



# 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<sup>3</sup>)

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:

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

# Certification Program Design

## Interactive, Hands-on Approach

Series of courses combining virtual classroom-style 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<sup>3</sup> Leverage Management Maturity Model



Negotiations Workshop

WEEK OF JANUARY 25, 2021

12:30 - 2:00 PM EST DAILY

TICKETS FOR \$995

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Conference registration covers all sessions and workbook materials including case studies and your deal plan.

## Sample Agenda: Assessing Leverage & Inspecting for Risk

January 25-29, 2021		
Timing	Session	Description
Day One - Class Introduction & Module 1		
20 Minutes	Class Intro and Expectations	Class overview, activities and expectations, Client Introductions
35 Minutes	Value-Based Selling & Deal Pricing – A Suppliers View	Overview of supplier strategies & methodologies that drive deal pricing
30 Minutes	Group Discussion – Suppliers Value Based Pricing	Group Discussion
5 Minutes	Homework Assignment	Preparation for tomorrow's workshop
Homework Assignment - Read the Negotiation Workshop sheet and prepare for Breakout exercise tomorrow		
Day Two – Module 2		
20 Minutes	Intro and Negotiations Workshop	Breakout negotiation exercise
20 Minutes	Group Discussion – Negotiations Workshop	Discuss how you worked to the conclusion of the exercise and trends in results
35 Minutes	Supplier Sales Motivations & System	Understand what we are up against – What do sales teams do and why
15 Minutes	Sales System Discussion and Prep for Tomorrow	Supplier interactions Workshop
Day Three – Module 3		
50 Minutes	Neutralizing the Sales Games	Implementing a Leverage Management process to counter supplier strategies
30 Minutes	Group Discussion – LM3 Implementation	Group Discussion
10 Minutes	Preparation for Homework	Review homework expectation and plans for tomorrow
Homework Assignment - Read the contract and fill out associated worksheets		
Day Four – Module 4		
30 Minutes	Case Study – Leverage Assessment	Assess case study scenario to determine deal leverage position
30 Minutes	Case Study Leverage Position Assessment	Group Discussion
30 Minutes	Introduction to Risk Inspection	Inspecting proposals and contracts to identify risks and readiness to execute
Homework Assignment - Review contract again with a focus on highlighting for risks		
Day Five - Module 5		
70 Minutes	Case Study Risk Inspection Review	Group discussion
20 Minutes	Class Wrap-up and Feedback	Group discussion to review class highlights and allow participants to provide feedback

# 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

WEEK OF FEBRUARY 15, 2021

12:30 - 2:00 PM EST DAILY

TICKETS FOR \$995

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## Sample Agenda: Counteracting Supplier Strategy with Effective Messaging

February 15-19, 2021		
Timing	Session	Description
Day One - Class Introduction & Module 1		
20 Minutes	Class Intro and Expectations	Class overview, activities and expectations, client Introductions
30 Minutes	Introduction to Supplier Strategies	Introduction to the 3 primary strategies suppliers use to consistently win deals
30 Minutes	Strategy Identification Group Workshop	Group activity to review supplier scenarios to identify strategies in action
10 Minutes	Workshop Discussion and Prep for Day 2	Day 1 review and preparation for Day 2
Day Two – Module 2		
35 Minutes	Intro to Supplier Execution Tactics to Support Sales Strategies	Deeper dive into the tactics that suppliers use to support their strategies
45 Minutes	Strategy Execution Workshop	Group activity to identify supplier strategy and tactics and how their used to execute deal set-up
10 Minutes	Strategy Playbook Review and Prep for Day 3	Day 2 review and preparation for Day 3
Day Three – Module 3		
30 Minutes	Supplier Strategy Playbooks	Review an example of a playbook that suppliers work from to set-up and win deals prior to negotiation
30 Minutes	Neutralizing Supplier Actions Workshop	Group activity to determine specific actions to neutralize supplier strategy/tactics
20 Minutes	Supplier Strategy within IT Agreements	Review of contract risk associated with Defend Strategies built into IT agreements
10 Minutes	Playbook & Agreement Review and Prep for Day 4	Day 3 review and preparation for Day 4
Day Four – Module 4		
35 Minutes	Impact of Messaging on Sales Process and Strategy	Review of sales strategy within the sales process and how messaging varies by deal
30 Minutes	Messaging Development Related to the Sales Funnel	Group discussion on how messaging needs to change based on where a deal is in the sales funnel
15 Minutes	Deal Examples for Messaging to the Sales Funnel	Participant examples of messaging to deals at various stages of the sales funnel
10 Minutes	Messaging Development Review & Prep for Day 5	Day 4 review – Homework intro & prep for Day 5
Homework – Complete Messaging Worksheet for Current Active Deal Not Yet Closed		
Day Five - Module 5		
20 Minutes	Build Your Own Messaging Workshop	Group discussion to review homework and refine messaging
60 Minutes	Messaging to Specific Deal Scenario Workshop	Group activity to review specific deal scenarios and develop effective messaging
20 Minutes	Class Wrap-up and Feedback	Group discussion to review class highlights and allow participants to provide feedback



# 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<sup>3</sup> Leverage  
Management  
Maturity Model



Action  
Planning  
Worksheet



Message  
Development  
Worksheet

WEEK OF MARCH 15, 2021

12:30 - 2:30 PM EST DAILY

TICKETS FOR \$995

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## Sample Agenda: Complex Deal Leadership

March 15-19, 2021	
Timing	Session Description
Day 1 - Alignment Challenge & Tools Introduction / Leverage Position	
60 Minutes	Welcome & Introduction – Complex Deal Alignment Challenge (Case Study)
20 Minutes	Deal Alignment & Leverage Assessment – Self Assessment & Action Planning
30 Minutes	Deal Alignment and Leverage - Peer Review & Coaching
15 Minutes	Day 1 Wrap-up & LM3 Modules 1-3 Prep
Day 2 – Initial Deal Planning – Early Warning / Risk Assessment / Forecast & Modeling	
40 Minutes	Best Practices Discussion – Early Warning / Risk Assessment / Forecast & Modeling
25 Minutes	Contract Risk Assessment & Deal Forecasting Workshop & Self Assessment
40 Minutes	Risk Assessment & Forecast / Modeling - Peer Review & Coaching
15 Minutes	Day 2 Wrap-up & LM3 Modules 4-6 Prep
Day 3 – Deal Plan Buildout – Deal Timeline / Supplier Knowledge / Deal Option Development	
40 Minutes	Best Practices Discussion – Deal Timeline, Supplier Knowledge & Deal Option Development
25 Minutes	Deal TimeLine, Supplier Knowledge & Deal Option Development Action Planning Workshop & Self Assessment
40 Minutes	Deal TimeLine & Deal Option Development - Peer Review & Coaching
15 Minutes	Day 3 Wrap-up & LM3 Modules 7-9 Prep
Day 4 – Finalizing Deal Plans – Information Control / Executive Alignment / Messaging Development	
40 Minutes	Best Practices Discussion - Info Control / Exec Alignment / Messaging Development
25 Minutes	Deal Messaging w/Exec Alignment and Info Control Workshop & Self Assessment
40 Minutes	Info Control / Exec Alignment / Messaging Development – Peer Review & Coaching
15 Minutes	Day 4 Wrap-up & Planning for Final Deal Plan Presentations
Day 5 – Deal Plan Presentation & Reviews	
30 Minutes	Finalize Deal Plans
45 Minutes	Deal Plan Review with Coaches
45 Minutes	Deal Plan Presentations to Group