resources are utilized without excessive manual intervention.

An ERP system acts as the central hub for all critical business functions, enabling data to be shared across various departments and providing a single source of truth. This integration ensures that all parts of the organization are working with the same data, which enhances accuracy and reduces data redundancy. ERP systems support core business processes such as order-to-cash, procure-to-pay, and plan-to-product, ensuring that these processes are streamlined and efficient.

Key Components, Functionalities and Benefits

ERP systems are designed to unify and streamline core business processes by integrating key modules that manage the operational and financial backbone of an organization. These interconnected modules enable seamless data flow, improving efficiency and providing a comprehensive overview of business performance.

Key Modules:

- **Supply Chain Management:** (SERP related modules: Purchase Ledger, Purchase Orders)

  Manages the flow of goods and services, including procurement, supplier management, purchase orders, and payments, ensuring efficient and cost-effective operations.

- **Sales Chain Management:** (Sales Ledger, Sales Orders, Quotations)

  Covers the entire sales process, from quotations and sales orders to invoicing and receipts, enhancing the management of customer orders and revenue tracking.

- **Inventory Management:** (Stock)

  Tracks inventory levels, stock movements, and deliveries, optimizing inventory turnover and reducing inventory holding costs while ensuring availability.

- **Bookkeeping and Financial Management:** (Nominal Ledger/Sales Ledger/Purchase Ledger)

  Handles all financial transactions, including general ledger, accounts payable and receivable, financial reporting, taxes and compliance, providing a clear view of the company's financial health.

Beyond the traditional core modules, ERP systems often extend their capabilities with additional functionalities like Human Resources Management (HRM) and Customer Relationship Management (CRM), enhancing the overall efficiency and connectivity of business operations:

- **Human Resources Management (HRM):**

  Manages employee records, payroll, recruitment, and performance management, supporting the entire employee lifecycle and ensuring compliance with labor regulations.

- **Customer Relationship Management (CRM):**

  Manages customer data, sales efforts, marketing activities, and customer service interactions, driving improved customer satisfaction and sales growth through better relationship management.

Functionality:

The functionality of an ERP system is what drives its value to businesses by integrating and streamlining core processes.

- **Integrated Data:** Ensures that all modules access and share the same data, eliminating data silos.
- **Automation:** Automates routine tasks, reducing manual effort and increasing efficiency.
- **Real-Time Information:** Provides real-time insights into business performance, enabling quick decision-making.

Industry-specific ERPs

Different industries require specific functionalities from their ERP systems. HansaWorld offers industry-specific solutions tailored to meet the unique needs of sectors such as retail, hotel, restaurant, production, rental, and job costing. Each industry module is designed to address the specific challenges and requirements of that industry, ensuring maximum efficiency and effectiveness.

- **Retail:** Includes Point of Sale (POS) systems, inventory management, and customer loyalty programs.
- **Hotels/Restaurants:** Management reservations, guest services, housekeeping, and biling.
- **Production:** Supports production processes, including production planning, scheduling, and quality control.
- **Rental:** Manages rental agreements, asset tracking, and maintenance schedules.
- **Job Costing (Time Biling and Project Management):** The Job Costing module in Standard ERP supports project budgeting, financial control, and invoicing based on project-specific rules, providing comprehensive oversight of project finances. When integrated with CRM and other modules, it extends functionality to include basic resource planning, such as scheduling personnel and equipment, management stock usage, and overseeing purchase orders and invoices, allowing for a broader scope of project management with a strong financial focus.
- **Service and repairs (Service Orders):** The Service Orders module in Standard ERP is designed for companies that provide repair services, offering an efficient tool to manage repair jobs, track warranty status, and organize work assignments for technicians.

Example: In the retail industry, HansaWorld's Standard ERP provides a comprehensive POS system that integrates with inventory management and CRM modules. This integration ensures that sales data is reflected in inventory levels and customer records, enabling stock updates and personalized customer service.

ERP Market Trends

The ERP market is highly competitive, with numerous vendors offering a wide range of solutions. Key trends in the market include the shift towards cloud-based ERP systems, the integration of artificial intelligence (AI) and machine learning (ML) for enhanced analytics and automation, and the growing importance of mobile access to ERP functionalities. HansaWorld is well-positioned to capitalize on these trends with our commitment to innovation and continuous improvement.

AI and ERP's: Business Operations with Intelligent Automation

The Role of AI in Modern ERPs

Artificial Intelligence (AI) is revolutionizing the way businesses manage their operations, and ERP systems are at the forefront of this transformation. AI enhances ERP systems by automating routine tasks, improving decision-making through advanced data analytics, and providing intelligent insights that drive business growth. In particular, HansaWorld's Standard ERP integrates AI-powered voice bots as out-of-the-box solutions, designed to assist customers in a variety of tasks. These voice bots can handle customer inquiries, automate routine tasks, and even provide real-time updates on business processes. HansaWorld remains committed to integrating the latest AI advancements into Standard ERP, ensuring our customers benefit from cutting-edge technology that drives business success.

Predictions:

The ERP market is continually evolving, driven by technological advancements and changing business needs. Understanding future trends in the ERP market is crucial for staying competitive and making informed decisions. As we look ahead, we can anticipate several key developments that will shape the future of ERP products. Innovations such as AI-driven analytics, increased cloud adoption, enhanced mobility, and greater integration capabilities are expected to redefine the ERP landscape. Additionally, the demand for more personalized and scalable solutions will continue to grow. In this section, we will explore these emerging trends and predictions, providing insights into how HansaWorld’s Standard ERP is positioned to meet the future demands of businesses worldwide.

- **Hyper-automation:** The integration of AI, ML, and robotic process automation (RPA) will lead to even greater automation of business processes.
- **Enhanced User Experience:** ERP vendors will prioritize optimizing the user experience by offering more intuitive interfaces, personalized features, consistent design across modules, and greater ease of use.
- **Integration with IoT:** ERP systems will increasingly integrate with Internet of Things (IoT) devices to provide real-time data and insights from connected devices.

Competitor Analysis

To effectively position Standard ERP in the market, it is essential to understand our competitors' strengths and weaknesses. Key competitors include SAP, Oracle, Microsoft Dynamics, Odoo, Sage and Infor. Each of these vendors has its unique selling points, but HansaWorld differentiates itself through our comprehensive integration capabilities, rapid implementation times, and flexibility to customize solutions to meet specific business needs. Our competitive pricing, localizations available "out of the box" and robust support infrastructure further strengthen our market position.

In addition to global competitors, we also face strong competition from local ERP providers in each market, who often cater specifically to regional needs and business practices. Understanding both global and local players is crucial for positioning Standard ERP effectively and highlighting our unique advantages.

Competitor Comparison

A thorough competitor comparison allows you to highlight the unique advantages and superior features of our products. By analyzing the strengths and weaknesses of alternative ERP systems, you can better articulate the distinct benefits and value that Standard ERP offers to potential customers. This comparison not only helps in positioning our product more effectively but also equips you with the knowledge to address customer concerns and objections confidently.

- **SAP:** Known for its extensive functionalities and scalability, but can be complex and costly to implement. Here are the main SAP products: SAP S/4HANA, Business ByDesign, Business One, SuccessFactors or Ariba.
- **Oracle:** Offers robust deatures and cloud capabilities, but may require significant customization. NetSuite is a cloud-based ERP solution that provides a comprehensive suite of applications for mid-sized businesses, including financials, CRM, and e-commerce.
- **Microsoft Dynamics:** User-friendly and integrates well with other Microsoft products, but may lack some advanced features.
- **Infor:** Focuses on industry-specific solutions, but may not offer the same level of integration as HansaWorld.
- **Sage:** Offers ERP solutions primarily targeted at small and medium-sized businesses, with products like Sage X3 and Sage Intacct designed for various industries. The main Sage products are Intacct, 50cloud Accounting, Business Cloud Accounting, X3, HR or Payroll.
- **Epicor:** Specializes in ERP solutions for manufacturing, distributions, retail, and services industries, offering both cloud and on-premise deployment options.
- **Odoo:** It is an open-source ERP system that offers a suite of business applications including CRM, e-commerce, accounting, inventory, and project management.
- **Others:** Visma, 1C, Intuit (Quickbooks), Xero, Acumatica, MYOB, etc and regional/local solutions.

Within the Partner Portal, the Sales Tools section includes a comprehensive library of battle cards designed to emplower HansaWorld sales teams and partners in competitive situations. These battle cards have meticulously crafted with contributions from both HansaWorld's global salesforce and its partners, providing valuable insights and strategic arguments against a wide array of worldwide competitors.

Each card focuses on specific rival products, offering detailed comparisons and counterpoints that can be leveraged throughout the sales process. Current battle cards cover prominent competitors such as Cimso, Oracle NetSuite, Microsoft Dynamics, SAP Business One, Sage, Odoo, Quickbooks, and more.

Competing Against In-House Developed ERPs for Industry-Specific Reasons

In today's competitive landscape, some companies choose to build their own ERP systems tailored to specific industry needs, aiming for greater customization and control. However, this approach often brings hidden challenges that can outweigh its initial appeal.

In-house ERPs are crafted to meet unique business requirements but frequently face major difficulties such as high development costs, ongoing maintenance burdens, support challenges, limited scalability, integration difficulties, and lengthy implementation times. These systems demand continuous updates and bug fixes, requiring dedicated teams and driving up operational costs. Custom ERPs often struggle to scale effectively, particularly when expanding into new markets or adding new features. **They typically lack comprehensive localization and up-to-date documentation, complicating support and compliance efforts.** Integration with new technologies, third-party applications, and ensuring data security are also complex, resulting in drawn-out development and adaption cycles.

Relying on in-house developers can lead to significant long-term dependency, making it difficult to respond swiftly to evolving business needs or manage critical issues if key personnel are unavailable. Moreover, frequent updates are necessary to stay compliant with changing legislation and to maintain seamless integration with external systems, adding further strain on resources and increasing the risk of operational setbacks.

Standard ERP offers comprehensive industry solutions with modules specifically designed for various sectors, including retail, hotels, restaurants, production, rental, and project management. With over three decades of experience, HansaWorld has successfully implemented ERP solutions across diverse industries globally, demonstrating its versatility and proven track record.

Cost-effective implementation is a significant advantage of Standard ERP. As a subscription-based model, Standard ERP eliminates the need for large upfront costs associated with in-house development. Its cloud-based infrastructure ensures automatic updates, reducing the need for dedicated IT staff for maintenance. The scalability and flexibility of Standard ERP are evident through its support for both cloud and hybrid deployments, providing the flexibility to scale as the business grows. Additionally, it is accessible on various platforms, including Windows, macOS, Android, and iOS, ensuring seamless operations across devices.

Standard ERP excels in both integration and innovation, seamlessly connecting with existing systems and third-party applications for streamlined operations. Equipped with advanced tools like AI, telephony, and integrated communication centers, SERP enhances business operations and decision-making. Enhanced data security is another critical benefit, with HansaWorld's robust data security plans ensuring the protection of sensitive business information, a critical aspect often overlooked in custom ERPs.

Standard ERP offers a distinct advantage with its rapid implementation, thanks to easily configurable modules and standardized deployment processes that significantly shorten setup times compared to custom-built systems. To overcome common objections such as perceived limitations in customization, fear of change, and concerns about data migration, SERP provides extensive customization capabilities through the Hansa Application Language (HAL), allowing for tailored configurations that align with specific business needs. Showcasing successful case studies and testimonials from industry customers who have smoothly transitioned from custom ERPs to SERP helps address fears of change. Our partners and HansaWorld’s proven expertise in data migration ensure a seamless, secure transition, reducing risks and maintaining uninterrupted business operations.

Competing against in-house developed ERPs requires a strategic approach focused on highlighting the comprehensive, cost-effective, and scalable advantages of Standard ERP. By addressing the key pain points of custom ERPs and demonstrating the superior benefits of HansaWorld's solutions, you can effectively position SERP as the preferred choice for industry-specific needs.

Customizable vs. Non-Customizable ERPs

Customizable ERPs: Customizable ERPs are designed to be flexible, allowing businesses to tailor the software. These systems offer extensive configuration options and often include development tools that enable customization of features, workflows, and interfaces. This adaptability ensures that the ERP system aligns closely with the unique processes and requirements of the organization, improving operational efficiency and user satisfaction. However, customization can increase implementation time and costs, and may require ongoing support for maintenance and updates.

Non-Customizable ERPs: Non-customizable ERPs, on the other hand, come with standardized features and functionalities. These systems are designed for quick deployment and ease of use, with a focus on delivering best practices and industry-standard processes. They are ideal for businesses looking for a more straightforward, cost-effective solution that can be implemented rapidly without the need for extensive configuration or customization.

Advantages of Non-Customizable ERPs

- **Cost-Effective:** Typically, non-customizable ERPs have lower upfront costs and reduced maintenance needs.
- **Faster Implementation:** These systems can be deployed more quickly since they do not require extensive customization.
- **Ease of Use:** With predefined workflows and features, users can quickly learn and start using the system.
- **Ease of Support:** Providing support is simpler and more efficient compared to customized ERPs, as standard features and configurations are easier to troubleshoot and maintain.

Disadvantages of Non-Customizable ERPs

- **Limited Flexibility:** Businesses must adapt their processes to fit the software, which may not meet all their specific needs.
- **Scalability Constraints:** As business needs evolve, a non-customizable ERP may not be able to grow or adapt

accordingly.

- **Potential Overlap with Existing Systems:** Standardized features may overlap with or be redundant to other tools or systems the business already uses.

Reasons for changing ERP systems

Changing an ERP system is a significant decision for any organization, often driven by a combination of internal and external factors. Understanding these reasons can help tailor the engagement process and demonstrate how HansaWorld's Standard ERP can meet their evolving needs.

1. **Outdated Technology**

   Many companies find that their current ERP system is based on outdated technology that can't keep up with modern business demands. This can lead to inefficiencies, compatibility issues with new software, and higher maintenance costs.

2. **Lack of Integration**

   As businesses grow or evolve, they often add new systems and processes. If the existing ERP cannot integrate seamlessly with other software or handle increasing complexity, it creates silos and data inconsistencies that hamper decision-making and efficiency.

3. **Poor Performance and Reliability**

   Frequent downtimes, slow performance, and system crashes are major pain points that drive businesses to seek more reliable ERP solutions. Performance issues can disrupt operations, leading to lost productivity, data and revenue.

4. **Inadequate Support and Customization**

   Legacy ERP systems may not offer the flexibility needed to support unique business processes or adapt to changing requirements. Insufficient customization options and rigid frameworks can constrain a company's ability to scale and adapt to new challenges.

5. **Compliance and Regulatory Challenges**

   Regulatory environments are constantly evolving. Businesses need ERP systems that can adapt to new compliance requirements and provide robust reporting capabilities to meet regulatory standards.

6. **Scalability Issues**

   If the current ERP cannot handle increased data volume, users, or transaction complexity, it can limit the company's growth potential.

7. **High Total Cost of Ownership (TCO)**

   Maintaining and upgrading legacy ERP systems can be costly. Businesses often find that the total cost of ownership, including licensing or subscriptions, hardware, maintenance, and support, is higher than expected.

8. **User Dissatisfaction**

   If the ERP system is not user-friendly or requires extensive training to use effectively, it can lead to user dissatisfaction and resistance. A more intuitive and accessible system can improve user adoption and productivity.

9. **Strategic Business Changes and Global Expansion Requirements**

   Companies undergoing strategic changes, such as mergers, acquisitions, or entering new markets, often require a more robust ERP system to support these initiatives. As businesses expand internationally, the need for multi-language support, multi-currency handling, and compliance with various international regulations becomes critical.

10. **Enhanced Data Analytics and Reporting**

    Modern businesses rely heavily on data-driven decision-making. If the existing ERP lacks advanced analytics and reporting capabilities, it can impede the ability to gain insights and make informed decisions.

11. **Security Vulnerabilities**

    Older ERP systems may lack advanced security features, making them susceptible to cyber threats. Upgrading to a modern ERP can enhance data protection and compliance with security standards.

How HansaWorld's Standard ERP addresses these issues

By understanding why businesses consider changing their ERP systems, HansaWorld can better position Standard ERP as the solution that addresses these pain points:

- **Advanced Technology:** Standard ERP is built on cutting-edge technology, ensuring compatibility with modern business tools and future-proofing the investment.
- **Seamless Integration:** The system offers robust integration capabilities, allowing businesses to connect various software and streamline operations.
- **Reliability and Performance:** Standard ERP is designed for high reliability and performance, minimizing downtimes and ensuring smooth operations.
- **Customization and Support:** The platform provides extensive customization options and comprehensive support, allowing businesses to tailor the system to their specific needs.
- **Compliance and Reporting:** Standard ERP includes features that help businesses stay compliant with evolving regulations and offers powerful reporting tools.
- **Scalability:** The system can scale with business growth, accommodating increased number of users, data volumes and complexity.
- **Cost Efficiency:** With a lower total cost of ownership, Standard ERP offers better value through its comprehensive feature set and reduced maintenance costs.
- **Consistency in User Experience (UX):** An intuitive user interface that is consistent across all modules ensuring that users can easily navigate and operate the system without needing to learn different processes for each module. This seamless consistency enhances the overall user experience by reducing the learning curve and minimizing errors. Users can quickly become proficient, as they spend less time adapting to the system.

By addressing these common reasons for changing ERP systems, HansaWorld's Standard ERP can be presented as the ideal solution to meet the evolving needs of businesses and support their growth, changes, challenges and success.

> At the end of this document, you will find an annex titled **"Key Points to Remember: HansaWorld and SERP."** Review this annex regularly to ensure you are always equipped with the essential knowledge needed to effectively present and position Standard ERP.

PART 2: HANSAWORLD'S PRODUCTS

HansaWorld offers a diverse suite of business management solutions designed to meet the unique needs of various industries. Here's a summary of our key products:

1. **Standard ERP**

   Standard ERP (SERP) is a comprehensive enterprise resource planning solution that integrates all aspects of business operations into a single platform. SERP is our core and main product.

2. **Standard Accounts**

   Standard Accounts is a robust accounting software solution tailored for entrepreneurs, start-ups and small businesses. It provides comprehensive financial management tools, including general ledger, accounts payable and receivable, bank reconciliation, financial reporting, and multi-currency support.

3. **Standard CRM**

   Standard CRM is a customer relationship management solution that helps businesses manage interactions with customers and prospects. Key features include contact management, sales pipeline tracking, customer service, and advanced reporting.

4. **Standard Hotel**

   Standard Hotel is a comprehensive property management system designed for the hospitality industry. It offers tools for reservation management, guest services, housekeeping, billing and invoicing, and detailed reporting.

5. **Standard Eats**

   Standard Eats is a specialized software solution for the food and beverage industry. It assists restaurants, cafes, and catering businesses in managing orders, inventory, menu items, and customer relationships. Features include order management, inventory control, menu management, customer loyalty programs, and real-time reporting.

6. **Standard POS**

   Standard POS is a powerful point-of-sale system designed for retail businesses. It features sales management, inventory control, multi-store management, and detailed reporting.

SERP: Our ERP Solution

Standard ERP offers a comprehensive suite of modules designed to meet the diverse needs of modern businesses. Each module is fully integrated, providing seamless functionality across various business operations. From accounting, sales, purchases, stock, retail and production to job costing and repairs, our modules ensure efficiency, accuracy, and enhanced productivity. Below is an overview of the key vertical modules that form the backbone of our powerful ERP solution.

Point of Sale (POS)

Standard ERP's Point of Sale (POS) module streamlines retail operations with real-time reporting, detailed financial overviews, and efficient inventory management. Integrated CRM functionality captures customer information and tracks purchase activity, enhancing targeted marketing efforts. The POS module supports external payment systems and loyalty programs, and ensures transaction recording even offline. The Point of Sales module in Standard ERP offers advanced live-sync capabilities, ensuring seamless operation across tills, efficient configuration, and robust synchronization of sales data, even when the server is offline.

Production

The Production module manages manufacturing and assembly processes with tools for production orders, bills of materials, and material requirements planning. It supports demand-driven environments by monitoring work in progress, managing costs, and scheduling resources for efficient production.

Job Costing / Project Management

The Job Costing module offers a robust set of tools for planning, executing, and monitoring projects, making it particularly valuable for the professional services industry. It integrates job costing and accounting processes, offering detailed project records for invoicing and reporting, and real-time project status updates.

Service Orders

The Service Orders module streamlines the management of service requests and maintenance activities. It tracks service orders from creation to completion, ensuring timely and efficient service delivery, and integrates with inventory and billing systems. The Service Orders module builds a comprehensive service history around each serial number, tracking all repairs, maintenance, and warranty details to provide complete visibility over the lifecycle of every item.

Rental

The Rental module manages the rental of equipment and assets, tracking availability, reservations, and returns. It supports billing and maintenance scheduling, helping optimize rental operations and asset utilization.

Contracts

The Contracts module handles contract management for various agreements, tracking terms, renewals, and compliance. It ensures accurate billing and facilitates easy contract modifications and renewals.

Restaurant

The Restaurant module optimizes restaurant operations, from table reservations and order management to kitchen coordination and billing.

Hotel

The Hotel module manages hotel operations, including room reservations, front desk operations, and billing. It integrates with housekeeping and maintenance systems.

Unique Selling Points (USPs)

Unique Selling Points (USPs) in Standard ERP refer to distinct features or approaches that set it apart from competitors. While some features might be available in other products, it's the unique (or Unusual) implementation or integration that distinguishes Standard ERP.

Sometimes, we refer to USPs not just as Unique Selling Points but also as Unusual Selling Points, highlighting the distinctive and uncommon features that make Standard ERP stand out in ways that competitors can't easily replicate. This includes aspects like user-friendly interfaces, advanced integration capabilities with diverse modules or systems, and streamlined processing methods. These features enhance functionality and improve the overall user experience, making Standard ERP a standout choice in the market. The USPs thus lie not just in the features themselves, but in how they are uniquely adapted to meet user needs and improve operational efficiency.

The USPs serve as a key differentiator, offering functionalities that customers might not currently utilize or be aware of. It is our responsibility to introduce these features to customers, igniting their interest in adopting new, innovative solutions that could enhance their business processes. In our pursuit of excellence in sales, we recognize a critical aspect: the art of proactive selling. This involves not just responding to our customers' current demands, but anticipating their future needs, understanding and delivering beyond the immediate requests of our customers. It's about discovering their unarticulated needs and guiding them towards solutions they might not yet be aware they require.

For over three decades, HansaWorld has excelled in identifying and fulfilling these latent needs. The conventional marketing methods, while effective in highlighting known products, often fall short in showcasing the potential of emerging solutions. Our role is to bridge this gap, bringing to light the possibilities and benefits of our proven and distinct solutions.

Some of our USPs:

- **Implementation Time:** Rapid Implementation Methodology (RIM) ensures quick deployment of core features. This approach minimizes downtime and allows businesses to start using Standard ERP's functionalities promptly.
- **Multi-platform and Multi-device Support:** Standard ERP is accessible on various devices and operating systems, including Windows, macOS, Android, and iOS.
- **Scalability:** SERP can grow with the business, supporting multiple countries and currencies in a single database.
- **One Code Base:** SERP operates on a single code base, which means that all updates are released simultaneously across all platforms by the same development team. This ensures consistency, reduces the risk of version discrepancies, and allows for faster implementation of new features and bug fixes.
- **Internet Light:** SERP is optimized for low-bandwidth environments, making it ideal for regions with slow internet speeds. This ensures reliable performance and accessibility even in less developed areas.

- **Ease of Navigation:** SERP is designed for intuitive navigation with minimal clicks required to access features. This enhances user experience and reduces training time as knowledge of one module facilitates the use of others.
- **Multi-Country in the same Database:** SERP supports multiple countries within a single database, facilitating seamless international operations. This capability allows businesses to manage subsidiaries in different countries without needing separate installations, making it crucial for global businesses looking to consolidate their operations and reporting.
- **Integrated Communication Centre:** Facilitates seamless communication within the organization.
- **Workflow Overview:** Provides a graphical overview of workflows for better process management.
- **Personal Desktop:** Customizable desktops for each user.
- **Remote Backup:** Includes failover server functions to ensure data security and continuity.
- **Drill-Down Functionality:** SERP offers extensive drill-down capabilities, allowing users to navigate through data hierarchies seamlessly. Users can easily access detailed information from summary reports, aiding in quick data correction and in-depth analysis, unlike competitors who typically have slower reports and less intuitive drill-down processes.
- **Multi-Language Support:** SERP is available in multiple languages, supporting global operations by allowing users to work in their preferred language.
- **MyStandard Platform:** MyStandard is a comprehensive web-based management tool for Standard ERP, allowing administrators to control server settings, manage users, monitor server activity, and perform updates and backups all from a single interface.
- **Integration of Vertical Modules:** SERP integrates numerous verticals, modules, and features into a single system.
- **Real-Time Reporting:** Instant access to up-to-date business information.
- **Automatic Nominal Ledger Transactions:** SERP automatically posts transactions to the nominal ledger without requiring batch transfers or manual approvals.
- **Embedded Telephony System:** SERP integrates telephony features within the ERP system.
- **Light Infrastructure Requirements:** SERP is optimized for minimal hardware and software requirements, reducing the total cost of ownership by allowing the system to run efficiently on less expensive hardware.
- **Hansa Application Language (HAL):** HAL is a proprietary language designed for rapid customization of SERP, allowing users to customize any part of the system quickly and easily. Its simplicity and ease of learning reduce the time and cost associated with system customization.
- **Office Synchronization:** SERP supports offline synchronization, ensuring continuous operation and data integrity even in environments with intermittent connectivity by synchronizing data when the system reconnects to the internet.
- **Quote to Cash and Purchase Order/Sales Order Process:** Standard ERP fully supports the entire business process from quoting to cash collection and purchase order to sales order, providing a comprehensive understanding and management of customer processes.
- **Hybrid Cloud Options:** HansaWorld offers flexible deployment options, including on-premise, cloud, or hybrid solutions.

For a detailed demonstration of our unique selling points, we recommend viewing our spotlight videos, which are designed to highlight key features and benefits of SERP. Spotlights and demo scripts are accessible on the **Partner Portal** at www.hansaworld.com. In the portal's **“Video Demonstrations”** section, you'll find the **“Spotlights”** area, which includes detailed scripts, demo data, and videos. Spotlights are concise videos that showcase the unique features of HansaWorld products, helping you effectively highlight key selling points.

Benefits of ERP Systems and USPs

When presenting the benefits of ERP systems, it's essential to distinguish between features, benefits, and the value they bring to the customer.

Features are the specific functionalities and capabilities of the system.

Benefits, on the other hand, are the advantages these features provide, like improved efficiency or reduced operational costs. Ultimately, the value for the customer is realized when these benefits translate into tangible business outcomes, such as increased profitability, enhanced decision-making, and a competitive edge. Understanding and articulating the benefits of ERP systems in this context ensures that customers can clearly see how adopting HansaWorld's Standard ERP will directly address their pain points and drive their business forward.

Value Proposition Statements

Developing clear and concise value propositions is essential to effectively communicate the unique benefits of Standard ERP. These value propositions should be tailored to different industries and business scenarios, highlighting the key benefits that resonate most with each target audience.

HansaWorld's Standard ERP is distinguished by several key USPs that translate into significant benefits and value for our customers. Here's how our best USPs enhance customer operations and drive business success:

1. **Integration with Multiple Platforms**
    - **Benefit:** Seamless access across various devices and operating systems (Windows, macOS, Android, iOS).
    - **Value for Customers:** Ensures that employees can work from anywhere, enhancing flexibility and productivity. This accessibility supports remote work and improves collaboration across different locations and devices.
2. **Advanced Reporting Tools**
    - **Benefit:** Comprehensive insights and analytics.
    - **Value for Customers:** Empowers businesses to make informed decisions based on real-time data. Advanced reporting tools provide detailed insights into various aspects of the business, helping to identify trends, optimize operations, and drive strategic initiatives.
3. **Customization Capabilities**
    - **Benefit:** Tailored system configurations to meet specific business needs.
    - **Value for Customers:** Offers the flexibility to adapt the ERP system to unique business processes and requirements. Customization ensures that the system aligns perfectly with the customer's workflow, enhancing efficiency and user satisfaction.
4. **Mobile Access**
    - **Benefit:** Full ERP functionalities on mobile devices.
    - **Value for Customers:** Increases agility and responsiveness by allowing employees to access critical business information on the go. Mobile access supports real-time updates and decision-making, particularly for field workers and remote teams.
5. **Scalability**
    - **Benefit:** Supports growth from small startups to large enterprises.
    - **Value for Customers:** Ensures that the ERP system can grow with the business, accommodating increasing data volumes and complexity. Scalability prevents the need for frequent system changes, providing a stable and long-term solution.
6. **Hybrid Cloud Options**
    - **Benefit:** Flexible deployment options (on-premise, cloud, hybrid).
    - **Value for Customers:** Offers the flexibility to choose the best deployment model based on specific needs, budget, and IT infrastructure. The hybrid model combines control with accessibility, ensuring data security while enabling remote access.
7. **Integrated Communication Centre**
    - **Benefit:** Facilitates seamless internal communication.
    - **Value for Customers:** Enhances collaboration and information sharing within the organization. Integrated communication tools streamline interactions and improve coordination, leading to better project management and operational efficiency.
8. **Workflow Overview**

- **Benefit:** Graphical overview of workflows.
- **Value for Customers:** Provides clear visibility into business processes, helping managers monitor progress and identify bottlenecks.

9. **Personal Desktop**
   - **Benefit:** Customizable desktops for individual users.
   - **Value for Customers:** Allow employees to tailor their workspace according to their preferences.
10. **Rapid Implementation Methodology (RIM)**
    - **Benefit:** Quick deployment of core features.
    - **Value for Customers:** Minimizes downtime and accelerates the time-to-value for the ERP system. Rapid implementation allows businesses to start benefiting from the system sooner, improving operational efficiency and return on investment.

By focusing on these unique selling propositions and clearly articulating the corresponding benefits and value, you can effectively communicate the advantages of Standard ERP to potential customers. This approach not only highlights the technical strengths of the solution but also demonstrates how it directly addresses the specific needs and challenges faced by businesses across various industries.

Customer Success Stories

Customer success stories are powerful tools that illustrate the real-world impact and effectiveness of HansaWorld's Standard ERP. These stories showcase how our solutions have helped various businesses overcome challenges, streamline operations, and achieve their goals. These success stories not only build credibility and trust but also serve as inspiration for other businesses considering our solutions.

> Please refer to our website
>
> https://www.hansaworld.com/en/customer-stories
>
> or our Partner Portal for customer success stories.

PART 3: CUSTOMER ENGAGEMENT

In this chapter, we explore the core strategies and best practices for engaging potential customers effectively. Customer engagement is the cornerstone of our sales process, as it enables us to build strong relationships, understand client needs, and tailor our solutions to address their specific challenges. We will explore various techniques for initiating meaningful conversations, maintaining ongoing communication, and demonstrating the value of Standard ERP in a way that resonates with each customer.

Understanding Customer Needs

Conducting Effective Needs Analysis we focus on making a strong impression through dynamic presentations and tailored proposals based on key insights gathered during initial interactions.

Steps for Conducting a Needs Analysis

1. **Initial Consultation:** During the first meeting, use targeted questions to gather essential information about the customer's business processes and pain points. Keep this interaction brief but informative.
   - **Example Questions:** "What are the main challenges you face with your current system?" "What specific goals do you hope to achieve with an ERP solution?"
2. **Quick Business Snapshot:** Instead of an extensive business review, create a quick snapshot of the customer's current state using concise questions and observations.
   - **Focus Areas:** Key business processes, immediate challenges, and high-level goals.
3. **Prioritize Key Pain Points:** Identify the most critical pain points that Standard ERP can address effectively. This allows you to tailor your pitch and demonstrations to highlight solutions for these issues.
4. **Industry-Specific Needs:** Leverage HansaWorld's industry-specific modules to tailor your questions. For example, inquire about inventory management in retail or production scheduling in manufacturing.
5. **Current System Evaluation:** Assess the customer's existing systems and workflows to identify gaps and areas for improvement.
6. **Leverage Existing Case Studies:** Use relevant case studies to illustrate how similar businesses have benefited from Standard ERP.

This approach builds credibility and provides concrete examples without the need for extensive initial analysis.

Motivation: Common Needs Driving Customer Decisions

Understanding the common needs that prompt customers to seek new ERP solutions can help tailor the engagement process effectively. These needs often include:

1. **The Quest for Efficiency**

   Customers aim to enhance operational efficiency by automating finance, sales, purchase, stock management, and other business processes. Automation reduces manual errors, speeds up processes, and allows employees to focus on more strategic tasks.

2. **Resolving Chaos**

   Significant issues with previous systems, such as frequent downtimes, data inconsistencies, or lack of integration, drive customers to seek more reliable and robust ERP solutions. A new system can bring order and stability to their operations.

3. **Market Competition**

   Staying competitive is crucial. Customers are motivated to adopt new systems and technologies to keep up with or surpass their competitors. This need is often driven by industry trends and peer pressure to innovate.

4. **Standardizing Processes**

   Introducing standard procedures and routines is essential for consistency and scalability. Customers seek ERP solutions that help them streamline and standardize their operations across departments and locations.

5. **External Pressure**

Advisors, banks, accountants, and government agencies often apply pressure on businesses to modernize their systems. Compliance with regulations, improved financial reporting, and meeting stakeholder expectations are common drivers.

6. **New Business Needs**

   Businesses expanding into international markets, entering new business areas, or changing strategies (e.g., from retail shops to online sales) require flexible and scalable ERP systems to support their growth and adapt to new challenges.

7. **Technological Advancements**

   To stay ahead of the curve, customers desire to leverage the latest technologies. Adopting advanced ERP solutions enables businesses to take advantage of innovations like real-time analytics, conversational artificial intelligence, and cloud computing.

8. **New Administration**

   New management often brings fresh perspectives and strategies. Implementing new systems is part of their approach to improve operations, introduce efficiencies, and drive business transformation.

Applying These Insights

By understanding these motivations, sales teams and partners can tailor their approach. For instance:

- **For Efficiency Seekers:** Highlight automation features and case studies showcasing improved operational efficiency.
- **For Resolving Chaos:** Emphasize the stability, reliability, and integration capabilities of Standard ERP.
- **For Market Competitors:** Showcase how adopting new technologies can provide a competitive edge.
- **For Standardization Needs:** Demonstrate how Standard ERP, designed using best business practices, can streamline processes and ensure consistency.
- **For External Pressure:** Provide examples of compliance and improved financial reporting facilitated by Standard ERP.
- **For New Business Needs:** Illustrate the scalability and flexibility of Standard ERP to support business growth and new strategies.
- **For Technological Advancements:** Highlight the advanced features of Standard ERP and how they leverage cutting-edge technology.
- **For New Administration:** Show how Standard ERP can help new managers drive transformation.

Empathizing with Customers

Understanding and empathizing with customers is essential for building strong, trust-based relationships. Showing genuine concern for their issues and understanding the root causes of their problems not only helps in tailoring the right solutions but also establishes a solid foundation of trust and credibility.

Techniques for Empathizing with Customers

1. **Active Listening**

Active listening is more than just hearing what the customer says; it involves fully engaging with them to understand their perspectives and emotions. Here are the key elements:

- **Give Full Attention:** Make sure to focus entirely on the customer without distractions (like your smartphone or Skype/WhatsApp/Notifications). This shows that you value their time and concerns.
- **Acknowledge Non-Verbal Cues:** Pay attention to body language, tone of voice, and facial expressions to gauge their emotions and underlying issues. This is another reason why it's essential to focus and give your full attention during interactions, as non-verbal signals can provide valuable insights that might be missed if you're distracted.
- **Avoid Interruptions:** Let the customer speak without interruptions. Hold your responses until they have finished

expressing their thoughts.

Example: "Thank you for sharing your challenges with us. I'm fully here to understand how we can help."

2. **Summarize What You've Heard**

Summarizing helps ensure you have accurately understood the customer's concerns. It also shows the customer that you are actively engaged and value their input.

- **Restate Key Points:** Briefly restate the main points the customer has mentioned to confirm your understanding.
- **Seek Clarification:** Ask follow-up questions if any points are unclear or need further explanation.

Example: "So, if I understand correctly, your main challenge is that your current system doesn't integrate well with your inventory management, causing delays and errors. Is that right?"

3. **Validate Their Experiences**

Validation involves acknowledging the customer's feelings and experiences, showing that you understand and appreciate their situation.

- **Express Empathy:** Use empathetic language to show that you recognize their difficulties and frustrations.
- **Normalize Their Feelings:** Assure the customer that their feelings and challenges are common and understandable.

Example: "It sounds really frustrating to deal with those kinds of delays and errors. Many of our customers have faced similar issues before switching to Standard ERP."

At the end of this document, you will find an annex titled **"Active Listening Prompts and Phrases for Summarizing and Validating Customer Concerns."** This section offers a practical resource of key phrases and techniques designed to help you engage effectively with customers.

4. **Explore Root Causes**

Explore deeper into the issues to understand the root causes. Ask questions that help uncover underlying problems. Example: "What do you think is the primary reason for these integration issues? Is it a limitation of your current software, or are there other factors at play?"

Incorporate challenging questions and insights into your presentations to engage the customer actively.

5. **Provide Reassurance**

Reassure the customer that you understand their needs and are committed to finding the best solution for them. Example: "Thank you for sharing these details. It's clear that you need a more robust and integrated system, and we're here to ensure that Standard ERP addresses these challenges effectively."

By incorporating active listening, summarizing, and validating experiences into your customer engagement process, you can ensure that customers feel valued and understood, leading to stronger relationships and more successful outcomes.

Building Trust and Relationships

Building trust and fostering strong relationships are the foundation of successful customer engagement. Trust is established not only through expertise but by showing genuine interest in the customer, listening attentively, and empathizing with their needs. By focusing on the customer first—expressing appreciation, asking thoughtful questions, and being consistently reliable—you create a rapport that leads to lasting, mutually beneficial relationships. In this section, we will explore proven strategies for building trust with customers, helping you become a trusted advisor.

Effective Communication Techniques

Good communication is key, whether you're meeting in person, online, or giving a presentation. This section covers best practices for communication, including virtual meeting techniques, storytelling methods, and effective presentation strategies, to ensure clear, impactful, and engaging interactions with customers.

1. **Virtual Meeting Best Practices**

In today's business environment, virtual meetings have become a standard. To ensure they are as productive and engaging as in-person meetings, follow these best practices:

- **Set Clear Objectives:**
  - Define the purpose and objectives of the meeting in advance.
  - Share the agenda with participants beforehand, detailing topics and expected outcomes.
- **Prepare and Test Technology:**
  - Choose a reliable video conferencing platform.
  - Test all technology (internet, software, camera, microphone) before the meeting to avoid technical issues.
- **Schedule Appropriately:**
  - Consider time zones and availability when scheduling.
  - Send calendar invites with details and reminders to ensure attendance.
- **Establish Ground Rules:**
  - Set rules for participation, such as muting when not speaking and using chat for questions.
  - Encourage joining from a quiet, distraction-free environment.
- **Maintain Engagement:**
  - Start with an icebreaker to make participants comfortable.
  - Use visual aids and live demos to showcase our solutions.
  - Encourage interaction through questions and feedback.
- **Follow-up:**
  - Summarize key points and decisions at the end.
  - Assign action items and send a follow-up email or message with the meeting summary.

2. Storytelling Techniques

Storytelling is a powerful tool to make presentations compelling and memorable. By integrating narratives into your presentations, you can effectively illustrate the value of Standard ERP and connect with your audience emotionally:

- **Start with a Hook:**
  - Begin with an engaging story or anecdote that captures attention.
  - Example: "Imagine a retail store struggling with inventory management. This was the reality for a customer before they implemented Standard ERP."
- **Structure Your Story:**
  - Use a clear structure: situation, challenge, solution, and outcome.
  - Example: "A manufacturing company faced production delays due to outdated systems. Implementing Standard ERP increased efficiency by 30%."
- **Make It Relatable:**
  - Use stories that resonate with the audience's industry, challenges, and goals.
  - Example: "Our hotel customer struggled with managing reservations. Standard ERP integrated their operations, enhancing guest experience."
- **Highlight Emotions:**
  - Emphasize the emotional aspects, such as frustrations and relief, to create a deeper connection.
  - Example: "The team felt overwhelmed with manual processes. After Standard ERP, they experienced significant relief with automated workflows."

Building Trust Early On

Trust is the cornerstone of any strong customer relationship. Building trust right from the start is key to a strong, lasting partnership. This section outlines how to build trust through transparency, reliability, and consistency.

Techniques for Building Trust

1. **Share Case Studies**

   Case studies are powerful tools for demonstrating your company's expertise and the tangible benefits of your solutions.

2. **Introduce the Team**

   Introducing your team members helps to personalize the engagement and shows the customer that they are working with a dedicated and knowledgeable group of professionals.

3. **Provide Testimonials**

   Testimonials from satisfied customers serve as social proof and can significantly enhance credibility.
   They demonstrate that other businesses have successfully partnered with your company and have achieved positive results.

4. **Ensure Follow-Through on Promises**

   Building trust is all about being reliable—keep your promises and deliver on what you say.
   - Set Clear Expectations: Clearly communicate what the customer can expect in terms of deliverables and timelines.
   - Regular Updates: Keep the customer informed about progress and any potential changes to the plan.
   - Accountability: Take responsibility for any issues that arise and address them promptly and transparently.

Guidelines for Effective Communication

Clear, concise, and consistent communication is critical throughout the customer engagement process. Effective communication ensures that customers feel informed, valued, and confident in their partnership with HansaWorld. This section emphasizes the importance of communication and provides guidelines for maintaining clarity and consistency.

1. **Tone**

The tone of your communication should be professional, courteous, and customer-centric. It should reflect a commitment to helping the customer and a genuine interest in their needs.

- **Be Professional:** Maintain a professional tone in all communications, avoiding slang and overly casual language.
- **Be Courteous:** Use polite language, express appreciation, and acknowledge the customer's concerns.
- **Be Customer-Centric:** Focus on the customer's needs and how you can help address them.

Example: "Thank you for bringing this to our attention. We understand how important this issue is for your business, and we are committed to resolving it promptly."

2. **Frequency**

Establish a regular communication schedule to keep customers informed and engaged. This helps in managing expectations and ensures that there are no long gaps between updates.

- **Initial Contact:** Follow up within 24 hours after the first meeting to thank the customer and outline the next steps.
- **Regular Updates:** Provide weekly or bi-weekly updates, when it is relevant to do so.
- **Milestone Notifications:** Communicate at key milestones to keep the customer informed of progress and upcoming activities. Avoid sharing irrelevant content or news.

3. **Channels**

Utilize multiple communication channels to ensure that information is accessible and convenient for the customer.
Different customers may prefer different methods of communication, so flexibility is key.

- **Email:** Use for detailed updates, documentation, and formal communications.
- **Phone Calls:** Ideal for urgent issues, complex discussions, or personalized updates.
- **Video Conferences:** Use for detailed discussions, presentations, or demonstrations.
- **Messaging Apps:** For quick updates, reminders, or informal check-ins (if appropriate).

Example: "We will primarily communicate via email for detailed updates, but please feel free to call me directly if you have any urgent questions or need immediate assistance."

Building Long-Term Relationships

In today's fast-paced business environment, building and maintaining long-term relationships with customers is crucial for sustained success. HansaWorld's commitment to customer satisfaction is evident through our comprehensive implementation methodologies and ongoing support initiatives, designed to ensure customers not only adopt our Standard ERP solution effectively but also continue to gain value from it long after the initial deployment.

Implementation Methodologies

HansaWorld offers two main implementation methodologies to cater to different customer needs:

- **Rapid Implementation Methodology (RIM):** Ideal for customers seeking a quick setup with basic features. RIM focuses on core modules and avoids complexities.
    - **Benefits:** Faster go-live, lower costs, and a streamlined implementation process.
    - **Customer Involvement:** Customers play a significant role in the preparation and data entry stages, ensuring they understand the system thoroughly.
- **HansaWorld Implementation Methodology (HIM):** Suitable for complex and customized implementations that require detailed analysis and customer-specific developments.
    - **Benefits:** Tailored to meet specific business needs, ensuring all unique requirements are addressed.
    - **Comprehensive Support:** Involves extensive training, testing, and customization to ensure a successful deployment.

Ongoing Support and Training

- **Training Programs:** Utilize HansaWorld University’s training materials and webinars to educate customers and their teams on using SERP effectively.
- **Continuous Engagement:** Maintain regular contact with customers post-implementation to address any issues, provide updates, and gather feedback.
- **Customer Support:** Provide comprehensive support through multiple channels, including online forums, detailed manuals, and direct assistance, often facilitated by our partners under service level agreements (SLA).

Security and Compliance

Ensuring data security and compliance with regulations is critical for customer trust and satisfaction. HansaWorld provides comprehensive data security plans and complies with global standards. Ensure customers that SERP complies with relevant regulations such as GDPR and industry-specific standards.

Effective customer engagement is about understanding their needs, presenting tailored solutions, and building lasting relationships through excellent implementation and support. By leveraging HansaWorld's robust methodologies, industry-specific expertise, and commitment to innovation, sales teams can ensure successful customer engagements and long-term satisfaction.

PART 4: THE SALES PROCESS

Understanding and mastering the sales process is essential for driving success and achieving targets. The sales process at HansaWorld is meticulously designed to ensure a seamless and efficient journey from lead generation to closing the deal. By following a structured sales approach, we can ensure consistency and maximize productivity. In this section, we will outline our comprehensive sales strategy, detailing each stage of the sales process, from initial contact to onboarding, and provide best practices for leveraging CRM tools, handling objections, and closing deals.

Sales Strategy

A well-defined sales strategy is crucial for targeting the right customer segments and effectively communicating the value of HansaWorld's Standard ERP. Our sales strategy is designed to leverage the unique strengths of our product, such as comprehensive integration capabilities, rapid implementation times, and industry-specific solutions. By focusing on key market segments and articulating a compelling value proposition, we aim to position Standard ERP as the preferred choice for businesses seeking scalable and customizable ERP solutions.

Key Components:

- **Market Segmentation:** Identify key markets and industries that can benefit the most from Standard ERP's features. This includes retail, hotels, restaurants, production, rental, and project management sectors.
- **Value Proposition:** Articulate the specific benefits of Standard ERP, such as scalability, customization, and integration capabilities, to resonate with potential customers.
- **Marketing Channels:** Utilize a mix of digital marketing, industry events, webinars, and partner networks to reach potential customers. Ensure our messaging is consistent and emphasizes our unique selling points.
- **Partnerships:** Develop strategic partnerships with industry influencers and technology partners to extend our market reach and enhance our credibility.

Sales Stages and Pipeline Management

Understanding and mastering the various stages of the sales process is essential for achieving consistent and successful sales outcomes. Each stage, from initial contact to closing the deal, plays a crucial role in building a strong relationship with potential customers and guiding them toward a purchase decision. By clearly defining these stages, sales teams can ensure that no critical steps are missed, leading to a more efficient and effective sales process.

Pipeline management is equally important as it provides a comprehensive view of where each prospect is in the sales journey. Effective pipeline management allows us to monitor progress, identify bottlenecks, and accurately forecast sales results. This enables sales teams to allocate resources effectively, address potential issues promptly, and maintain a steady flow of deals through the pipeline. In this section, we will detail each stage of the sales process and discuss best practices for managing the sales pipeline, ensuring that our sales strategy is optimized for maximum efficiency and success.

Sales Stages:

1. **Prospecting:** Identify potential customers or partners and gather initial information.
2. **Qualification:** Assess the needs and potential of the lead to determine if they are a good fit for Standard ERP.
3. **Presentation and Meetings:** Deliver a compelling product demo and presentation tailored to the lead's specific needs.
4. **Solution Design/Quotation/Proposal:** Develop and present a customized proposal that outlines the solution and pricing.
5. **Negotiation:** Address any objections and negotiate terms to reach a mutually beneficial agreement.
6. **Closing the Deal:** Finalize the agreement and complete the necessary paperwork to close the deal.
7. **Onboarding:** Ensure a smooth transition to implementation and provide ongoing support.

1. Prospecting

By implementing a systematic lead generation process, we can ensure a steady flow of qualified prospects who are genuinely interested in HansaWorld's Standard ERP solutions.

Target Customer Profiles

Our ideal customers are mid-sized businesses across various industries, including retail, hotels, restaurants, production, and project management. These businesses benefit most from the scalability, customization, and comprehensive functionalities of SERP. When identifying target customers, focus on businesses where we have strong references, case studies, or active contracts, as these add credibility and strengthen our sales approach.

We also specifically target:

- **Companies offering a repetitive service with recurrent invoicing:** These businesses require reliable automation and streamlined invoicing processes to manage ongoing services efficiently, making Standard ERP an ideal solution.
- **IT companies selling software, support, services, and running projects:** With complex needs for managing projects, tracking billable hours, and integrating various service offerings, these companies will find the job costing and CRM modules of Standard ERP highly beneficial.
- **Companies renting out equipment:** These businesses often face challenges in managing rentals, tracking inventory, and scheduling maintenance. Standard ERP's rental and service orders modules provide a comprehensive solution to meet these needs.
- **Apple resellers:** Given our software's roots and continuous development in environments originally designed for Apple, our ERP solutions are optimized for businesses dealing with Apple products, ensuring seamless integration and superior performance. For Apple resellers, it is crucial to highlight our integration with Apple's Global Service Exchange (GSX), ensuring that Standard ERP seamlessly supports their specific operational needs.
- **Supporting Multiple Processes:** Standard ERP excels in environments where multiple, integrated business processes are essential. For example, in a golf club setting, our system seamlessly manages rental services, reservation bookings, point of sale, and food and beverage operations, all within a single platform. Another example could be Healthcare Facilities, SERP handles patient scheduling, billing, inventory management for medical supplies, and staff management, providing a unified solution that streamlines complex healthcare operations.This ability to handle diverse functions makes Standard ERP an ideal choice for businesses with complex operational needs.
- **Strategic Competitor Information:** Identify target customers based on known challenges faced by users of competitor systems, such as difficulties with recent localization changes or inadequate support services.

Understanding our ideal customers is fundamental to tailoring our sales approach and delivering solutions that meet their specific needs. By developing detailed customer profiles, we can better identify the unique challenges and requirements of businesses across various industries.

Utilize digital marketing, industry events, and partner networks to generate leads. Qualify leads by assessing their needs, budget, and decision-making process.

Identifying Potential Customers:

- **Market Research:** Conduct thorough market research to identify potential customers. Use industry reports, market analysis, and competitor insights to understand where your product can have the most impact.
- **Target Segmentation:** Segment your target market based on industry, company size, geographic location, and other relevant factors. This helps in focusing yours and our partners efforts on the most promising prospects.
- **Ideal Customer Profile (ICP):** Develop an ideal customer profile based on your most successful and satisfied customers, industries that are available in your market.

Gathering Initial Information:

- **Data Collection:** Use various sources to gather initial information about potential customers or new partners. This can include online databases, company websites, LinkedIn profiles, and industry publications.
- **Networking:** Attend industry events, conferences, and trade shows to meet potential customers and gather information firsthand. Networking helps build initial relationships and gather insights into their needs and challenges. Even if you don't have a booth, simply walking around exhibitions can be highly valuable. It allows you to connect with prospects in an informal setting, observe competitiors' offerings and strategies, and practice your sales pitch in real-time interactions. These experiences help refine your approach and deepen your understanding of market dynamics.
- **Business Networking Organizations:** Participating in business networking organizations such as business chambers, local business clubs, and networking events is a highly effective way to connect with key decision-makers, generate leads, and expand your professional network. These organizations often bring together a diverse range of businesses and professionals, providing opportunities to build relationships, share insights, and discover potential collaborations. Engaging with these groups helps increase brand visibility, positioning your company as a

trusted industry player within targeted communities. Regular attendance at these events not only strengthens your market presence but also provides valuable opportunities to introduce your solutions in a setting that fosters trust and credibility.

- **Referral Programs:** Implement referral programs to leverage your existing customer base and partners for introductions to new prospects. Referrals often lead to higher-quality leads and quicker trust-building. Additionally, consider partnering with complementary businesses, such as POS hardware resellers, who can suggest your ERP solutions while you recommend their products. Such sales partnerships create a mutually beneficial relationship, expanding your reach and enhancing your value proposition to customers.

2. Qualification

Qualifying leads is a critical step in the sales process that ensures we focus our efforts on prospects with the highest potential to convert into customers. Effective lead qualification helps in prioritizing opportunities and allocating resources efficiently. By assessing key factors such as business needs, budget, and decision-making processes, we can identify leads that align well with HansaWorld's Standard ERP solutions.

Understanding the Lead's Needs and Potential

1. **Initial Discovery Call:**
   - The initial discovery call is designed to gather detailed information about the lead's business, challenges, and goals. This conversation helps you understand their needs and assess whether Standard ERP can provide a suitable solution.

     Before the call, review any available information about the lead's company, industry, and potential pain points. This will allow you to ask relevant and insightful questions.
2. **Use of Qualification Frameworks:**
   - **BANT Framework:** Assess the lead based on Budget, Authority, Need, and Timing.
     - **Budget:** Determine if the lead has the financial capacity to invest in an ERP solution. Ask questions like, "What budget range have you allocated for this project?"
     - **Authority:** Identify the decision-makers involved in the purchase process. Ask, "Who will be involved in the decision-making process for this purchase?"
     - **Need:** Understand the specific problems they are looking to solve. Questions like, "What are the biggest challenges you're currently facing with your existing systems?" can uncover critical needs.
     - **Timing:** Assess the lead's timeline for making a decision and implementing the solution. Ask, "What is your timeline for implementing a new ERP system?"
3. **Assessing Fit with Standard ERP:**
   - **Alignment with Features:** Determine if the lead's needs align with the features and capabilities of Standard ERP. For example, if they require robust inventory management, ensure that this is a strong feature of Standard ERP.
   - **Customization Requirements:** Identify any specific customization needs the lead might have.
   - **Industry-Specific Needs:** Consider if the lead's industry has specific requirements that Standard ERP can address. For instance, a manufacturing company may need features related to production planning and scheduling.
   - **Open-ended Questions:** Use open-ended questions to encourage detailed responses. For example, "Can you describe the biggest challenges you're facing with your current system?" or "What are your top priorities for this project?"
   - **Follow-up Questions:** Dig deeper into responses with follow-up questions. For example, if a customer mentions a specific challenge, ask, "Can you elaborate on how this issue impacts your daily operations?"
4. **Evaluating the Lead's Potential:**
   - **Company Size and Growth Potential:** Assess the size of the lead's company and their growth trajectory. Larger companies or those with significant growth potential may offer more opportunities for long-term engagement and upselling.

- **Existing Systems and Pain Points:** Understand the lead's current systems and the pain points they are experiencing. This will help you position Standard ERP as a superior solution.
- **Strategic Fit:** Consider if the lead aligns with your company's strategic goals. For example, if you are focusing on expanding in a particular industry or geographic region, prioritize leads that fit these criteria.

5. **Scoring and Prioritizing Leads:**
   - **Lead Scoring:** Implement a lead scoring system to rank leads based on their fit and readiness to buy. Assign scores to various criteria such as budget, authority, need, timing, company size, and strategic fit.
   - **Prioritization:** Use the lead scores to prioritize your follow-up efforts. Focus on high-scoring leads that show the greatest potential for conversion and align well with your product offerings.
6. **Next Steps:**
   - **Tailored Follow-up:** Based on the information gathered, tailor your follow-up communication to address the specific needs and concerns of the lead. Provide relevant case studies, whitepapers, or demo videos that align with their interests.
   - **Setting Expectations:** Clearly outline the next steps in the sales process, including scheduling a detailed product demo, arranging meetings with technical experts, or providing a customized proposal.
   - **Follow-up Strategy:** Develop a follow-up strategy to maintain regular contact with prospects. Consistent follow-ups keep you top of mind and help build a relationship over time.

By thoroughly qualifying leads, you can ensure that your sales efforts are focused on prospects with the highest potential for conversion. This strategic approach not only increases your chances of closing deals but also helps build strong, long-term relationships with customers who are a good fit for Standard ERP.

> At the end of this document, you will find an annex titled **"Prospecting and Lead Qualification Checklist."** This section provides a step-by-step guide to help you effectively identify, evaluate, and qualify potential leads.

Pipeline Management and CRM Usage

Prospecting should be a continuous activity. Dedicate regular time each week to identify and reach out to new potential customers.

- **Tracking:** Use CRM tools like our Workflow Overview to track the status of each lead and opportunity through the sales stages.
- **Partner leads:** Partners should ensure that all leads are registered in the Partner Portal. This step is critical for tracking and managing potential sales opportunities effectively.
- **Regular updates:** Keep the CRM data current by regularly updating the status of leads and sales activities.
- **Forecasting:** Analyze the sales pipeline to forecast future sales and identify potential revenue.
- **Optimization:** Identify and address any bottlenecks or challenges in the sales process to improve efficiency.

Utilizing Customer Relationship Management (CRM) tools effectively is essential for managing leads, tracking interactions, and streamlining the sales process. Best practices for CRM usage ensure that our sales team and partners can maintain an organized, up-to-date, and accurate sales pipeline, enabling informed decision-making and efficient workflow management. By adhering to these practices, we can enhance customer interactions, improve data integrity, and ultimately drive better sales outcomes.

Freezing and Unfreezing Prospects

Managing prospects through different stages of engagement, especially when they are not ready to proceed immediately, is crucial for maintaining relationships and re-engaging them when the timing is right. There are various reasons why a prospect might not be ready to move forward, such as internal budget constraints, shifts in business priorities, or a need for further internal alignment. Understanding the psychology behind these delays is important; prospects often freeze the process due to a lack of urgency, fear of making the wrong decision, or needing more time to gather additional information and secure internal buy-in. By recognizing these factors and managing the freezing and unfreezing process effectively, you can maintain a positive relationship with the prospect and increase the likelihood of closing the deal when they are ready to move forward.

Identifying When to "Freeze" a Prospect

- **Lack of Engagement:** Recognize signs such as reduced communication, postponed meetings, or expressed budget constraints. These indicators suggest that the prospect might not be ready to move forward, and it may be prudent to put the engagement on hold.
- **Clear Communication:** Have an open conversation with the prospect to understand their reasons for delay. If they are not ready to proceed, suggest pausing the engagement and agree on a timeline for revisiting the discussion.

Strategies for Maintaining Engagement During the Freeze Period

- **Keeping in Touch:** Periodically check in with the prospect to maintain the relationship. These check-ins should be light and value-focused, such as sharing industry insights, new product features, or relevant success stories. This keeps the prospect engaged without pressuring them to make immediate decisions.
- **Educational Material:** Providing valuable content, such as whitepapers, case studies, or invitations to webinars, helps keep the prospect informed and demonstrates your ongoing commitment to their business needs. Tailoring this content to their specific interests can make these touchpoints more impactful.
- **Tailored Communication:** Send updates that are specifically relevant to the prospect's industry and challenges. Personalized communication shows that you understand their business and are continually thinking about how your solution can benefit them.

Getting Further Internal Alignment and Techniques for "Unfreezing" and Re-Engaging Prospects

Reassessing Needs: When re-engaging, bring new insights or updates to the table. Schedule a meeting to discuss any changes in their business or industry that may now make them more ready to proceed. This approach positions you as a proactive partner, not just a vendor. Ensure that all relevant decision-makers within the prospect's organization are involved in the discussions.

Use the insights from your competitive analysis to highlight what makes your ERP solution unique. Develop a compelling value message that clearly communicates the benefits of your ERP solution. This message should address the key pain points identified in your competitive analysis and position your product as the best choice.

3. Presentation, Meetings and HansaWorld Impact Selling Technique

The HansaWorld Impact Selling Technique is a dynamic sales approach designed to deliver high-impact presentations that highlight the most compelling features and benefits of our ERP solutions. This method is crafted to make an immediate and strong impression, allowing potential customers to quickly see the value and relevance of our products without the need for extensive initial consultations.

How to Execute the HansaWorld Impact Selling Technique

Preparation:

- **Identify Key Features:** Focus on the features of HansaWorld ERP that will resonate most with the target audience, such as integration capabilities, scalability, and industry-specific solutions.
- **Run Power Demos:** Perform visually impressive and functionally rich demonstrations that showcase these key features.
- **Craft Persuasive Messages:** Check our spotlight scripts for concise, impactful messaging that clearly articulates the benefits and unique selling points (USPs) of our SERP solution, emphasizing emotional appeal and practical benefits.

Presentation:

- **Engage from the Start:** Begin with a powerful opening that captures the audience's attention, such as a startling fact or a compelling question.
- **Showcase Key Features:** Use our spotlights and power demos to illustrate how SERP can address common business challenges and enhance operations.
- **Highlight Immediate Benefits:** Emphasize quick wins and immediate value that the product can deliver, ensuring the audience can see the practical benefits right away.

Handling Questions:

- **Anticipate Common Questions:** Be prepared for typical inquiries and have ready-made, compelling responses that keep the focus on the product's impact. Ideally, incorporate answers to common questions directly into your presentation, proactively addressing potential concerns before they arise. By doing so, you prevent participants from introducing doubts or "planting seeds" of uncertainty while showcasing your deep understanding of the product. This approach ensures a more seamless, confident presentation and keeps the focus on the value and impact of your solution.
- **Stay Focused on Impact:** Steer the conversation back to the core features and benefits that create the most impact, using customer success stories as examples.

Why HansaWorld Impact Selling Works:

- **Efficiency:** Quickly demonstrates the product's value without extensive preliminary meetings, saving time for both the sales team and the customer.
- **Immediate Connection:** Allows potential customers to instantly see the relevance and benefits of the product, fostering a stronger initial connection.
- **High Engagement:** Captures and maintains the audience's attention through powerful demonstrations and emotionally engaging presentations (engaging presentations does not mean using slides, quite the contrary).

By adopting the HansaWorld Impact Selling Technique, you can effectively impress potential customers and drive sales through high-impact, memorable presentations that highlight the unparalleled value of SERP.

Power Demos:

- **Concise and Impactful:** Power demos should be concise, impactful, and focused on the most compelling features of Standard ERP. These demos are designed to quickly capture the customer's attention and highlight the system's key strengths.
- **Preparation:** Prepare power demos in advance, ensuring they are well-structured and tailored to the audience. Practice delivering these demos to ensure smooth and confident execution.

Spotlights:

- **Focused Feature Demonstrations:** Spotlights are short, focused demonstrations that highlight specific features or modules of Standard ERP. These can be used during follow-up meetings or as part of a larger presentation.
- **Targeted Approach:** Use spotlights to address particular areas of interest or concern for the customer. For example, if a customer is particularly interested in CRM capabilities, a spotlight demo can delve deeply into this feature.

By utilizing detailed demo scripts, incorporating common business scenarios, and using power demos and spotlights effectively, we can enhance the impact of our product demonstrations. This approach ensures that customers clearly see the value of Standard ERP and how it can address their specific needs, ultimately driving more successful sales outcomes.

> For sales teams and partners looking to deliver effective product demonstrations, comprehensive demo scripts are available on the Partner Portal at hansaworld.com. Within the portal's "Video Demonstrations" section, you will find resources such as **Standard ERP Basic: Part 1, Part 2, and Part 3**, which include detailed scripts and demo data to guide you through showcasing the core functionalities of SERP.

Additionally, this section contains demo materials tailored to specific modules and verticals, complete with videos and supporting demo data, ensuring that you can provide customized and industry-relevant presentations to potential customers.

When conducting demos, it's crucial to remain flexible and responsive to the customer's needs rather than strictly following a script. While prepared demos provide a solid foundation, the key to a successful demonstration lies in adapting to the customer's specific interests and business requirements.

Handling Objections

Addressing objections effectively is crucial to moving the sales process forward. Common objections may relate to cost, implementation time, system compatibility, or the perceived complexity of the product.

Strategies for Handling Objections:

- **Listen Actively:** Ensure you understand the objection fully before responding.
- **Acknowledge the Concern:** Show empathy and validate the customer's concern.
- **Provide Evidence:** Use data, case studies, and testimonials to demonstrate how the concern can be addressed.
- **Reframe the Conversation:** Steer the discussion back to the core benefits and value of the ERP system.
- **Offer Solutions:** Provide practical solutions or alternatives that can mitigate the concern.

Examples of Common Objections and Responses

Cost:

- **Objections:** "The initial investment seems high."
- **Response:** "While the initial investment is an important consideration, our customers typically see enough benefits within the first year due to significant efficiency gains and cost savings. Additionally, our subscription model offers flexibility, allowing you to scale the system as your business grows without substantial upfront costs."

Implementation Time:

- **Objection:** "We're concerned about the time it will take to implement the system."
- **Response:** "Our Rapid Implementation Methodology (RIM) ensures that core features can be deployed quickly, minimizing disruption to your operations. Most customers are able to start using the essential functions of Standard ERP within a few weeks, allowing your team to transition smoothly."

System Compatibility:

- **Objection:** "We're worried that Standard ERP won't integrate with our existing systems."
- **Response:** "Standard ERP is designed with flexibility in mind, offering seamless integration with a wide range of existing systems and third-party applications. This ensures a smooth transition and continuity of operations without needing to overhaul your current setup."

Customization:

- **Objection:** "Will the system be flexible enough to meet our unique business needs?"
- **Response:** "Standard ERP offers extensive customization options through our Hansa Application Language (HAL), enabling you to tailor the system to your specific processes and requirements. This allows the system to evolve with your business."

Scalability:

- **Objection:** "Can the system grow with our business?"
- **Response:** "Standard ERP is designed to scale effortlessly, supporting businesses of all sizes. Whether you're expanding to new markets or increasing your operational complexity, Standard ERP can accommodate your growth without requiring a system change."

User Adoption:

- **Objection:** "We're concerned about how our team will adapt to the new system."
- **Response:** "Our intuitive user interface and comprehensive training programs make it easy for your team to adopt Standard ERP."

Data Security:

- **Objection:** "How secure is our data with Standard ERP?"
- **Response:** "Data security is a top priority for us. Standard ERP includes robust security measures such as encryption, access controls, and regular security audits to protect your data. Additionally, our system complies with global data protection regulations like GDPR."

Vendor Reliability:

- **Objection:** "How reliable is your support and system uptime?"
- **Response:** "HansaWorld has a proven track record of over three decades in the ERP industry. Our global support network, forums and comprehensive service level agreements (SLAs) ensure reliable support and system uptime, giving you peace of mind that your operations will run smoothly."

Long-Term Value:

- **Objection:** "How does this system provide long-term value for my business?"
- **Response:** "Standard ERP is not just a software solution; it's a strategic investment in your business's future. With continuous updates, scalability, and customization, it adapts to your evolving needs, ensuring you stay competitive and efficient over the long term."

Industry-Specific Needs:

- **Objection:** "We operate in a niche industry with specific needs. How can Standard ERP address these?"
- **Response:** "Standard ERP offers industry-specific modules tailored to meet the unique challenges of various sectors, including retail, hotels and manufacturing. These modules are designed to provide the exact functionalities you need to optimize your operations. Additionally, Standard ERP's extensive customization capabilities allow us to further tailor the system to your specific business processes and requirements, ensuring a perfect fit for your unique needs."

Effective Meetings

Conducting effective meetings is essential to maintain momentum in the sales process and ensure productive engagements with potential customers. Here's how to structure and conduct meetings effectively:

Preparation:

- **Research the customer:** Before the meeting, gather as much information as possible about the customer's business, industry, challenges, and goals. This will help tailor your presentation to address their specific needs.
- **Set Clear Objectives:** Define the goals of the meeting. Are you aiming to gather information, present a proposal, or close the deal? Clear objectives help keep the meeting focused.
- **Prepare Materials:** Ensure all necessary materials, such as presentation slides, product demos, spotlights, battle cards, and case studies, are ready and tailored to the customer's needs.

Conduct the Meeting

Conducting an effective meeting is crucial for building trust, gathering valuable information, and advancing the sales process. Here's how to ensure your meetings are productive and engaging:

Start with a Clear Agenda

- **Outline the Agenda:** Begin the meeting by outlining the agenda to set expectations and ensure all participants are aligned on the objectives. This helps keep the meeting focused and organized. Effective time management is crucial for conducting productive meetings. Ensuring that meetings start and end on time demonstrates respect for all participants' schedules and helps maintain focus and efficiency.

Engage Participants

Engaging participants effectively during a meeting is key to building rapport, gathering valuable insights, and ensuring a productive dialogue. By creating an interactive and welcoming environment, you can encourage prospects to open up and share their needs and concerns. This engagement not only helps in understanding the prospect's requirements better but also establishes trust and fosters a collaborative atmosphere. Here's how to engage participants successfully:

- **Use Interactive Techniques:** Encourage participation by asking open-ended questions, facilitating discussions, and actively listening to responses. This helps the prospect open up and builds a more engaging and informative dialogue.
- **Mind your Body Language:** Be mindful of your body language to convey openness and trustworthiness. Your goal is to win the prospect's trust and make them feel comfortable.

- **Balance the Conversation:** Aim to speak 40% of the time, allowing the prospect to speak 60%. This ensures you gather as much information as possible and make the prospect feel heard.

Stay Focused:

Maintaining focus during meetings is essential to ensuring that objectives are met and that the conversation remains productive. By guiding the conversation back to the agenda when it goes off track, you can ensure discussions remain focused and relevant. Building rapport with the prospect is equally important; getting to know them on a personal level helps establish a strong connection and fosters a collaborative environment.

Collaborate with Colleagues (if possible):

Collaborating with colleagues during meetings can enhance the quality of the discussion and provide additional insights. Attending meetings with a colleague not only offers support but also brings diverse perspectives to the table. Including co-sales and pre-sales experts from other countries can add value by uncovering additional needs and providing specialized knowledge.

Take Detailed Notes:

- **Record Key Points:** Take notes during the meeting to capture the customer's words and descriptions of their difficulties. This allows you to quote them later, highlighting the cost or lost opportunities of not addressing their challenges.
- **Follow-up:** Ensure you document any unanswered questions or follow-up items. If you don't know the answer to a customer's question, admit it and commit to finding the answer or connecting them with someone who can help.

Use of Visual Aids:

- **Demonstrate the Product Live:** Focus on live product demonstrations rather than slide presentations. This approach allows you to showcase the team, the local company, and the product in action. Live demos are more engaging and can effectively uncover additional needs while providing a dynamic and interactive way to present information.

Identify Budget and Decision Makers

How to Identify the Budget:

Understanding a customer's budget can provide valuable insights into their purchasing power and constraints, enabling you to tailor your presentation and proposal more effectively. By identifying the budget early in the sales process, you can better align HansaWorld's solutions with the customer's financial capabilities, ensuring a more focused and productive discussion.

- **Direct Questions:** During initial conversations, ask direct questions about the budget to understand their financial capacity. Phrases can be key, such as "What budget range have you allocated for this project?"
- **Contextual Clues:** Pay attention to contextual clues during discussions. Statements about cost concerns or previous expenditures on similar projects can provide insights into their budget. For example "Have you been exploring other options? Could you tell us about some of them?"
- **Financial Information:** Review public financial information if available. Annual reports, financial statements, or press releases can give a sense of the organization's financial health and spending capacity.

For a detailed, structured approach to identifying and managing budgets, please refer to the annex titled **"Identifying the Budget: Step-by-step Guide,"** located at the end of this document.

How to Identify Decision-Makers:

In the sales process, it is crucial to identify and engage with the decision makers within a prospective customer's organisation asap. Knowing who holds the authority to approve purchases and make final decisions allows you to tailor your approach and ensure your message reaches the right individuals. Identifying decision makers early on helps streamline the sales cycle, minimizes delays, and increases the likelihood of a successful outcome. By focusing your efforts on the key stakeholders, you can effectively address their specific concerns and demonstrate how HansaWorld's solutions meet their needs. Focusing on key decision-makers is essential, as lower-level employees may not have the authority to drive purchasing decisions. Leverage LinkedIn to identify and connect with stakeholders who influence or approve the buying process.

- **Organizational Hierarchy:** Understand the customer's organizational structure. Knowing who holds key positions can help identify who is likely to be involved in the decision-making process.
- **Direct Inquiry:** Ask questions to understand the decision-making process. For example, "Can you walk me through your decision-making process for this type of purchase?" or "Who else in your organization will be involved in this decision?"
- **Engage Stakeholders Early:** During meetings, ensure that key stakeholders are present. If not, request introductions to those who will be involved in the decision.

> To streamline the sales process and ensure you are engaging with the right individuals, we have provided the **"Decision-Maker Identifier Checklist"** in the annexes. This tool will help you identify key stakeholders and decision-makers within a potential customer's organization, ensuring your efforts are focused on those who have the authority and influence to drive the purchase decision.

Company Presentation and Demo Guidelines

Company Presentation: Start your meeting with a concise and impactful company overview. Highlight our global presence by mentioning that HansaWorld operates in 100 countries and has been a leader in the industry for 30 years. Share the HansaWorld story, emphasizing our multilingual and multi-country capabilities, and provide a brief background of our founder to establish credibility.

First 15 Minutes: Within the first 15 minutes, focus on showcasing the company's top features. Begin with the Customer Status Report to demonstrate the seamless integration of CRM and ERP functionalities. This approach will quickly illustrate the efficiency and comprehensiveness of our solutions.

Technical Details: Avoid going into deep technical details during the initial meeting. Instead, highlight the system's capabilities through live demonstrations of reports and emphasize the speed and efficiency enabled by our advanced tools. This will keep the conversation engaging and accessible.

Emotional and Professional Demo: Ensure your demonstration is both professional and emotionally engaging. Highlight what sets us apart from competitors with statements like, "Unlike most of our competitors, we...". This approach helps to build a strong, memorable impression.

Decision-Maker Presence: Always strive to have a key decision-maker present during the demo. Technical leads can provide valuable insights, but having a buying manager ensures that the necessary authority for purchasing decisions is in the room.

Elevator Pitch: Be prepared to deliver your core messages effectively, even without visual aids. Focus on clear and concise communication of key points to ensure that your audience can grasp the essential benefits and features of our solutions without relying on a screen. For example:

Integrated Communication Centre: "Our integrated communication center streamlines all your communication channels—emails, calls, and messages—within the ERP system. This integration enhances collaboration and ensures no important information slips through the cracks."

Integrated CRM: "Our integrated CRM functionality allows you to manage customer relationships within the same platform as your ERP. This means better data consistency, improved customer service, and a comprehensive view of customer interactions all in one place."

Workflow Management: "Standard ERP's workflow management capabilities provide a graphical overview of your processes, helping you streamline operations and improve efficiency. You can easily track tasks, approvals, and deadlines to ensure everything runs smoothly."

Drill-Down Capabilities: "Our advanced drill-down capabilities allow you to explore data in depth. From summary reports, you can easily navigate to detailed records, providing clarity and insight without switching between multiple systems."

> Delivering an effective product demonstration is critical to showcasing the value of our ERP solutions. For a comprehensive guide on how to prepare, including key steps to ensure your demo is impactful and aligned with customer needs, please refer to the **"How to Prepare for a Demo: Step-By-Step"** annex at the end of this document.

4. Solution Design, Quotation, Proposal

Tailoring the ERP solution to meet the customer's unique requirements quickly is crucial for demonstrating its value and effectiveness.

Steps to Craft Customized Solutions

1. **Quick Needs Assessment:** Use the information gathered during the initial consultation to identify the specific modules and features of Standard ERP that will address the customer's needs.
2. **Solution Mapping:** Quickly map the identified needs to the functionalities of Standard ERP. Create a brief solution list that shows how each feature addresses a specific need.
3. **Customization:** Identify any essential customizations required. Focus on quick wins and high-impact customizations.
4. **Scalability:** Highlight how Standard ERP can grow with the customer's business, accommodating increasing complexity and scale.
5. **Integration:** Emphasize the seamless integration capabilities that eliminate the need for multiple disparate systems.

Proposal Templates and Best Practices

Use standardized proposal templates to ensure consistency and professionalism. Tailor these templates to reflect the specific requirements and benefits for each customer.

Key Components of a Proposal:

1. **Executive Summary:** Provide a brief overview of the customer's needs and how Standard ERP addresses them.
2. **Company Overview:** Include a brief introduction to HansaWorld, emphasizing our experience, global presence, and commitment to innovation.
3. **Customer Needs and Goals:** Summarize the customer's specific needs and goals based on the needs analysis.
4. **Proposed Solution:** Detail the proposed solution, including the specific modules and features of Standard ERP that will address the customer's needs.
5. **Customization and Integration:** Outline any required customizations and integrations, and how they will be achieved.
6. **Data Migration:** Describe the approach to data migration (if needed), ensuring a seamless transition of existing data into SERP.
7. **Implementation Overview:** Provide a high-level overview of the implementation process, without going into extensive detail.
8. **End-User Training:** Highlight the training plans designed to equip end-users with the knowledge and skills needed to use SERP effectively.
9. **Value Proposition:** Highlight the expected benefits and impact of the proposed solution.
10. **Terms and Conditions:** Include the terms and conditions of the proposal, including pricing, payment terms, and support arrangements (SLAs).

Best Practices for Proposal Writing

- **Clarity and Conciseness:** Ensure the proposal is clear and concise, avoiding jargon and overly technical language, and a tone that sounds too marketing-oriented or sales-driven.
- **Visuals:** Use visuals to illustrate key points and make the proposal more engaging.
- **Customer Focus:** Keep the focus on the customer's needs and how the solution addresses them. Avoid generic content that does not add value.
- **Proofreading:** Carefully proofread the proposal to eliminate errors and ensure it presents a professional image.

Quoting and negotiating are important steps in the sales process, particularly with ERP systems, where deals are often complex and involve multiple stakeholders. Learning these processes can greatly affect the result of sales efforts, fostering long-term relationships and driving business success. The next sections cover the intricacies of creating compelling quotes, implementing effective pricing strategies, and using proven methods for negotiating and closing ERP deals.

Quotation Process

Creating accurate and persuasive quotes is essential for demonstrating professionalism and a thorough understanding of the customer's needs. Begin by conducting a detailed study of the customer's needs. Once the requirements are clear, craft a quote that not only lists products and services but also aligns with the unique needs of the customer. This customization demonstrates your commitment to addressing their specific challenges and adds value to your proposal.

Before sending out a quote, ensure it is carefully reviewed internally. This step is critical to maintaining accuracy, ensuring compliance with company policies, and avoiding potential errors that could undermine credibility. Involving relevant managers or departments in the review process can help verify the quote's comprehensiveness and alignment with strategic goals.

Pricing

Effective pricing strategies are crucial for closing ERP deals. These elements not only impact the financial aspects of the deal but also influence customer satisfaction and long-term relationship building.

Pricing transparency is a critical component of building trust with customers and ensuring a smooth sales process. Clear pricing helps customers know what they are paying for and why, eliminating confusion and fostering a positive relationship from the start. Being upfront about all potential costs helps build long-term relationships and customers appreciate honesty. Make sure that all terms and conditions related to pricing are clearly stated.

Subscription-based Pricing

In today's market, subscription-based pricing models are highly attractive as they offer flexibility and scalability. Providing customers with options for monthly, quarterly, or annual billing allows them to choose a plan that fits their financial cycle and operational needs. Highlighting the benefits of each plan, such as cost savings with annual subscriptions or the flexibility of monthly plans, can aid in the decision-making process.

The subscription model offers significant benefits, including greater cash flow flexibility by allowing businesses to scale server resources and user licenses up or down according to their needs, reducing the burden of large upfront investments and simplifying budgeting. Additionally, subscriptions support business growth by offering scalable resources and services that can adapt as the company evolves, ensuring that the solution remains aligned with their changing needs.

Discount Strategies

1. **Understanding Pricing and Functionality**
    - Before considering discounts, it is crucial to understand and articulate the value of our products. Standard ERP offers comprehensive features and functionalities that deliver significant benefits to businesses. Emphasize these benefits to potential customers, ensuring they appreciate the inherent value of the solution.
    - Discounts should not be the first tool for closing a sale. Instead, focus on matching the product's features with what the customer needs, thereby justifying the pricing. Only when the customer fully understands the product's value proposition should discounts be discussed.
2. **Scenarios for Discounting**
    - **Entering New Markets:** Discounts may be more readily offered when entering new geographical markets or industries where establishing a presence is strategic. In these cases, offering a discount can help overcome initial market entry barriers and build a customer base.
    - **New Partners and References:** For new partners or customers who can provide valuable references or case studies, which is crucial for attracting further business. Discounts may be considered when customers or partners engage in joint marketing efforts, co-branded campaigns, or other promotional activities.
    - **Long-Term Commitments or Volume Discounts:** Discounts are more likely to be granted for long-term subscriptions or multi-year contracts, especially when prepayment is involved. This not only secures future revenue but also mitigates the impact of inflation, benefiting both the customer and HansaWorld.
3. **Requesting and Approving Discounts**
    - **Discount Request Process:** All discount requests should be accompanied by a clear rationale, detailing the specific business case or strategic value the discount will bring. This includes documenting how the discount aligns with our overall sales and market penetration strategy.
    - **Approval Workflow:** Discounts require approval from senior management to ensure they align with company policies and financial objectives. The request should include:
        - The proposed discount percentage and duration, typically limited to one year, with renegotiation required annually unless otherwise agreed.

- Justification for the discount, including any anticipated long-term benefits (e.g., market penetration, reference opportunities).
- A plan for ensuring the customer's continued satisfaction and engagement, ensuring the discount translates into a long-term partnership.

- **Prepayment and Long-Term Discounts:** For discounts offered in exchange for prepayment, ensure that the contract terms include clear clauses on the payment schedule, product delivery, and any inflation adjustment mechanisms.

Region-Specific Considerations in Quoting

It's important to be aware of regional business practices and cultural expectations, which can significantly impact the negotiation process and final agreement. In certain regions, there is often an expectation of discounts regardless of the initial price offered. This cultural nuance means that the initial quote may be viewed as a starting point for negotiation rather than a final offer.

To navigate these expectations effectively:

- **Research Local Practices:** Understand the typical negotiation behaviors and discount expectations in the customer's region before drafting the quote.
- **Clear Communication:** Be transparent about the value and benefits of your product to justify the initial pricing.
- **Prepare for Negotiations:** Be ready to discuss the quote in detail and to offer concessions that align with regional expectations while maintaining the perceived value of your product.

By being mindful of these region-specific practices, you can craft quotations that respect cultural norms, build trust, and increase the likelihood of closing the deal on favorable terms.

5. Negotiation

Negotiating ERP deals requires a strategic approach that balances firmness with flexibility. When negotiating with customers, it's essential to build value by emphasizing the efficiency and cost savings that Standard ERP can bring to their operations. Highlight how implementing Standard ERP can lead to significant improvements in efficiency and operational performance, streamlining processes, reducing errors, and enhancing productivity. Use real-world examples, tailored to the specific industry and operational context of the customer, to make the value proposition more relatable and compelling.

Additionally, it's important to emphasize the specific features and modules of SERP that align with the customer's needs, showing how these features will directly benefit their operations, improve workflows, and solve their current challenges. By focusing on these aspects, you can build a compelling case for the value of SERP without relying on complex or arguable calculations, ensuring that the customer understands the practical benefits and improvements your solution can deliver.

Finding Common Ground

In any negotiation, the ability to find common ground is crucial to building a lasting and mutually beneficial partnership. This involves not only understanding the needs and priorities of both parties but also recognizing the broader impact of the agreement. By focusing on shared goals and aligning interests, you can create solutions that benefit everyone involved, fostering a collaborative atmosphere that drives success for both the customer, our partners and HansaWorld.
The following strategies will guide you in navigating these discussions to ensure that all stakeholders emerge as winners.

- **Mutual Benefits:** Successful negotiation depends on finding a win-win-win solution. Engage in discussions that explore both parties' priorities and constraints. By understanding what the customer values most—be it cost, implementation speed, or customization—you can propose solutions that align with their expectations while meeting your sales objectives.

  However, the benefits extend beyond just the two parties involved. When a company implements Standard ERP, not only do they and HansaWorld win, but their entire ecosystem—including customers, partners, suppliers, employees, and auditors—also benefits. Standard ERP enhances organization and efficiency, leading to smoother operations, better compliance, and more reliable business interactions. By facilitating a well-organized business environment, SERP helps create a ripple effect of positive outcomes for all stakeholders involved.

- **Adaptability:** Demonstrating flexibility in negotiations can foster goodwill and trust. Whether it's adjusting payment schedules, offering phased implementation, or providing additional training sessions, showing a willingness to accommodate the customer's needs can be a deciding factor in closing the deal. Discuss the customer's budget to ensure alignment with what can be delivered and identify any necessary adjustments to meet their expectations. Highlighting your adaptability can reassure the customer of your commitment to their success.

6. Closing the Deal

Successfully closing a sale is the culmination of the entire sales process and requires a combination of strategic techniques, clear communication, and thoughtful engagement. This phase is crucial because it translates all your efforts into tangible results, ensuring that the customer feels confident in their decision and is excited about moving forward. A decision to buy is not automatic; it often requires guiding the prospect through the final stages of their decision-making process. Salespeople must navigate this phase with confidence while also addressing any remaining concerns the customer may have.

Creating Urgency

Creating a sense of urgency is essential to motivate potential customers to make a decision promptly. This can be achieved through several techniques:

- **Time-Sensitive Offers:** Present discounts, special deals, or added-value services that are available for a limited time to encourage swift decision-making.
- **Scarcity and Exclusivity:** Highlight limited availability or exclusive offers to create a psychological trigger that drives urgency.
- **Availability of the Implementation Team:** Emphasize that the implementation team's availability is limited, which can affect project timelines if a decision is delayed.
- **Market Competitiveness:** Emphasize the competitive advantages of implementing Standard ERP sooner, positioning the customer ahead of their competitors.
- **Highlighting Immediate Benefits:** Focus on the quick wins and immediate value the customer will gain from implementing the solution.
- **Target Specific Dates:** Set a clear go-live target, such as January 1st, to stress that starting the implementation immediately is crucial to meet the desired deadline.

Providing Clear Next Steps

Once a verbal agreement is reached, it's essential to guide the customer through the next steps:

- **Structured Plan:** Provide a clear, structured plan outlining timelines for contract signing, initial payments, and implementation kickoff.
- **Documentation and Formalities:** Ensure all necessary documentation is prepared and reviewed promptly to prevent delays and maintain momentum.

Building Confidence and Making Prospects Feel They Are Taking the Right Decision

One of the most crucial aspects of guiding prospects towards a purchase is building confidence in their decision-making process. As a sales professional, your role extends beyond presenting the features and benefits of SERP; **you must also build a strong emotional connection with the prospect, making them feel that they are making the right choice for their business.**

To achieve this, focus on affirming their understanding of their needs and how Standard ERP aligns with their goals. Reiterate the value propositions that resonate most with them, using clear, relatable examples that demonstrate how Standard ERP has successfully addressed similar challenges in other organizations. This helps create a sense of familiarity and trust, reassuring the prospect that they are not alone in their journey.

Furthermore, ensure that all communications are transparent and consistent. Prospects should never feel left in the dark or overwhelmed with information. Instead, guide them through the decision-making process with empathy, patience, and clarity. By doing so, you not only help them make an informed decision but also foster a positive perception of your brand as a trusted advisor.

Engaging Key Stakeholders

Ensure that all key decision-makers are involved in the closing discussions. Engage with executives, decision makers and financial officers to expedite the approval process and ensure alignment. Present a unified front by involving your own internal stakeholders, demonstrating the company's commitment and adding credibility to the process.

Checking Buying Signals

Pay close attention to buying signals, both physical and non-physical, to determine if the customer is ready to close. Look for relaxed body posture, facial expressions, and smiling, indicating reduced defensiveness. Note the customer's increased interest, ownership-like behavior, requests for documentation, or new questions being asked.

Techniques for Earning the Right to Ask for the Order

Use trial closes to test whether the time is right for the prospect to make their buying decision. Ask questions that allow the prospect to comment on their thought process without being pressured into a final decision, such as inquiring about preferred installation locations.

Why the time is now to make a decision

In today's fast-paced business environment, the speed at which decisions are made can often determine an organization's success. When engaging with prospects, it is important to emphasize why now is the ideal moment to adopt Standard ERP. Delaying a decision can lead to missed opportunities, increased costs, and the risk of falling behind competitors who are more agile in their approach.

Highlight the cost of inaction by illustrating how inefficiencies, outdated systems, or fragmented processes can continue to drain resources and hamper growth. Demonstrate how Standard ERP's integrated solutions can immediately begin addressing these pain points, driving tangible improvements in efficiency, productivity, and decision-making.

It’s also crucial to frame the decision as an opportunity to future-proof their business. As markets evolve and customer expectations shift, having a robust, adaptable ERP system in place becomes not just a benefit but a necessity. Stress the importance of staying ahead of industry trends and technological advancements to avoid the pitfalls of playing catch-up later on.

Additionally, time-sensitive incentives, such as limited-time offers or favorable subscription terms, can create a sense of urgency. These should be presented not as pressure tactics, but as added value that underscores the benefit of acting promptly.

In essence, guide prospects to see that the risks associated with delaying a decision far outweigh any perceived benefits of waiting. By positioning Standard ERP as a timely solution to their immediate and future needs, you help them recognize that now is the right time to take action.

Strategies for Guiding Customer Decisions

Effectively guiding customer decisions is an essential part of the sales process. This section explores various strategies that can help you influence the decision-making journey of potential customers. By focusing on key principles such as trust-building, value framing, and timing, you can better navigate customer concerns and steer them towards choosing Standard ERP. These techniques will enhance your ability to connect with prospects, address their needs, and drive successful outcomes.

1. The Role of Cognitive Biases in Decision-Making

- **Anchoring Effect:** Initial information can heavily influence decisions. This can be applied by emphasizing key selling points early in discussions or demos.
- **Confirmation Bias:** Understand that prospects may seek information that confirms their existing beliefs. Tailor your communication to gently challenge these beliefs with new perspectives.
- **Loss Aversion:** Emphasize the potential risks or losses a customer might face by not adopting Standard ERP. For example, focus on how staying with outdated systems could lead to inefficiencies or missed opportunities.

2. Leveraging Social Proof

- **Testimonials and Case Studies:** Demonstrate how other companies have successfully implemented Standard ERP to build trust and reduce uncertainty.
- **Scarcity Principle:** Emphasize unique features of Standard ERP that are not easily found in competitors' products.

3. Understanding the Customer's Decision-Making Process

- **Emotional vs. Rational Decision-Making:** Explore how both emotional and rational factors influence decisions. Highlight how Standard ERP addresses both the practical needs and the aspirational goals of businesses.
- **Decision Fatigue:** Recognize that too many choices can overwhelm customers. Simplify the decision process by narrowing down options and providing clear recommendations.

4. Building Trust and Reducing Perceived Risk

- **Risk Reduction Strategies:** Emphasize quick wins and early success indicators.

- **Transparency and Honesty:** Ensure that you are transparent about the benefits and limitations of Standard ERP, which helps in building long-term trust.

5. Framing the Value Proposition

- **Prospect Framing:** Frame the value of Standard ERP in a way that aligns with the prospect's core business objectives, relate them directly to how they solve specific pain points.
- **Positive vs. Negative Framing:** Use both positive framing (benefits of adoption) and negative framing (consequences of non-adoption) to appeal to different psychological triggers.

6. The Impact of Timing in Decision-Making

- **Urgency and Timing:** Create a sense of urgency by discussing upcoming industry changes or deadlines that may impact the decision-making process. This can prompt faster decisions.

7. Utilizing the Reciprocity Principle

- **Giving Before Asking:** Provide value upfront, such as informative webinars, reports, or personalized advice, which can create a sense of obligation in the prospect to reciprocate by moving forward with the purchase.

Integrating these considerations can deepen the effectiveness of your sales strategy, helping to better understand and influence the decision-making process of potential customers.

Sealing the Agreement

Formalizing the deal is the final step in the closing process. Once all details are agreed upon, review the contract with the customer, ensuring all negotiated terms are accurately reflected. Mark the closing of the deal with a formal announcement, thank-you note, or gesture of appreciation to set a positive tone for the relationship.

By mastering these comprehensive strategies, sales teams can effectively close ERP deals, ensuring a smooth transition from prospect to satisfied customer. This approach not only increases the likelihood of closing the sale but also lays the foundation for a strong, long-term relationship.

7. Onboarding and Handover Process

The handover process is a crucial phase that ensures a smooth transition from the sales team to the implementation team, setting the foundation for a successful partnership with the customer. This process includes the following key steps:

1. **Contract Finalization and Billing Setup:**
    - Once the sale is confirmed, collaborate with the customer to finalize the subscription contract. Ensure all details, including subscription terms, pricing, and service level agreements, are clearly outlined.
    - Coordinate with the finance department to establish accurate invoicing arrangements. This includes setting up the contact and contract, and ensuring the customer understands the payment terms and methods.
2. **Implementation and Onboarding Preparation:**
    - Introduce the customer to the implementation team and provide them with an overview of the HansaWorld Implementation Methodology (HIM) or Rapid Implementation Methodology (RIM), as applicable.
    - Share relevant training materials and resources to prepare the customer for the onboarding process. This may include access to HansaWorld University courses, webinars, and documentation on the implementation process.
3. **Invoicing Process Explanation:**
    - Clearly communicate the invoicing process to the customer, ensuring they understand when and how they will be billed. This includes explaining the invoicing cycle, payment terms, and any penalties or conditions for late payments.
    - Address any questions the customer may have regarding billing to ensure transparency and to build trust.
4. **Ongoing Support and Transition:**
    - Confirm that the customer is aware of the support channels available to them post-implementation, including contact details for the customer support team and access to online resources like forums.

- Ensure a smooth transition by following up with the customer after the initial handover to address any concerns and to confirm their satisfaction with the process.

For a practical guide to ensure success at every stage, please refer to the annex titled **“Checklist for Each Phase of the Sales Process”** at the end of this document. This checklist will help you stay organized and focused throughout the sales journey, from prospecting to closing.

PART 5: PARTNER COLLABORATION

HansaWorld's success is deeply rooted in our robust network of partners who play a critical role in delivering our ERP solutions to a global audience. Our Partner Collaboration framework is designed to foster strong, mutually beneficial relationships with a variety of partner types, including Value Added Resellers (VARs), White Label Partners, Referral Partners, Channel Recruitment Partners, Integration Partners, and Service Partners. Through comprehensive training, competitive commissions, and continuous support, we empower our partners to achieve outstanding results and drive growth in their respective markets. This section outlines the various partner programs available, their unique benefits, and how we work together to provide exceptional service to our customers, while running a successful partnership and business..

What We Offer

HansaWorld's partner program equips partners with the tools, resources, and support they need for success. As integral members of the HansaWorld family, partners benefit from sustainable revenue streams and the opportunity to build long-term profitable relationships with customers. We ensure a non-competitive environment where partners do not compete with us or each other for the same customers, maximizing mutual success. Our onboarding investment is among the lowest in the industry, offering comprehensive product training and accreditation, tailored to meet individual needs with bespoke courses available. Partnering with HansaWorld means embarking on a collaborative journey, guided by a dedicated Channel Manager to develop a best-practice selling team, and having direct access to a local Product Manager to ensure our products are localized and relevant to your specific markets.

Partner Program Overview

Each partnership type comes with distinct benefits, comprehensive training opportunities, and competitive commission structures. By collaborating closely with our partners, we ensure they have the necessary tools, knowledge, and support to successfully market, implement, and support HansaWorld products. This overview details the specific roles, responsibilities, and advantages associated with each partnership type, highlighting how we work together to drive mutual success and expand our global reach.

- **White Label Partners**
  - **Description:** Suitable for experienced software distributors or companies seeking tailored industry solutions.
  - **Benefits:** Own price list, marketing strategy, highest possible margin percentage, use of own sales network.
- **Value Added Resellers (VARs)**
  - **Description:** Ideal for IT companies or consulting houses ready to sell, implement, and maintain business software.
  - **Benefits:** Access to ready-to-use marketing materials, direct access to resources, competitive commissions.
- **Referral Partners**
  - **Description:** Suitable for any company in IT service or consulting or accounting bureaux wanting to complement their offerings with ERP solutions without focusing on sales or implementation.
  - **Benefits:** Earn commissions for referring customers to HansaWorld, minimal involvement in the sales process.
- **Channel Recruitment Partners**
  - **Description:** Companies in regions where HansaWorld does not yet have representation, who can help bring HansaWorld's software to their area.
  - **Benefits:** Develop new markets, competitive commissions, support from HansaWorld in establishing the market presence.
- **Integration Partners**
  - **Description:** Companies with software or hardware that complement HansaWorld ERP solutions, seeking to integrate their products.
  - **Benefits:** Opportunity for co-development, access to HansaWorld's customer base, collaborative marketing efforts.
- **Service Partners**
  - **Description:** Providers of hosting or other cloud solutions, looking to add ERP software to their product list or

replace an existing ERP solution.

- **Benefits:** Competitive commissions, ability to provide a complete solution to customers, reduced cost of support with remote services.

Partner Onboarding Process

Application and Evaluation: Potential partners apply and are evaluated based on their expertise, market reach, and alignment with HansaWorld's values.

Training and Certification: Partners undergo rigorous training and certification to ensure they can effectively sell and implement HansaWorld products.

Support Structure: Partners receive ongoing support from HansaWorld, including access to marketing materials, sales tools, and a dedicated partner manager.

Routine for Signing New Partners

1. **Paperwork:** Ensure all signed paperwork is in our possession and a countersigned copy is returned to the partner/distributor.
2. **Welcome Mail:** Send a welcome email to the partner with the subscription and hosting price list attached, including necessary instructions.
3. **Contact Information:** Add the partner's contact card information to the local company and Hansamail company, ensuring the dealer checkbox is ticked in HansaMail.
4. **Website Update:** Send partner information for updating the website with their regional details.
5. **Email Setup:** Assist the partner in setting up a standard ID-verified email address by downloading any HW product and registering their email address. Provide this email address, contact card name, and number for setting up partner portal access for the partner and relevant staff.
6. **Training:** Inform the relevant personnel once the partner portal access is set up so they can send the training information.

Partner Education Program

To ensure our partners thrive from their very first days with HansaWorld, we provide a comprehensive Partner Education Program. This program is specifically designed to accelerate the success of newly signed partners by equipping them with the necessary knowledge and skills to drive sales, enhance customer service, and manage complex projects effectively.

Training Overview

The training plan consists of carefully selected topics that are essential for partners to successfully start and grow their business with Standard ERP. These topics cover a broad range of areas, including product knowledge, sales techniques, project management, and customer service excellence.

Browse by Position

Our training program is structured to meet the needs of different roles within your organization:

- **Management:** This course is the first step for newly recruited partners, providing a comprehensive overview of HansaWorld as a company, our product offerings, pricing, subscription models, and basic modules. It also includes sessions on product and project management and practical exercises like creating a Go-To-Market plan.
- **Sales:** Tailored for sales personnel, these courses focus on developing an effective sales and marketing strategy, from lead generation to quoting. The program includes basic training on Standard ERP, CRM, and tips for effective selling.
- **Consultants:** This track is designed for consultants who will be implementing and supporting Standard ERP. It covers system administration, logistics, and the Rapid Implementation Methodology (RIM), ensuring that consultants can deliver high-quality service and support.
- **HAL Programmers:** For technical roles, we offer both basic and advanced training on HAL (Hansa Application

Language), enabling partners to customize and extend the functionality of Standard ERP to meet specific client needs.

Certification Process

To ensure partners can deliver the highest quality service and support to their customers, we require the completion of specific training modules followed by assessments. Certification is a crucial part of our program, as it guarantees that our partners are fully prepared to represent HansaWorld and our products effectively.

Additional Vertical Training

For partners serving specific industries, we offer additional training in verticals such as Webshop, Service Orders, Production, POS, Hotel & Restaurant, Job Costing, Contracts, and Rental. These courses provide in-depth knowledge and practical skills needed to manage industry-specific modules of Standard ERP effectively.

Partner Sales Process

This process involves joint selling strategies, including collaborative planning and shared resources, to identify target markets, develop effective marketing campaigns, and enhance sales efforts. Through this cooperative framework, we aim to maximize the effectiveness of our sales activities and achieve mutual growth and success.

Joint Selling Strategies:

- **Collaborative Planning:** We work closely with partners to identify target markets, develop joint marketing campaigns, and coordinate sales efforts. This collaborative approach ensures alignment and maximizes the effectiveness of sales activities.
- **Shared Resources:** We provide partners with access to sales tools, CRM systems, and support materials to enhance their selling capabilities. This includes access to HansaWorld's demo environments, product brochures, and case studies.

Initial Partner Support:

For initial meetings with new partners and prospective customers, HansaWorld will provide direct support, leading the sales process to help partners gain confidence. As partners successfully close deals, they will transition to leading these efforts independently. This process will begin anew if partners move into different verticals—such as transitioning from restaurant demos to production demos—where HansaWorld will again provide hands-on support until the partner is confident and capable of operating autonomously.

Partner CRM Access and Usage:

- **Guidelines:** We ensure partners use the CRM system effectively to track leads, manage customer relationships, and report on sales activities. Regular training sessions and best practice sharing will help partners maximize the use of CRM tools.

Collaborative Marketing Strategy

HansaWorld's marketing strategy is built on strong collaboration with our partners, ensuring that our market approach is tailored, impactful, and aligned with each partner's unique market and industry focus. We co-fund local advertising initiatives and joint online marketing campaigns, including platforms like LinkedIn, to boost our market presence and engage targeted audiences effectively. These collaborative efforts enable us to leverage the strengths of our partners and create a unified market message that resonates with potential customers.

A key aspect of our strategy is securing reference customers before launching new sales efforts. Success stories and case studies significantly enhance credibility in new markets, providing powerful proof points that can accelerate the sales cycle. We also encourage partners to apply for industry awards, as recognition from respected organizations enhances brand reputation and distinguishes our solutions in competitive markets.

While we acknowledge the growing influence of digital channels, our experience shows that social media may not be the most effective way to reach our core audience of small to mid-sized businesses, many of whom do not actively engage on these platforms. As a result, our focus is on more direct and impactful marketing strategies, with our website serving as a critical hub for customer engagement and information. We prioritize word-of-mouth referrals as our main lead generator, leveraging the trust and connections of our partners and customers to expand our reach organically.

We also support partners in co-funding attendance at events and expos, recognizing the value of in-person interactions in building relationships and generating leads. Hosting local events, such as workshops or seminars, is another effective way to connect directly with potential customers and showcase our solutions in action. Ultimately, our marketing strategy is a shared plan with each partner, emphasizing a collaborative approach that aligns with their market dynamics and customer needs.

By fostering strong partnerships and providing comprehensive support and resources, HansaWorld can effectively extend its market reach and enhance the overall customer experience.

For a comprehensive overview on how to get started and maximize your partnership with us, please refer to the annex titled **“Partner Quick-Start Guide”** at the end of this document. This guide provides essential steps and resources to help you start off on the right foot.

Best Practices for Channel Managers

As a channel manager, you are the foundation in expanding the reach and success of HansaWorld’s Standard ERP. Your role involves not only generating and nurturing partner leads but also maintaining the highest ethical standards, fostering team collaboration, and ensuring seamless customer engagement. This section provides a comprehensive guide to the best practices that will help you excel in your role. From leveraging your network and industry events to mastering product knowledge and delivering impactful demos, these tips will equip you with the tools and insights needed to drive performance and achieve results. Whether you are engaging with non-desperate customers or ensuring the use of approved terminology, adhering to these best practices will enhance your effectiveness and contribute to the overall growth of HansaWorld.

Generating Partner Leads

Channel managers should focus on leveraging their networks and attending industry events to generate new partner leads. It is important to conduct thorough market research and adhere to the agreed go-to-market (GTM) strategy. This approach ensures alignment on market opportunities, such as targeting customers using products that are not performing well locally or capitalizing on recent localization changes that provide SERP with a competitive edge. Strengthening the online presence can also attract potential partners.

Maintaining Ethical Standards

Integrity is paramount. Always provide truthful information and use clear, concise communication. Avoid unnecessary jargon to ensure your message is understood.

Knowledge and Preparation

It is essential for Channel Managers to be thoroughly familiar with Standard ERP's unique selling points and proficient in delivering key demos. Regular participation in web tests helps in staying updated with the latest features and functionalities.

Team Collaboration

Encouraging a collaborative environment where team members share knowledge and support each other is vital. Adhering to HansaWorld’s methodologies and engaging in continuous learning will help maintain high standards of performance. Channel managers should proactively involve product managers (PMs) and other sales experts when preparing for demos that require in-depth technical knowledge or when a customer has specific customization needs that go beyond the standard product capabilities. While PMs are a valuable resource, it’s important to recognize that other colleagues may also offer specialized knowledge, particularly in areas like implementation, industry-specific processes, or technical configurations. Salespeople are encouraged to leverage the broader expertise within the organization to provide comprehensive answers and solutions to potential customers. This approach not only enhances the sales process but also strengthens the company’s reputation for delivering well-rounded and informed customer service.

Customer Engagement

Understanding customer needs through effective questioning and taking responsibility for actions ensures reliable performance.

Selling to Non-Desperate Customers

For customers who may not have an immediate need, it is important to be knowledgeable and present impressive demos.

Terminology and Presentation

Using approved terminology maintains consistency and professionalism. Focus on delivering shorter, impactful demos that highlight key features to keep the audience engaged without overwhelming them.

Using our CRM Properly

Effective use of our CRM system is crucial for tracking interactions, managing leads, and ensuring consistent follow-up. By keeping detailed and up-to-date records of customer and partner communications, you can better manage relationships and identify opportunities for growth. Utilizing the CRM effectively also allows for more accurate forecasting and reporting, enabling you to make informed decisions that contribute to the success of HansaWorld.

Pass the Relevant Tests Related to Your Position

Ongoing learning and certification are key components of your role as a channel manager. It is essential to pass the relevant exams and tests offered through HansaWorld University, as they ensure you have the latest knowledge and skills needed to represent us effectively. These assessments help you stay current with product updates, sales strategies, and industry best practices, which are vital for maintaining your expertise and credibility.

Train Often to Meet Your Colleagues, Partners, and Customers

Regular travel to meet with colleagues, partners, and customers is an important aspect of your role. Face-to-face interactions help build stronger relationships, foster trust, and provide opportunities for deeper engagement.

Talk to Senior Management and Our CEO Often

Frequent communication with senior management and our managing director is important for staying aligned with the company's strategic direction and ensuring that your efforts are in sync with broader business goals. These conversations provide valuable insights into the company's vision and priorities, helping you to make more informed decisions and contribute effectively to the growth of HansaWorld. Regular dialogue with leadership also allows you to share feedback, report on market trends, and discuss challenges, fostering a collaborative environment where your input is valued.

Use Brochures, White papers, and Case Studies

Providing high-quality marketing collateral is crucial for educating potential customers and supporting the sales process. HansaWorld offers a comprehensive library of brochures, white papers, and case studies. You should visit our partner portal for more details.

Engaging Content

Learn from our spotlights and webinars to provide dynamic and interactive content that showcases Standard ERP's capabilities and benefits.

Professional Appearance

Always adhere to a professional dress code, but adapt to fit the specific customer's style—whether they are more relaxed, formal, or corporate. Your appearance should align with the customer's environment to build rapport while maintaining credibility and representing the company's standards.

By following these tips, channel managers can effectively contribute to the growth and success of Standard ERP.

Key Features of HansaWorld CRM Tools

1. **Lead and Opportunity Management:** Track leads from initial contact through to closure. Capture essential information such as lead source, contact details, and interaction history.
    - **Example:** Use the CRM to log details of a prospect met at an industry event, including their specific interests and follow-up actions.
2. **Sales Pipeline Visualization:** Visualize the sales pipeline to monitor the progress of each opportunity. Identify bottlenecks and prioritize high-potential leads.
    - **Example:** A sales manager can view all current opportunities in a pipeline format.
3. **Task and Activity Tracking:** Assign tasks and set reminders for follow-ups to ensure no opportunity is

overlooked. Track all activities related to a lead or customer.

- **Example:** Schedule a follow-up call with a prospect after sending a proposal and receive automatic reminders.

4. **Reporting and Analytics:** Generate detailed reports on sales performance and pipeline status. Use these insights to refine sales strategies.

Recording Sales Activities in our CRM

In Standard ERP, we use specific activity types to efficiently track and manage our sales efforts within the CRM. Each activity type is designed to capture distinct aspects of our sales process, ensuring comprehensive documentation and follow-up. It's essential to record all future tasks as activities in the CRM to ensure a structured approach and avoid missing any follow-up opportunities. Even if a customer or lead is lost today, scheduling future contact—whether in a year, or more— and setting a task in the CRM keeps the door open for renewed opportunities down the line.

By categorizing activities this way, we ensure structured tracking, effective follow-up, and a clear overview of all sales-related actions.

For guidance on optimizing channel management and ensuring effective collaboration, please refer to the annex titled **"Channel Manager Best Practices Checklist"** at the end of this document. This checklist outlines key strategies for managing channels successfully.

CONCLUSION

This document is designed to be your go-to resource for mastering the art of selling Standard ERP. It is more than just a guide; it's a roadmap to success, crafted to empower you with the strategies, techniques, and best practices needed to excel in every aspect of the sales process.

By immersing yourself in the knowledge shared within these pages, you are positioning yourself to not only meet but exceed expectations. Understanding the nuances of Standard ERP and its unique selling points equips you to speak with authority and confidence, resonating with potential customers and partners alike.

The importance of tailoring your sales approach to the specific needs and pain points of each customer cannot be overstated. In doing so, you demonstrate not only your expertise but also your genuine commitment to helping businesses thrive. Remember, each interaction is an opportunity to forge meaningful connections and build lasting relationships that drive mutual success.

Leverage the tools, marketing materials, and support resources at your disposal. These assets are designed to enhance your sales efforts, enabling you to deliver impactful presentations and persuasive demos that clearly showcase the transformative power of our ERP solutions.

Every sale is more than a transaction; it's a chance to create a lasting impact on a customer's business, to be a part of their journey towards greater efficiency, growth, and success, while also helping them overcome difficult times or challenges along the way.. Your role as a salesperson is not just about closing deals—it's about being a catalyst for positive change in the organizations we serve.

Your expertise, dedication, and unwavering commitment to excellence are the pillars of our success. Together, we have the power to innovate, excel, and drive the growth of HansaWorld to new heights.

Let's embrace each challenge with confidence, each opportunity with enthusiasm, and each success with the knowledge that we are making a difference. The future of HansaWorld's growth is in our hands—let's seize it together.

GLOSSARY OF COMMON TERMS AND ACRONYMS IN ERP SALES

A

- **API (Application Programming Interface):** A set of tools and protocols for building software and applications that allow different systems to communicate with each other.
- **AI (Artificial Intelligence):** The simulation of human intelligence in machines that are programmed to think and learn.
- **AS (Application Server):** A server designed to run applications, which can be part of an ERP system.

B

- **B2B (Business-to-Business):** Transactions between businesses rather than between a business and individual consumers (B2C). Standard ERP supports B2B operations by facilitating complex processes such as bulk ordering, multi-level pricing, and supply chain management.
- **B2C (Business-to-Consumer):** Transactions between businesses and individual consumers. Standard ERP's B2C features are tailored for industries such as retail and hotels, providing tools for customer relationship management, order processing, and personalized marketing efforts.
- **BI (Business Intelligence):** Technologies and strategies used by enterprises for data analysis and management of business information.
- **BPM (Business Process Management):** A systematic approach to making an organization's workflows more effective and efficient.
- **BANT (Budget, Authority, Need, Timing):** A sales qualification framework used to evaluate the potential of a prospect by assessing their Budget, Authority to make decisions, Need for the product, and Timing of the purchase.

C

- **CRM (Customer Relationship Management):** A set of tools for managing an organization's interactions with current and potential customers.
- **CX (Customer Experience):** The overall experience a customer has with a business, from initial contact to post-sale support.

D

- **DBMS (Database Management System):** Software that uses a standard method of cataloging, retrieving, and running queries on data.
- **DMS (Document Management System):** A system used to track, manage, and store documents, reducing paper use and increasing efficiency.

E

- **ERP (Enterprise Resource Planning):** Integrated management of main business processes, often in real-time, mediated by software and technology.
- **EDI (Electronic Data Interchange):** The computer-to-computer exchange of business documents in a standard electronic format between business partners.

F

- **FAQ (Frequently Asked Questions):** A list of common questions and answers on a particular topic.

G

- **GDPR (General Data Protection Regulation):** A regulation in EU law on data protection and privacy for individuals within the European Union.
- **GenAI (Generative AI):** Refers to artificial intelligence that can create content, such as text, images, or other media, from data inputs.

H

- **HAL (HansaWorld Application Language):** A proprietary programming language used for customizing and developing within Standard ERP.
- **HIM (HansaWorld Implementation Methodology):** A detailed approach to implementing Standard ERP, tailored to complex and customized deployments.
- **HRM (Human Resource Management):** The management of an organization's workforce, or human resources.
- **HCM (Human Capital Management):** A set of practices related to people resource management, focused on the organizational need to provide specific competencies and are implemented in three categories: workforce acquisition, workforce management, and workforce optimization.

I

- **IoT (Internet of Things):** The interconnection via the internet of computing devices embedded in everyday objects, enabling them to send and receive data.
- **ICP (Ideal Customer Profile):** A description of the type of customer that would benefit most from Standard ERP, guiding marketing and sales efforts to focus on prospects most likely to convert and achieve long-term success.

K

- **KPI (Key Performance Indicator):** A measurable value that demonstrates how effectively a company is achieving key business objectives.

L

- **LAN (Local Area Network):** A computer network that interconnects computers within a limited area such as a residence, school, laboratory, or office building.
- **LMS (Learning Management System):** A software application for the administration, documentation, tracking, reporting, automation, and delivery of educational courses, training programs, or learning and development programs.

M

- **ML (Machine Learning):** A subset of AI that allows systems to learn from data and improve over time without being explicitly programmed.
- **MRP (Material Requirements Planning):** A production planning, scheduling, and inventory control system used to manage manufacturing processes.

P

- **PaaS (Platform as a Service):** A cloud computing model that delivers applications over the internet.
- **PM (Product Manager):** Responsible for localizations, translations and testing at HansaWorld.
- **POS (Point of Sale):** Refers to the place and time where a retail transaction is completed.

R

- **RFP (Request for Proposal):** A document that solicits proposals.
- **RIM (Rapid Implementation Methodology):** A streamlined approach to implementing Standard ERP, focusing on quick deployment with core features.
- **ROI (Return on Investment):** A measure used to evaluate the efficiency or profitability of an investment.
- **RPA (Robotic Process Automation):** The use of software robots to automate highly repetitive, routine tasks normally performed by a human.

S

- **SaaS (Software as a Service):** A software distribution model in which a third-party provider hosts applications and makes them available to customers over the internet.
- **SCM (Supply Chain Management):** The management of the flow of goods and services.

- **SERP:** Refers to HansaWorld's comprehensive enterprise resource planning solution, integrating various business operations into a single platform.
- **SLA (Service Level Agreement):** A contract between a service provider and a customer, in our context about support.

T

- **TCO (Total Cost of Ownership):** A financial estimate intended to help buyers and owners determine the direct and indirect costs of a product or system.

U

- **UI (User Interface):** The means by which the user and a computer system interact, in particular the use of input devices and software.
- **USPs (Unique Selling Points):** Distinct features or approaches that differentiate Standard ERP from competitors.
- **UX (User Experience):** A person's emotions and attitudes about using a particular product, system, or service.

V

- **VAT (Value Added Tax):** A type of tax that is assessed incrementally, based on the increase in value of a product or service at each stage of production or distribution.
- **VARs (Value-Added Resellers):** Partners who sell Standard ERP with additional services or features that enhance the core product, extending its reach and offering tailored solutions to specific industry or regional needs.

W

- **WO (Workflow Overview):** In Standard ERP, refers to a graphical representation of business processes and workflows, providing users with a clear view of the steps involved in various tasks and helping to manage and optimize workflows for better efficiency and productivity.
- **WMS (Warehouse Management System):** A software application designed to support and optimize warehouse or distribution center management.
- **WAN (Wide Area Network):** A telecommunications network that extends over a large geographic area for the primary purpose of computer networking.

This glossary provides a solid foundation for understanding the terminology used in ERP sales, ensuring that your sales teams and partners are well-equipped to communicate effectively and confidently with potential customers.

CHECKLIST FOR EACH PHASE OF THE SALES PROCESS

Sales Phase 1: Prospecting

1. **Identify Potential Customers**
    - **Action:** Use market research, industry reports, competitor analysis, and your existing customer base to identify potential leads. Look for industries or segments where we have strong references or active contracts, as these can strengthen your sales pitch.
    - **Tools:** Utilize LinkedIn, industry databases, governmental databases such as company registers, and internal CRM data. Consider checking competitor customer lists, especially if they have weaknesses that can be exploited.
2. **Build a Target List**
    - **Action:** Create a list of potential customers in your CRM based on industry, company size, and pain points.
    - **Recommendation:** Prepare bullet points of key Unique Selling Points (USPs) you want to discuss during your interactions (calls, meetings). Have relevant documentation, such as brochures and case studies, ready to share for further internal circulation.
3. **Initial Outreach**
    - **Action:** Reach out to prospects using email, LinkedIn, or cold calls, aiming to connect with decision-makers rather than gatekeepers. Whenever possible, warm up your leads through introductions from mutual connections or referral programs.
    - **Approach:** Use your network, LinkedIn connections, and industry contacts to build credibility before direct outreach. Tailor your message to address specific pain points and highlight relevant success stories.
4. **Create a Sense of Urgency**
    - **Action:** Introduce a time-sensitive element to encourage engagement, such as inviting prospects to a demo event or webinar. This provides a clear next step for prospects and encourages them to take prompt action.
    - **Tools:** Use platforms like GoToWebinar, which allow you to host events without attendees seeing each other, enhancing the perception that others are also turning to Standard ERP. Highlight that the market is actively looking to us for solutions, creating interest.
5. **Initial Outreach**
    - **Action:** Consistent follow-ups are crucial. Keep the conversation going with timely, relevant updates, and continue providing value through shared insights or relevant content.

Checklist

✔ Create and update the target list in CRM.

✔ Complete initial outreach.

✔ Track responses and schedule follow-up actions.

✔ Update CRM with each contact attempt.

Sales Phase 2: Qualification

1. **Conduct Initial Discovery**
    - **Action:** Schedule a discovery session—this could be a call, video meeting, or in-person meeting—to gather insights into the prospect's business needs, challenges, and goals. Focus on understanding their pain points, current systems, and the drivers behind their interest in a new ERP solution. Even if the prospect is satisfied with their current system, use this opportunity to learn more about their ERP, identifying areas where SERP may provide superior benefits.
2. **Assess Key Qualifiers** - Use guiding questions to qualify the prospect effectively:

- **Budget:** Understand the prospect's investment capacity.
- **Authority:** Identify decision-makers and influencers.
- **Needs:** Find out the key problems they have.
- **Timeline:** Learn how soon they want a solution.

3. **Evaluate Fit with Standard ERP**
    - **Action:** Assess if the prospect's needs align with Standard ERP's features. When encountering satisfied customers of other ERP systems, take the time to understand why they are content. Use this information to build battle cards that outline how Standard ERP can address gaps or provide enhanced capabilities compared to the competitor's offerings.
4. **Score and Prioritize Lead**
    - **Action:** Use some form of lead scoring to prioritize follow-up actions.
5. **Schedule Product Demo**
    - **Action:** Set a date for a demo tailored to the prospect's key pain points. Prepare a list of key functionalities to showcase based on their specific interests and needs.

Checklist

✔ Conduct discovery.

✔ Qualify leads based on BANT and their needs and alignment with SERP features.

✔ Score each lead and update CRM.

✔ Schedule product demo.

✔ Prepare bullet points of functionalities to be demonstrated.

Sale Phase 3: Product Demonstration

1. **Prepare for the Demo**
    - **Action:** Review the prospect's specific needs and tailor the demo script.
2. **Execute the HansaWorld Impact Selling Technique**
    - **Action:** Start with a compelling story that matches the prospect's needs. Keep the demo focused and engaging, highlighting key features in under an hour.
3. **Highlight Key Features**
    - **Action:** Focus on 2-4 core features that directly address the prospect's challenges.
4. **Engage and Handle Questions**
    - **Action:** Encourage questions and provide answers that highlight the value of Standard ERP. Use this interaction to gather essential information about potential number of users, including data migration needs, required integrations, and other details needed to prepare an accurate quote. During this discussion, assess whether the implementation will follow the Rapid Implementation Methodology (RIM) or the HansaWorld Implementation Methodology (HIM), which may require quoting a pre-analysis phase.
5. **Close with a Call to Action**
    - **Action:** End the demo by setting clear next steps, such as scheduling a deeper dive or sending a proposal.

Checklist

✔ Review prospect's needs and tailor the demo.

✔ Execute the demo using the Impact Selling Technique.

✔ Gather key information during Q&A (user count, data migration needs, integrations).

- ✔ Decide if RIM or HIM
- ✔ Follow up with additional materials or next steps.

Sales Phase 4/5: Proposal & Negotiation

1. **Prepare for Negotiation**
    - **Action:** Understand the prospect's key decision factors, such as budget constraints or specific feature needs.
    - **Preparation Checklist:** Identify key stakeholders, revisit past communications, and review the prospect's budget.
2. **Present the Proposal**
    - **Action:** Present a customized proposal that aligns with the prospect's needs. Do not simply send the quote by email—always aim to have a meeting or, at a minimum, a phone call to walk through the proposal. This ensures the prospect fully understands the value and details.
3. **Address Objections**
    - **Action:** Use prepared responses to handle objections effectively.
4. **Offer Flexible Terms**
5. **Seek Commitment**

Checklist

- ✔ Review proposal details and tailor them to prospect needs.
- ✔ Prepare responses for common objections.
- ✔ Confirm all decision-makers are aligned before closing.

Sales Phase 5/6: Closing and Handover

1. **Present Final Proposal and Contract**
    - **Action:** Send the finalized proposal and go through it with the prospect, highlighting key terms.
2. **Obtain Verbal Agreement**
    - **Action:** Seek verbal confirmation before moving to contract signing.
    - **Script:** "Are you comfortable with the terms outlined? If everything looks good, we can proceed with the contract."
3. **Send Contract for Signature**
    - **Action:** Send the contract and set a clear deadline for signing.
4. **Follow Up Post-Signing**
    - **Action:** Confirm receipt of the signed contract and outline next steps, including onboarding.
5. **Onboarding Handover**
    - **Action:** Complete a detailed handover to the implementation team, including customer goals and agreed terms.
    - **Checklist:**
        - ◆ Ensure all documents are shared with the implementation team.
        - ◆ Schedule an onboarding call with the customer.

Checklist

- ✔ Present and review the final proposal with the prospect.
- ✔ Obtain verbal and then formal agreement.
- ✔ Complete onboarding handover and schedule next steps.

Prospecting and Lead Qualification Checklist

- ✔ Define Ideal Customer Profile (ICP).
- ✔ Focus on industries where we have reference customers or contracts related to them.
- ✔ Target companies needing integrated processes, scalability, or industry-specific solutions.
- ✔ Prioritize businesses needing recurring invoicing, rental management, or project tracking, POS, hotels.
- ✔ Conduct market research using online databases, reports, LinkedIn, company websites.
- ✔ Attend industry events, webinars, and trade shows for networking.
- ✔ Leverage customer success stories and partner referrals.
- ✔ Target industries facing new regulations, taxes, or reporting rules, as these changes often require new systems.
- ✔ Develop a referral program (or similar) for customer and partner introductions.
- ✔ Identify companies using competitor products with challenges like high costs or lack of flexibility or localizations not properly supported.
- ✔ Focus on customers dissatisfied with current ERP solutions.
- ✔ Determine decision-making authority and team involvement.
- ✔ Identify needs: current system challenges, goals, integration issues.
- ✔ Assess timing: decision timeline, events driving the need for change.
- ✔ Score leads on fit with ICP, urgency, decision-making authority, budget alignment, competitive position.
- ✔ Prioritize high-scoring leads for immediate follow-up.
- ✔ Keep medium-scoring leads engaged with regular touchpoints.
- ✔ Reassess low-scoring leads periodically.
- ✔ Regularly update lead information in CRM.
- ✔ Track key metrics: lead source, conversion rates, stage duration.
- ✔ Set reminders and follow-up tasks in CRM.

This streamlined checklist helps maintain an organized approach to prospecting and lead qualification, focusing on high-potential opportunities and ensuring effective pipeline management.

Active Listening Prompts and Phrases for Summarizing and Validating Customer Concerns

These will help your sales team and partners engage more effectively with prospects by showing empathy, understanding, and commitment to solving their problems.

1. Summarizing Customer Concerns

Summarizing involves repeating back what the customer has said in your own words to confirm your understanding. This shows that you are actively listening and helps clarify any misunderstandings.

Tips:

- Use phrases like "So, what I'm hearing is…" or "It sounds like you're saying…"
- Keep summaries concise and focused on the key points.
- End with a confirmation question to ensure accuracy.

Example Phrases:

- "So, what I'm hearing is that your main challenge is managing inventory discrepancies, which is causing delays in fulfilling customer orders. Is that correct?"
- "It sounds like you're saying that your current system is not integrating well with your other software, leading to data silos and inefficiencies. Did I get that right?"
- "Let me make sure I understand this correctly: You're concerned that the implementation process might be too disruptive for your team. Is that accurate?"

2. Validating Customer Concerns

Validating involves acknowledging the customer's feelings and experiences, showing empathy, and confirming that their concerns are reasonable and understood.

Tips:

- Use empathetic language that shows you appreciate their perspective.
- Avoid dismissing their concerns or immediately jumping into solutions without acknowledging the problem first.
- Reassure them that their concern is common and you have solutions.

Example Phrases:

- "I completely understand why that would be frustrating. Many of our clients initially faced similar challenges before switching to Standard ERP."
- "It makes sense that you would be worried about the cost; a lot of businesses we work with have felt the same way before realizing the long-term savings."
- "I can see why you're concerned about data security. This is something we take very seriously, and we have robust measures in place to protect your information."
- "That's a valid concern. Transitioning to a new system can seem overwhelming, but our team is here to ensure that the process is smooth and manageable."

3. Encouraging Further Explanation

Encouraging customers to expand on their concerns helps you gain a deeper understanding of their needs and frustrations.

Tips:

- Use open-ended questions that prompt more detail.
- Show curiosity and willingness to learn more about their specific issues.
- Ensure the customer feels heard without interrupting.

Example Phrases:

- "Can you tell me more about how this issue affects your daily operations?"
- "I'd love to understand more about what's causing this challenge for your team. Could you elaborate on that?"
- "How long have you been dealing with this problem? What other impacts has it had on your business?"

4. Reassuring and Offering Support

Once you've summarized and validated, it's important to offer reassurance and explain that you're there to help them find a solution.

Tips:

- Offer a brief reassurance that the issue can be resolved.

- Set a supportive tone that shows you're on their side.
- Directly connect their concern to a solution or next step.

Example Phrases:

- "Rest assured, we've dealt with similar situations, and we have a clear approach to resolve this."
- "Thank you for sharing this. It's great that we're having this conversation because we can now focus on addressing these exact issues."
- "We've helped other companies in your industry with this, and I'm confident we can do the same for you. Let's work together to make this easier."

KEY POINTS TO REMEMBER: HANSAWORLD AND SERP

- Over 30 years of ERP innovation and industry leadership.
- Global reach with support in 40+ languages and regional compliance.
- Proprietary technology that allows rapid customization and scalability.
- Seamless integration of all business processes in one platform.
- Multi-platform support for maximum flexibility.
- Unique industry-specific modules tailored to diverse sectors.
- Quick implementation with our Rapid Implementation Methodology (RIM).
- Future-proof solution with continuous updates and integrations.
- Light infrastructure requirements, optimized for low-bandwidth environments.
- Superior data security, compliance with GDPR, and robust backup systems.
- Embedded communication tools and integrated telephony.
- Drill-down functionality for in-depth data analysis and quick corrections.
- Consistent, intuitive interface across all modules, minimizing training time.
- Real-time reporting and streamlined decision-making capabilities.
- Proven track record of success with diverse global clients.
- Competitive edge with unique, built-in features not easily replicated by others.
- Committed to ongoing R&D.
- All-in-one solution that replaces multiple disjointed systems.
- Highlight our differentiation from complex, costly, and outdated competitors.
- Position SERP as a strategic partner for growth, efficiency, and innovation.
- Emphasize how SERP meets customer needs better than anyone else.
- Fully automated cloud infrastructure delivers the software as a complete cloud service with maximal automation, including version updates.

DECISION-MAKER IDENTIFIER CHECKLIST

Here's a checklist designed to help you identify the key decision-makers in a company. This checklist includes specific questions and actions that will guide you in understanding who the decision-makers are, their roles, and how to engage them effectively.

Step 1: Initial Research and Preparation

- **Action:** Conduct preliminary research on the company's structure using LinkedIn, the company's website, our CRM data, and other available resources.

Key Information to Look For:

- C-suite executives (CEO, CFO, CIO, etc.)
- Department heads or managers relevant to the project.
- Any recent organizational changes (new hires, restructuring).

Step 2: Ask Questions to Identify Roles and Responsibilities

These questions should be asked during discovery calls, meetings, or any early interactions with the prospect.

1. **Questions for Identifying Decision-Making Authority**
   - "Who is typically involved in the decision-making process for new software or technology investments in your company?"
   - "When your company evaluates a solution like this, who would usually sign off on the final decision?"
   - "Who are the key stakeholders that need to be involved in discussions about [specific product feature or function]?"
2. **Questions for Understanding Influence and Internal Dynamics**
   - "Are there specific teams or individuals who would be most affected by the implementation of this solution?"
   - "Who would you say has the most influence over decisions related to this area?"
   - "Do you have any external advisors or consultants who play a role in the decision-making process?"
3. **Questions to Clarify Budget Control**
   - "Who is responsible for approving the budget for this type of project?"
   - "Is there a specific department or person that handles financial approvals for new technologies?"
   - "Are there any specific financial decision-makers that we should be involving early on to ensure alignment?"
4. **Questions for Timeline and Process Understanding**
   - "Could you walk me through your decision-making process for a project like this?"
   - "What are the typical steps you follow when evaluating new solutions?"
   - "Is there a committee or group that will be reviewing our proposal?"

Step 3: Validate the Information Collected

- **Action:** Summarize your understanding of the decision-making structure back to the contact to ensure accuracy.
- **Validation Prompt:**
  - "Just to confirm, it sounds like [Name/Role] would be the main decision-maker, with input from [Other Departments/Individuals]. Is that correct?"
  - "So, the final decision would come from [CFO, Head of IT], but [Operations Manager, Head of Sales] will be heavily involved in the evaluation, right?"

Step 4: Map Out Key Stakeholders

- **Action:** Create a decision-maker map that includes key influencers, technical evaluators, and ultimate approvers.

Step 5: Engage Decision-Makers and Influencers

- **Action:** Tailor your communication to each identified stakeholder based on their role and influence level.
- **Engagement Strategies:**
  - **For Ultimate Decision-Makers:** Focus on overall business impact, and strategic benefits.
  - **For Influencers and Technical Evaluators:** Focus on features, implementation details, and how it addresses specific operational pain points.

Final Checklist for Identifying Decision-Makers

✔ Research the company structure and identify potential decision-makers before the first meeting.

✔ Ask specific questions to clarify roles, responsibilities, and influence levels.

✔ Summarize your understanding of the decision-making structure to validate with the contact.

✔ Map key stakeholders and categorize them as Decision Maker or Influencer.

✔ Tailor your communication and engagement strategy for each identified decision-maker.

✔ Regularly reassess and update the decision-maker map as the sales process evolves.

IDENTIFYING THE BUDGET: STEP-BY-STEP GUIDE

This guide provides clear instructions and practical steps to help you uncover budget details early in the sales process, ensuring you can tailor your approach and proposal effectively.

Step 1: Conduct Pre-Meeting Research

1. **Gather Public Financial Information**
   - Review the prospect's publicly available financial documents, such as annual reports, press releases, financial statements, or news articles. Look for revenue, profit margins, recent funding, or cost-saving initiatives that indicate their financial health and spending capacity.
   - Use platforms like the company's website, LinkedIn, financial news sites, and databases.
   - **Key Indicators to Note:**
     - Recent financial performance (profit or loss).
     - Investments in new technology or infrastructure.
     - Cost-cutting measures or statements about financial constraints.
2. **Identify Past Expenditures on Similar Projects**
   - Look for any mentions of previous technology investments, ERP implementations, or similar projects that indicate their budgetary priorities.
   - **Example:** If the company recently invested in a CRM or cloud infrastructure, this might suggest an openness to investing in complementary systems like ERP.

Step 2: Plan your Budget-Related Questions

1. **Prepare Direct Questions**
   - Write down specific, direct questions that will help you uncover the prospect's budget range.
     Focus on phrasing that makes it clear you need this information to offer the most relevant solution.
   - **Examples of Direct Questions:**
     - "To tailor our proposal effectively, could you share the budget range allocated for this project?"
     - "What kind of investment has your company planned for this type of solution?"
     - "Are there any budget constraints we should be mindful of as we discuss potential solutions?"
2. **Develop Questions About Financial Priorities:**
   - Create questions that explore the company's financial priorities and how your solution fits within those priorities.
   - **Examples:**
     - "How does this project rank in terms of priority compared to other investments?"
     - "Are there any competing priorities that might impact the available budget?"

Step 3: Engage the Prospect in Conversation

1. **Start with Open-Ended Questions:**
   - Begin your discussion with open-ended questions that allow the prospect to talk about their needs and challenges. This sets a comfortable tone and naturally leads to budget discussions.
   - **Example Questions:**
     - "Can you walk me through your main goals for this project?"
     - "What challenges are driving the need for this solution?"

2. **Transition to Direct Budget Questions:**
   - Once rapport is established, transition smoothly into direct budget-related questions. Ensure your approach is conversational and framed around finding the best solution for their needs.
3. **Listen for Contextual Clues about Budget:**
   - Pay close attention to statements that indicate financial concerns or previous spending patterns. Contextual clues often provide insights into their budget without direct questioning.

Step 4: Inquire Subtly About Competitors and Alternatives

1. **Ask About Previous Solutions Explored:**
   - Ask questions about any other solutions they have considered, including the budgetary feedback they received from those evaluations.
   - **Script Example:**
     - "Have you looked at other ERP solutions? What were some of the budget considerations or feedback you received?"
2. **Identify Benchmark Spending:**
   - Use information about competitors and similar projects to gauge what the prospect might be willing to spend.
   - **Script Example:**
     - "We've seen companies in your industry allocate between X and Y for similar solutions. Does that align with what you're considering?"

Step 5: Confirm and Validate Budget Information

1. **Summarize and Validate the Information Gathered:**
   - Summarize what you've learned about their budget to confirm your understanding. This step helps clarify any discrepancies and reinforces your understanding of their financial boundaries.
   - **Script Example:**
     - "Based on our conversation, it seems like you're working within a budget of [X amount]. Is that correct?"
     - "I understand that budget is a concern, and it sounds like keeping costs within [specific range] is a priority. Does that sound right?"
2. **Clarify Approval Process:**
   - Ask about how budget approvals are handled within the organization to identify any potential obstacles or additional decision-makers.
   - **Example Questions:**
     - "Who will need to approve the budget for this project?"
     - "Is there a specific process or committee that reviews project expenditures?"
3. **Explore Budget Flexibility:**
   - Inquire subtly to see if there is flexibility within the budget, such as phased payments, or alternative funding sources that can be leveraged. Consider proposing a phased implementation approach, or escalate the matter if a discount needs to be evaluated.
   - **Script Example:**
     - "If the initial budget is tight, are there ways we could structure the investment over time to make it more manageable?"

Step 6: Document Budget Insights and Adjust Your Sales Approach

1. **Update CRM with Budget Information:**

- Record all budget-related information in your CRM to ensure the sales strategy is aligned with the prospect's financial constraints.

2. **Tailor Proposals Based on Budget Insights:**

   - Adjust your proposals and presentations to fit the budget insights you've gathered.

3. **Plan Follow-Up Discussions with Financial Decision-Makers**

In cases where our pricing exceeds the prospect's budget, consider proposing a phased implementation approach, starting with high-priority functionalities that fit within their current budget, while deferring lower-priority features to a later stage. Additionally, always discuss with your HansaWorld manager, channel manager or operations team to explore potential discounts that could accelerate closing the deal or prevent loss. It's also important to highlight the total cost of ownership when discussing budgets, ensuring that the prospect understands the comprehensive value compared to alternative solutions.

By following these step-by-step actions, you will effectively identify the customer's budget early in the sales process. This approach ensures that your discussions and proposals are aligned with their financial capabilities, allowing you to offer solutions that fit both their needs and their budget constraints, enhancing your chances of closing the deal successfully.

HANSAWORLD

HOW TO PREPARE FOR A DEMO: STEP-BY-STEP

Here's a detailed step-by-step guide on how to prepare for a demo of Standard ERP. This guide will help you set up a highly impactful and customized demonstration that addresses the prospect's specific needs and highlights the key features of Standard ERP.

Step 1: Research the Prospect Thoroughly

1. **Understand the Prospect's Business**
2. **Identify Key Pain Points:**
   - Look for common challenges in their industry that Standard ERP can address, such as inventory management issues, poor CRM integration, or inefficient financial processes.
3. **Know the Key Stakeholders**
4. **Know Your Audience:** Identify who will be attending the demo and tailor your demo by highlighting features that meet the specific needs of each audience, ensuring it resonates with their key pain points.

Step 2: Tailor the Demo Script to the Prospect's Needs

1. **Select Relevant Features:**
   - Identify the 3-4 key features of Standard ERP that will directly address the prospect's pain points.
   - Focus on modules and functionalities that match their industry (e.g., CRM for sales-driven companies, inventory management for retail).
2. **Customize Scenarios:**
   - Create a narrative that is relevant. For example, show how a retail manager would use the system to track inventory in real-time.
   - Prepare examples that reflect their specific business challenges.
3. **Plan the Flow of the Demo**
4. **Engage HansaWorld Trained Staff:** Initial demos should be led by HansaWorld trained staff, with partners shadowing to learn. Once confident and approved by their channel manager, partners can conduct demos with HW staff shadowing until their closing rates meet expectations. This process should be repeated for each new vertical they enter, such as moving from retail to hospitality.

Step 3: Prepare Demo Data and Environment

1. **Use demo data that is relevant**
2. **Test All Features:**
   - Run through the demo multiple times to ensure all features work seamlessly and the system is functioning correctly.

Step 4: Rehearse the Demo

1. **Run through the Demo Script:**
   - Practice delivering the demo script aloud, focusing on smooth transitions between points.
   - Rehearse addressing the specific pain points and how SERP solves them.
2. **Anticipate Questions:**
   - Think of potential questions or objections that might arise during the demo and prepare responses.
   - Rehearse handling these questions confidently, maintaining the focus on how the product adds value.

3. **Time Your Demo:**
    - Ensure the demo fits within the allocated time, typically 1 hour, ideally 30 minutes. Avoid rushing, and allow time for questions.
    - Plan to spend more time on the most critical parts for the prospect and less on less relevant features.

Step 5: Prepare Engagement Points and Interaction

1. Identify moments during the demo where you can engage the prospect, such as asking for feedback or prompting them to imagine using the feature.
2. Throughout the demo, acknowledge the prospect's challenges and validate their experiences. Use phrases like, "We've seen many companies face this challenge, and this is how our solution can help."

Step 6: Prepare Post-Demo Materials

1. **Create a Follow-Up Plan:**
    - Prepare key points to cover in your follow-up, including a recap of the demo, next steps, and additional resources that might be useful.
    - Set expectations for the next meeting or call, such as reviewing a proposal or a deeper dive into specific features.
2. **Gather Additional Resources:**
    - Compile any relevant case studies, whitepapers, or brochures that were discussed during the demo.
    - Prepare a summary document that highlights the key benefits of Standard ERP, tailored to the prospect's specific pain points.

Final Pre-Demo Checklist

✔ Research the prospect and understand their needs.

✔ Tailor the demo script to address specific pain points.

✔ Set up and test the demo environment with relevant data.

✔ Rehearse the demo and anticipate questions.

✔ Plan engagement points to keep the prospect involved.

✔ Prepare follow-up materials and outline next steps.

PARTNER QUICK-START GUIDE

Here's a Partner Quick-Start Guide designed to help partners start selling Standard ERP immediately.
This guide includes actionable steps, key product highlights, talking points, and responses to common objections.

1. Understanding Standard ERP: Product Highlights

Key Product Features and Benefits:

1. **Comprehensive Integration:** Standard ERP integrates all core business functions (finance, sales, inventory, CRM, etc) into a single platform, eliminating data silos and improving efficiency.
2. **Scalability and Flexibility:** Supports businesses of all sizes, with multi-currency, multi-language, and multi-country capabilities in a single database.
3. **Rapid Implementation (RIM):** Offers a Rapid Implementation Methodology that ensures quick deployment with minimal disruption to business operations.
4. **Customization through HAL**
5. **Robust Security Features**
6. **Integrated Communication Tools**
7. **Real-Time Reporting**

2. Key Talking Points for Selling Standard ERP

Core Messages to Use in Sales Conversations:

1. "Standard ERP is a single, integrated platform that simplifies your business operations. No more juggling multiple systems—get everything you need in one place."
2. "We offer a rapid implementation approach that gets you up and running quickly, minimizing downtime and disruption to your business."
3. "Our solution grows with you. Whether you're expanding internationally or adding new business units, Standard ERP scales seamlessly to meet your needs."
4. "Data security is a top priority. Standard ERP's built-in security features keep your business information safe and compliant."
5. "From financial management to CRM, inventory, and production—Standard ERP handles it all, reducing manual work and boosting productivity."

3. Common Objections and How to Overcome Them

"The system seems complex. Will my team be able to use it?"

We've designed SERP to be user-friendly and intuitive, with a consistent interface across all modules.

"What about the cost? It seems like a big investment."

SERP pays for itself quickly through efficiency gains and cost savings, thanks to streamlined operations and reduced manual work.

"We're worried about data security. How do you protect our information?"

SERP includes robust security measures, such as data encryption, access controls, and secure backups.

"We're concern about the implementation process being distruptive."

Our Rapid Implementation Methodology (RIM) focuses on getting you up and running quickly with core functionalities first, minimizing downtime and allowing you to see immediate benefits.

4. Steps to Start Selling Immediately

Step 1: Familiarize yourself with the Sales Materials

Review all available sales collateral, including demo scripts, case studies, and spotlight videos available in the partner portal.

Step 2: Conduct Product Demos

Use the provided demo scripts and spotlights to showcase key features of Standard ERP to potential clients.

Step 3: Register Leads in the Partner Portal

Step 4: Address Objections Confidently

Be prepared with responses to common objections. Rehearse to build confidence and ensure smooth delivery during conversations.

Step 5: Leverage Case Studies and Success Stories

Step 6: Stay Engaged and Follow Up Regularly

Schedule regular follow-ups to keep prospects engaged. Use CRM to track touchpoints and ensure timely communication.

Quick-Start Checklist for Partners

- ✔ Review key product highlights and familiarize yourself with SERP's main benefits.
- ✔ Use the provided scripts.
- ✔ Register all leads in the Partner Portal and keep their status updated.
- ✔ Conduct targeted demos focusing on prospect-specific needs.
- ✔ Prepare and practice responses to common objections.
- ✔ Share case studies to build credibility and illustrate success.
- ✔ Maintain regular follow-ups to nurture leads through the sales process.

CHANNEL MANAGER BEST PRACTICES CHECKLIST

1. Generating Partner Leads

- **Leverage Your Network:** Regularly connect with your professional network to identify potential partners.
- **Attend Industry Events:** Participate in trade shows, webinars, and networking events to generate leads.
- **Strengthen Your Online Presence:** Update your LinkedIn profile and engage in industry discussions to attract potential partners.

2. Maintaining Ethical Standards

- **Communicate Honestly:** Always provide accurate and truthful information to partners and customers.
- **Use Clear, Concise Language:** Avoid jargon and ensure your message is easily understood by all stakeholders.

3. Knowledge and Preparation

- **Master Product Knowledge:** Stay up-to-date with SERP's features and USPs.
- **Deliver Effective Demos:** Regularly practice demos and adapt them to address specific customer needs.
- **Participate in Training:** Engage in training sessions to keep your skills current.

4. Team Collaboration

- **Encourage Teamwork:** Foster a collaborative environment by sharing knowledge and supporting colleagues.
- **Involve Product Managers:** Engage product managers and other experts for demos requiring advanced technical knowledge.
- **Leverage Broader Expertise:** Utilize the knowledge of colleagues and partners in implementation, industry-specific processes, and technical configurations.

5. Customer Engagement

- **Understand Customer Needs:** Use effective questioning to identify customer pain points and tailor your approach.
- **Take Responsibility:** Follow through on commitments and ensure actions are completed promptly.
- **Emphasize Results:** Focus on delivering results quickly and efficiently to build trust.

6. Selling to Non-Desperate Customers

- **Be Knowledgeable:** Understand the product thoroughly to impress customers who may not have an immediate need.
- **Deliver Impactful Demos:** Keep demos concise and focused on the most relevant features to maintain engagement.

7. Terminology and Presentation

- **Use Approved Terminology:** Maintain consistency and professionalism by using the company-approved language and Continental English.
- **Short, Engaging Presentations:** Deliver shorter demos that highlight key features without overwhelming the audience.
- **Learn from Webinars and Spotlights:** Use company webinars and spotlights to enhance your presentations and showcase Standard ERP's capabilities.

8. Use our CRM Properly

- **Track Interactions:** Log all partner, leads and customer communications in our CRM to ensure proper follow-up.
- **Manage Leads and Opportunities:** Use our CRM and Workflow Overview to manage your sales pipeline, track

progress, and identify opportunities for growth.

- **Update Regularly:** Keep CRM records current to improve forecasting and decision-making.

9. Pass the Relevant Tests Related to your Position

- **Engage in Ongoing Learning:** Regularly take tests and certifications offered through HansaWorld University to maintain expertise.
- **Stay Current:** Ensure you are up-to-date with the latest product updates, sales strategies, and industry best practices.

10. Travel Often to Meet your Colleagues, Partners, and Customers

- **Plan Regular Visits:** Schedule trips to meet with partners, customers, and colleagues to build stronger relationships.
- **Foster Trust and Engagement:** Use face-to-face interactions to deepen connections and improve collaboration.

11. Communicate with Senior Management and CEO Often

- **Stay Aligned with Strategic Direction:** Regularly communicate with senior management to stay informed about company goals.
- **Share Feedback and Market Insights:** Use these conversations to provide feedback, report market trends, and discuss challenges.

12. Use Brochures, Whitepapers, and Case Studies

- **Leverage Marketing Collateral:** Use the available brochures, whitepapers, and case studies to support your sales efforts.
- **Access to Partner Portal:** Visit the partner portal regularly to access the latest marketing materials.

13. Performance Measurement

- **Set Measurable Goals:** Establish specific, measurable goals for yourself and your partners to ensure alignment with company targets.
- **Track Performance:** Use performance indicators to monitor sales, customer acquisition, and partner engagement.

14. Partner Training and Enablement

- **Equip your Partners:** Provide partners with the necessary knowledge about products, sales strategies, and market insights.
- **Motivate Certifications:** Encourage partners to pursue relevant certifications to enhance their credibility and expertise.

15. Cultural Sensitivity and Global Awareness

- **Respect Cultural Differences:** Be aware of cultural differences when interacting with international partners and customers.
- **Tailor Communication:** Adapt your communication style to respect cultural preferences and norms.

16. Collaboration with Marketing and Product Development

- **Work Closely with Marketing:** Ensure consistent messaging and branding in all communications.
- **Inform Product Development:** Share insights from partners and customers to guide product improvements, localizations, and translations.

Checklist

✔ I connect with my network regularly.

✔ I attend industry and networking events.

- ✔ I communicate clearly and honestly.
- ✔ I stay updated on product features.
- ✔ I practice and refine my demos.
- ✔ I share knowledge with my team.
- ✔ I use approved company language and terminology.
- ✔ I log all interactions in CRM.
- ✔ I adapt my appearance and presence to the customer's style while staying professional and aligned with company standards.
- ✔ I pass relevant tests and certifications.
- ✔ I meet partners and customers often.
- ✔ I communicate regularly with senior management and our CEO.
- ✔ I measure performance.
- ✔ I equip and train my partners.
- ✔ I respect cultural differences in my communications.