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EUCIP

European Certification of
Informatics Professionals

EUCIP

Sales and Application Consultant

Elective Level Profile Specification

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Short Description

A EUCIP Sales and Application Consultant is expected to combine competence in a specific technology (context-dependent, e.g. CAD) with advanced marketing concepts and a general knowledge of typical client needs. Effectiveness in persuading when presenting solutions, practical demonstrations and commercial proposals is a must.

This profile requires a minimum work experience of **18** months in a compatible job role; if this requirement is not fulfilled, the candidate might be certified as an **Associate** Sales and Application Consultant.

Tasks Overview

As part of a supplier company (hardware, IT infrastructure, DBMS and operating systems, security and maintenance tools, system application software, services such as project delivery, facility management and outsourcing) is in charge of promoting a specific product line.

Co-operates with the internal marketing department in the identification of appropriate strategies and practical action plans involving the promotion of the product.

Maintains up-to-date information on market dynamics and trends, strengths and weaknesses of own offering, competitors and potential partners actions. Defines and maintains appropriate sales approaches and tools to better promote the product.

Either in general conventions or in specific one-to-one dialogues, provides support to the sales representatives both in understanding the main selling points associated with the product and in identifying concrete opportunities.

Based on an accurate and deep knowledge of the reference markets, anticipates changes, suggests and designs new technology solutions or plans for combining and integrating the product with other products or services proposed either by the same company or by other business partners.

Maintains a dialogue at a technical level with other product managers and with experts of information systems architecture, system networking, data centre maintenance, etc....

Supports the sales representative and the client organisation in envisaging business improvement opportunities and presenting project proposals.

Participates in a sales team by providing specific product information and effective support in configuring a demo environment and in presenting the product to the potential customer. Through an in-depth knowledge of competitive offerings, effectively differentiates the proposed solution to create customer preference and commitment.

In case of a customized demonstration, collects sample data and uses them to build a significant pilot model of the new system. Solves common modelling issues through an intelligent use of existing product features and functions; proposes sensible workarounds for more critical issues; in case of serious mismatches, proposes the usage of additional tools or slight changes; in the latter case, defines high level functional specifications for the required modifications.

Based on a sound knowledge of the typical issues in the application domain, proposes “standard” approaches to the most effective usage of the product, and works within client organisation to envisage streamlined procedures and workflows.

Plans and manages effective communication sessions (i.e. various types of formal and informal meetings, training, presentations, demonstrations, brainstorming etc.) showing strong relational skills, goal-orientation, a problem solving attitude and a full mastery of business communication techniques.

Depending on the type and range of the specific IT product under his/her responsibility, participates in the application project with different roles: in case of relatively simple products having a minor organisational impact (e.g. a printer), might operate in a completely autonomous way and provide the customer with installation, set-up, personalisation, training and hand-over of the solution to the internal ICT staff.

In case of extremely complex products and systems (e.g. an ERP system), might either be a member of a large team for the application project or simply hand-over all the relevant information (e.g. suggested project scope, estimation of efforts, ...) acquired during the sales process to a dedicated system implementation team.

Essential Behavioural Skills [4]¹

The Sales and Application Consultant role requires a good general knowledge, ability to communicate and interact effectively (in both oral and written form) with customers, colleagues, users and managers.

Attention to the client, interaction, ability to collect information, plus keen organisational and commercial sensitivity are required to understand quickly the client's needs.

Analytical and comparative intelligence, imagination and proactivity are required to formulate and validate solutions.

Attention to detail, a logical-minded and goal-driven approach, flexibility, determination, teambuilding and ability to gain credibility, to identify priorities, to influence and to persuade are also required to achieve effective results.

¹ numbers in brackets represent EUCIP points

Detailed Skills Required

**Deep competence level [10,5] as specified below
+ [10]² context-related**

A1.11 Product expertise for offer marketing [1,5]

- Contribute to the identification of all potential target markets for a specific product.
- Contribute to the analysis of the main characteristics of the target markets.
- Identify the most relevant features and functions of the product.
- Compare the product with competitive and alternative products.
- Support the marketing department in positioning the product for a specified target market and in presenting it through appropriate marketing messages.
- Contribute to the definition and collection of a "sales kit" for the product, including:
 - o the basic criteria for identifying the ideal target customer (customer profile),
 - o the key messages for promoting the supplying company and the product,
 - o marketing materials and appropriate support for illustrating the product at various levels of detail,
 - o product lifecycle/development roadmap and differences between versions/localisations,
 - o analysis of competitors and their specific offering,
 - o analyses of the factors that differentiate the proposed product/solution from other options,
 - o documents reporting quotations from testimonials, case studies/success cases, possible anecdotes from customers who had bad experiences with other options,
 - o some support for cost/benefit analysis.

A4.07 Preparing an IT product demonstration [1,5]

- Analyse client organisation needs that can be addressed through the IT product.
- Identify appropriate presales interaction methods for the client.
- Evaluate the specific client context, typical issues, examples of items and terms used.
- Develop a programme for one or more demo sessions, taking into account the respective audience.
- Selecting appropriate arguments and tools for the presentations.

² this special EUCIP profile requires a deep competence in a specific IT matter that depends on the target context; 10 EUCIP points are therefore allocated for this set of variable subjects, and the candidate will be allowed to fulfil this requirement through any accredited module that can reasonably be associated with his/her own area of expertise.

- Develop specific resources for the product demo, possibly including:
 - o Personalized presentations,
 - o Custom-tailored descriptions of the supplying organisation and of the product,
 - o Context-related examples,
 - o Some sample cases based on plausible data sets (meaningful to the audience).
- Select an appropriate mix of high level messages about the solution (addressing the inner needs) and technical features/details characterising the product.
- Prepare hardware, software and data sets for the demo sessions.

A6. 09 Demonstrating an IT solution [1,5]

- Manage expectations and time constraints.
- Demonstrate expertise of the product and understanding of its reach.
- Master the technical usage of the product, so as to communicate simplicity and to focus all the attention on the contents.
- Manage unexpected system problems, by making rapid decisions (whether to troubleshoot and overcome them or to take a turn-around approach).
- Relate concepts to the experience of the audience.
- Handle questions and interruptions effectively.
- Manage the transition from phase to phase, and alternate with other speakers in a seamless manner.
- Apply communication skills, speaking clearly using pace, pitch and intonation to stimulate interest.
- Capture the audience with a brilliant tenure, always maintaining a professional attitude.
- Monitor the level of attention in the audience.
- Allow for/solicit interaction, also in order to make sure that the concepts are kept.

A4. 04 Technology opportunities and package selection [1,5]

- Analyse service processes and compare them against alternative solutions proposed by standard software packages (“best practice” approach).
- Evaluate the Internet as a tool for creating new opportunities for service offering.
- Produce a report documenting the major features of a specific package (e.g. a CRM tool).
- Define a framework for effective package selection.
- Evaluate a software package against defined requirements.
- Work within a framework for package selection.
- Document the functional match of a package solution.
- Contribute to gap analysis for a package selection.
- Present the recommendation for a specific package solution.

B1.12 Defining a solution architecture [1,5]

- Gather and analyse:
 - o user requirements
 - o operational requirements
 - o system requirements for hardware, software, and network infrastructure.
- Transform requirements into functional specifications: considerations include performance, maintainability, extensibility, scalability, availability, deployability, security, and accessibility.
- Transform functional specifications into technical specifications: considerations include performance, maintainability, extensibility, scalability, availability, deployability, security, and accessibility.
- Select the appropriate technologies for the physical design of the solution.
- Create the physical design for:
 - o the solution,
 - o deployment,
 - o maintenance,
 - o the data model.
- Create specifications for auditing and logging
- Validate the physical design.

B1.14 System deployment methods [1,5]

- Organize the deployment of a system, i.e. the delivery of IT to the users in the target client organisation.
- Control and understand the business application of artefacts resulting from software development.
- Organise deployment workflow and product roll-out activities; including:
 - o testing the software in its final operational environment (beta test)
 - o packaging the software for delivery
 - o software distribution
 - o data population, both through new data entry activities and through migration from legacy system files or databases
 - o training the users.
- Support the client organisation in planning and acting the operational start-up of the new system.
- Organise and control initial support service provision during system start-up.

A3.03 Solution envisaging [1,5]

- Envisage and develop a solution concept.
- Analyse the feasibility of the solution.
- Analyse and refine the scope of the solution project.
- Identify key project risks.
- Contribute to gathering and analysing business requirements.
- Create a conceptual model of business requirements or data requirements: methods include Object Role Modelling (ORM) and UML.
- Validate the conceptual design
- Create the logical design for the solution.

- Create the logical data model.
- Validate the proposed logical design.
- Write a clear specification document.

Incisive competence level [7,5]

A6.05 Selling techniques [1]

- Manage introductions and establish an initial relationship based on a positive approach.
- Identify key people, opinion leaders and influencers in the audience.
- Find a trade-off between disclaimers and personal/professional standing and credibility.
- Enforce personal credibility through proper manner and appearance:
 - o Displaying confident, relaxed and friendly manner,
 - o Presenting a professional appearance,
 - o Demonstrating expertise and understanding of contents,
 - o Ability to relate concepts to the experience of the audience.
- Appreciate the importance of listening to assist communication.
- Appreciate non-verbal communication:
 - o Using non-verbal methods to enhance communication,
 - o Recognising barriers to effective communication.
- Understand human behaviour and underlying motivations.
- Create an empathetic climate and gain the customer's trust.
- Communicate enthusiasm and willingness to innovate
- Identify customer's priorities and perspectives, match them against own targets and perform conflict resolution.
- Highlight the key messages.
- Respond to unexpected needs and reactions
- Create a shared vision on possible solutions
- Understand client's arguments and address them to a positive conclusion.
- Evaluate and apply the appropriate level of psychological pressure to convince the customer.
- Negotiate specific conditions for an acceptable agreement.
- Persuade and support the customer in getting confident with the expected outcome of the agreement.
- Summarize the qualifying aspects of the agreement and make sure that the communication is clear, with no space for misunderstanding.
- Communicate a personal commitment to cover possible open issues and to follow-up.

A5.01 Project Management essentials [1,5]

- Define the role of the various specialists in a typical project organisation structure (e.g. Rational Unified Process, PRINCE2, etc.).
- Contribute to the IS project plan for a given business scenario.
- Contribute to risk analysis of a project proposal, concentrating on business risk.

- Use standard approaches to evaluate a project plan from the business viewpoint.
- Assist in defining the phases within a project and the role of the business analyst in those phases.
- Assist in the creation of constraints and the definition of milestones, checkpoints and reviews for a project.
- Define Corporate Standards for the documentation of business analysis deliverables in a project.
- Contribute to quality assurance processes within a project, from a business perspective.

A3. 06 Customer and contract acquisition [1]

- Analyze and qualify leads, suspects and prospects reported through various sources (fairs, telemarketing, web marketing, ..).
- Qualify a prospect by analyzing a single sales opportunity and taking into account the following factors:
 - o Potential customer value for the supplying organisation,
 - o How the proposed contract relates to the customer's CSFs,
 - o Customer's financial position, credit worthiness,
 - o Active reference value.
- Collect information about potential customer organisation and perform customer intelligence.
- Manage complex sales cycles:
 - o needs analysis and solution proposal (including technical annexes),
 - o risk/cost estimation and margin control,
 - o positioning, qualification and possible demonstrations of the solution,
 - o proposal / tender preparation,
 - o proposal presentation and contract finalisation,
 - o Outcome analysis (win & loss).

A1. 10 Marketing of IT products and services [1,5]

- Apply business-to-business marketing and sales strategies for IT products and services to different market sectors, including:
 - o primary sector and mineral industry,
 - o construction industry,
 - o manufacturing (e.g. industrial equipment, consumer packaged goods,..),
 - o wholesale and retail trade,
 - o transportation / communications / utilities,
 - o financial services,
 - o entertainment / other services,
 - o public administration.
- Appreciate the impact on sales processes of different jurisdictions and tax systems, including specific laws on contracts, IT suppliers and labour regulations wherever applicable.
- Promote the employing organisation, its IT products and services through a proactive collaboration with the marketing department in the following areas:
 - o corporate image, public relation and communication,
 - o market researches and product marketing,
 - o identification of business drivers,

- competitive positioning,
- development of long term objectives.
- Play an active role in defining and deploying:
 - marketing campaigns,
 - definition of prices and discounts, preparation of standard quotations,
 - classification and management of business opportunities,
 - sales analysis, forecasting and resource planning.
- Analyse target markets, also using Business Intelligence tools to classify, segment and evaluate potential targets.
- Analyse competitors, their offering and market presence.
- Use SWOT Analysis to position IT products and services offered to the market.
- Appreciate the importance of an integrated view of customers and trading partners through Data Warehouse and Data Marts.
- Manage customers databases and qualify specific potential clients, opportunities and required actions in the ideal sales process.

B2.05 Data migration [1]

- Use SQL queries and database tools to support data migration.
- Assess that a “clean” database is available for use.
- Check what kind of data can actually be extracted from previously existing (legacy) systems.
- Check what kind of data can actually be extracted from databases used during system piloting phases.
- Support possible manual data entry for initial population of the new database.
- Contribute to the extraction of data in various formats (plain ASCII, CSV, XML...).
- Know how to use standard Database interfaces like ODBC, JDBC, etc.
- Identify effective and non dangerous shortcuts (e.g. copy and modify, automated procedures, secure SQL DML queries) to increase efficiency of initial data population.
- Assess that all data is normalized and consistent both with system internal rules (e.g. referential integrity) and with agreed conventions (e.g. coding schemes, uppercase/lowercase etc.); ensure that the users / data owners be responsible for data accuracy and cleanliness.
- Evaluate when the system is ready to “go live”.

A4.03 Package implementation techniques [1,5]

- Acquire an understanding of the software package market in a particular business context.
- Evaluate a software package against defined requirements.
- Document the functional match of a package solution.
- Perform a gap analysis for a package selection.
- Present the recommendations for a specific package solution.
- Present recommendations concerning the “fit” of the software package to agreed functional and non-functional requirements.
- Explain the advantages of the package approach.

- Identify, assess and propose solutions for enhancing end-user productivity through:
 - o optimal use of package software,
 - o integration between different package software modules (if applicable),
 - o integration between package software and common desktop applications,
 - o personalized user interface and restricted data sets.
- Appreciate the issues with tailoring the package software.
- Identify specific requirements to be solved through custom software development and write functional specifications for necessary changes or extensions to the standard package.
- Explain a specific package implementation methodology (e.g. ASAP for SAP).
- Explain the different scope of subsequent modelling and piloting phases of a typical package implementation methodology.
- Define the modified business processes required in a package solution.
- Ensure that business events are managed through appropriate systems and that adequate information is distributed to the decision makers according to the projected business processes.
- Ensure that the target organisation is aware of all security issues related to a complex information system.
- Configure package security features so as to grant the right data visibility to every user and to prevent unauthorized access.

Annexes

Sample Learning Modules	EUCIP Points
EUCIP CORE PLAN	X
EUCIP CORE BUILD	X
EUCIP CORE OPERATE	X

External references to SFIA[®] version 3 by the SFIA Foundation

Skill 78: Sales Support

“The provision of technical advice and assistance to the sales force, sales agents, reseller/distributor staff, prospective or actual users of products or services (collectively – the customers), either in support of customer development or sales activity or in fulfilment of sales obligations.”

Levels 4 and 5

Skill 76: Marketing

“The research, analysis and stimulation of potential or existing markets for IT products and services, both to provide a sound basis for their development and to generate a satisfactory flow of sales enquiries.”

Levels 4 and 5

Skill 77: Selling

“The identification of sales prospects, the development of customer interest, and the preparation, execution and monitoring of sales of any IT product or service into an external or internal market.”

Levels 4 and 5

Skill 2 : Consultancy

“The provision of advice, assistance and leadership in any area associated with the planning, procurement, provision, delivery, management, maintenance or effective use of information systems and their environments. The consultancy can deal with one specific aspect of IT and the business, or it can be wide ranging and address strategic business issues.”

Level 5

Skill 33: System Installation/Decommissioning

“The installation, testing, implementation or decommissioning and removal of cabling, wiring, equipment, hardware and appropriate software, following plans and instructions and in accordance with agreed standards. The testing of hardware and software components, resolving malfunctions found and recording the results. The reporting of details of hardware and software installed so that configuration management records can be updated.”

Levels 4 and 5

External references to AITTS by the German Government – *Arbeitsprozessorientierten Weiterbildung in der IT-Branche*

Profil 6.4: IT Sales Advisor (IT-Vertriebsbeauftragte/r)

“IT Sales Advisor beraten Kunden bei der Auswahl von Services, Hard- und Software und entwickeln gemeinsam mit dem Kunden (individuelle) Lösungen.”

Profil 6.3 : IT Product Coordinator (IT-Produktkoordinator/in)

“IT Product Coodinator entwickeln und optimieren marktgerechte Hardware- und Software-Produkte sowie Dienstleistungen. Sie begleiten Produkte über ihren gesamten Lebenszyklus.”

External references to *Nomenclature 2005* by CIGREF (club informatique des grandes entreprises françaises)

(?) Métier 1.1: Consultant en systèmes d’information

*“Il anticipe et fait mûrir les nouveaux projets par une sensibilisation à l’apport des technologies nouvelles et une analyse prospective des processus métiers.
Il assiste la maîtrise d’ouvrage pour la définition des besoins et des solutions à mettre en œuvre, dans un souci de meilleure intégration dans le système d’information d’entreprise.”*