

Opportunity Plan					
Account name		CUSTCO Example Co. 17 Main st, Glasgow, G4 7YL			
Team members		Jamie Black – Account Director Alfred Fredrickson – Operations Director Thomas Miers – Presales Yammi Hosith - Demo Exec Team – Frerick Crane, Billy Hour, Mike Hughes, John McVie			
Current Status		Final 2 waiting for preferred vendor to proceed to POC Oct 11th			
Describe Project and Objectives		<p>CUSTCO Group Values - Personal service, real value for money and dependability...</p> <p><i>“Our long term vision is to continue to develop our third party network to increase our presence on the ground and investing in new technology. We want to develop stronger, ongoing relations with our customers across software development lifecycles, providing enhanced customer service and enabling customers to transact business outside of office hours. Whilst the core of our business will remain focused on face-to-face keeping our agents at the centre of our model, we also need to reflect the changing requirements of our customers. .”</i></p> <p>Systems to Enable our People (SEP) Initiative – 25% Productivity increase by Systems that will Enhance People Productivity & Customer Engagement IEP – Integrated Enhancement Programme IEP phase 1</p> <ul style="list-style-type: none"> ○ Single Customer View - Master Data Management (MDM) by initiate (completed) ▪ IEP phase 2 CRM <ul style="list-style-type: none"> ○ Customer Experience & Management, Consistent, Integrated View of Customer ○ SOA Approach ○ Increase channels to market (Web sales and self-service) ○ Enhanced customer support centres (24x7 and peak) ▪ IEP desired CRM <ul style="list-style-type: none"> ○ Required functionality to enable new business model ○ Integrate (300 Agencies, Customer Service Centre (200strong), Direct Field Consultants, Back Office & Web) 			
Barriers to Winning		<p>Lacking current onsite referenceability in Software Development in the UK Lacking reference with similar Red25 business model No Exec relationships to date, though this will change on 21st Sept with key exec meeting to take place prior to decision being made Agency based business model is not typically sweetspot for Red25 Lack of Process management out of the box If CUSTCO have an competitive offering that has been deployed across an agency network and is flexible with strong integration capability into the likes of MDM then we have a problem</p>			
Competitors		<p>Unknown but unlikely to be Oracle,SAP,Microsoft or SFDC CUSTCO indicated that they are looking for a partner small enough to care but stable enough to be around in 5 years...hunch is that we are up against MySys</p>			
Problem Acknowledgment	Implication Analysis	Investigate Solutions	Competitive Review	Selection	Negotiation
Revenue Breakdown		£1,2M Software with £1,0M proposed for Phase 1&2 with 2013 purchase £2.3M Services			
Signature Date		December 2013 with committed invoice in 2014			

Prospect Status	
Describe the current situation	<ul style="list-style-type: none"> - Finalising contracts by 22nd September 2013 - Completing POC proposal by 17th September 2013 - Exec Meeting to assess cultural fit on 21st September 2013 - Decision on preferred vendor by 11th October 2013 latest - POC to start no later than Nov1st - Board presentation first week December - Board/IDP team confirm progress to project - Sign Contracts in December 2013 and Invoice
Describe their problems	<ul style="list-style-type: none"> - CUSTCO looking to extend their 9-5 Business Model with Customer Service Centre (CSC) to provide flexibility and greater service - CUSTCO need to provide more channel choice by Contact Centre and Web - Need to integrate these extensions to the business model so that they preserve their core values of (Award Winning Service, Value For Money and dependability) - They need to be more proactive and intelligent at campaigning and this single customer view and integrated communications will enable this
Describe the Implications	<ul style="list-style-type: none"> - Over time their service will deteriorate in line with customer expectations in a 24x7 and mobile/web world - They limit their ability to effectively campaign more deeply to customers/prospects
How will they justify the budget	<ul style="list-style-type: none"> - CUSTCO will invest in a CRM system that they will then lease out to their network of 100+ tied agents at an annual cost - Budget is already approved and IDP have committed to the board a September 2011 go live date - This programme underpins their defined strategy and has board level approval as part of SEP and IEP
What happens if they do nothing	<ul style="list-style-type: none"> - There is no impending implosion of CUSTCO if they do nothing - They cannot provide the extended hours and greater choice that they have committed to their board and agency network of tied agents - There is definite demand from the agencies for the out of hours service and the ability to
Qualification	
Why are they looking for a solution?	<ul style="list-style-type: none"> - CUSTCO looking to extend their 9-5 Business Model with Contact Centre (CC) to provide flexibility and greater service - CUSTCO need to provide more channel choice by CC and Web - Need to integrate these extensions to the business model so that they preserve their core values of (Award Winning Service, Value For Money and dependability) - They need to be more proactive and intelligent at campaigning and this single customer view and integrated communications will enable this - The solution therefore needs to deliver the following <ul style="list-style-type: none"> - Pure CRM customer/contact management - Integrate with MDM (Surface the Single customer view) - Integrate with their LOB systems - They need defined role based access that will differ between Back office, Field Consultants, Agencies and CCs etc - They need integrated view of all customer comms across

	<p>channels and across agencies and CCs</p> <ul style="list-style-type: none"> - Campaign and Lead Management - Phase 1 to be delivered in first 9 months of 2014 <p>- CUSTCO ARE NOT LOOKING FOR</p> <ul style="list-style-type: none"> - Transactional capability such as Quote to Sale or MTAs as with other Red25 customers
Why should they select Red25?	<p>1. TECHNICALLY & FUNCTIONALLY STRONG FIT</p> <ul style="list-style-type: none"> - Unique – CUSTCO have a unique business model and strategy not suited to package vendors but well suited to our flexible easy to integrate solution...if we assume that they have not got an alternative that fits their model out of the box then we are the right company to build the system to meet their requirements and unique business model - Integration - CUSTCO fits their core need of Integrating customer engagement across channels - Flexibility - Our MO of Integrating to and leveraging data and other core systems is well aligned to the need to work with MDM and CUSTCO LOB systems - Customer Experience - Customer Care and Customer/Agent Experience is at the heart of our vision and values <p>2. VALUE FOR MONEY</p> <ul style="list-style-type: none"> - Time to Value: Our phased implementation, competitive commercials and track record of time-to-value aligns to this core value <p>3. SIZE – Synergy is good Red25 suits their desire to work with a company small enough to care and stable enough to be around in 5 years...and NOT a global software company to tell them what to do</p> <p>4. DEPENDABILITY</p> <ul style="list-style-type: none"> - Software Pedigree of Red25 - Technology Partnership – our customer benefit from our ability to align our roadmap with their business drivers - Total Engagement – CEO top down engagement and accountability for the relationship and implementation/support
Why will they act now?	<p>Project has been committed onto priority list with a deliverable committed to the CUSTCO board for September 2013</p> <ul style="list-style-type: none"> - Driven by demand from the Agency Network who will pay for the service and therefore will deliver immediate revenue benefit for CUSTCO in the last quarter of 2013 - Driven by expansion of Contact Centre - They have changed their original plan of a prolonged 3 month POC with 2 vendors to a 1 month POC with 1 vendor to enable desired go live date - This is phase 2 of an IEP programme that is already underway and successful - CUSTCO have a strong Operating ratio and have budget approved for the project
What is their evaluation process?	<p>Completed...Pre RFI, RFI, RFP, 3 day onsite RFP pitch and bespoke demo Focus is now on POC proposal and Commercial Proposal</p>
What is their decision	<p>Final assessment of cultural fit during exec engagement on 27st September 2013</p>

process?	<p>Commercials and POC proposal being finalised by 7th September 2013 Implementation references will take place after the Preferred vendor decision however the promise of these will also influence the decision</p> <ul style="list-style-type: none"> - We have lined up ACME BUILDING (onsite) and ACME OTHER CUSTOMER (Audio only)
What is their procurement process?	<ul style="list-style-type: none"> - Finalising contracts by 22nd September 2013 - Completing POC proposal by 17th September 2013 - Exec Meeting to assess cultural fit on 21st September 2013 - Decision on preferred vendor by 11th October 2013 latest - POC to start no later than Nov1st - Board presentation first week December - Board/IEP team confirm progress to project - Sign Contracts in December 2013 and Invoice
Are there any product gaps	<p>No although our Analytics and Campaign capability is derived from OTHER SUPPLIER and is NOT Out of the Box. OTHER SUPPLIER engagement has not been as slick as it could have been due to this being the first UK engagement</p>
What are their selection criteria?	<p>5 Criteria...and we have score highly in the first 3...still evaluating the final 2</p> <ul style="list-style-type: none"> - Functional Fit - Technical Fit - Cultural Fit - Commercials - Quality of POC proposal
What are the Gotchas?	<ul style="list-style-type: none"> - Financials: (BILLY) Procurement has briefed the stakeholders on prior concerns about our seeming declining performance prior to acquisition. Billy has addressed these with procurement but the stakeholders may ask. - Agency (Non contact centre) based experience: (MIKE) The only experience we can site might be Crazy Johns rolled out in a network of retail branches, Eskom rolled out to walk in branches and Standard Bank case/workflow functionality being rolled out to branches - Cost/Value for Money: (ALFRED) We are often expensive on implementation relative to competitors...but we will craft the right flexible solution and it is phased to deliver value for money and with significant investment from - PROBLEM OTHER CUSTOMER: (BILLY) Why are they not referenceable...CUSTCO may have spoken to them off the record - Gartner and Analyst insight: (JAMIE) Mike Billington from Procurement used to be a VP at Gartner and may have an inside track on our 2009 performance?
Exec Meeting Roles	<ul style="list-style-type: none"> - John McVie: Holding companies commitment and Pedigree. - Mike Hughes: Red25 heritage, vision and values...CUSTCO staff on average have a very long tenure...people stay and are passionate about the company...nice parallel with Red25! - Billy Hour: Red25 commitment, Governance/Accountability - Steven Thurlow: Red25 technology the right fit for CUSTCO now and future... Mobile, CRM trends & Innovation - Jamie Black: Focus on meeting objectives and facilitate
CUSTCO Stakeholders	<ul style="list-style-type: none"> - Jim McKinsy, CIO: 100 days at CUSTCO <ul style="list-style-type: none"> - 11 years at Tesco as Customer Service and IT Director. - 7 years at PWC

- Housing start-up and Owned consultancy prior to these
- Flagged an interest in Analytics and the role that this might play for CUSTCO
- **Tom Brown, IDP Programme Director:** Responsible for first phase and implementation of MDM in particular.
- **Armanda Foss, General Manager, Strategy & Marketing:** Keen eye on their brand and commitment to service (see awards below)
 - 3rd year running 'Best Software Solution' by the readers of PC Weekly
 - Remington, awarded top 5-stars all CUSTCO products British Software Awards General Developer of the Year
 - Association of Software developers Customer Impact Survey of 35 Software companies:
 - o 65% Net Promoter score v 53% Industry average
 - o 90% customers say CUSTCO easy to do business with and fair
 - o 89% customers agree CUSTCO 'really care' DOWN 4% from 93% due to bedding in new systems
 - Also was/is West of Scotland RFUC and Secretary Glasgow RFUC
- **Reeta Bing, Project Manager IDP:** Reeta has been present throughout the process at all meetings to date.
- **Gary Manson, Group Head Procurement:**
- **John Millington, Procurement Specialist:** John owns a company (Blue Bottle) specialising in managing software procurement, ex VP of Gartner and prior to that worked at IBM...knows his stuff!

Action/Close Plan

What	Who	When	Status
Commercial Negotiations	Alfred/Mike/Jamie	17 th Sept	Final Draft being reviewed
Legal Ts & Cs	Brian	17 th Sept	In progress
Proof Of Concept Proposal	Alfred	17 th Sept	Final draft review
SUPPLIER Commercials	Jamie & SUPPLIER	20 th Sept	Pending
Exec Meet	Fredrick, Mike, Billy, John, Jamie	21 st Sept	Committed
References confirmed	Jamie/John	24 th Sept	CUSTCO to confirm availability
Preferred Vendor Announcement	CUSTCO	11 th Oct	Process in flight still
POC Delivery	Alfred Fredrickson	November	Final Planning
Board Presentation & Demo	John M/Jamie	Early Dec	Early planning
Go/Nogo & Contracts	Jamie	Mid Dec	Pending