Designing a Proof of Concept Strategy That Converts

May 16, 2022

Julie Oddo
VP, Customer Success

LEARN TO WIN

What are we going to talk about?

1   Why a PoC?

2   Foundation to a successful PoC

3   Components of a successful PoC?

Why a PoC?

Should all deals start with a PoC?
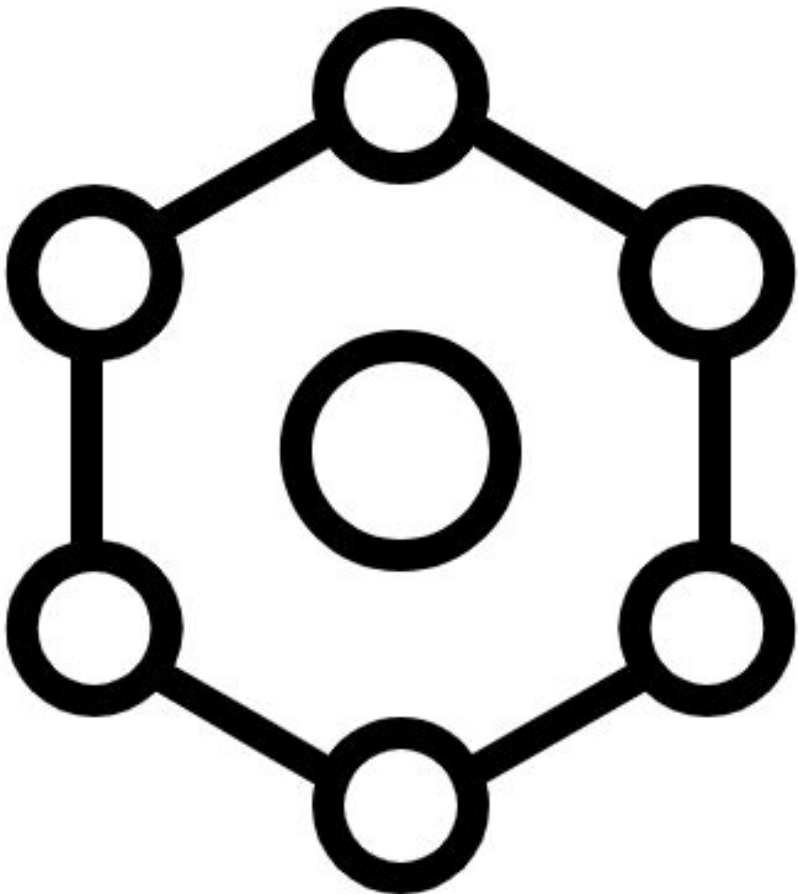**No**

What deals should start with a PoC?
Small and large organizations may want to start with a pilot or PoC before signing a larger deal.

Do PoCs end with a yes or no?
No!

*The PoC should demonstrate that the product or concept will **fulfill customer requirements** while also providing a compelling **business case** and **value** for a full rollout.*

STRUCTURE

The one foundation to successful PoC

LEARN TO WIN

Components of a successful PoC

1. Scoping and pricing

2. Goals/Success Criteria

3. Clear timeline and milestones

4. Experience

5. Insights review and expansion planning

LEARN TO WIN

Scoping and Pricing Do's and Don'ts

Do

- Keep the scope small and well-defined
- Be very involved in the entire process
- Identify customer stakeholders with R&R
- Ensure customer has skin in the game
- Keep you general approach and methodology similar to full customer journey

Don't

- Promise anything too big or complex
- Run it as a self-serve PoC
- Include too many customer stakeholders (one-pizza rule!)
- Do it for free
- Overcomplicate or engineer the PoC

LEARN TO WIN

Goals and Success Criteria

Ask questions like,
"What would have to happen for you to say this was a raving success?"

Think about:
What kind of business value can we prove in our PoC timeline?

- Specific
- Measurable (and qualitative)
- Actionable
- **Realistic**
- Timely

LEARN TO WIN
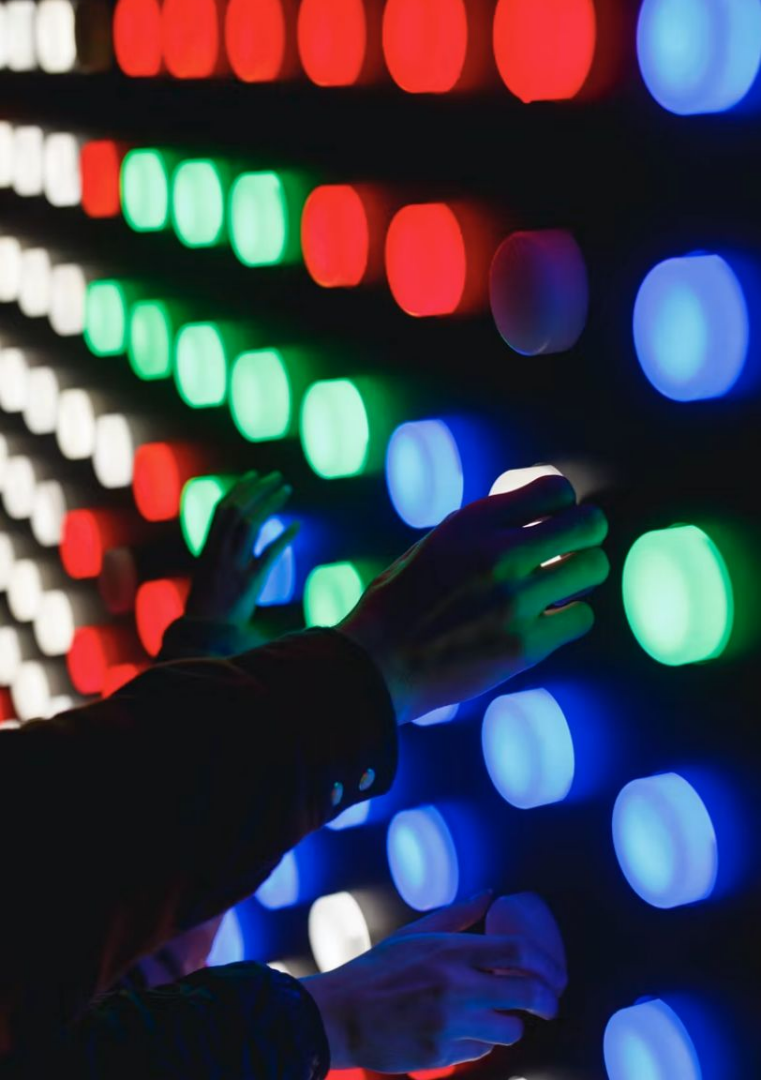
Timeline and Milestones

DESIGN

EXPERIENCE

EVALUATE

Overall timeline should be the shortest time to value possible!

The Experience

- High-touch service
- Regular contact throughout with stakeholders
- Begin to track results
- If possible, don't provide results to customer until insights review

LEARN TO WIN

Insights Review and Expansion Planning

Tell the story

- Treat this like a mini-QBR
- How did we do against our goals?
- 2-3 wins
- 1-2 misses
- Include qualitative and quantitative results
- What did we learn?
- Where do we need to pivot to improve for the expansion?

LEARN TO WIN

Questions?