ClearEdge
PARTNERS

CLEAREDGE ACADEMY

CERTIFICATION PROGRAM OVERVIEW

Raising Awareness
Building Skills
Developing Leadership

Certification Program Mission

Deliver educational experiences to raise awareness, build skills, and develop leadership to promote world class competitiveness in IT deal preparation and execution.

Why Become a Certified Deal-Leader?

Traditional negotiation trainings and approaches fail to identify, create and exploit leverage in cross-functional buying situations. ClearEdge Academy's Certification Track consists of three unique courses that prepare IT professionals and buyers to compete with their most strategic suppliers.

The program combines a mix of classroom learning, case studies, workshops, peer reviews, coaching and comprehension assessments in order to certify participants as Leverage Managers.

ClearEdge Academy Certification Program Builds:

Highly repeatable process to neutralize sales systems

Understand how to drive efficiencies within your organization and how to create a repeatable process to continually drive the best results.

Focus on activities proven to promote negotiation strength

What motivates suppliers changes over time. Stay up to date on all relevant vendor knowledge to identify where leverage opportunities exist and where potential risk points may lie.

Awareness across all stakeholders on sales tactics, sales strategies, and information control requirements

Suppliers plan and strategize to capture the most value as possible from a deal. Learn the frameworks and best practices that can be replicated on an enterprise-wide scale to drive continual deal success and counter any supplier strategy.

Leadership skills to align teams around deal strategies

A successful negotiation requires buy-in from your stakeholders and team members. Understand the difficulties organizations run into when trying to align teams and how to avoid fallen victim of misalignment during negotiations.

Actively Managing Leverage

Negotiating without Leverage is Just Begging

It’s often said that negotiating without leverage is another form of begging, yet we commonly observe enterprise buyers approaching suppliers with little time to execute a deal, no viable alternatives to a proposal, and no valid reasons for the supplier to offer a better, more competitive deal. Supplier sales teams are masters at executing their “land-and-expand” strategy, getting a foot in the door, winning over users, spreading across business units and processes, and growing their footprint. These activities occur as the sales team actively works to eliminate any and all sources of leverage you may have.

The Foundation of our Program: Leverage Management Maturity Model (LM^3)

ClearEdge has developed its methodology over a decade of analyzing deal-making, in cooperation with our Executive Advisory Board consisting of the top IT buyers at global enterprise wide companies. Organizations who excel in these 9 areas consistently demonstrate best-in-class deal execution:

Early Warning	Do we have an organized approach to starting deals on time?
Risk Assessment & Inspection	Do we understand all contractual and business risks?
Forecast & Modeling	How much do we need and when do we need it?
Deal Timeline Development	Have we documented a calendar of deal making activities?
Supplier Knowledge	How might supplier sales systems and motivations affect my deal?
Deal Option Development	What deal alternatives or “Plan Bs” do we have?
Information Control	What information will we protect and what will we share?
Executive Engagement	Are executives informed, aligned, and participating on the deal?
Messaging Development	Are we controlling the story with credible and consistent messaging?

Certification Program Design

Interactive, Hands-on Approach

Series of courses combining classroom learning, case studies, workshops, peer reviews, coaching & assessment. The result certifies participants as deal leaders who can diagnose risks and leverage challenges, identify and counter supplier strategies and effectively prepare and execute complex deal engagements by:

- Understanding supplier sales and pricing systems
- Inspecting contracts for risk, assessing deal-specific financial models
- Identifying and countering prevalent supplier sales strategies
- Building internal and external messaging plans
- Assessing leverage position and action plans for improvement
- Aligning cross-functional stakeholders
- Building and executing strategic deal plans

Core Courses

Assessing Leverage and Inspecting for Risk

Focused on the key elements of Leverage Management and IT Deal Risk Assessment through understanding of sales systems, contract risk and spend modeling for IT sourcing and deal stakeholders.

Countering Supplier Strategy with Effective Messaging

Diagnose sales strategies and tactics used by suppliers, develop plans and craft messages in order to counter sales team activities.

Complex Deal Leadership

Comprehensive analysis of spending situations involving multiple stakeholders and powerful suppliers on client-specific, significant "live" spend events for experienced deal-makers.

Assessing Leverage & Inspecting for Risk

The Fundamentals of IT Deal-Making

Assessing Leverage & Inspecting for Risk is designed to raise awareness of sales systems, provide tools for reviewing contracts and inspecting proposals, and introduce the basics of managing leverage. Case studies and workshops illustrate the value of information in negotiation, how leverage can shift over time, and where supplier sales teams can hide risky terms within your deal.

Key Learning Objectives

- Review supplier sales methodologies and value-based pricing systems
- Understand the three main sources of leverage
- Assess IT contracts for risk
- Inspect deal-specific financial models and supplier proposals
- Learn the 9 key capabilities for Managing Leverage

Approach

The course combines interactive discussions and self-guided work built on client case studies, actual contract examples, and real supplier proposals. Participants will return to their organizations with tools in hand to improve execution on their next deal. Tools, frameworks and worksheets include:

- Is This a Good Deal? Checklist
- Risk Assessment Framework
- LM^3 - Leverage Management Maturity Model
- Negotiations Workshop

Sample Agenda: Assessing Leverage & Inspecting for Risk

Start Time	End Time	Session	Description
Introduction			
8:30 AM	9:00 AM	Registration & Coffee	
9:00 AM	9:10 AM	Welcome	Introduction to class overview and skills.
Module 1 - The Pricing Game			
9:10 AM	10:00 AM	Introduction to Value-Based Pricing	Overview of supplier strategies and Leverage Management Maturity Model framework.
10:00 AM	10:30 AM	Negotiations Workshop	Negotiation exercise that highlights supplier vs. buyer side tactics and motivations.
10:30 AM	10:40 AM	Break	
10:40 AM	11:25 AM	Sales Systems & Motivations	Uncover supplier motivations and tactics.
11:25 AM	11:45 AM	Neutralizing the Sales Game	Understand how to counter supplier strategies.
11:45 AM	12:30 PM	Lunch	
Module 2 - Case Study A			
12:30 PM	2:00 PM	Contract & Proposal Inspection (Case Study 1)	Individually analyze sample contract to identify risk and potential pitfalls.
2:00 PM	2:10 PM	Break	
2:10 PM	3:10 PM	Contract & Proposal Review (Case Study 1)	Rejoin as a group to discuss risk findings.
3:10 PM	3:20 PM	Break	
Module 3- Case Study B			
3:20 PM	4:15 PM	Contract & Proposal Inspection (Case Study 2)	Individually analyze sample contract to identify risk and potential pitfalls.
4:15 PM	5:00 PM	Contract & Proposal Review (Case Study 2)	Rejoin as a group to discuss risk findings.

Countering Supplier Strategy with Effective Messaging

Identify Sales Strategies & Tactics, Then Neutralize Them

This course will allow you to identify supplier sales strategies and develop messaging which will neutralize them. Traditional negotiation trainings often fail to identify, create and exploit leverage in cross-functional buying situations. This enables suppliers to control spending events and consistently outperform enterprise buyers. By focusing on messaging which motivates the sales team and clearly outlines leverage, buyers can regain control in their negotiations.

Key Learning Objectives

- Learn how to identify the prevailing IT supplier sales strategies
- Understand suppliers' deal approval process and the role of the forecast
- Anticipate the tactics a supplier will use to support their sales strategy
- Use frameworks to develop messages that influence the forecast and change the dynamics of a deal

Approach

The course combines interactive discussions and self-guided work built on real world case studies, actual contract examples, and real supplier situations including Microsoft, Oracle, and Salesforce. Participants will return to their organizations with tools in hand to improve execution on their next deal. Frameworks and worksheets include:

- Sales Strategy Identification
- Buyer Leverage Assessment
- Sales Tactics Identification
- Sales Tactics Neutralization
- Buyer Message Development

Sample Agenda: Counteracting Supplier Strategy with Effective Messaging

Start Time	End Time	Session	Description
Introduction			
8:00 AM	8:30 AM	Registration & Coffee	
8:30 AM	9:15 AM	Introduction into Supplier Strategies	Discuss 3 main strategies suppliers use to consistently win deals.
9:15 AM	9:30 AM	Strategy Identification Workshop	Activity to review supplier scenarios to identify the related strategy used.
9:30 AM	9:45 AM	Workshop Output Discussion	Discuss as a group the findings from the previous workshop.
Break: 9:45 AM - 10AM			
10:00 AM	10:30 AM	Execution Tactics That Support Sales Strategies	Deeper dive into 3 main strategies to highlight the tactics that support each.
10:30 AM	10:45 AM	Strategy and Execution Workshop	Activity to review supplier strategy and how they execute deals.
10:45 AM	11:00 AM	Workshop Output Discussion	Discuss as a group the findings from the previous workshop.
11:00 AM	11:30 AM	Supplier Strategy Playbooks	Address the playbooks that are used by suppliers to dictate deal negotiations.
Lunch: 11:30 AM - 12:15 PM			
12:15 PM	12:45 PM	Neutralizing Sales Strategies & Tactics Workshop	Exercise to develop strategy to counter vendor tactics commonly used.
12:45 PM	1:00 PM	Workshop Output Discussion	Discuss as a group the findings from the previous workshop.
1:00 PM	2:00 PM	Opening Discussion on Messaging & The Role of the Sales Funnel	Introduce strategic messaging and how supplier quota systems work.
Break: 2:00 PM - 2:15 PM			
2:15 PM	3:15 PM	Message Development to Impact Sales Funnel	Discuss strategic messaging to vendors and how to take advantage of their quota.
3:15 PM	3:45 PM	Group Exercise on Message Effectiveness	Review of client messaging to assess its ability to motivate a supplier.
Break: 3:45 PM - 4:00 PM			
4:00 PM	5:00 PM	Group Exercise: Messaging for Specific Sales Scenarios	Activity to develop messaging for specific sales scenarios applicable to participant.

Complex Deal Leadership

Identify Sales Strategies & Tactics, Then Neutralize Them

The final of three sessions in our Deal-Leader Certification Track, Complex Deal Leadership focuses on building a plan to align stakeholders and execute a strategic deal with a supplier of the participant's choice. Participants will systematically build a deal plan including stakeholder priority assessment, leverage position, action plan, risk assessment and messaging plan.

Key Learning Objectives

- Work with coaches and peers to build a customized deal plan for an upcoming spend of their choice
- Learn how to assess and improve stakeholder alignment
- Apply lessons learned from real life case studies to their own spend event
- Assess leverage, strengths and weaknesses of their current deal and build action plans to improve

Approach

The course combines interactive discussions, real world case studies and self-guided work with significant 1:1 coaching from ClearEdge Analysts and Subject Matter Experts. Participants will return to their organizations equipped with a fully developed and vetted deal plan to execute on an upcoming deal of their choice. Tools include:

- Stakeholder Alignment Diagnostic
- Deal Risk Assessment Worksheet
- LM^3 - Leverage Management Maturity Model
- Action Planning Worksheet
- Message Development Worksheet

Sample Agenda: Complex Deal Leadership

Day 1			
Start Time	End Time	Session	Location
8:30 AM		Registration & Coffee	
		Introduction: What's at Stake?	Training Room
		Case Study: Alignment Challenge	Training Room
LM^3 Module 1 (Leverage Position & Early Warning)			
		Case Study Discussion	Training Room
		Self-Assessment, Action Planning, Peer Review & Coaching	Huddle Rooms
12:00 PM		Lunch	
LM^3 Module 2 *(Risk Assessment)*			
		Best Practices Discussion	Training Room
		Self-Assessment, Action Planning, Peer Review & Coaching	Huddle Rooms
LM^3 Module 3 *(Forecast & Modeling)*			
		Best Practices Discussion	Training Room
		Self-Assessment, Action Planning, Peer Review & Coaching	Huddle Rooms
Case Study Review *(Forecast & Modeling / Risk Assessment)*			
		Walk Through BAU, Risk Assessment and Action Plan from Case Study	Training Room
5:30	7:00	Dinner On Site	Kitchen & Dining Room

Day 2			
Start Time	End Time	Session	Location
Open			
7:30 AM		Breakfast	
8:00		Opening	Training Room
LM^3 Module 4 *(Deal Timeline Development, Supplier Knowledge, Deal Option Development)*			
		Case Study Discussion	Training Room
		Self-Assessment, Action Planning, Peer Review & Coaching	Huddle Rooms
LM^3 Module 5 *(Information Control)*			
		Case Study Discussion	Training Room
		Self-Assessment, Action Planning, Peer Review & Coaching	Huddle Rooms
LM^3 Module 6 *(Messaging Development)*			
		Messaging Development Best Practices	Training Room
		Messaging Planning, Peer Review & Coaching	Training Room
12:00 PM	1:00	Lunch	
LM^3 Module 7 *(Executive Engagement)*			
		Executive Briefing Framework & Case Study	Training Room
		Executive Breifing, Peer Review & Coaching	Huddle Rooms
	5:00	Present Final Deal Plans	Training Room