ECC Sales Discovery Process

The established ECC Sales Discovery process considers a company’s specific needs to recommend the best offering for the prospective client. This process starts with the sales rep, and as the process continues, grows to include the SE, Professional Services, and even implementation partner teams.

Links to documents referenced in this course can be found in each platform’s ECC Content Guide hosted in the MRC and Spark.

Pick the first topic for an overview of the sales process.

Topics

* Step 1: Assess Fit
* Step 2: Demo ECC
* Step 3: Scope and Quote
* Sales Process flow

Step 1: Assess Fit

Step 1 – Assess Fit

The ECC Sales Process begins with the Sales team’s introductory conversations with a client. Here the Sales rep assesses the Customer’s Fit; both to measure the prospects interest level, and to consider which feature set best aligns with their needs.

At this point, a representative can use the ECC Elevator Pitch and Early Discovery Questions resources to learn about the prospect. These discovery questions are particularly useful during your first conversation with a prospect to identify the interest and opportunity level of their company.

Select a button to see some early discovery questions and characteristics of the ideal customer profile.

Questions at this early stage include:

* Are your Primary buyers B2B or B2C?
* What are the pain points you are trying to resolve for your buyers? And what issues are your buyers reporting?
* Do you have a current ecommerce site?
* Do you have a view of which products sell best?
* What are your growth plans for the next 3 years?

An ideal customer has:

* A defined digital commerce strategy
* Business growth goals or goals to reduce cost by going online
* Well understood B2B or B2C business scenarios and challenges defined by data
* And a Committed budget for their eCommerce endeavors.

When your conversation with a prospect moves beyond the Early Discovery Questions, it’s time to dig a little deeper. Leverage the ECC Digital Commerce Qualification Questionnaire to establish the fit for the prospect and determine the ECC offering that can be recommended. The first set of questions on this document helps define what needs they’re looking to fill with an ecommerce platform.

From there examine information about the Customer’s business model, revenue and inventory requirements. Making sure you gather the customer information and indicate accordingly on the worksheet.

The last section of the questionnaire helps identify which Feature Set they should consider. Remember, if they need a single feature from the Advanced portion- they must consider this option.

The ECC Digital Commerce Questionnaire is to be completed by the customer to provide further insight into the customer’s needs. How they answer these questions, guide future discussions and demonstrations to ensure their specific needs are addressed.

After you receive the answers back from the prospect, use the Digital Commerce Qualification Questionnaire Decoder to determine the best ECC offering to recommend to the customer.

It’s important to be intentional early in the discovery process, so you can best sell our value proposition and determine fit. When done correctly this allows the whole team to present demos and offerings that speak directly to the customer’s situation and needs.

Select the Right Arrow Icon to Continue.

Step 2: Demo ECC

Step 2 – Demo ECC

Once the fit has been determined and a suitable ECC Offering is identified, the Demo part of the process begins. The SE (Solutions Engineer) owns this stage of the process. The sales team can also ask the customer detailed questions to help guide the team to create ECC Demos based on relevant customer scenarios and provide additional information to fill RFPs.

The SE team will own the ECC demo sites and demonstrations and manage and promote the use of the RFP bank.

For ECC Advanced opportunities, our 3rd party implementation partners (Silk Software, Yoma, etc.) will provide support for demos and customer engagements starting with this stage. They will have detailed questions for the customer as they try to understand the custom requirements so that a relevant demo can be delivered. Contact our implementation partners through our Epicor ECC Professional Services team.

Select the Right Arrow Icon to move to the Scope and Quote section.

Step 3: Scope & Quote

Step 3 – Establish Scope and Quote

When a prospect makes the decision to continue after demos, the ECC Professional Services team joins the sales team to analyze the scope of the project and establish a final statement of work. Depending on the ECC offering selected and the geography of the customer, this service discovery step may be optional as there is a standardized Statement of Work (SOW) for ECC Express and ECC Base in the Americas. For international customers, ECC Base requires a service discovery step to create a more specific SOW.

For ECC Advanced, a detailed service discovery is required and our implementation partners Silk (for US), or Yoma (for international) participate in this part of the process.

ECC Sales Process

Refer to this flowchart to better understand the Sales Process Flow. Select a button to hear more. Use the right arrow icon when done.

ECC Express keeps the process quick and simple; Sales involves the SE team to deliver demos if requested. Pre-recorded demo videos are also available in Spark that can be sent directly to the customer. Because of the simplicity of product and to keep internal costs manageable, no service discovery is needed.

ECC Base may require demos from the SE team, and in the Americas a standard Statement of Work is used. Outside of the Americas, Sales finalizes a customized Statement of Work together with Epicor Professional Services.

For ECC Advanced prospects, SEs and/or our 3rd party implementation partners (Silk, Yoma) deliver the demos, and the PS team joins in to carry out a detailed service discovery before finalizing the Statement of work.

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