



Enterprise / Mid-Market Sales Playbook for Partners

Introduction: How to use this document

This document serves as a guide for you to identify how the customer defines value, which will then guide the conversation to the *relevant* differentiation of 8x8's solution to solve the customer's pain points. Use this reference document to drive early calls and discovery within the sales process. It should serve as a guide for consistently communicating our differentiated value with new prospects and current customers in order to uncover new sales opportunities.

The objectives of this sales playbook:

- Provide a consistent talk track
- Ask probing discovery questions to understand how prospects define value
- Position the 8x8 story by mapping their value drivers in the context of our defensible differentiation
- Set trap-setting questions to shape the customers' view of "required capabilities"
- Explain "How we do it" and "How we do it better"
- Deliver tangible proof points



As with any field enablement tool, this is a living document that will evolve over time. The content within this document is based on input from multiple team members across the company, please treat it with the utmost confidentiality. As always, we wish you the best of success and good selling. All feedback, positive or negative, is appreciated and welcomed.

Value Drivers

- Why do anything – Reasons motivating the economic buyer / decision makers
- A business / industry problem from the customer's perspective (would exist without 8x8)
- Affects revenue, cost, risk

Value Driver	Description
Lower cost of ownership and improve customer service	Decrease costs associated with high phone bills, administrative, and maintenance costs required to support old, on premise phone equipment
Deliver personalized customer experience	Build and maintain customer loyalty by arming employees with the communication tools that deliver the speed of responsiveness, personalization and execution precision needed to optimize each moment of engagement
Identify actionable business insights using advanced analytics	Lower operational costs and accelerate revenue by using advanced analytics to drive automation and increase customer loyalty through data-driven personalization
Enable new business models	Deliver greater business agility to support new products, services, business models and expansion into new markets
Facilitate flexible work locations and business continuity	Enable employees to work from anywhere while supporting organizational goals of reducing facility expenses; support increased business continuity (disasters, emergencies)

Defensible Differentiators

- Explains why 8x8 is the only choice
- Demonstrates required capabilities to solve the customers' problems
- Defensible

Differentiator	Enabling Capability
Global capabilities	<ul style="list-style-type: none"> ● Global architecture and relationship with the carriers ● Service - 8 global deployment teams ● Patented geo routing (8x8 Global Reach) ● 24x7 global support (8x8 Global Reach) with local 8x8 employees ● Carrier agnostic
Guaranteed call quality and reliability	<ul style="list-style-type: none"> ● Own the technology stack ● SLA covers end-to-end ● Proven expertise in delivering a consistent end user experience over inconsistent networks
Enterprise team messaging	<ul style="list-style-type: none"> ● Enterprise scale - designed deployments supporting up to 100s of thousands of employees ● Interoperability to 3rd party messaging platforms enabling them to work as one
Unique insights from one system of intelligence	<ul style="list-style-type: none"> ● One platform enabling a single data store across voice, meetings, team messaging and contact center ● ML / AI use of that data to identify and run more efficient processes ● Lowest cost, most powerful speech analytics up and running in minutes
One system of engagement	<ul style="list-style-type: none"> ● Integrated platform for phone, meetings, team messaging and contact center for employee-to-employee and employee-to-customer communications ● One administration UI and self-service configuration
Proven security and compliance	<ul style="list-style-type: none"> ● FISMA/NIST 800-53, HIPAA, Privacy Shield, Secure Real-time Transport Protocol (SRTP) ● Data sovereignty and GDPR compliant - 15 data centers globally ● "Authority to Operate" from HM's government ● One admin UI resulting in fewer access points for security breach
Lowest risk partner	<ul style="list-style-type: none"> ● Best in class enterprise Ts & Cs ● Lowest risk solution ● Business flexibility

Value Driver to Differentiator Map

Value Driver	Defensible Differentiator	
Lower cost of ownership and improve customer service	<ul style="list-style-type: none"> • Global capabilities • Guaranteed call quality and reliability • Enterprise team messaging • Proven security and compliance 	Lowest risk partner
Deliver personalized customer experience	<ul style="list-style-type: none"> • Unique insights from one system of intelligence • One system of engagement 	
Identify actionable business insights using advanced analytics		
Enable new business models	<ul style="list-style-type: none"> • Unique insights from one system of intelligence • One system of engagement • Proven security and compliance 	
Facilitate flexible work locations and business continuity	<ul style="list-style-type: none"> • Global capabilities • Guaranteed call quality and reliability • Enterprise team messaging • Proven security and compliance 	

Value Driver: Lower cost of ownership and improve service

Audience: CFO / COO / CIO / VP IT / IT Director

Do NOTHING / Negative Consequences	<ul style="list-style-type: none"> ● Excessive IT time spent maintaining phone system(s) and maintenance vendors ● Complex management of global dial plan and multiple global carrier relationships ● Limited communications capabilities, time consuming and expensive to enhance and upgrade HW & SW ● Complicated maintenance of security and compliance in each region ● Unpredictable and expensive phone bills due to long distance calling costs
Positive Business Outcomes	<ul style="list-style-type: none"> ● Minimize communication costs in IT resources, HW refresh, maintenance contracts, & rapid deployment ● Ability for self-service without IT or Professional Services ● Increase flexibility and agility to enhance infrastructure at speed of innovation ● Enhance productivity with the ability to maintain context and content across communication channels ● Ensure adherence to security / compliance requirements ● Replace expensive, variable phone bill w lower cost, predictable monthly subscription w global presence ● Improve customer satisfaction via faster case resolution and better response time
Required Capabilities	<ul style="list-style-type: none"> ● Eliminate PSTN carrier requirements & leverage existing data network to communicate with 8x8 services ● Replace annual maintenance / support contracts with one-time cost of implementation ● Deliver multichannel communications between geographies, at scale, on a single unified platform ● Guarantee call quality based on patented geo routing for superior service delivery ● Secured encryption of signaling and media (such as SRTP & TLS over SIP)
Metrics	<ul style="list-style-type: none"> ● Telephony cost reduction ● Support SLA including first call resolution and support availability ● Service delivery deployment time and post-sales support resolution time ● Average handle time and abandonment rate ● Agent turnover
How We Do It	<p>UC: Geo redundancy to ensure call flow processing. Failover between data centers for 8x8 Virtual Office hosted PBX happens instantly. Active calls will disconnect but new calls can be generated immediately.</p> <p>CC: Local redundancy - hot swappable servers. Advanced Virtual Tenant Architecture (AVTA) is a multi-platform architecture that takes advantage of fully-redundant servers, databases, & storage resources.</p> <p>SLA</p> <ul style="list-style-type: none"> ● Patented geo routing recognizes user end point location to route to closest data center ● Leveraging technology such as packet duplication <p>Service Delivery</p> <ul style="list-style-type: none"> ● Global deployment presence that understand each unique global requirement ● Follow the sun support centers around the globe to meet first call resolution
Better	<ul style="list-style-type: none"> ● 8x8 technology ownership & innovation unifies disparate systems onto one cloud platform ● Complete IP ownership allows for agile and accelerated innovation to meet evolving market needs ● Integrated cloud-based platform improves overall reliability and availability <ul style="list-style-type: none"> ○ Global footprint – Fully redundant presence with 15 global data centers supporting customers in 110+ countries, with local numbers in 83 Countries, toll free in 122 countries ○ >26 top tier carriers for connectivity to PSTN around the world ○ Patented geo routing reduces latency between endpoint and 8x8 platform ○ <30 second data center failover ○ Carrier agnostic network support of public or private access ○ 3.5 MOS score voice quality SLA when traversing public / private access with analytics for every call ○ Average core call flow processing uptime of 99.9999% ● Service delivery, deployment, and post-deployment support <ul style="list-style-type: none"> ○ Quick Start global deployments to accelerate time to value ○ No dependency on third-party support due to IP ownership ○ Fully-enabled global enterprise support centers ○ Centralized management reduces new site deployment from days to minutes

Proof Points

Analyst Reports/Studies

- Gartner | [2018 Magic Quadrant Report for UCaaS, Worldwide](#) – 7 year consecutive market leader
- IDC | [8x8's Enterprise Engagement Management Platform: Moving Toward an Integrated Approach](#)
- Aberdeen | Firms combining contact ctr & business communications increase revenue growth by 2.4X

Internal Reports/Study

- Vanson Bourne | Improving Customer Experience with the Third Wave of Enterprise Communications

Customer References/Case Studies

- **GameStop:** Global retailer with 7,000+ stores in 14 countries | **Problem:** Disparate systems including Cisco UC/CC solution at corporate, multiple carrier relationships, no visibility into usage, IVR, two FTE maintaining 4000+ sites | **Solution:** 9000+ UC Classic | **Result:** One platform, alleviating resource burden, each store has IVR, DRBC (disaster recovery business continuity); predictable cost per site
- **Trimble:** \$2.6B developer of positioning (GPS) technology-based products | **Problem:** Constant battle of hardware and software refresh between multiple clusters of Cisco Call Manager; PSTN relationships; difficult to maintain a global footprint | **Solution:** 6000 UC Editions / 100 CC | **Result:** Provided scalability, ease of deployment, bulk provisioning, customization of specified features to meet their business value
- **Zebra Technologies:** Specialty printers, mobile computing, data capture, radio frequency identification (RFID) and real-time locating systems | **Problem:** Difficult to manage global footprint of disparate systems and carrier relationships | **Solution:** 5000 UC Classic / 30 CC with integration into 3rd party Contact Center solution | **Result:** Increased responsiveness, lower cost

Discovery Questions

1. Preparation (to establish credibility and provide relevant insights), assumes you have already:

- Researched insights about the business you're calling on (e.g., annual report, CEO reports)
- Researched customer's industry/vertical/geo to understand compliance regulations and data sovereignty
- Determined relevant use cases in similar industry/vertical
- Understand their competition and how they differentiate
- Looked at LinkedIn Profiles of the meeting attendees to get a sense for their personal motivations

2. Opening Questions

- What are the top strategic initiatives for the company. How would you prioritize these goals? (to determine relevant value drivers - align and select relevant priority from our list of five Value Drivers)
- Other customers we talk to are typically challenged with <insert industry specific challenge>. Have you experienced similar challenges? What are you doing to mitigate any related risks?

3. Value Driver-Specific Questions

Before/Negative Consequences (How are things working now?)

- How do you manage multiple carriers?
- How do you manage multiple disparate systems (maintenance, patches, H/W refresh, S/W upgrades)?
- How do you introduce new business applications?
- What are the top challenges your agents face? Is turnover growing or declining?
- How do you measure customer experience by user/agent?
- How do you use those metrics to identify and improve efficiency (quality management, recording, reporting/analytics)?

After/Positive Business Outcomes (How would you like them to be?)

- If you could reduce complexity in your environment, where would you start?
- Describe the effect that responding to innovation quickly might have on your infrastructure and people.
- How would the ability to deploy/PoC UCaaS/CCaaS solutions faster impact your business? Your team?

Required Capabilities (What's required to get there?)

- What capabilities are you looking for in a solution to improve efficiency in your telecommunications infrastructure? (Leverage differentiator trap-setting questions)

Metrics - How will you measure success? What is the ROI necessary to fund this project or go this direction?

- Adoption - Global usage on VOD and VOM
- Technology reliability (removing system outages would save \$x) - Moss score
- Operational cost savings - Avg. Handle time reduction, First Contact resolution, Avg. wait time
- Agent retention & productivity
- Quality management & coaching (Supervisor interaction time)

Value Driver: Deliver targeted customer experience

Audience: CIO/ VP IT/ IT Director / VP of Support / Contact Center Exec

Do NOTHING / Negative Consequences	<ul style="list-style-type: none"> ● Fragmented systems of record are unavailable to employees who need it to solve customers' problems ● Limited ability to personalize customer engagements due to disparate communication applications across chat, phone, video, email ● Unable to effectively swarm a customer issue due to the inaccessibility of subject matter experts ● Difficult to anticipate needs and improve operational processes due to lack of engagement insights ● Constrained agent coaching due to supervisors having to access call recordings through IT and not CRM ● Unpredictable staffing for call volume leading to long customer hold times and a subpar experience
Positive Business Outcomes	<ul style="list-style-type: none"> ● Maintain context and content across multichannel communications ● Accelerate time to resolution, improve customer and employee experience, and retention of both ● Provide voice and digital customer inquiries with contextual awareness within the same user interface ● Improve customer satisfaction and NPS scores ● Increase agent performance and productivity
Required Capabilities	<ul style="list-style-type: none"> ● Deliver dashboards and wallboards to field all calls quickly and efficiently ● Integrated analytics to make better decisions ● Centralized administration and configuration to reduce IT costs and efforts ● Agent endpoint integration to improve productivity ● Shared presence to increase collaboration ● Multichannel contact center ● Integrations to customer core systems such as CRM with contextual CRM record screen pop ● Speech Analytics to automatically analyze 100% of calls for sentiment analysis ● Quality, collaborative performance management ● Advanced interaction routing and show skills-based inbound voice ● Cross-platform team messaging to connect disparate teams and experts ● Scalability and adding new channels of communication for customers to reach you
Metrics	<ul style="list-style-type: none"> ● Time to resolution ● First call resolution % ● NPS score ● CSAT score ● Customer retention % ● # of referrals
How We Do It	<ul style="list-style-type: none"> ● Integrate voice, video, meetings, and contact center solutions across mobile and desktop devices ● Unique insights from one system of intelligence using analytics across calls, messages, video meetings, contact center calls, social channels
Better	<ul style="list-style-type: none"> ● Route incoming interactions to the most relevant resource based on product knowledge, language, priority and agent status, routing is further improved with CRM system integration ● History and context readily available via contextual screen pop ● One click from chat to voice to video ● One click subject matter expert access through Expert Connect ● Cross-platform team messaging to connect disparate teams and experts ● Data analytics on every employee and customer interaction ● Speech analytics up and running in minutes with minimal to no professional services ● @ mentions for real time agent feedback and performance management ● Granular search analytics ● Full graphical call and event flow visualizations ● Single hand to shake for support

Proof Points

Analyst Reports/Studies

- Gartner | [2018 Magic Quadrant Report for UCaaS, Worldwide](#) – 7 year consecutive market leader
- IDC | [8x8's Enterprise Engagement Management Platform: Moving Toward an Integrated Approach](#)
- Aberdeen | Firms combining contact ctr & business communications increase revenue growth by 2.4X
- KPCB Mary Meeker | [2017 Internet Trends](#) 82% of customers stop doing business after 1 bad experience

Internal Reports/Study

- Vanson Bourne | Improving Customer Experience with the Third Wave of Enterprise Communications
- 8x8 | [Maturity Model Assessment](#)

Customer References/Case Studies

- **Movement Mortgage:** Top 10 real estate lender in the US | **Problem:** IT time consumed by managing multiple complex vendors | **Solution:** 4000+ UC / 30+ CC Classic, simple & efficient management with one vendor for UC/CC to address company size and complexity | **Result:** Consolidated 650 branches into one centrally managed platform, able to spin up new locations in minutes instead of days; agility & scalability to deliver outstanding customer service | [Testimonial](#) | [Press Release](#)
- **iCruise:** Top seller of cruises, serving 80k passengers annually | **Problem:** 80% of bookings completed via call center, difficult to expand PBX to support company growth; business features such as call recording and reporting cost-prohibitive; concerns about business continuity during hurricane season | **Solution:** 30+ UC / 100+ CC Classic, combined hosted phone service and call center | **Result:** One communications solution, confidence in disaster recovery, increased sales conversion | [Testimonial](#) | [Press Release](#)
- **Lenox:** 129-year-old retailer and market leader in quality tabletop, giftware, and collectibles | **Problem:** Time-consuming interactions with multiple vendors | **Solution:** Single vendor, single platform for CX and EX | **Result:** Saved thousands in initial setup, and significantly lowered maintenance costs

Discovery Questions

1. Preparation (to establish credibility and provide relevant insights), assumes you have already:

- Researched insights about the business you're calling on (e.g., annual report, CEO reports)
- Researched customer's industry/vertical/geo to understand compliance regulations and data sovereignty
- Determined relevant use cases in similar industry/vertical
- Try to use their product as a customer so that you can relate your experience (if available)
- Looked at LinkedIn Profiles of the attendees in the meeting to get a sense for their personal motivations

2. Opening Questions

- What are the top strategic initiatives for the company? How would you prioritize these goals? (to determine relevant value drivers - align and select relevant priority from our list of five Value Drivers)
- Many companies are investing in customer experience, even over products. Is customer experience a strategic priority for your company?
 - If "Yes" - Who leads the customer experience initiative? CIO? CRO? CMO?
 - If "No" - How will you evaluate the impact of customer experience on financial performance?

3. Value Driver-Specific Questions

Before/Negative Consequences (How are things working now?)

- Does your team experience communication fatigue as a result of your platform mix? How has this impacted performance, morale and retention?
- Describe how you manage consistency with an ever-evolving environment (physical, virtual, cloud).
- Describe how support agents reach experts in your company for ticket resolution?
- What kind of cross-platform insights do you have in your employee and customer interactions?

After/Positive Business Outcomes (How would you like them to be?)

- To deliver a better customer experience to differentiate against the competition, where would you start?
- Describe the effect that responding to customers more quickly might have on your revenue.

Required Capabilities (What's required to get there?)

- What capabilities are you looking for in a solution to improve time to resolution in your communications and support infrastructure? (Leverage differentiator trap-setting questions)

Metrics - How will you measure success?

- What key metrics do you focus on most? If you could improve one, which would you improve?

Value Driver: Identify actionable business insights using advanced analytics

Audience: IT Director/ Line of Business owner / VP of Service / Operations

Do NOTHING / Negative Consequences	<ul style="list-style-type: none"> Higher operational expenses due to inability to accurately align activity with resources Lower customer satisfaction due to inability to personalize customer interactions High agent turnover due to inability to provide relevant, timely, data-driven coaching
Positive Business Outcomes	<ul style="list-style-type: none"> Lowest cost, most powerful speech analytics to drive automation, up and running in minutes Drive market leading innovation using real-time customer and product performance data Increase customer loyalty through data-driven personalization Benchmark & measure employees supporting customers Perform quality management at scale without listening to each call Analyze and act on customer and employee sentiment Accelerate customer & employee best practices at scale
Required Capabilities	<ul style="list-style-type: none"> Configurable dashboards for instant visibility into key performance indicators (KPI) by role Map interaction data to end-customer value through CRM integration Visibility into distributed locations such as global branch offices, regional headquarters, & remote users Open APIs for interaction events and data access Flexible, web-based system administration
Metrics	<ul style="list-style-type: none"> Revenue per employee Revenue growth Operating margin Customer churn
How We Do It	<ul style="list-style-type: none"> Real time and historical reporting at the company, department, agent or queue level Out-of-box or customizable reports and dashboards Speech, quality management, quality of service, & customer experience analytics Network assessment tools enabling quality of service measurement and troubleshooting Standard CRM integration
Better	<ul style="list-style-type: none"> Draw insights from a single unified data store within a single application with one system of intelligence Enable ML / AI use to identify and run more efficient processes (led by former CTO of IBM Watson) APIs allow 3rd party applications to retrieve and summarize reporting data from 8x8's unified data store Speech Analytics enable companies to analyze conversations for compliance, user performance, coaching and operational insights and is operational in minutes APIs provide expanded access to telephony controls, automated user provisioning, and reporting data Out-of-the-box integrations to Google G-Suite and Microsoft Office provide customers with unique contextual interaction filtering to automatically present the most relevant information to the end user MarianalQ acquisition in May 2018 strengthens ML/AI capabilities to provide contextual personalization for omnichannel customer service with complete contextual interaction history before and during a conversation

Proof Points

Analyst Reports/Studies

- Gartner | [2018 Magic Quadrant Report for UCaaS, Worldwide](#) – 7 year consecutive market leader
- IDC | [8x8's Enterprise Engagement Management Platform: Moving Toward an Integrated Approach](#)
- Aberdeen | [Connect Employee Engagement & Customer Satisfaction: UC in the CC](#)

Internal Reports/Study

- Vanson Bourne | Improving Customer Experience with the Third Wave of Enterprise Communications

Customer References/Case Studies

- **Bizmatic**: Electronic Health Records software | **Problem**: Unable to scale customer base with diverse medical practices as information was lost in transit between separate customer support centers | **Solution**: 80+ CC Classic, centralized queue management and direct access routing matches CRM records with inbound callers | **Result**: Access to actionable data to speed resolution time, improving CX, retention and growth; Better call tracking and reporting improved staffing plan and agent productivity
- **Town Fair Tire**: Tire retailer operating 90+ stores | **Problem**: Invested heavily in a competitor's CC but without decent quality recordings; no details on volume of incoming or outgoing calls | **Solution**: 700+ UC / 80+ CC, single custom dashboard | **Result**: 35%+ monthly savings on phone bill; efficiency gains and improved CX by leveraging queues to facilitate service and call-backs to customers not placed on hold
- **Illumio**: Cybersecurity startup preventing breaches in cloud data centers | **Problem**: Critical to integrate CRM into a phone system that could 'follow the sun' to connect geographically distributed agents across countries | **Solution**: Combo 60+ UC / 10+ CC seats, Salesforce integration, international scalability for the service and support of remote employees | **Result**: Lower wait times from improved queue routing

Discovery Questions

1. Preparation (to establish credibility and provide relevant insights), assumes you have already:

- Researched insights about the business you're calling on (e.g., annual report, CEO reports)
- Researched customer's industry/vertical/geo to understand compliance regulations and data sovereignty
- Determined relevant use cases in similar industry/vertical
- Look at LinkedIn Profiles of the attendees to get a sense for their personal motivations

2. Opening Questions

- What are the top strategic initiatives for the company? How would you prioritize these goals? (to determine relevant value drivers - align and select relevant priority from our list of five Value Drivers)
- Other customers we talk to are typically challenged with <insert industry specific challenge>. Have you experienced similar challenges? What are you doing to mitigate any related risks?
- Other customers are challenged with the following. How are you mitigating these risks?
 - Pulling together data from multiple applications into a cohesive view
 - Low velocity making operational changes due to lack of real time metrics
 - Time spent listening or reading customer interactions to ensure higher quality of service
 - Poor customer loyalty from inability to delivery personalized service from CRM integration

3. Value Driver-Specific Questions

Before/Negative Consequences (How are things working now?)

- What business processes are supported (customer service, sales, collections, etc.)?
- What tools are used to analyze data? What do you like about those tools? Dislike?
- What are your top machine learning or AI projects? How is customer contact data being used?
- How are you communicating reporting and how often (dashboards vs excel)? Can u share a copy with us?

After/Positive Business Outcomes (How would you like them to be?)

- If you could reduce complexity in your environment, where would you start?

Required Capabilities (What's required to get there?)

- In an ideal scenario, how would this information be shared with you?
- What information would you like to see that is not in your current reporting and analytics solution?
- In an ideal scenario, what would your reporting and analytics tool look like?

Metrics - How will you measure success?

- How do you forecast staffing? How do you track success/adherence to this forecast?
- What do you hope to achieve or improve with access to data? Call deflection? First call resolution?
- What KPIs do you currently use to measure your staff?
- How are you capturing customer feedback as opposed to quantitative data about your contact center?

Value Driver: Enable new business models

Audience: CIO/ VP IT/ IT Director/ CFO / Line of Business owner / Business Owner

Do NOTHING / Negative Consequences	<ul style="list-style-type: none"> ● Limited communications capabilities, time consuming and expensive to enhance and upgrade ● Slow time to market - limited IT innovation capacity due to time spent on maintaining existing systems ● Increased security and compliance risk due to growing support for shadow IT ● Isolated applications due to little to no ability to quickly integrate
Positive Business Outcomes	<ul style="list-style-type: none"> ● Accelerate time to value for new business models ● Minimize communication costs in IT resources, HW refresh, maintenance contracts, & rapid deployment ● Reallocate savings into additional resources, skill set development ● Increase flexibility and agility to enhance infrastructure at speed of innovation ● Adhere to security / compliance requirements
Required Capabilities	<ul style="list-style-type: none"> ● One cloud platform for phone, meeting, collaboration and contact center ● Centralized administration and configuration to reduce IT effort and costs ● Scalable, instantaneous multichannel communication between locations on a single unified platform ● Agent endpoint integration to improve productivity ● Cross-platform team messaging to connect disparate teams and experts ● Ability to integrate into existing environments with out-of-the-box functionality or open APIs
Metrics	<ul style="list-style-type: none"> ● Revenue and profitability ● Total communication costs ● IT time spent on maintaining phone system each month ● Support SLA including first call resolution and support availability ● Service delivery deployment time and post-sales support resolution time ● Customer NPS ● Partner NPS
How We Do It	<ul style="list-style-type: none"> ● Capital reallocation - Transitioning to cloud-based communications results in savings from upfront capital investment/initial hardware, annual maintenance and support contracts ● Scalability and simplicity of adding new channels of communication ● Offer one cloud solution for voice, video, meetings, and contact center solutions across mobile and desktop devices ● Follow the sun support centers around the globe to meet first call resolution ● Guaranteed reliability
Better	<ul style="list-style-type: none"> ● Greater upfront savings from lower phone bills, decrease maintenance costs, improve employee productivity ● Integrated cloud-based platform improves overall reliability, reducing the need for IT support <ul style="list-style-type: none"> ○ Fully redundant (15 global data centers) ○ Patented geo routing ○ <30 second data center failover ○ Public or private access ○ 99.99% Reliability SLA ○ 3.5 MOS score voice quality SLA ○ Analytics available for every call ○ SLA applies to both private or public network access ● Scalability and adding new channels of communication <ul style="list-style-type: none"> ○ Quick Start deployments to accelerate time to value ○ Centralized management reduces new site deployment from days to minutes

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- Determined relevant use cases in similar industry/vertical
- Try to use their product as a customer so that you can relate your experience (if available)
- Looked at LinkedIn Profiles of the attendees in the meeting to get a sense for their personal motivations

2. Opening Questions

- What are the top strategic initiatives for the company. How would you prioritize these goals? (to determine relevant value drivers - align and select relevant priority from our list of five Value Drivers)
- Other customers we talk to are typically challenged with <insert industry specific challenge>. Have you experienced similar challenges? What are you doing to mitigate any related risks?
- As you drive towards 5% top line growth by [company specific goals here] and increased operational efficiency, how will you evaluate the ability of your communication technologies to support those goals?
- What you're saying is typical, we often see companies like yours dealing with this type of environment. What types of new ways of doing business are you being asked to support – such as new sales channels, new product divisions?

3. Value Driver-Specific Questions

Before/Negative Consequences (How are things working now?)

- What does it take to enhance or upgrade capabilities with the current phone system?
- What percent of the team's time is spent on driving new innovation vs maintaining existing systems?
- What is [company name's] policy for shadow IT?
- What kind of impact has shadow IT had on the security and compliance risk?
- What steps are working for you to save money that can be reallocated to fund the new business models?

After/Positive Business Outcomes (How would you like them to be?)

- If you had business insights earlier, which business solutions would you have been able to roll out to your customers sooner?
- How would the ability to increase pace of innovative business initiatives affect your competitiveness?

Required Capabilities (What's required to get there?)

- What capabilities are you looking for in a solution to improve efficiency in your telecommunications infrastructure? (Leverage differentiator trap-setting questions)

Metrics - How will you measure success?

Value Driver: Facilitate flexible work locations

Audience: CIO/ CFO / VP IT/ IT Director for Public Sector / Consulting Agencies

Do NOTHING / Negative Consequences	<ul style="list-style-type: none"> ● Expensive facilities & telecommunications administration and maintenance costs ● Valuable IT resources wasted on low value activities ● Lack of flexibility to support new ways of working due to limited to no ability to add capabilities ● Low employee satisfaction, retention, and recruitment ● Excessive risk of a major weather incident negatively impacting the network and productivity
Positive Business Outcomes	<ul style="list-style-type: none"> ● Support a culture that enables remote work: conduct business anytime, anywhere in any circumstance ● Provide quick turn up, turn down of services as employees change status ● Maintain one number for each user, transparent to the rest of the internal and external business ● Enable employee and customer engagement in their preferred method of communication ● Lower corporate space cost (WFH, cubicle optimization with hot desk)
Required Capabilities	<ul style="list-style-type: none"> ● Mobility: anywhere on any device at any time ● Identical experience remotely as in the corporate office ● Deploy corporate features for all remote workers ● Secured communication ● Ability to chat/talk/video/SMS/conference with the same corporate identity
Metrics	<ul style="list-style-type: none"> ● Reduced facility costs ● Speed of user adoption ● Team efficiency by activity or sales productivity ● Employee retention ● Ease of coaching with manager access to meaningful activity data
How We Do It	<p>8x8 cloud offers access to all users from anywhere on any device</p> <ul style="list-style-type: none"> ● Service is available in six continents with patented automated geolocation detection and security ● Integration with your corporate Single Sign On <p>One look & feel for all user personas, including the full set of collaboration functionality</p> <ul style="list-style-type: none"> ● Intuitive user interface, accelerating user adoption ● Use it on your corporate or personal device
Better	<p>Upfront capital investment and upkeep:</p> <ul style="list-style-type: none"> ● Single interface for softphone, chat, and meetings, in a mobile BYOD strategy ● Faster deployment with extensive experience and proven methodology ● Seamless office moves <p>User & Manager productivity & satisfaction</p> <ul style="list-style-type: none"> ● Working from anywhere while having a complete unified communication feature set ● Out of box integration with your system of record, even on the go ● Global Insight to user trends, accountability to measurable objectives, coaching

Proof Points

Analyst Reports/Studies

- **Gartner** | [2018 Magic Quadrant Report for UCaaS, Worldwide](#) – 7 year consecutive market leader
- **IDC** | [8x8's Enterprise Engagement Management Platform: Moving Toward an Integrated Approach](#)
- **Surepayroll** | 86% of workers say that working alone allows them to hit maximum productivity, 92% say that video collaboration improves their team work

Internal Reports/Study

- **Vanson Bourne** | Improving Customer Experience with the Third Wave of Enterprise Communications

Customer References/Case Studies

- **Regus**: World's largest provider of flexible work spaces | **Problem**: Unable to offer a business phone service with key features such as mobility, multi-channel communications, presence-enabled directories | **Solution**: 40k+ UC / 500+ CC - world's largest UC deployment across 17 countries | **Result**: Continuous communications experience, with the ability to seamlessly switch from chat, messaging and voice while roaming across multiple networks, such as 3G/4G LTE and Wi-Fi
- **Fitbit**: Health and fitness monitoring | **Problem**: Frequent office changes | **Solution**: 250 UC | **Result**: Easy plug and play installation
- **Swedish Match**: Tobacco manufacturer | **Problem**: Weather impairment (snow) impact their inside sales during winter | **Solution**: 500 UC / 20 CC | **Result**: Softphone & WFH backup strategy for CC agents, same features provided to the corporate user as much as to the remote worker

Discovery Questions

1. Preparation (to establish credibility and provide relevant insights), assumes you have already:

- Researched insights about the business you're calling on (e.g., annual report, CEO reports)
- Researched customer's industry/vertical/geo to understand compliance regulations and data sovereignty
- Determined relevant use cases in similar industry/vertical
- Try to use their product as a customer so that you can relate your experience (if available)
- Looked at LinkedIn Profiles of the attendees in the meeting to get a sense for their personal motivations

2. Opening Questions

- What is your current ratio of employees working at a desk versus working on the field or at home?
- How do you reconcile your on-premise and remote teams into one single, secured collaboration space?
- How do you ensure remote workers show their corporate identity when reaching out to customers?
- How do you measure productivity of your remote workforce and compare it to your office workforce?

3. Value Driver-Specific Questions

Before/Negative Consequences (How are things working now?)

- We've seen these common goals with many of our other customers. How would you prioritize these?
 - End user satisfaction and workplace flexibility
 - Mobility and efficiency while preserving workflow process
- Describe the impact of not hiring valuable talent due to his/her (remote) location?
- How do you quantify the impact in time and dollars of employee travel to physically attend a meeting versus using modern collaboration tools?
- How much time does it take a manager to collect data to improve their team productivity?
- How much does it impact morale not to have flexibility in their workplace location?

After/Positive Business Outcomes (How would you like them to be?)

- If you could allow teams to work fully or partially from home, which would you enable first and why?
- Describe the effect of empowering your team with a WFH strategy.
- How would your end user react to the ability to use their favorite tool to collaborate with colleagues?

Required Capabilities (What's required to get there?)

- What capabilities are you looking for in a solution to improve efficiency in your telecommunications infrastructure? (Leverage *differentiator* trap-setting questions)

Metrics - How will you measure success?

- How would access to a tool that measures all end users, regardless of their location, checks their real time activity, and keeps them accountable by sharing the daily/weekly/monthly stats enhance your business?

Differentiator: Global capabilities

Audience: CIO/ VP IT / Director of IT / Line of Business Owner / Business Owner

Definition	<ul style="list-style-type: none"> ● Global architecture and relationship with the carriers ● Service - 8 global deployment teams ● Patented geo routing (8x8 Global Reach) ● 24x7 global support (8x8 Global Reach) with local 8x8 employees ● Carrier agnostic
Customer Value	<p>↑ revenue:</p> <ul style="list-style-type: none"> ● Enable deployment into previously non-serviceable geographies without requiring local presence ● Improve customer experience by improving user/agent/workgroup productivity <ul style="list-style-type: none"> ○ Multichannel communications enable engagement using each customer's preferred method ○ Guaranteed call quality, agent availability, reporting and administration <p>↓ cost:</p> <ul style="list-style-type: none"> ● Single platform reduces maintenance costs across disparate carriers and systems ● 24x7 follow the sun global services eliminates need for round-the-clock IT maintenance teams ● Reduce complexity of defining LCR (leased cost routing) and ARS (auto route selection) ● Collapse global voice lines into existing data line ● Carrier agnostic connectivity eliminates need for private WAN (wide area network) <p>↓ risk:</p> <ul style="list-style-type: none"> ● Increase customer loyalty with effective communications and improved customer experience ● Ensure continuity of service with access to one of the world's largest voice networks, offering redundant paths to multiple destinations around the world
Defensibility	<ul style="list-style-type: none"> ● Regus: World's largest provider of flexible work spaces Problem: Unable to offer a business phone service with key features such as mobility, multi-channel communications, presence-enabled directories Solution: 40k+ UC / 500+ CC seat World's largest UC deployment, 17 countries Result: continuous communications experience, with the ability to seamlessly switch from chat, messaging and voice while roaming across multiple networks, such as 3G/4G LTE and Wi-Fi ● RPM: \$1.6B manufacturer Problem: Support global expansion with service that could run over the open Internet without private voice lines Solution: 700+ UC / 40 CC Result: Consistent, reliable service that is accelerating their time to market and supports their global expansion ● Barnhardt: 118 year old manufacturer producing bleached cotton fiber products for industries spanning medical and beauty to home care and consumer products Problem: On premise system couldn't support mobility & rural location requirements Solution: 700+ UC, Salesforce integration, advanced analytics Result: Increased responsiveness with access from anywhere, any device
Trap-setting Questions	<ul style="list-style-type: none"> ● How do you review a specific call that may have had a challenge with voice quality? ● How do you escalate a chat to a call, and then a call to a meeting, inviting additional participants? ● How do you merge a second call for a 3-way conference? ● Describe how you escalate a chat to a meeting without leaving the app. ● Describe how you provide ad-hoc Call Recording Control to a user. ● Describe how you chat with users in Slack, SFDC Chatter or Hangouts.
Objection Handling	<ul style="list-style-type: none"> ● How do you handle the scale of our business? <ul style="list-style-type: none"> ○ 8x8 supports largest enterprise with over 30k users while our nearest competitor has publicly stated they have do not have any customers w over 10k seats. ● Competitors are telling us they are a CLEC which gives them total control of the PSTN access. <ul style="list-style-type: none"> ○ (BR) CLECs are subject to high regulatory reporting and service compliance costs while providing no improvement in network quality and performance. 8x8 was born into the cloud vs. running a CLEC. ● Can you support all of the countries where we operate? <ul style="list-style-type: none"> ○ As of Oct 2018, 8x8 provides global service with 15 global data centers, serving customers in 157 countries with global 24/7/365 follow-the-sun customer support ● Is your solution rip and replace or is there migration process? <ul style="list-style-type: none"> ○ We have experience with both models, and will work with you to define the best deployment method ● How do you manage global deployments? <ul style="list-style-type: none"> ○ 8x8 has a proven model, as demonstrated by Regus, the world's largest UCaaS deployment

Differentiator: Guaranteed call quality and reliability

Audience: CIO/ VP IT / Director of IT / CC Leaders / Sales Ops / Line of Business Owner / Business Owner

Definition	<ul style="list-style-type: none"> ● Own the technology stack ● SLA covers end-to-end ● Proven expertise in delivering a consistent end user experience over inconsistent networks
Customer Value	<p>↑ revenue:</p> <ul style="list-style-type: none"> ● Improve brand awareness and sales productivity, increasing customer attainment and retention <p>↓ cost:</p> <ul style="list-style-type: none"> ● Less demand for IT resources to support and maintain phone systems ● Quality and consistency of calls enable decentralized workforce to be productive by enabling clear communications - lower facility cost (desk compression), increased productivity <p>↓ risk:</p> <ul style="list-style-type: none"> ● Limit opportunity cost due to lost business from downtime
Defensibility	<ul style="list-style-type: none"> ● Zen Desk: Customer service and engagement application provider Problem: Disparate, outdated technology that couldn't support global growth Solution: 8x8 platform integrated with Salesforce Result: Improved call quality, reliability, support for global growth ● Silver Peak: SD-WAN solution provider Problem: Outdated Avaya PBX couldn't support growth Solution: 8x8 Platform with Silver Peak SD WAN Result: Crystal clear call quality deployable in hours ● Town Fair Tire: Tire retailer operating 90+ stores Problem: Invested heavily in a competitor's CC but without decent quality recordings; no details on volume of incoming or outgoing calls Solution: 700+ UC / 80+ CC, single custom dashboard Result: 35%+ monthly savings on phone bill; efficiency gains and improved CX by leveraging queues to facilitate service and call-backs to customers not placed on hold
Trap-setting Questions	<ul style="list-style-type: none"> ● What is the lowest SLA of the components in the solutions being proposes? (hard to be 5 x 9s if the components are 4 x 9s) ● What aspects of the proposed solution from other vendors do they not own? ● How do you manage an End-to-End SLA across multiple vendors today? ● How much time does your IT spend managing multiple SLAs from multiple vendors? ● How much have the other vendors paid out in SLAs? (check on this one) - never paid out?
Objection Handling	<ul style="list-style-type: none"> ● Everyone says they guarantee call quality in the contract - how are you different? <ul style="list-style-type: none"> ○ Have you seen it in writing from the other vendors? Here's ours. ● It's impossible to deliver quality of service over the internet. <ul style="list-style-type: none"> ○ You're right, it used to be that way. We're able to do it because we design, develop and maintain the platform. Using our patented technology, we monitor the internet connections and route around issues. Additionally, we are continually improving the capabilities across all technologies to mitigate issues we see working with the public internet. We also measure and validate the network ahead of time. Each call is then measured and reported on to understand that every call is being delivered to ensure the service is operating as expected. ● How can you maintain reliability globally as we grow? <ul style="list-style-type: none"> ○ 8x8 has 15 data centers globally providing our customers with proven global support. ● How do you detect tool failure? If we detect a user or group of uses are offline - where do the calls go? <ul style="list-style-type: none"> ○ We constantly monitor service and will instantly and automatically route calls to a designated location.

Differentiator: Enterprise team messaging

Audience: CIO/ VP IT / Director of IT / Line of Business Owner

Definition	<ul style="list-style-type: none"> Enterprise scale - designed deployments supporting up to 100s of thousands of employees Interoperability to 3rd party messaging platforms enabling them to work as one
Customer Value	<p>↑ revenue:</p> <ul style="list-style-type: none"> Improve brand awareness/sales productivity <ul style="list-style-type: none"> Increase loyalty with effective communications Increase speed to revenue by real-time connection between customers and their partners Increase upsell/cross-sell in digital market space with quick and relevant recommendations <p>↓ cost:</p> <ul style="list-style-type: none"> Improve employee experience <ul style="list-style-type: none"> Access to the right SME for fast resolution predictable OpEx modelling Increase employee productivity <p>↓ risk:</p> <ul style="list-style-type: none"> No migration from existing platforms required
Defensibility	<ul style="list-style-type: none"> Conde Nast: Top US travel publication Problem: Need CCaaS solution with current investment in slack Solution: X4 with cross-team messaging Result: Integrate CCaaS without disruption to slack investment Trimble: \$2.6B developer of positioning (GPS) technology-based products Problem: Multiple PBX and inability to cross pollinate Solution: X2 Result: Gained ability to chat/presence/meetings/screen sharing across all locations under a single roof Arista & Horizon Services & Forest Lawn: Funeral businesses Problem: Difficulty to reach out to experts globally from the Contact Center Solution: X6 with Expert Connect Result: Ability to chat/click to call/presence across the entire organization
Trap-setting Questions	<ul style="list-style-type: none"> In looking for a CCaaS provider, how important is it that you preserve your existing chat applications? Have you ever been bounced from person to person within a call center for the same issue? What are your expectations of reaching the right SME regardless of their organization or role on the first attempt? Describe the benefit your organization may derive from a single platform versus multiple application. How will your end user react to using multiple applications for chat? What is your fall back plan if your chat/collaboration system is down (see Slack uptime)?
Objection Handling	<ul style="list-style-type: none"> We already have these capabilities with Slack (or Chatter, etc.) <ul style="list-style-type: none"> The great thing is that you can keep all those existing messaging applications, but now enable them to talk together as well as have a solution that extends to the rest of the company. We don't want to deal with the change management involved with introducing a new application. <ul style="list-style-type: none"> No change management needed with our team messaging, as users of current applications can continue to use what they have. Do you support public and private rooms? <ul style="list-style-type: none"> Team messaging supports both, including confidential and/or other content meant for a limited audience. Competitors claim best of breed (BR) <ul style="list-style-type: none"> 8x8 offers integrated solution of UC and CC, not 2 disjointed products One support system for all communications – no finger pointing 8x8 is recognized 3 years in a row by GMQ in both UCaaS and CaaS unlike Nice-inContact 8x8 vision to support all business customers is clear: The Nice acquisition of inContact creates internal change; change in focus, partners & revenue plans with a strong emphasis on Enterprise customers

Differentiator: Unique insights from one system of intelligence

Audience: CIO/ VP IT / Director of IT / Line of Business Owner / Business Owner

Definition	<ul style="list-style-type: none"> ● One platform enabling a single data store across voice, meetings, team messaging and contact center ● Enabling ML / AI use of that data to identify and run more efficient processes ● Lowest cost, most powerful speech analytics up and running in minutes
Customer Value	<p>↑ revenue:</p> <ul style="list-style-type: none"> ● Improving customer experience leads to customer retention and referrals <ul style="list-style-type: none"> ○ Configurable dashboards and reports enable managers to ensure interactions are handled on-time by the best skilled person available ○ Identifying trends from successful calls enables enhanced training and coaching of best practices <p>↓ cost:</p> <ul style="list-style-type: none"> ● Improve employee experience <ul style="list-style-type: none"> ○ Simple to use and powerful analytics saves supervisors' time ○ Identify trends from Speech Analytics and QM to enable improvements that reduce expensive callbacks <p>↓ risk:</p> <ul style="list-style-type: none"> ● Improve customer loyalty <ul style="list-style-type: none"> ○ Utilize analytics to ensure personalized customers experiences, reducing poor loyalty and low NPS
Defensibility	<ul style="list-style-type: none"> ● Bizmatics: Electronic Health Records software Problem: Unable to scale customer base with diverse medical practices as information was lost in transit between separate customer support centers Solution: 80+ CC Classic, centralized queue management and direct access routing matches CRM records with inbound callers Result: Access to actionable data to speed resolution time, improving CX, retention and growth; Better call tracking and reporting improved staffing plan and agent productivity ● Town Fair Tire: Tire retailer operating 90+ stores Problem: Invested heavily in a competitor's CC but without decent quality recordings; no details on volume of incoming or outgoing calls Solution: 700+ UC / 80+ CC, single custom dashboard Result: 35%+ monthly savings on phone bill; efficiency gains and improved CX by leveraging queues to facilitate service and call-backs to customers not placed on hold ● Illumio: Cybersecurity startup preventing breaches in cloud data centers Problem: Critical to integrate CRM into a phone system that could 'follow the sun' to connect geographically distributed agents across countries Solution: Combo 60+ UC / 10+ CC seats, Salesforce integration, international scalability for the service and support of remote employees Result: Lower wait times from improved queue routing
Trap-setting Questions	<ul style="list-style-type: none"> ● How do you compile reports from multiple point solutions to draw actionable conclusions? ● How do you track and report the complete customer journey, from a call originating in the contact center, which is then transferred to a subject matter expert? ● How would access to a single report that capture voice interactions, chat and email affect your business? ● Describe how you would use a speech analytics app that allows you to create your own custom topics.
Objection Handling	<ul style="list-style-type: none"> ● Everyone claims robust analytics and reporting - how are you different? <ul style="list-style-type: none"> ○ 8x8 has all the data for your internal calls (UC) AND we have all the data from your calls with customers (CC); this allows us to have a single view of volumes, transfer activity and outcomes ● How do you claim one system of intelligence, when all customers use a plethora of applications? <ul style="list-style-type: none"> ○ 8x8 delivers one system of intelligence for your communications activities. For related third party applications like CRMs, we have open APIs allowing for import/export of key data. ● How can you claim minimal professional services for Speech analytics when tuning is always required? <ul style="list-style-type: none"> ○ 8x8 Speech Analytics offers 64 pre-built topics allowing for call categorization out of the box, which you can further 'tune' by customizing your own topics, dictionary of terms, and key phrases

Differentiator: One system of engagement

Audience: CIO / VP IT / Director of IT / VP of Support or Contact Center

Definition	<ul style="list-style-type: none"> ● Integrated platform for phone, meetings, team messaging and contact center for employee-to-employee and employee-to-customer communications ● One administration UI and self-service configuration
Customer Value	<p>↑ revenue:</p> <ul style="list-style-type: none"> ● Increase sales conversion with 1 cloud solution that provides customer journey analytics across systems ● Improve sales productivity by providing all contextual information to personalize the engagement ● Improve customer experience leading to higher customer retention and referrals <p>↓ cost:</p> <ul style="list-style-type: none"> ● Improve employee productivity <ul style="list-style-type: none"> ○ Readily accessible data requiring less clicks to move between modes of communication with full context served up in every live interaction (escalate chat to call to meeting in one app) ○ Lower implementation and integration costs and headaches with one vendor ○ Reallocate IT staff from the need to install, support and maintain separate point solutions to higher impact work with one unified architecture, technology, and support team to manage ● Decrease time to resolution <ul style="list-style-type: none"> ○ Expert Connect - Enable agents to instantly find a curated list of available experts to drive resolution ○ Sameroom - Reach experts across 20+ team messaging tools of choice (Slack, SFDC Chatter, Hangouts) ○ Agent endpoint integration - agents can make and receive calls without third party apps ○ See who is online, free, busy, on a call, or away as an employee or a support agent <p>↓ risk:</p> <ul style="list-style-type: none"> ● Fewer cloud vendors decreases potential for security hacking ● No third-party apps means no finger pointing between vendors, resulting in faster resolution
Defensibility	<ul style="list-style-type: none"> ● Movement Mortgage: Top 10 real estate lender in the US Problem: IT time consumed by managing multiple complex vendors Solution: 4000+ UC / 30+ CC Classic, simple & efficient management with one vendor for UC/CC to address company size and complexity Result: Consolidated 650 branches into one centrally managed platform, able to spin up new locations in minutes instead of days; agility & scalability to deliver outstanding customer service Testimonial Press Release ● iCruise: One of the largest sellers of cruises, serving 80k passengers annually Problem: 80% of bookings completed via call center, business features such as call recording and reporting cost-prohibitive Solution: 30+ UC / 100+ CC Classic, combined hosted phone service and call center Result: Increased sales conversion effectiveness Testimonial Press Release ● Lenox: 129-year-old retailer and market leader in quality tabletop, giftware and collectibles Problem: Time-consuming interactions with multiple vendors Solution: Single vendor, single platform for CX and EX Result: Saved thousands in initial setup, significantly lowered maintenance costs
Trap-setting Questions	<ul style="list-style-type: none"> ● How does your team manage communication fatigue as a result of your platform mix? How has this impacted performance, morale and retention? ● How do you integrate islands of communication across team messaging solutions? ● How do you evaluate analytics across all interactions -calls, messages, video meetings, & social channels? ● Describe how you manage consistency with an ever-evolving environment (physical, virtual, cloud). ● Tell me about your IT staffing plan to handle the extra resources needed to install, support and maintain three separate solutions? (If against RC, mention that Zoom is control released by a third party) ● How many vendor support teams are needed to handle any kind of Tier 1/2 support? Tier 3/4 support? ● How do agents find experts in your organization? ● How many applications are needed to connect an agent with phone service and contact center software? ● How would visibility into employee presence from any communication application increase productivity? ● How do you currently integrate your telephony, messaging, contact center, and meeting technologies?
Objection Handling	<ul style="list-style-type: none"> ● With one system of engagement, do you use a single data model? <ul style="list-style-type: none"> ○ We bring together all data across communications touch points into a single data store to capture, store, and maintain it in a way that supports the use of AI/ML techniques. ● Do I have to pay for all of those capabilities even if we are not going to use them? <ul style="list-style-type: none"> ○ No. With X Series, you can choose the service plan that best fits each type of use.

Differentiator: Proven Security and Compliance

Audience: CIO / VP IT / Director of IT / VP of Support or Contact Center / LOB owners

Definition	<ul style="list-style-type: none"> ● FISMA/NIST 800-53, HIPAA, Privacy Shield, Secure Real-time Transport Protocol (SRTP) ● Data sovereignty and GDPR compliant - 15 data centers globally ● “Authority to Operate” from HM’s government ● One admin UI resulting in fewer access points for security breach
Customer Value	<p>↓ risk:</p> <ul style="list-style-type: none"> ● Highest levels of security and compliance consistently maintained <ul style="list-style-type: none"> ○ One unified system, making it easier to spot anomalies and thwart attacks ○ Built from the ground up with security as a top priority, continuously updated to stay ahead of hackers ○ PCI-DSS compliant merchant for credit card purchases, scanned quarterly by an authorized PCI vendor ○ FCC Customer Proprietary Network Information (CPNI) compliant ○ Secure Coding practices, including scanning for OWASP, BSIMM and CWE-based vulnerabilities ○ Proprietary Fraud Detection and 24-hour network operations center ○ Secure Endpoint Provisioning—unlike most providers, all 8x8 endpoints are provisioned and activated securely over an encrypted channel ○ Secure Real-time Transport Protocol (SRTP) - Encrypted signaling and voice
Defensibility	<ul style="list-style-type: none"> ● Optiv: Largest information security and infrastructure solutions provider Problem: Find a communications provider to meet their security requirements Solution: 30 offices with 600 UC / 50+ CC, integration with Salesforce, PCI and HIPAA compliant communications Result: Deployed in 30 days. ● Happi Family Care: Pediatric and urgent care center Problem: Find a secure communications solution that and actually worked Solution: 20 CC, auto attendant, secure and compliant communications for a thriving practice, deployed in 2 days Result: A phone system that can grow with their practice ● Patient Services, Inc. (PSI): Financial assistance to patients with serious chronic illness Problem: Required a HIPAA certified communication solution Solution: 80+ / UC 30+ CC with HIPAA compliance and certification Result: “No more dropped calls” and peace of mind with security and compliance
Trap-setting Questions	<ul style="list-style-type: none"> ● What 3rd-party validation is done to ensure compliance with HIPAA and security regulations? ● Are tailored Business Associate Agreements (BAA) offered to protect your compliance? ● How is data protected in motion and at rest? ● How do you enable accessibility (communications on the right device, the right place, at the right time) ● How are communications integrated with security and compliance policies and procedures? ● How does your current communications solution scale with changing customer/patient needs? ● How does your current communications solution provide fully automatic disaster recovery?
Objection Handling	<ul style="list-style-type: none"> ● We heard 8x8 doesn’t meet key US federal government standards such as the HIPAA, or, provide limited features causing critical information to be deleted with customers losing access to it. <ul style="list-style-type: none"> ○ 8x8 is third-party certified as being a HIPAA-compliant business associate and is one of the only major cloud communications providers that openly offers business associate agreements (BAAs) to help customers comply with HIPAA requirements. 8x8 services can be set-up with administrative controls and restrictions to protect stored faxes, recordings and voicemails. ● Are you able to recommend particular configurations of our system to help us comply? <ul style="list-style-type: none"> ○ Yes. 8x8 can supply you with expertise or suggestions to help you comply. We are happy to have one of our experts walk you through how our services are set up to facilitate compliance. ● What has 8x8 done to ensure its own compliance? <ul style="list-style-type: none"> ○ 8x8 has a security and compliance officer with more than 20 years of experience. ○ At 8x8, compliance is an extensive, ongoing process. We make sure the company complies and verify that our own chain of third parties is also compliant with relevant regulatory requirements. ● Has your compliance been assessed by independent experts? If so, who did the assessment? <ul style="list-style-type: none"> ○ Yes, 8x8’s compliance is done by a third party.

Buyer Brief

- **Select an Account:** Select an account that is currently in the mid stages of your pipeline. Preferably, this is a new account with which you have already conducted initial discovery and are currently discussing potential solutions.
- **Complete the Buyer Brief Template:** Using the information that you know about this account, complete the Buyer Brief below.

Customer Name:	
Customer’s Background: General details about the account that will help your role play partner better understand the customer and the opportunity	
Description and Quantification of the Customer’s Pain Points: Details about the business and technical issues the customer is currently experiencing...and the dollar impact of those issues <i>(Why buy anything? Why buy anything now?)</i>	
Required Capabilities: Details about the criteria that the customer will use to make a buying decision <i>(Why buy anything from us?)</i>	

Role Play Preparation: Seller Prep Sheet

Rep Name (Plays Seller):		Role Play Partner (Plays Buyer):	
Opportunity Name:		Opportunity Name:	
Value Driver:			

Our Competitors:	
Our Differentiators Against Competitors:	

	What Would We Like the Customer to Say?	What Questions Can I Ask to Get Them to Say That?
Pain Points (Before Scenarios & Negative Consequences):		
T h e M a n t r a	After Scenarios & Positive Business Outcomes:	
	Required Capabilities:	
	Metrics:	
	How We Do It:	
	Better:	
	Proof Points:	

Additional Prep Notes:	
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Playbook Exercise: Role Play Observation

Seller	Buyer
Seller Observations	
Gate 1: Discovery	
<input type="checkbox"/> Uses open-ended, two-sided Discovery Questions <input type="checkbox"/> Asks Trap-Setting Questions that influence the decision criteria <input type="checkbox"/> Listens 75% of the time and speak 25% <input type="checkbox"/> Effectively leads with the customer's challenges rather than our products <input type="checkbox"/> Draws out the specific explicit needs	
Gate 2: Validation	
<input type="checkbox"/> Confirms the presence of challenges before moving the sale forward <input type="checkbox"/> Draws out Positive Business Outcomes that will be compelling to the economic buyer <input type="checkbox"/> Establishes Required Capabilities that will be compelling to the technical buyer <input type="checkbox"/> Establishes Metrics that are tangible and relevant <input type="checkbox"/> Uses the Mantra to gain agreement with the customer	
Gate 3: Solution Mapping	
<input type="checkbox"/> Explains how the challenges we solve directly impact functional or personal goals <input type="checkbox"/> Maps offerings to the customer's explicit needs and Required Capabilities <input type="checkbox"/> Articulates Defensible Differentiation <input type="checkbox"/> Leverages Proof Points that are relevant to the Positive Business Outcomes <input type="checkbox"/> Gains agreement to specific next steps	
Seller Feedback	
Two things you liked about the role play	
1)	
2)	
Two things that could be improved	
1)	
2)	

Opportunity Overview

Opportunity Name:	
Seller Name:	
Opportunity Description:	

Sales Stage:	
Forecast Category:	
Known Qualification Gaps & Challenges:	

Business Initiatives & Outcomes

Top Initiatives	
1	
:	
2	
:	
3	
:	

Positive Business Outcomes

Identified Pain (MEDDIC)

Business Pains	
Business Pains:	
Size of Pain (\$):	
Who is Impacted:	

Technical Pains	
Technical Pains:	
Size of Pain (\$):	
Who is Impacted:	

Decision Making Roles (MEDDIC)

Role	Name & Title	How do you know?
Economic Buyer		
Technical Buyer		
Champion		
Other Influencers		

Decision Criteria (MEDDIC)

Required Capabilities

Metrics

Solution Overview (HWDI & Better)

Description of the Proposed Solution

Competition (MEDDICC)

Competitor		Competitors Strengths Competitors Weaknesses Our Differentiation	
1 :		Strengths:	
		Weaknesses:	
		Our Differentiators:	
2 :		Strengths:	
		Weaknesses:	
		Our Differentiators:	
3 :		Strengths:	
		Weaknesses:	
		Our Differentiators:	

Relevant Proof Points (MEDDIC)

Customer		Solution Implemented & Business Outcomes Achieved
1 :		
2 :		
3 :		

Decision Process (MEDDIC)

Step	Owner	Due Date
1 :		
2 :		
3 :		
4 :		
5 :		

Critical Next Steps

Action Item	Owner	Due Date
1 :		
2 :		
3 :		
4 :		
5 :		

Pre-Call Plan

Rep Name:			
Opportunity Name:			
Targeted Next Steps:			
Sales Stage:		Buyer Stage:	

Objectives & Desired Outcome

Ours	Theirs

Timed Agenda

___ min.	
___ min.	
___ min.	
___ min.	
___ min.	

Participants

Our Participants		Customer Participants	
Name	What role will they play?	Economic Buyer:	
		Champion:	
		Other:	
Pain Points:		Size of Pain (\$):	
Positive Business Outcomes:			
Required Capabilities:			

Discovery Questions

1	
:	
2	
:	
3	
:	
4	
:	

Trap-Setting Questions

1	
:	
2	
:	
3	
:	

Anticipated Objections

1	
:	
2	
:	
3	
:	

Objection Response

1	
:	
2	
:	
3	
:	

Targeted Next Steps

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