

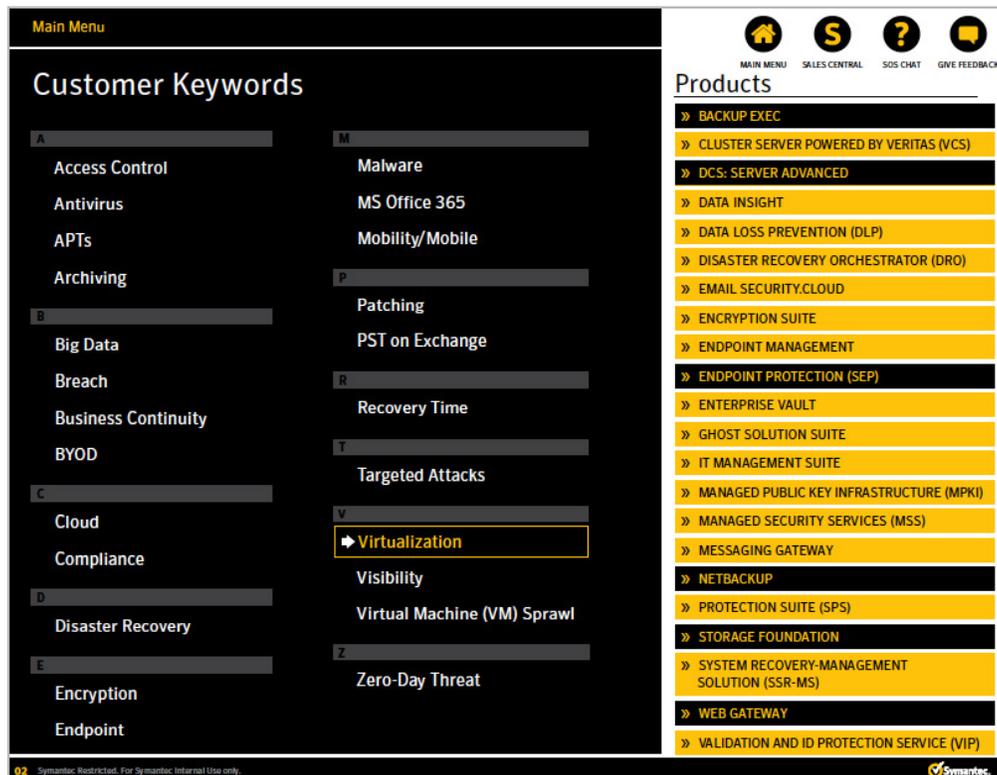
CASE STUDY / SYMANTEC KEYWORD CROSS-SELL TOOL

Symantec wanted to increase sales effectiveness for ISO teams who often understood only one half of its portfolio—either security or information management solutions—and who were thus unable to respond to customer keywords outside of their expertise. They also wanted to enable teams to capture all possible opportunities through better cross-selling.

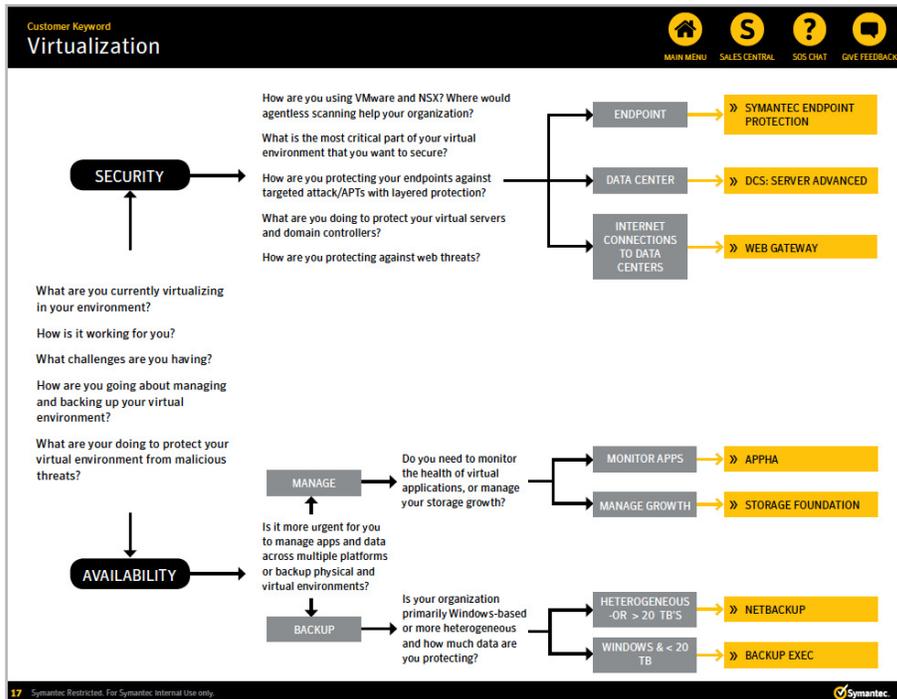
THE CHALLENGE

Symantec had a massive portfolio of both information management and information security solutions. Inside sales reps were often unable to effectively handle calls regarding the side of the portfolio they didn't focus on, leading to missed opportunities. The reps needed a tool that enabled them to make sense of both sides of Symantec's portfolio and also lead customers to possible cross-sell and upsell opportunities in either domain.

To address the issues of a large portfolio and inconsistent expertise within the ISO, Pearson & Co. recommended creating a sales tool that would provide reps with discovery questions that keyed off specific customer problems, connect those problems to the right solution, and serve up cross-sell and up-sell opportunities, along with product value propositions, to the rep on the call in real-time.



An easily scannable menu of customer keywords leads ISRs to possible solutions.



Discovery questions enable ISRs to determine the best solution to discuss with customers.

The screenshot shows the 'NetBackup' product page within the Symantec Keyword Cross-Sell Tool. It includes a navigation bar and a 'CLOSE or RENEW that product' section with questions about data recovery and backup policies. A 'Value Prop' section highlights NetBackup's industry-leading technology. An 'UPSELL new component' section lists questions about backup environment analysis and hardware sourcing, leading to 'Symantec Discovery (Formerly NBU Analyzer)' and 'NetBackup Appliance'. A 'CROSS-SELL new product' section lists questions about data retention, deletion, and storage growth, leading to 'Enterprise Vault', 'Enterprise Vault.Cloud', 'Data Insight', and 'Storage Foundation HA'. A footer indicates 'Symantec Restricted. For Symantec Internal Use Only'.

Discovery paths, value propositions, and key messages enable ISRs to close, renew, upsell and cross-sell in real-time.

WHAT DID PEARSON DO FOR SYMANTEC?

Pearson & Co. developed a groundbreaking, fully interactive tool for real-time use by the ISO team during prospect calls. The tool's discovery paths helped reps identify products to recommend in response to specific, high-use customer keywords. The tool also gave ISO reps discovery questions, value propositions, and talk track paths to help them cross-sell solutions from all parts of the portfolio.

First, we worked with Symantec to come up with a list of customer contexts to be used as keywords within the tool. These keywords led reps to discovery paths that enabled the rep to get to a sales opportunity by understanding the customer problem and connecting it to the right information management or information security solution. Reps were then able to get to the needed solution quickly and were served up concise product value propositions and why now statements on the product pages. These product pages also came with additional discovery questions that were linked to upselling and cross-selling solution opportunities. All of the discovery paths and value propositions were vetted with ISO groups around the world. The tool was also equipped with buttons that allowed reps to connect to their sales portal, access more technical reps that could help close customers on the spot, and give feedback for future updates and improvements.

WHAT HAPPENED?

The Symantec Keyword Cross-sell Tool was seen as an extremely useful tool and was used by more than just the inside sales team members. Reps across the company were using it real-time on calls to help them answer customer questions and increase cross-sell opportunities.

HERE'S WHAT YOU NEED TO DO.

If you want to equip your field, call **Jenee Gatto** today at **408-540-5305**. Or, if you'd like to explore more contextual selling best practices such as strategic messaging, high-value pursuit support, sales playbooks and guided selling tools, visit us at www.contextual-selling.com.