



Connect With Purpose

April 19th 2016



Connecting with Purpose

Welcome!!

IT'S ALL ABOUT YOU!!

- Quarterly Web Seminars
- Topics chosen by you

Connect with Purpose!

ScanSource Communications and ShoreTel Connect CLOUD
— everything you need to get your profits soaring!



LEARN MORE

Agenda

Thomas Simone - Client Sales Executive (CSE)

- How can best practices help you “Connect w/Purpose”

Garry Simpson - Manager Solution Center

- ShoreTel Solution Center

Joe Diaz - Distribution Partner Business Manager

- Competitive advantages

Shelly Parker - Field Marketing Manager

- Why are campaigns and promotions important

Q&A



How To Interact With Sales

A CSR's Perspective on Winning Cloud Deals

April 19th 2016



I've Found an Opportunity... What do I do now?

1. Opportunity is registered with ShoreTel through ScanSource
2. Email with lead information is sent to assigned ShoreTel CSR and territory sales team
3. Assigned CSR contacts sub-agent to Coordinate next steps:
 - discovery/demonstration/proposal build call with sales

The Call

- From an introduction between the prospect and sales team
- ShoreTel CSR will conduct continued discovery to tailor the demo
- Demo lead by ShoreTel CSR and support team
- After demo, ShoreTel CSR will educate the prospect on ShoreTel cloud licensing bundles.
 - This will allow the customers select the bundles that best meet his/her requirements
- Proposal is then created by the CSR and sent to the customer cc. the sub-agent
- Next steps set (typically proposal review call, proof of concept etc.)

What now?

- After a well done discovery call, we typically determine whether or not a prospect fits the profile of a ShoreTel Connect Cloud customer
- If this is determined to be a good fit, discover what the customers decision making process is and work with the sales team to secure the business.
- If it is determined to be a bad fit, thank the prospect for their time and consideration and agree to reconsider another time in the future when our solution may be a better fit for their requirements.



Competitive Update

April 19th 2016



Advantage ShoreTel Connect:

- Focus, Tightly Integrated, Simplicity
 - ❖ ShoreTel focuses on a single platform:
ShoreTel Connect ShoreTel Connect receives the full, undivided attention of ShoreTel and customers can be confident that their investment in ShoreTel Connect is protected
 - ❖ ShoreTel Connect is deployed as a single platform and managed as a single platform:
The collaboration tools offered by ShoreTel Connect are tightly integrated with each other and available through a single interface
 - ❖ ShoreTel Connect is a complete feature rich unified communications platform that includes presence, IM, web conferencing and mobility features.



ShoreTel Solution Center

April 19th 2016



ShoreTel Live! - Connect



Who

ShoreTel Employees
Solution Center SAs

What

Connect ONSITE
Connect CLOUD
Connect Contact Center
(CLOUD/ONSITE)



When

Tuesdays - ONSITE
Thursdays - CLOUD
Third Week of Month
(Contact Center CLOUD/ONSITE)

Where

Online Webinar
www.shoretel.com/upcoming-events

Why

Overview Demonstrations
Allows for Maximum Exposure
Get Custom Demonstration



Channel Marketing Update

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Key Initiatives



Top Three Initiatives

- 1 Demand Generation
- 2 Website Design/ SEO & Social
- 3 Partner Specific Initiatives

ShoreTel and ScanSource promotion details

ShoreTel and HPE Bundles

- **Offer:** Pre-approved pricing on select PoE switches & accessories when sold with ShoreTel solution or upgrade. No registration or paperwork required for pricing.
 - **Eligibility:** Open to all partners in good standing with BOTH the HPE/Aruba & ShoreTel partner programs.
 - **Distribution:** Valid via Authorized HPE/Aruba & ShoreTel distributors – e.g. ScanSource. HPE/Aruba gear available via ScanSource
- ShoreTel gear can be purchased via Ingram or how you normally purchase.
- **Discount:** Significant Discount on Approved HPE SKUs
 - **Effective:** 3/1/16 - 6/30/16

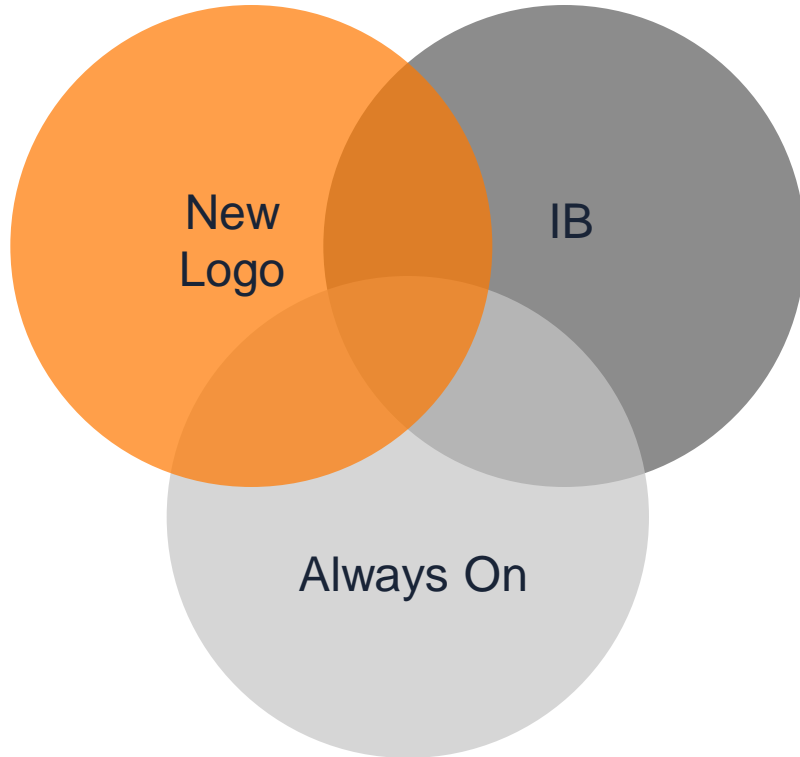
Beyond Expectations

ENHANCED! Connect CLOUD Lead Registration

ScanSource Connect Cloud Sub-Agents, who are also Premise Partners can earn two entries for every NEW, qualified, Connect CLOUD lead received. Entries count toward your overall Beyond Expectations point Accumulation that counts toward your overall Beyond Expectations point accumulation.

[Register your Connect CLOUD leads now!](#)

3 Types of Demand Generation



Demand Generation

Net New Logo

- BSNL PH I/II & III
- Onsite

Installed Base (IB)

- Get Connected Hybrid
- Get Connected Cloud

Always on

- Social Media
- Funnel Factory
- Nurturing

GET CONNECTED HYBRID CAMPAIGN – Available Now!

Objectives:

- ✓ Customer acquisition campaign for ShoreTel Connect HYBRID Sites
- ✓ Build awareness that the Partner company is the one to work with for telephony
- ✓ Generate interest with IT/Office Manager and LOB managers around business issues
- ✓ Identify near and long-term leads for Partner sales team to follow-up
- ✓ Drive appointments

Tactics:

- ✓ Trigger events targeting IT/Office Managers and the LOB Buyer
- ✓ 9 week nurturing campaign to educate and influence prospects



GET CONNECTED HYBRID CAMPAIGN PACKAGE

Educational offers

- 2 Landing Pages
- 1 ebook
- 1 HYBRID Info Graphic
- Twitter Format
- Facebook & LinkedIn Formats
- Campaign Overview PowerPoint

Content

- 8 Nurture Emails
- 4 Lead Generation Emails
- 3 Blog Posts
- 2 Call Guides
- 40 Social Media Comments
- Implementation Guide



	Book title: A Simple Equation: Cloud Communications - Business Success
Position	Here we are going to provide the back for the call? I wanted to follow up on the event that you attended about moving your phone system to the cloud to answer questions you may have and offer some recommendations specific to your company.
Question	(What questions do we want to ask to generate interest and qualify the prospect for a first meeting?) <ol style="list-style-type: none">1. What do you think of the concept, work is no longer a place you go, it's a thing you do? How do you think this applies to your business?<ul style="list-style-type: none">• Expand reporting and data capabilities• Increase application integration• Reallocate IT resources• Protect your margin and revenue stream2. What business advantages particularly interested you?3. How would those business advantages benefit your company?4. How do you feel a cloud phone solution would fit your company?5. What questions do you have from the event?6. What is your role with the phone system and is implementing them?7. What are your main technology concerns today?8. Additional questions you typically ask to qualify a new prospect.
Handle Objections	(What potential objections can we anticipate?) <ol style="list-style-type: none">1. Just attended the event to get some ideas2. Not ready to make a change or can't afford to make a change3. We just upgraded4. Not comfortable with cloud for our phone system

GET CONNECTED HYBRID CAMPAIGN EXECUTION

IT & Office Manager
LOB Manager



Signature Wins-The MRR model works!!

PARTNER A-

Meltzer, Purtil & Stelle LLC

- 41 profiles with a MRR of \$3,200
- 36 months for a total of \$115,128
- Source: BSNL

MPSLAW MELTZER, PURTILL & STELLE LLC

PARTNER B-

Keller-Leopold Insurance

- 120 Day sales cycle
- \$1,575 MRR/\$1,725 NRR
- Source: BSNL



KellerLeopold
INSURANCE

PARTNER C-

Agility Health

- 250 users
- In trial
- Source: BSNL and BSNL II

agilityhealth[®]
Serving Together. Better.SM

Marketing asks- ScanSource Connect with Purpose



1. Position the RIGHT Campaign
2. Lead Registration and Campaign alignment
3. Include Campaign Cost for ROI
4. Work closely with your PBM and ScanSource to ensure we can meet campaign goals and objectives together
5. Implement Always-on marketing best practices in your organization