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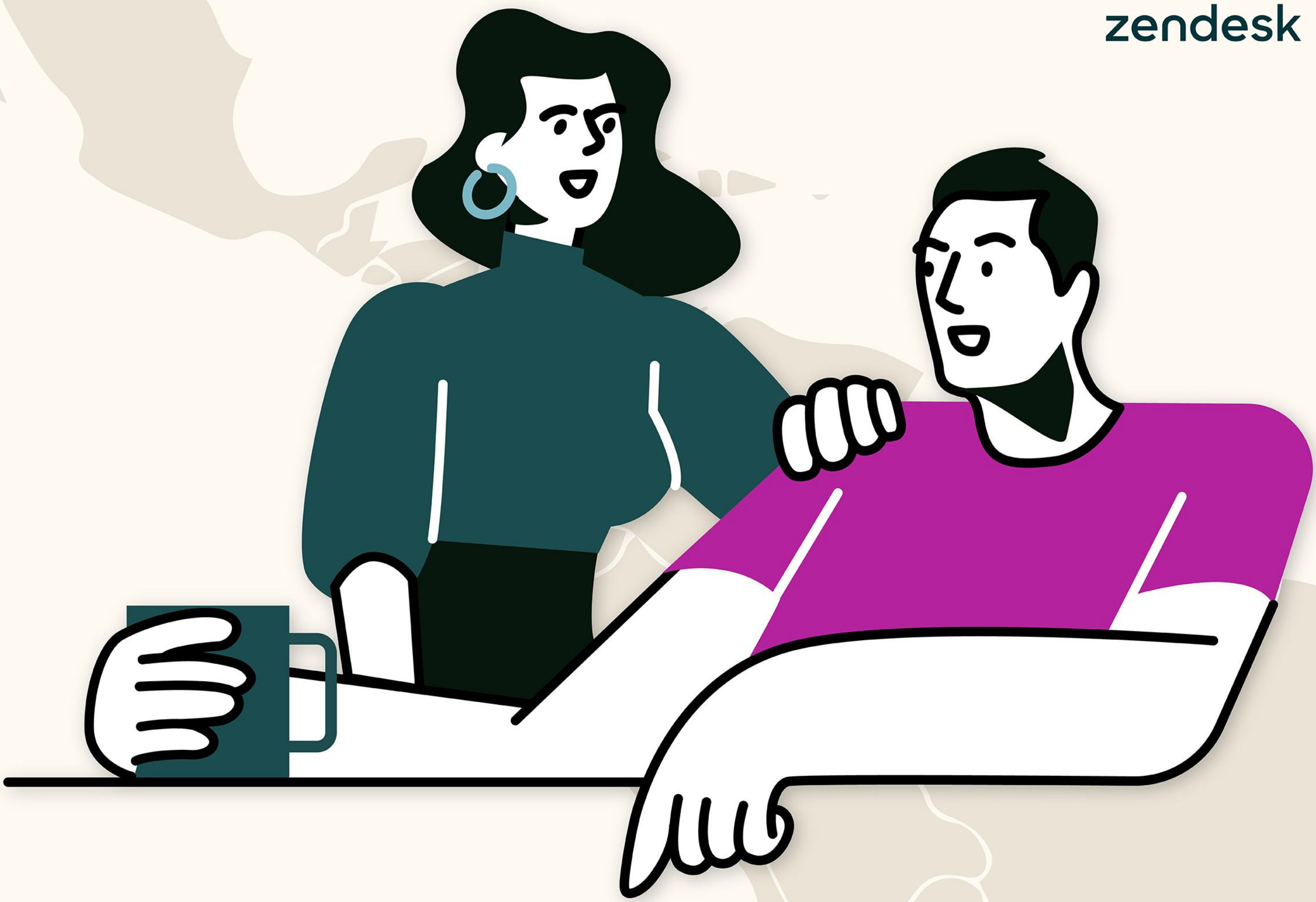

LATAM Tech Café

CAFÉ

WELCOME TO

LATAM Tech Café Café

24th / FEBRUARY 2023

CHAMPIONS OF CUSTOMER SERVICE

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Agenda

5 min	Introduction
10 min	Requirements Management - RECAP
25 min	Technical Proposal Topics
10 min	New Tool - OMBUD
5 min	Q&A - Next steps

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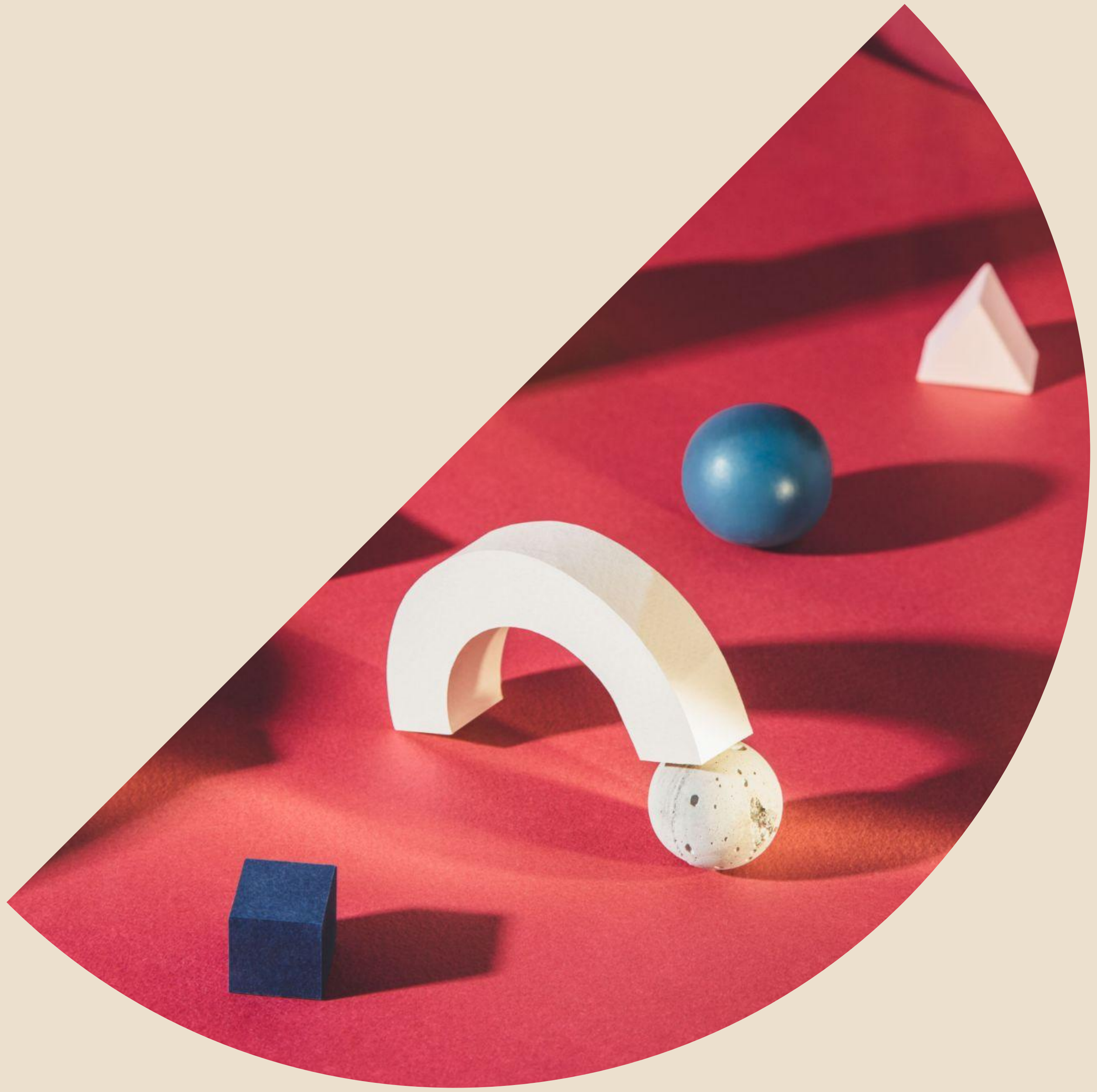
Introduction



Joao Vicente
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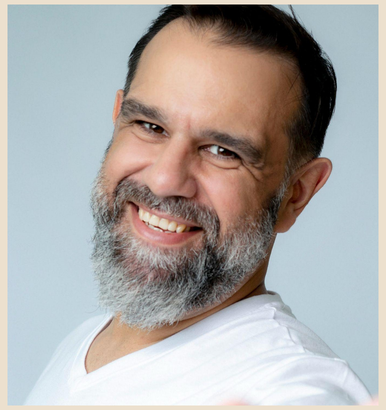
LATAM TECH CAFÉ

OUR TEAM

START WITH YOU ALL AND WE ARE HERE TOGETHER

Florin Pascu

Partner Presales Program Manager



Joao Ferreira

Senior Partner Service Manager

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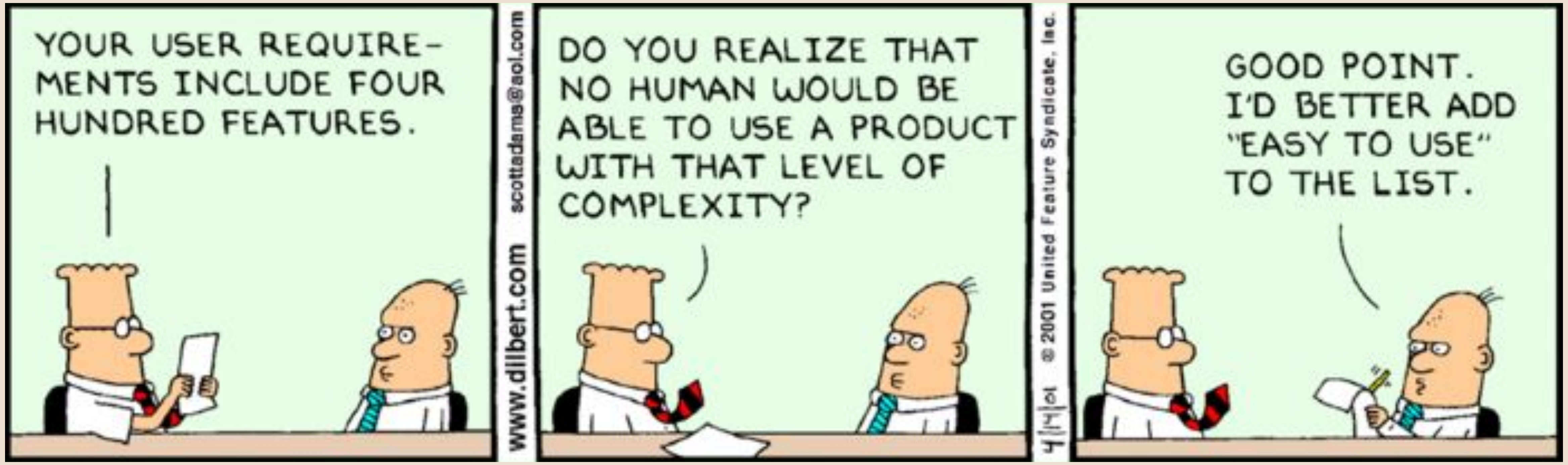
1. Count on you to see what is working, what is not working, ideas, next topics, etc. (We will send a form for you)

2. Technical Focus, but impossible to know everything 😉

3. We will upload the recording to Partner Portal soon, please share with your team!

4. Be curious and have fun!

Requirements Management (RECAP)



Impossible to address in some minutes! So be curious!

Context

Specification

Overview: project objectives, key stakeholders, and a preliminary scope with a brief description of the functions the system is expected to perform (example: vision document)

System models: show the relationship between system components and between the system and its environment (examples: context diagram, use case diagram, process model, etc.).

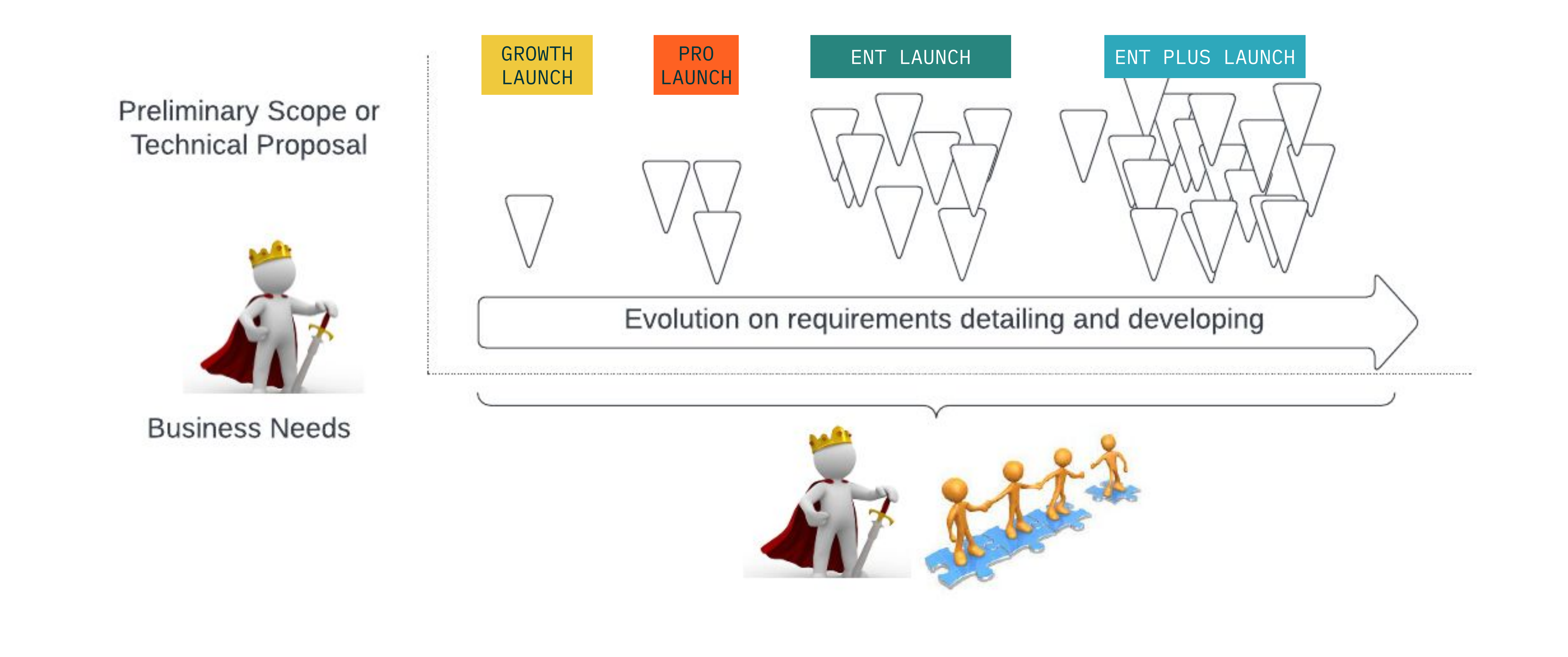
Functional requirements: describes tasks and services that the system will provide to its users (example: list of use cases, user stories). It also includes the software's external interfaces.

Non-functional requirements: restrictions imposed on the software and relates them to the functional requirements.

Glossary: defini tion of technical (business) terms, synonyms, and acronyms (abbreviations) used throughout the document.

Detailed requirements specification: details the functional requirements (eg, use case specifications, business rules).

Detailing Level



TIP:

- Focus on the simpler and fast
- Commons sense
- Growth and Pro packages are GREAT starting point with low risk.
- Be clear on communication, check 2 or more times!!!

Template Sheet

ReqID	Label	Definition	Priority	Difficulty	Classification	Responsible	Validation	Impacted Use Cases
REQ1	Capture	The tool **shall** be able to capture ticket information including customer, name, phone, and email	HIGH	LOW	Funcional	Donald Duck	Open a ticket and see agent workspace	UC-1
REQ2	Update information when source changes	The tool **shall** take into account the successive contacts from each customer and update the conversation independent of the channel used	HIGH	LOW	Constraint	Donald Duck	resume contact in new channel with the same customer and check conversation	UC-2
REQ3	Traceability Reports	The tool **shall** generate reports including all or part of the traceability information, using these user-defined templates.	MEDIUM	LOW	Funcional	Donald Duck	Open report and validate minimum 10 tickets	UC-3
REQ4	Conversation and SLA	The tool **must** be able to allow contact from the customer with a live agent during business hours	HIGH	MEDIUM	Constraint	Donald Duck	Test each schedule assigned and capture messages off duty	UC-2 UC-3
REQ5	Navigation to the Authoring tool	The tool **shall** allow navigation from the information displayed in the main window and the agent tool from which the information has been captured	LOW	LOW	Constraint	Donald Duck	Open ticket, navigate to user contact and organization validating the information	UC-1 UC-3

https://docs.google.com/spreadsheets/d/19_Joz_xufoutUdMciSrsFB1ipjxp1zV3hd5r8aYXBAU/copy#gid=0

Detail more or less?

Less detail in the specification	More detail in the specification

Less detail in the specification

- Internal development
- Grouped team
- Does not develop test cases or elaboration occurs in parallel with requirements.
- Less accurate estimates
- Low requirements traceability
- High customer engagement
- High knowledge of the team about the business
- Existing precedents
- Concurrent development of operating procedures
- Use of packages in the solution
- Low expectation of labor turnover

More detail in the specification

- External development
- Dispersed team
- Test cases prepared from the specification
- more accurate estimates
- High requirements traceability
- Low customer engagement
- Low knowledge of the team about the business
- unprecedented
- Development with already defined and mature operational procedures
- The solution will not adopt packages
- High expectation of manpower turnover

Take time to revise the topic and have this fresh in mind

Main issues

- Communication
- **Access to Stakeholders**
- User Indecisions/Indefinitions
- **Implicit** or tacit requirements
- Changes
- Conflicts
- Resistance to change
- Stakeholder does not dominate his business
- Stakeholders **insatiable** with requirements
- Stakeholder does not read the requirements specification
- Consistency
- **Vague needs**
- **Prioritization**

Prioritization Criteria

Prioritization Criteria	How to prioritize requirements?	When to use?
Business value (benefit)	Based on cost-benefit analysis.	Incremental projects or projects that have budget limitations.
Risk (technical or business)	Based on the greatest failure risks for the project.	Maximize the probability of project success.
Cost	Based on the costs of implementing the requirements.	Stakeholders can change priorities once they understand the costs.
Losses	Based on losses incurred by not implementing the requirement.	When policies and regulations are imposed on the organization or risk of loss of opportunity for competition.
Dependency on other requirements	Based on the dependence that high value-added requirements have on low value-added requirements.	Incremental projects or projects that have budget limitations.
Stability	Based on consensus (most useful or valuable) obtained by stakeholders.	When there are conflicts or lack of definition of stakeholder requirements.
temporal sensitivity	Based on time sensitivity.	When there are windows of opportunity for the business that should be taken advantage of (seasonality or specific situations - for example

Some methodologies:

1- Timeboxing/budgeting

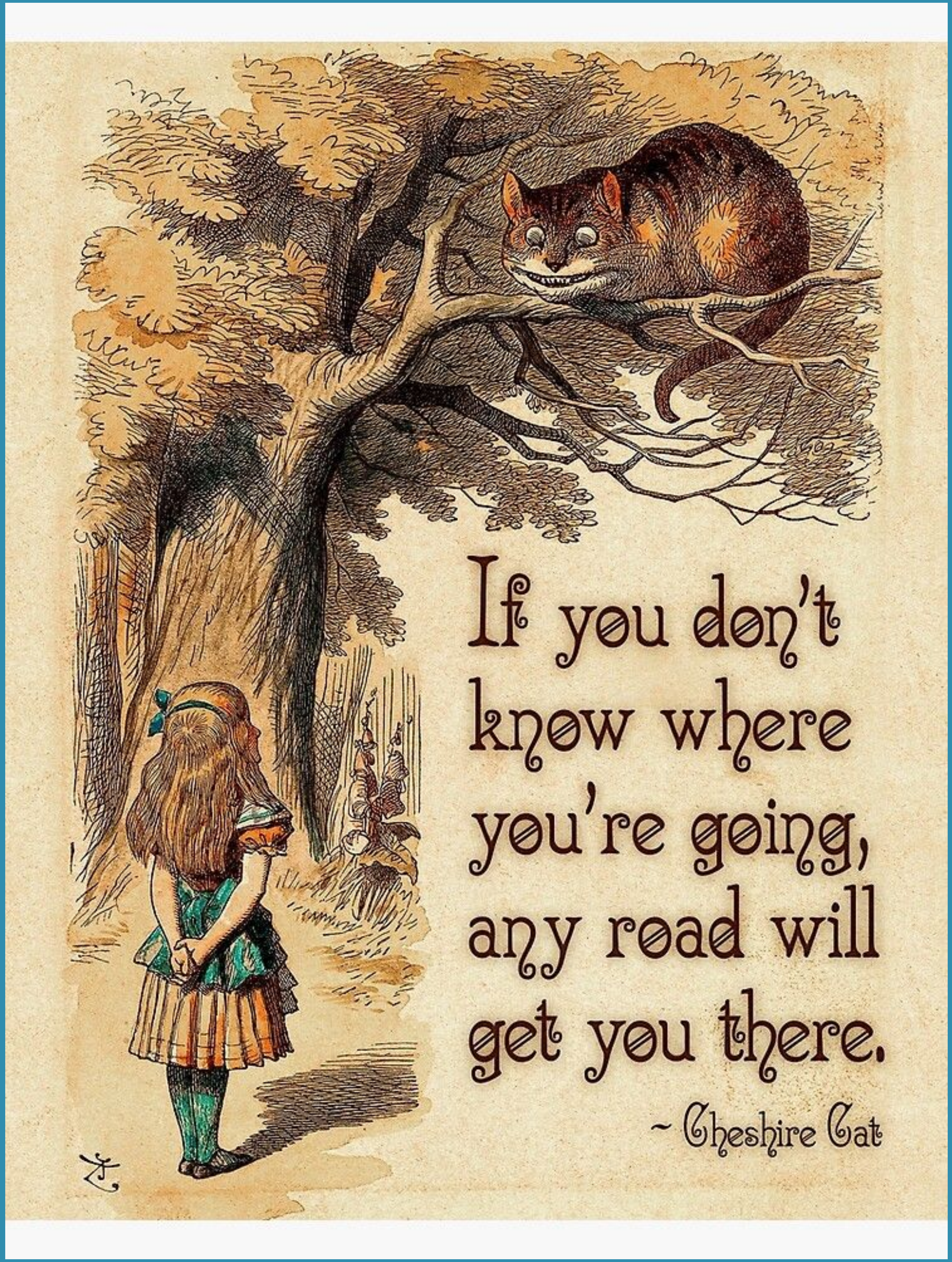
- **All in**
- **All out**
- **Selective**

2 - Scrum

- **Priority by sprint**

3 - MoSCoW

- **Must -** Minimum Usable SubseT
- **Should -** Viable, but may affect customer satisfaction
- **Could -** One way to differentiate the could from the should is the level of dissatisfaction that its non-compliance will cause.
- **Won't -** Won't have this time (not now at least)


If you don't
know where
you're going,
any road will
get you there.
~ Cheshire Cat

Technical Services Proposal Topics

Main focus

Where should I start?

It is all about the customer!

Know your customer and organize the information kept in demos and visits.

MAKE NOTES!!!!!!

Ensure You Fully Understand Your Potential Client's Problem, Wants, and Needs

Create a Value Proposition That's as Specific as Possible

General Topics

Write an executive summary.
(about the customer)

Specify what the client can expect from the project.

Establish what your deliverables will be. (with suggested timeline, efford and assumptions)

Confirm and outline the costs and investments.

Specify any other contract terms and conditions.

Executive Summary

- An executive summary provides a one-page maximum overview of the entire project.
- The executive summary should broadly **highlight the client’s issues and challenges**, and how you plan on tackling or addressing them.
- Think of it as a distillation of the most important information, a “too long, didn’t read” summary for executives who might not have the time or inclination to read the full proposal.

Project Outline/Scope of Work

The project outline states what you will (and will not) do for the proposed fee.

- Clearly describe the scope of work, including the scope and quantity of deliverables, time frames, and any other necessary expectations for the work.
- You want to be ultra-specific because if you encounter scope creep, you'll have this document for reference.

If you're being hired to implement a client's help center, be sure to outline how many words or articles you will write, how many revisions are included, etc. Other metrics:

- Number of fields/forms
- Number of Groups

DOUBLE ATTENTION TO MIGRATION AND INTEGRATING NEEDS!!!!

Deliverables

You might also find it necessary to outline deliverables. Deliverables are the identifiable end products you will be "delivering" to the client.

While there can be a lot of overlap between "deliverables" and "project outline/scope of work," the difference between the scope of work and deliverables might be best explained with an example.

Let's imagine you were hired to implement a customer help desk, your scope could be to document the basic structure of the help desk, understand the desired self-service needs, list and help with priorities for internal or public articles, etc.

However the deliverable should be something like:

- 2 language structure,
- up to 3 structure sublevels,
- help center administration training (3 hours),
- 5 hours implementation support after go-live, etc.

Timeline

A good consulting proposal manages expectations so no unwanted surprises pop up. Part of that requires outlining when you expect to complete the project.

- When does the project begin?
- When does the project end?
- Are there any milestones in between?

With long projects, it can be helpful to have checkpoints for completed work. This can help you manage your time and build confidence in the client that things are going as planned.

You can also use milestones to release partial payment of funds.

Just be sure not to pin yourself down with too many milestones, to allow some flexibility in your workflow.

Assumptions

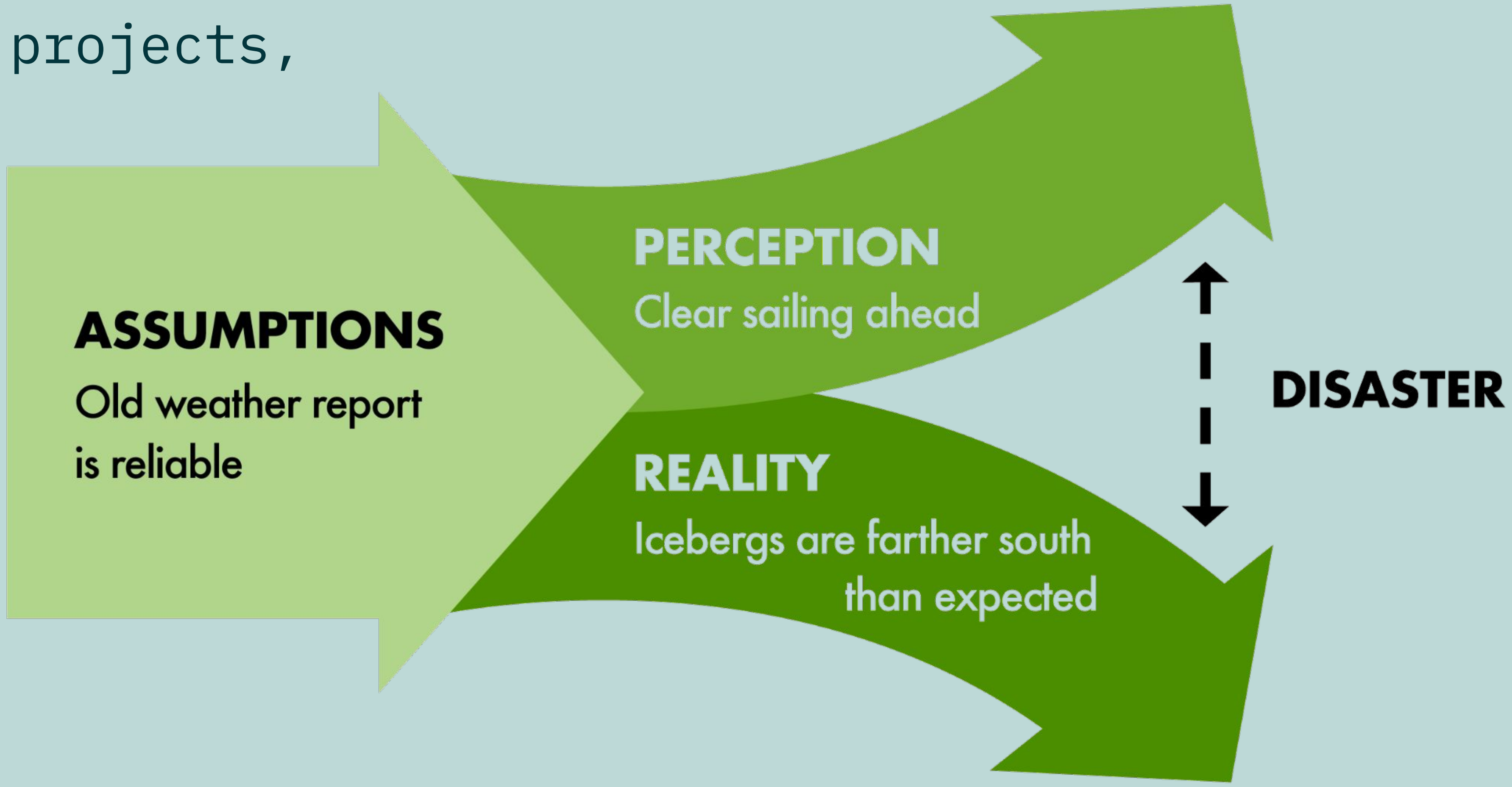
As important as saying what your service or project will deliver, is making it clear what WILL NOT be delivered!

- Be specific
- Never trust on sentence as: "Any item or deliverable not explicitly covered is not considered in scope"
- Be sure to cover all items your customer may "think" is implicit to a covered topic

Client Requirements

Many times, when there are delays on consulting projects, the bottleneck lies with the client.

For example, every web developer knows the pain of being stalled on a build because they're waiting on assets from the client. **If any part of your job could be stalled due to client delays, make sure to document them all.**



Make this questions for your team

Macro Checklist

All involved team in services proposal was trained properly?

- Take a look at Zendesk Implemnetation Bootcamp

Do we have previous implementation experience with similar customers?

- Previous lessons learned
- If less experience, pay attention to scoping details!

Do we have experience to all deliverables & scope? Migration? Integration? Development?

- It is time to ask for help! Call your PSM immediately and he may direct you to assist options

Do we validate with the client all points, assumptions, before setting a price?

- Define a price before validade the scope may impact the project quality and the customer experience!

Do the Implementation Bootcamp!

GOLDEN TIPS

"divide and conquer"

Tricky and hard dealing customer (including budget sensitive) may leverage the a technical proposal without price!

Keep it simple

- Keep the first implementation as simple as possible, focusing on OOTB implementation and putting all hard work to 2nd or 3rd implementation waves.
- Create a long term plan with everything the customer asks, but direct them to the simple first implementation
- Avoid development if a marketplace is available! Even if there is limitations on the app!

Ask for help soon

- Ask for help as soon as possible. It is a lot easier to get assistance during pre-sales and find resources to support your implementations.
- Is subcontracting is needed, you have room to negotiate

SUMMARY - Template

- **Cover Page:**
  - [Your company’s name/branding] [Client’s name] [Project name] [Date of proposal]
- **Executive Summary:**
  - [Provide a brief overview of the proposed project. Highlight the client’s issues and challenges, along with how you plan to address them. Limit the summary to one page or less.]
- **Project Outline/Scope of Work:**
  - [Clearly state what you will and will not do for the proposed fee. Be as specific as possible.]
- **Deliverables:**
  - [Outline the identifiable end products you will deliver to the client.]
- **Timeline:**
  - [State when the project will begin and end, along with any important milestones in between.]
- **Assumptions**
  - [outline and document all assumptions and non scope clauses, be aware of "implicit" topics]
- **Fees and Payment Terms:**
  - [List your fees—and indicate what they do and do not include. Specify due dates, accepted payment methods, and the payment terms.]
- **Client Requirements:**
  - [If any part of your job could be stalled due to client delays, make sure to list it here.]
- **Expiration Date:**
  - [Provide the date when the proposal will expire.]
- **Contract Terms (Optional):**
  - [Add any terms and conditions here if you choose to make yours a proposal-contract combination.]

OMBUD

Zendesk RFPs

and

Proposals

Response Tool

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Partner Presales Program Manager

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Overview

What is Ombud?

- A proposal management software
- Used when responding to RFPs, RFIs, RFQs, Security Questionnaires, and Legal Questionnaires.
- Ombud proposal Workspace linked with the Salesforce opportunity (don't forget to register!)
- This integration ensures reporting is accurate, shares the proposal progress.

How does it help

- Respond and Collaborate on Proposals - lets you respond to RFPs within Ombud. You can use Zendesk pre-written Master Content to quickly, accurately, and persuasively answer RFX questions. You can also collaborate with Zendesk team and coworkers to respond to RFXs.
- Handle Knowledge Management Capture, where the content manager can work with multiple teams across the company to create and continually master content for each Zendesk product and service, as well as general company information. You can also use this to information to respond to RFPs / proposals.

Steps to work with Ombud

[Complete Partner Training]

Source and review the bid / RFP requirements

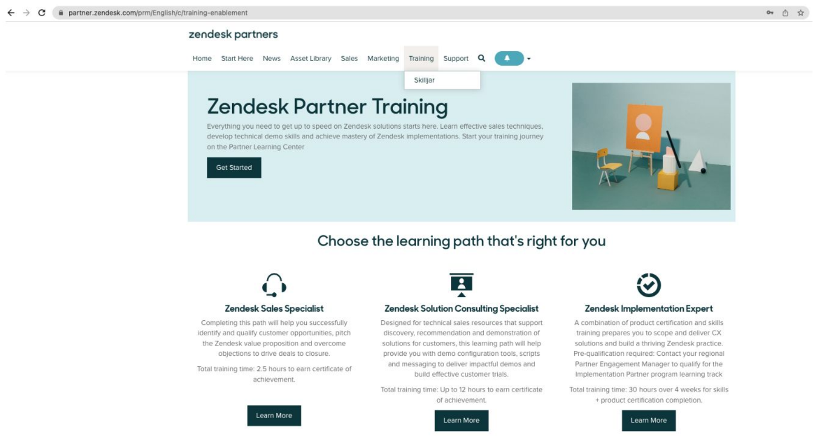
RFP uploaded into Ombud

RFP response completed

Sales / PreSales / Implementation

New partner LMS - Skilljar (SSO via Partner Connect)

- MEDDPICC for Partners
- Product training
- Requirements



Use cases

- RFP responses / customer proposals
- If unsure check with your PSE
- Document in the template the requirements

PSE uploads the RFP

- Partner bid team will get access to the Workspace to start responding (including **auto suggestions & auto-fill responses**)
- Log into the portal and check the assigned sections

Export and submit

Once completed, the Response Document can be exported (Word / Excel formats) and sent to the customer

The RFP process is usually more than answering the questions - from Executive Summary to Presentation, Demo and Implementation. Client retention / renewal can also involve an RFP!

Solution Demo

References - Links

Name	Description	Link
Implementation Bootcamp	Join our resident implementation experts as we guide you through the Zendesk Launch Framework - a tried and tested scoping and implementation methodology, designed to delight customers.	https://partnertraining.zendesk.com/path/support-suite-implementation-expert-bootcamp
Requirements Template Sheet	Requirements Template - make a copy and use as much as possible	https://docs.google.com/spreadsheets/d/19_Joz_xufoutUdMciSrsFB1ipjxp1zV3hd5r8aYXBAU/copy#gid=0
Requirements Tech Cafe - Deck	Presentation Deck with all links	https://drive.google.com/file/d/1b5G9k-Nh0hbBw_8hFYzLI1XIM0r7IcMt/view?usp=share_link
Requirements Tech Cafe Recording - Portuguese	Recording from Portuguese section	https://drive.google.com/file/d/156Gq3xaS0QxwyHTZ-_Mv_z9CO7q9sKYg/view?usp=share_link
Requirements Tech Cafe Recording - Spanish	Recording from Spanish section	https://drive.google.com/file/d/1RKeNsWxY7yy9ZUzq7MHuithf3dCR1Ibf/view?usp=share_link

thank you

Até o nosso próximo encontro

Smarter Outsourcing. Scalable Technology. Better Business.

ArenaCX is the global marketplace platform where companies build, sustain, and scale their CX operations.

Schedule A Meeting

See How It Works