OUTBOUND OUTSELL

SALES CAMP

OUTSHINE

looker

PARTICIPANT WORKBOOK

v2019September

TABLE OF CONTENTS

PreWork

Videos

Looker BI (About Looker)
https://www.youtube.com/watch?v=_s3pQGipfrs
Published: Mar 31, 2019
Runtime: 11:11

Introduction to Business Intelligence

Business Intelligence Q1 Review
https://vimeo.com/328512154/6d55bf44d3
Published: April 2019
Runtime: 11:20

Data Platform Q1 Review
https://vimeo.com/328512180/3582fe50a9
Published: April 2019
Runtime: 9:10

Introduction to Business Intelligence
https://www.youtube.com/watch?v=5nGqJPkRC8o
Published: Jan 31, 2019
Runtime: 4:57

Beyond BI with Looker Applications
https://www.youtube.com/watch?v=VY0Z5iEXEXw
Published: May 3, 2019
Runtime: 48:36

The Future of BI Is Not a BI Tool
https://www.youtube.com/watch?v=A-XIouP0yRM
Published: Aug 26, 2019
Runtime: 01:00:35

Moving beyond BI with a Cloud Data Platform
https://www.youtube.com/watch?v=fK5B1nWv514
Published: May 30, 2019
Runtime: 01:00:14

Welcome to Looker 6
https://www.youtube.com/watch?v=SVftLf1Majc
Published: October 18, 2018
Runtime: 33:52

Tool Kit Series

Custom Visualizations in Looker
https://www.youtube.com/watch?v=ixwWGKyG3wA
Published: Dec 7, 2018
Runtime: 33:51

Advanced Analysis with Derived Tables
https://www.youtube.com/watch?v=E47xbD6Y64A
Published: Dec 18, 2018
Runtime: 55:00

Sales Pitch Series (Mandatory Viewing)

Looker Demo for Capital Brands
http://bit.ly/2zRVwE7
Runtime: 01:00:24

Looker & Jukin Media
http://bit.ly/2zYhqWm
Runtime: 57:07

Looker & JibJab
http://bit.ly/2POFCF6
Run time: 01:05:50


BOOM!

DAY 1

Schedule

Time	Subject	Speaker
9:00 hrs - 9:15 hrs	Icebreaker	MC
9:15 hrs - 10:00 hrs	Introduction to business intelligence	Daniel Mintz
10:00 hrs - 10:45 hrs	Looker’s competition	Josh Parenteau
10:45 hrs - 11:00 hrs	15-minute break	
11:00 hrs - 11:45 hrs	Discovery	Bill Macy
11:45 hrs - 12:30 hrs	Powered by Looker	TBD
12:30 hrs - 13:30 hrs	LUNCH	
13:30 hrs - 14:45 hrs	KT Hub	Sara B.
14:45 hrs - 15:00 hrs	15-minute break	
15:00 hrs - 16:00 hrs	Office scavenger hunt	MC
16:00hrs - 16:15 hrs	Survey — Day 1	

Objectives

- Summarize the business intelligence industry.
- List 5 of Looker’s competitors and our market advantage.
- Define Looker the IBI product.
- Define what it means to be “Powered by Looker.”
- Navigate the NEW KT Hub learning portal.
- Successfully navigate Looker’s intranet to find applicable resources.
- Locate the teams in the Santa Cruz office.

Session 1: Introduction to Business Intelligence

Learning Objectives:

- Define the business intelligence industry.
- Articulate why Gartner ratings matter to the sales cycle.
- List five advantages of business intelligence.

Definition:

Business intelligence (BI) is a technology-driven process for analyzing data and presenting actionable information to help executives, managers, and other corporate end-users make informed business decisions. BI encompasses a wide variety of tools, applications, and methodologies that enable organizations to collect data from internal systems and external sources, prepare it for analysis, develop and run queries against that data, and create reports, dashboards, and data visualizations to make the analytical results available to corporate decision-makers, as well as operational workers.

What value do Gartner ratings bring to the sales cycle?

What are five advantages that business intelligence brings to a data-focused industry?

Additional Resources:

What You Need to Know about Business Intelligence
https://www.forbes.com/sites/forbesbusinessdevelopmentcouncil/2018/08/07/what-you-need-to-know-about-business-intelligence/#4f16528d2ef7

5 Things I Wish I'd Known about Business Intelligence
https://www.thoughtspot.com/fact-and-dimension/5-things-i-wish-i%E2%80%99d-known-about-business-intelligence

Session 2: Looker's Competition

Learning Objectives:

- List Looker's top 5 competitors.
- Define where Looker has an advantage over each of the competitors.
- Define where Looker has weak points against competitors.

List the top 5 competitors to Looker:

1. ______
2. ______
3. ______
4. ______
5. ______

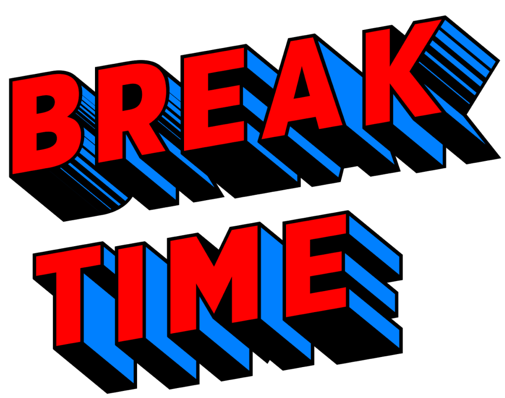
Where does Looker have an advantage over other competitors?

What are Looker's weak points against competitors?

Additional resources:

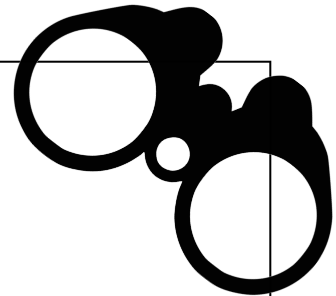
Monetizing Data with Embedded Analytics
https://info.looker.com/i/1090111-monetizing-data-with-embedded-analytics/0?

Embedded Analytics: The Looker Platform vs. Alternatives
https://info.looker.com/i/1071182-embedding-analytics-the-looker-platform-vs-alternatives/0?



Session 3: Discovery (Deep Dive)

Learning Objectives:



- Define “Open-Ended” and “Drill-Down” questioning strategies.
- List the questions to ask to capture the information needed to answer ANTUM.
- List the questions and four areas of discovery that validate an opportunity as real.
- List the five criteria that determine whether an opportunity is worth pursuing for Looker.
- Define Value One.

What is open-ended questioning?

What is drill-down questioning?

List the questions to ask to capture the information needed to answer ANTUM:

Authority:

Need:

Technology:

Urgency:

Money:

List the questions needed to validate that an opportunity is ready to move to the next stage in the following four areas.

Technical fit:

The fox:

Budget:

Active initiative or pain:

List the questions you would use to investigate the four criteria that determine whether an opportunity is worth pursuing for Looker.

Timeline:

Key resources:

Budget alignment:

Use case:

Define Value One:

Additional Resources:
Discovery section of the New Hire ramp:
https://looker.showpad.biz/courses-paths/division/8/

Discovery call recordings:
https://recordings.salesloft.com/c/11435/861e4495-22f2-45eb-86c7-654cb9910fd8
https://recordings.salesloft.com/c/11435/2b2305ad-a9ec-4474-9883-0cb2639df62d
https://recordings.salesloft.com/c/11435/22cb28e3-93a9-49e5-8681-91a2cb31b700
https://recordings.salesloft.com/c/11435/40ceda8f-d8af-42bb-8d33-7469de72b55e

Are they a good technical fit?

The idea behind the technical fit is simply whether or not your firm can meet the technical requirements of the project. If the client needs video services and you do graphic design, it's clearly not a great fit to work together. If they need a website built on a platform that you don't support, they're likely not a great fit either.

Figuring out whether someone is a good technical fit requires a basic understanding of a client's project requirements. In some instances, there are immediate red flags indicating that fit isn't present, while other situations might require you to scope out a bit of the project before you can make a proper decision. Depending on how specific your service offerings are, you might put determining technical fit at the very front of your qualification process, or towards the end as you start getting into the details. Some helpful questions to ask when determining technical fit include:

- What programming languages (if any) is the client expecting to use when tackling this project?
- What software or technology (if any) is the client expecting to use when tackling this project?

- What range of services (i.e. design, photography, marketing, analytics, etc.) is the client expecting for this project?
- What testing and QA process is the client expecting to be conducted for this project?

Are they a good timeline fit?

A rather standard question, timeline fit is meant to determine whether the client's timeline is reasonable given the way in which you work. It's important, however, to realize that the timeline extends beyond just the time they have available for the delivery of the project.

Some clients might have adequate time for the work to be done, but are pressing you to get a proposal to them before you have enough time to properly scope out the engagement. On the other hand, some clients will have conflicting expectations about how long it will take them to make a decision, actually get started, and launch.

When thinking about timeline fit, you'll want to examine the entire process from sales through to delivery and break out the expected milestones the client needs to hit. Some helpful questions to ask when determining timeline fit include:

- When is the client expecting a proposal?
- When is the client expecting to make a decision on their vendor?
- When is the client expecting to start the project?
- When is the client expecting deliverables to be presented for internal review?
- When is the client expecting deliverables to be launched?

Source:
https://www.shopify.com/partners/blog/111898758-6-questions-to-help-you-gauge-client-fit

Powered by Looker demo discovery questions
https://docs.google.com/document/d/1Ps5GRyrRrRSiN4sggrcOVVE7x8Au0mIj9j6iKYoRQow/edit

Discovery / Qualification Conversation Threads

Thread #1 – Why Are We Talking?

- Tell me a little more about the problem you are looking to solve.
  - How does that show up in your organization (i.e., what **evidence** do you get of that on a daily basis)?
- *(Or) Recap what you've heard from SDR and ask if those are the problems they are trying to solve.*
  - *How does that show up in your organization (i.e., what* ***evidence*** *do you get of that on a daily basis)?*
- What else…anything else?
- How would you prioritize these problems, in order of importance (and why)?
- Assuming you were able to solve these, what results or ***impact*** would you be able to achieve?
  - What would be the impact (in your opinion) of <u>not</u> doing anything about this problem right now? Would others agree?

Thread #2– Business Case/Budget

- Does this decision have to be cost-justified?
  - How do you plan on going about that? What does that look like?
    - Has a budget been approved?
      - Where is the funding coming from?

Thread #3 – Organizational Context

- Assuming that you decide to make a change, what other parts of the organization would be most affected?
  - Who within each of these areas would be involved? Why?
    - *If appropriate:* What's the best way to meet with them to gain an understanding of their requirements?
- What other projects/priorities exist in your organization?
  - Will these projects be competing for resources?
    - How will the company prioritize these?

Thread #4 – Decision Criteria

- Can we talk about the criteria are you going to use to judge what the right solution is to solve these challenges?
- Let's say we meet all your system/technical functionality requirements….. what else would your organization have to have in order to recommend a change like Looker?
    - What else…anything else?
        - Is one more important than the other?
- What alternatives are being considered in addition to Looker?
    - How does Looker compare to those alternatives?
        - What are others' opinions on the various options?

Thread #5 – Decision Process

- What's your purchasing & decision process for a purchase of this size? *(We know that Security, Legal, Finance, and Procurement often get involved, and we can share how this has worked for other customers similar to you.)*
    - Who else do you believe has to sign off?
        - What are their criteria for choosing the right solution?
            - What solutions have you purchased previously at X company?
                - What was that process/outcome?
    - What are the steps?
        - What else…anything else?

Thread #6 – Constraints

- Given the opportunity to improve the business, is there a particular reason that you haven't done anything thus far?
    - Is the change time-sensitive, meaning that you need to do something by a certain date? If so, why?
        - What would prevent the company from making the change, or making the change within the desired timeframe?

This is where you uncover any time, resource, or money constraints.

---

3 reasons why deals are lost:

1. We do not understand the company's change or buying criteria (#1, #3, #4)
2. We do not understand the decision process (#5)
3. There's no cost justification or business case (#2, #6)

Session 4: Powered By Looker (PBL)

Learning Objectives:

- Articulate why PBL is the future of BI.
- Define what PBL is and how it differs from classical BI.

Why is PBL the future of BI?

What is PBL?

Additional Resources:

PBL Pitch Deck
https://docs.google.com/presentation/d/1y3v9z_oDYEvAt3qq8tL_WHV4c9gub_Wy7M3NP5M1aIg/edit#slide=id.g4fc8f71fb1_2_118

Embedding Analytics: The Looker Platform vs. Alternatives
https://info.looker.com/i/1071182-embedded-analytics-looker-platform-vs-alternatives/0?

Guide: Monetizing Data with Embedded Analytics
https://info.looker.com/embedded-analytics/monetizing-data-with-embedded-analytics

Brief: Embedding Analytics with the Looker Platform
https://info.looker.com/i/1090150-overview-embedding-analytics-with-the-looker-platform/0?

An interactive demo of embedded analytics
https://looker.com/demo/try-embedded-analytics#success

Build vs. Buy: Choosing the Right Embedded Analytics Solution
https://looker.com/blog/embedded-analytics-solutions

Session 5: KT Hub

Learning Objectives:

- Define KT Hub.
- Locate KT Hub.
- Navigate to your learning path in KT Hub.

What is KT Hub?

What other notable things did you notice in KT Hub?

Using KT Hub

Navigation

Purple Tiles: Looker internal role-based learning.

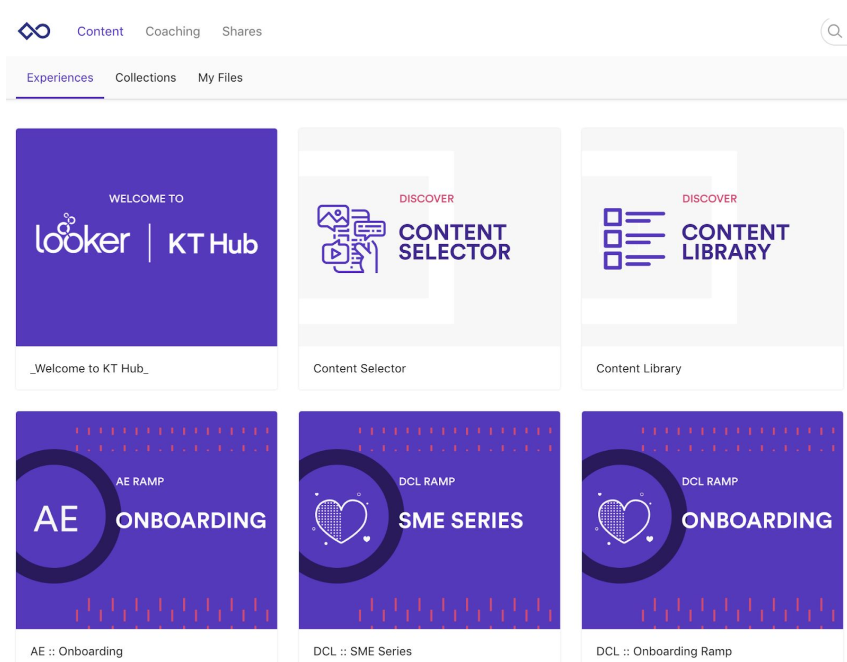
- Each team has an onboarding & continued education Experience, curated by your team training lead.
- Courses from all teams are present in the electives Experiences.

White Tiles: **Authoritative & current** customer-facing content.

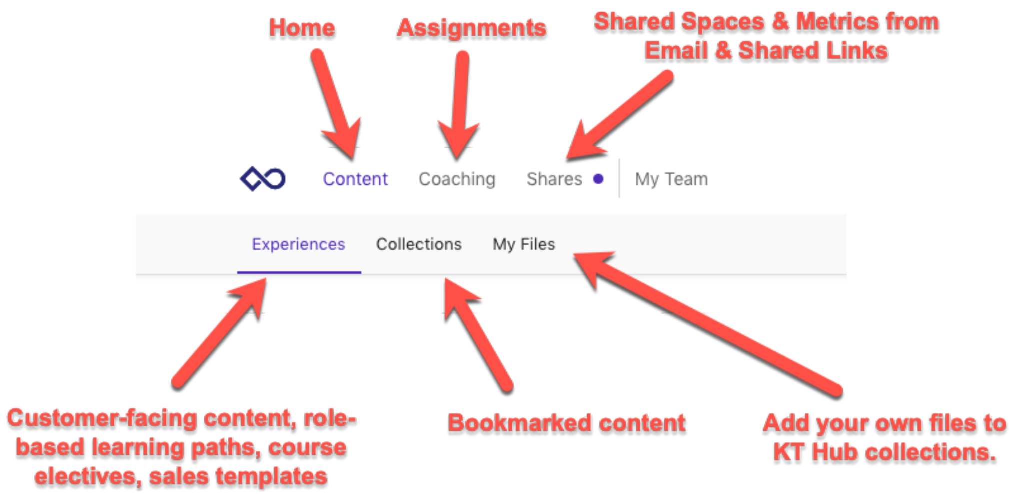
Discovering Content

Content Library: Search using one criterion.
Content Selector: Search using multiple criteria.
Search: Search titles, page content, metadata tags, and transcriptions from the single search field. Filter your results with the Advanced Search options.

Drag and drop to re-order colored tiles (experiences) in a way that makes the most sense for you.



Navigation Menu



Content	Home view
Coaching	Learning assignments and opted-in courses
Shares	Metrics from link & email shares and **Shared Spaces**
Experiences	What KT Hub offers — internal learning and customer content
Collections	Bookmarked content
My Files	Add your own files to your KT Hub collections

Collections

A **Collection** is a folder of bookmarked items. You can create a collection of favorite items, or create collections for each client.

You can add content to a Collection from a content Experience or from My Files.

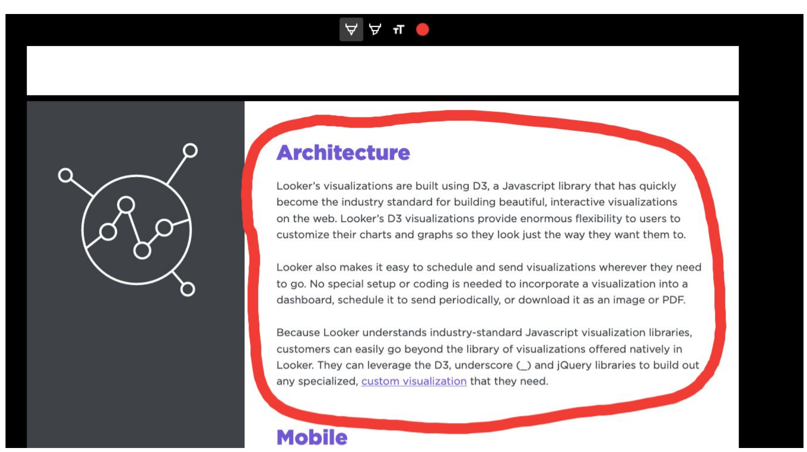
To add content to a collection, click the folder icon from the asset itself or toggle multiple items to add en masse. With either method, you'll be prompted to add to an existing collection or create a new one. A general rule of thumb is to make sure the content is ordered with Personal Content first, followed by videos, then slide decks, then whitepapers or PDFs.

Presentations

To begin a presentation, simply click into an asset.

There is no need to have multiple programs open or worry about the exact formatting and layout of content. KT Hub allows you to transition seamlessly between asset types like videos, slide decks, and PDF content, and the experience is the same on any device.

There are several annotation tools available for you while you are presenting or preparing content for the prospect.



You can:
- Select a color and mark up the asset
- Highlight relevant sections
- Add important notes

These annotations are unique to each collection. They do not alter the original document and cannot be seen by other users.

Conversations with customers can necessitate a quick change of topics and content as questions arise. KT Hub facilitates pivoting to another page or another asset as quickly as the conversation flows.

Because you are presenting from the same location where all of your content lives, you can be confident that you can quickly find the right content wherever your conversation leads you.

Sharing Content

There are three preferred ways to share content. You can email or copy a sharing link from within:

- The collection's overview
- The collection itself
- The presentation

Sharing by Email
When you share by email, you will have an opportunity to click on the hyperlink in the email dialogue and preview what the recipient will see. You can cancel the email to rearrange your collection if desired.

Sharing by Link
When sharing by link, make sure to include how you're distributing that share in the title. An example would be [Company] + Slack. You can recover past shared links in the Shares area. If you change the order of items in the collection, those changes will be reflected when the recipient visits the link.

Great for dedicated Slack channels!

Shared Spaces

Shared Spaces is designed for three purposes:

- To support the evolution of a conversation over a long sales cycle.
- To create a branded or co-branded collaborative environment for customers, prospects, and even for colleagues and team members.
- To ensure secure sharing of sensitive content to specific recipients.

Within a shared space, users can continually add content; manage members and add new members as the conversation evolves; moderate commentary; and view all member activity within the space.

Personalize the experience by creating unique messages regardless of whether you're sharing with a colleague or a prospect.

When your space is ready, it's time to invite members and stakeholders. Click **Invite** and add the contact's email addresses as well as a short introductory email.

Each invitee will receive a unique invitation email asking them to confirm their identity and create a password. **This last step ensures that Shared Space is secure.**

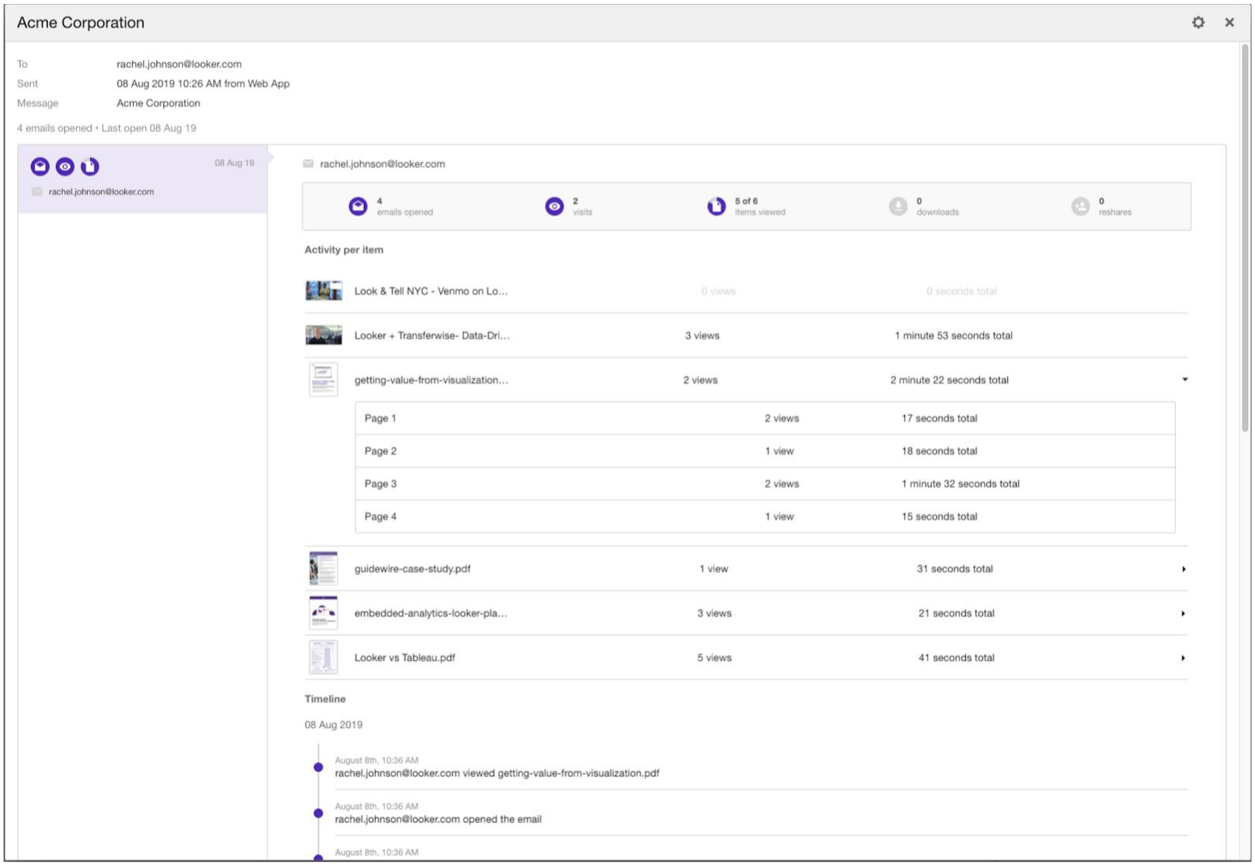
Once your invitees have authenticated and logged in, they'll have the opportunity to view and update their profiles.

As members log in, view or download content, and add comments, all of their activities are tracked and reported back to you so that you have a complete understanding of every interaction throughout the entire sales cycle.

Metrics

Once users visit a share or a microsite, you will be able to see exactly how much time someone spends with the overall collection, with each asset, and even with pages within the asset. These metrics are visible in the Shares area on the main menu.

Use the metrics to get a greater understanding of what issues matter to your client, and to identify the most effective content in your collection.



When your client invites additional colleagues into a shared space, or further shares an email share, KT Hub will capture that contact information in the metrics section.

You can also download the mobile app for the KT Hub platform, Showpad, to receive push notifications to your device when a client interacts with content.

BREAK TIME

Scavenger Hunt - Office

Learning Objectives:

- Meet people in the office.
- Locate resources in the Santa Cruz office.

Your mission:

Split into groups of 2 or 3 and grab a Post-It stack and a pen. For each prompt below, write the answer on a single Post-It note to bring back to the room when completed. This task list is in no particular order.

- Introduce yourself to three people in the Sales group you haven't met yet. Who are they and what are their roles?
- Find the Sales Ops pod. When do you reach out to the different groups within Sales Ops, and what is the best way to get in contact with them?
- Find the Renewals pod. How long does Looker need to retain a customer before they become profitable? How long before the contract end date does the renewals team begin reaching out?
- On the third floor, how many soft seating areas are there and where is each one? Introduce yourself to someone sitting nearby.
- Find someone who has worked at Looker for more than 3 years. Who is it? Ask them about their favorite Looker memory.
- Find the DCL pod. What's one of the most common feature requests they hear?
- Find the white flipbook binders in the Sales area. What's your favorite customer quote?

  Bonus: Find the secret chocolate stash.

  Bonus: Find the hidden item in the putting green.


KAPOW!

DAY 2

Schedule

Time	Subject	Speaker
9:00 hrs - 9:30 hrs	Looker, Runner, Builder	MC
9:30 hrs - 10:00 hrs	Looker is my title — feedback	MC
10:00 hrs - 10:45 hrs	Sales process overview	Tom Briner
10:45 hrs - 11:00 hrs	15-minute break	
11:00 hrs - 11:45 hrs	Stages: Negotiation through close (deep dive)	Tom Briner
11:45 hrs - 12:45 hrs	SDR pro-tips	Sandra Parhami
12:45 hrs - 13:45 hrs	LUNCH	
13:45hrs - 16:00 hrs	Pitch perfect (competition)	MC
16:00hrs - 16:15 hrs	Survey — Day 2	

Objectives

- Define good practices when asking, giving, and receiving feedback from a teammate.
- Describe the seven stages of the sales process here at Looker.
- List 5 tips and/or behaviors of an awesome SDR.
- Name 5 good questions to be answered in the Discovery Stage.

Specific to the pitch perfect challenge:

- Articulate points of a good followup with a client.
- Define what comprises a successful sales pitch.
- Address pain points: who do you go to?
- Describe approaches to handling conflict from a client.

Session 6: Looker Is My Title — Feedback

Learning Objectives:

- Define the different types of feedback.
- Define S.M.A.R.T. feedback.
- Analyze when it is best to ask for feedback on critical performance.
- Identify different sources and their value when asking for feedback.
- Describe how appropriate reactions to receiving feedback would appear.
- Identify what might be considered when giving feedback.

Types of Feedback

Informal feedback

Informal feedback can occur at any time, as it is something that emerges spontaneously in the moment or during the action. Therefore, informal feedback requires the building of rapport with students to effectively encourage, coach, or guide them in daily management and decision-making for learning. This might occur in the classroom, over the phone, in an online forum, or in a virtual classroom.

Formal feedback

Formal feedback is planned and systematically scheduled into the process. Usually associated with assessment tasks, formal feedback includes such things as marking criteria, competencies, or achievement standards, and is recorded for both the student and organization as evidence.

Peer feedback

There is no longer a need for teachers to be the only experts within a course. With basic instruction and ongoing support, peers can learn to give quality feedback, which is highly valued by peers. Providing regular opportunities to give and receive peer feedback enriches their learning experiences and develops their professional skill set.

Constructive feedback

This type of feedback is specific, issue-focused, and based on observations. There are four types of constructive feedback:

- Negative feedback: Corrective comments about past behavior. Focuses on behavior that wasn't successful and shouldn't be repeated.
- Positive feedback: Affirming comments about past behavior. Focuses on behavior that was successful and should be continued.
- Negative feed-forward: Corrective comments about future performance. Focuses on behavior that should be avoided in the future.
- Positive feed-forward: Affirming comments about future behavior. Focuses on behavior that will improve performance in the future.

*Source:

https://federation.edu.au/staff/learning-and-teaching/teaching-practice/feedback/types-of-feedback

S.M.A.R.T. Feedback

Specific: When setting goals and objectives, eliminate any ambiguity or misunderstanding. Objectives that are too general leave room for interpretation and can lead to a potential conflict between the manager and the employee. For example, the performance goal to “improve customer service” does not specify what aspect of customer service should be improved or how it will be evaluated. A more specific objective could be to improve the customer satisfaction survey results by a certain percentage. The less ambiguity, the less chance for misinterpretation.

Measurable: In order for both the manager and the employee to know when the objective has been achieved, it must be measurable. Measuring objectives is easier when you are dealing with hard numbers, for instance with objectives related to sales and financial data. Intangible objectives are usually harder to measure but can be done with a little creativity. For example, in order to encourage an employee to become more of a team player, the objective could be for the employee to organize a number of team events or to participate in a certain number of cross-functional team projects.

Achievable: Objectives should always be set jointly between managers and employees in order for employees to feel ownership and take responsibility for the objectives. If an objective is deemed unrealistic and impossible to achieve, employees may become disengaged and unmotivated before even making an attempt. Objectives should be set that challenge the employee, but they must still be attainable. This encourages employees to work hard toward their goals with the assumption that the goal can be achieved.

Relevant: Objectives should be aligned with the overall strategic direction of the organization. Employees need to feel that their work is meaningful and contributes to the organization as a whole. Consequently, objectives should be tied to departmental and organizational objectives. Failure to do so can result in an employee becoming demotivated and confused about their role.

Timed: All objectives should have a timeframe so it is clear when the objective should be achieved. This could be an annual or quarterly timeframe, or by a specific date. Putting an actual timeframe on an objective can also bring a sense of urgency — some employees work better under pressure.

Source:
https://www.forbes.com/sites/karlmoore/2014/12/04/giving-s-m-a-r-t-feedback-to-millennials/#7dc8643371d3

Asking for Feedback

Source:
https://cuttingedgepr.com/free-articles/the-best-ways-to-ask-for-feedback-at-work/

Sources of Feedback

List 4 sources of feedback:

Receiving Feedback

Key takeaways about when you receive feedback:

Giving Feedback

Do you think the tonality of feedback makes a difference? Why?

Does the timing of feedback make a difference?

Session 7: Sales Process Overview

Learning Objectives:

- List the stages of the sales process.
- Describe which stage might be the most challenging.

List the stages of the sales process:

Which stages might be the most challenging for you, and why?

BREAK TIME

Session 8: Stages: Negotiation through Close (Deep dive)

Learning Objectives:

- List 3 critical questions that need to be answered in the Negotiation stage.
- List the elements of the Submission stage.
- Define who and what are involved in the Close stage.

What are 3 critical questions that should be asked in the Negotiation stage?

1. ______________________________
   ____
2. ______________________________
   ____
3. ______________________________
   ____

Elements of the Submission stage:

Who and what are involved in the Close stage?

Session 9: SDR Pro Tips

Learning Objectives:

- Define the SDR role.
- List the ANTUM criteria.
- Summarize the AE/SDR relationship.

Define the SDR role:

List the ANTUM criteria:

Summarize the AE/SDR relationship:

Pitch Perfect — Competition

Learning Objectives:

- Identify elements of a successful sales pitch.
- Define elements of a poor sales pitch.
- Evaluate consistently the quality of a sales pitch.
- Analyze a sales pitch for growth feedback.

Using this deck for your pitch:
https://docs.google.com/presentation/d/1uUiBcYHiRaIfXuMkhbnUwQ0DZ80ah90N1bs_ZCAAZcQ/edit#slide=id.g6266d321c3_3_1861

Instructions:

Using this provided sales pitch deck
10-15 Minutes to make sales pitch
Dual round elimination
Each round is 30 minutes
Groups of four per coach
Pair off in twos
First-person pitch to other (coach evaluates)
Second-person pitch to other (coach evaluates)
The person with a higher score (from the coach) moves into the higher bracket

Elements of a Successful Sales Pitch:

1. Thorough research
2. Define the problem and offer a solution
3. Make compelling points
4. Make it urgent
5. Add additional value
6. Focus on benefits
7. Follow up

Growth-positive questions:

Really Useful Information

Slide Decks from Camp

Where you can find all the decks for all that was presented in this camp:
Shared Drive:
https://drive.google.com/drive/u/0/folders/10etW6SHauVifpf2pjJ-sQP64qLu8No3g

Day 1

General:
https://docs.google.com/presentation/d/1n2qbYJkM0FDpuRfFGe0SvfSsMiQn_P9BaHJH5Qucs6s/edit#slide=id.g612c78ddb9_0_27

Session 4: PBL Pitch
The Modern Platform for productizing and embedding analytics
https://docs.google.com/presentation/d/1y3v9z_oDYEvAt3qq8tL_WHV4c9gub_Wy7M3NP5M1aIg/edit#slide=id.g4fc8f71fb1_2_118

PBL Overview
https://docs.google.com/presentation/d/114DYftT4kXr3JklMDsUtTC9QzrWKEbNlVKOOZK8Jzgl/edit#slide=id.p1

Day 2

General:
https://docs.google.com/presentation/d/1E5v7zWn1-M1mYxOBhjqECE6265byK9_CmnDwp_Px85w/edit#slide=id.g6255c7bbc7_0_0

Session 7: Sales Process Overview
https://docs.google.com/presentation/d/1Hmy5fXWJgHtmr2EH1P750CPoUNfojTbY_nj17HAIWGk/edit#slide=id.g46d8bd9650_0_0

Sales Process by Looker

https://lou.looker.com/teams/sales/process

Points of contact (useful people)

- Account Executive:
    - East: Derrich Beauchamp (Sr. Enterprise)
    - West: Jeffrey Garcia
- Competitors: Josh Parenteau
- Customer Success: Paul Fennell & Eanna Cunnane
- Department of Customer Love: Jiro Wiseman & William Lane
- Professional Services: Russell Garner
- Engagement Managers: Russell Garner
- Sales Operations: Lisa Daly
- Sales Executive(s):
    - Rafa Jara-Simkin: East
    - Deren Rehr-Davis: West
    - Darragh Quin: EMEA
- Enablement/Training: Bill Macy
- Legal: Lupe Garcia-Pham or Duncan Sharp
- Marketing: Elena Rowell
- Renewals: Ryan Lee
- Alliances: Sam Harkness

Slack Channels

#sdr: All the SDRs in the company
#security: Keep up-to-date about the latest security issues
#all-hands: Keep up with the latest updates on Looker
#it: Very useful to know when there is a phishing attack or other computer issues
#alliances: Questions about implementation outsourced to partners? Ask Alliances!

Looker User Guide & Resource:

https://looker.com/guide

Lookmarks

Demo: Looker instance used to demo product to customers
Dig: Internal Lookers only forum
Discourse: External community forum for customers
Expensify: Where you put all your travel and business expenses
Gmail: Email service
Guru: Quick help reference for knowledge on the Looker product
Helpdesk: Ticketing service used by all teams for internal requests
Incident Management: Details internal process for critical application issues
Jira: Project Management program
KT Hub: Learning Center Training & Content Management System
Learn: Interactive training sandbox for learning Looker
Lever: Internal Job listing site to refer your friends
Looker Calendar: Looker organization Google calendar
LookerShare: Company-wide Google drive
Lou: Looker’s internal web page of the internal structure
Meta: Looker’s own Looker instance
Namely: HR management platform
Services Catalog: Direct link to a list of services in Helpdesk
Slack: Instant messaging communication platform
TripActions: Travel agency service for booking company travel
Zendesk: Used by support (DCL) for customer ticket tracking
Zoom: Our video conferencing software

Mobile Apps (you should install on your phone)

Expensify: For your company expenses
Gmail: To always access your work email
GDrive: To access your files
GCal: To keep you organized
HID: Allows you to have access to Looker properties
Namely: Looker’s HR System
Slack: Looker’s primary instant message program
Trip Actions: For booking business travel

Glossary(s)

Online Growing Glossary

https://docs.google.com/document/d/1oaMSxHLykoaTcrLJNK5NVMrDPk34aDJZHh98kfJntpA/edit

Looker Lexicon

https://docs.google.com/document/d/1--PY5mPHLJcytI6pnThyoBh7a-rypRPCaYfydKi4zyg/edit

Legal

Legal FAQs

NDAs and Evaluations

A prospect wants us to sign an NDA before discussions or a trial; what should I do?

Send them Looker's pre-signed NDA with the "Send NDA" button on the prospect's Salesforce account page.

What if the prospect gives us their NDA template to sign?

Explain that we have an NDA template, and send our pre-signed NDA. If they insist on theirs, send their document to legal@looker.com for approval.

The prospect wants to make changes to our NDA; what should I do?

Send them a Word copy of our NDA and forward any changes to legal@looker.com for review.

What if a potential customer wants us to sign an evaluation agreement?

Looker's EULA must be accepted before starting the trial, and it already contains eval terms. If the prospect insists on a separate agreement, send them our eval agreement template.

License Agreement

A prospect wants to see our MSA. Where is it?

The Looker-hosted MSA is here and the customer-hosted MSA is here.

Can a prospect make changes to our MSA?

Only for prospects of $50,000 or more. Send any proposed changes to legal@looker.com .

I need to send a prospect a Word copy of our MSA. Where is it?

Send this MSA for Looker-hosted and this MSA for customer-hosted. Send the accompanying FAQ as well.

Data Processing Agreements (DPAs)

A prospect or customer wants to see our DPA. Where is it?

Send them Looker's pre-signed DPA with the "Send DPA" button on the their Salesforce account page.

A prospect or customer sent me their DPA document. Can we sign it?

Send them a Word copy of our DPA along with the accompanying FAQ and explain that Looker's DPA is specifically designed to align with our product and services. If they insist on their template, forward to legal@looker.com for review.

A prospect or customer wants to make changes to our DPA. What should I do?

For prospects $50k or more, send them a Word copy of our DPA along with the accompanying FAQ and forward any changes to legal@looker.com for review.

Miscellaneous

A prospect has requested a Business Associate Agreement (BAA), or they have sent their own BAA. What should I do?

Contact legal@looker.com with this request.

A prospect wants to see our SOC 2 report or other security information. What should I do?

Grant them access to our Whistic security portal (instructions here).

Legal Resources for Sales

Legal Contacts

Request Type	Contact
General	legal@looker.com
EMEA sales support.........................	darina.byrne@looker.com
Inside and Outside East sales support	yemi@looker.com
Inside West sales support	james.hancock@looker.com
Outside West sales support	juliana.calil@looker.com
Escalations	duncan.sharp@looker.com

Legal Documents

The following documents can be found on the Legal Lou page:

Pre-signed DPA and NDA — How-to
NDA with Cover Sheet — Customer-facing*
Trial/Evaluation Agreement
Annotated Looker Cloud MSLA — INTERNAL ONLY
Annotated Customer-Hosted MSLA — INTERNAL ONLY
MSLA — Cloud
Cloud MSLA FAQ
MSLA — Customer-Hosted
Customer-Hosted MSLA FAQ
DPA — Customer-Facing*
DPA Cloud FAQ
DPA Customer-Hosted FAQ

*For the DPA and NDA, please send the pre-signed version in SFDC unless the prospect requests to make changes.

Miscellaneous Resources

- GDPR (https://looker.com/privacy/gdpr; includes sub-processor info)
- General security info (https://looker.com/product/security)

- Whistic security portal (instructions here; grants access to SOC 2 and other docs)
- Sales contracting guidelines (here)

THANK YOU

Troy Anderson	Jeff Garcia	Graham Norwood
Tom Briner	Dan Goldstein	Sandra Parhami
Sara Brylowski	Rachel Johnson	Darragh Quinn
Corey Carruthers	Erik Kuld	Deren Rehr-Davis
Jeff Van Earwage	David Mintz	Elena Rowell
John Ewald	Tig Newman	Scott Siegel
Olivia Winter	Katie Woolsey	Vicki Yang

Without these individuals, this camp wouldn't have happened!

Fun Stuff

IQ TEST

(This is for fun)

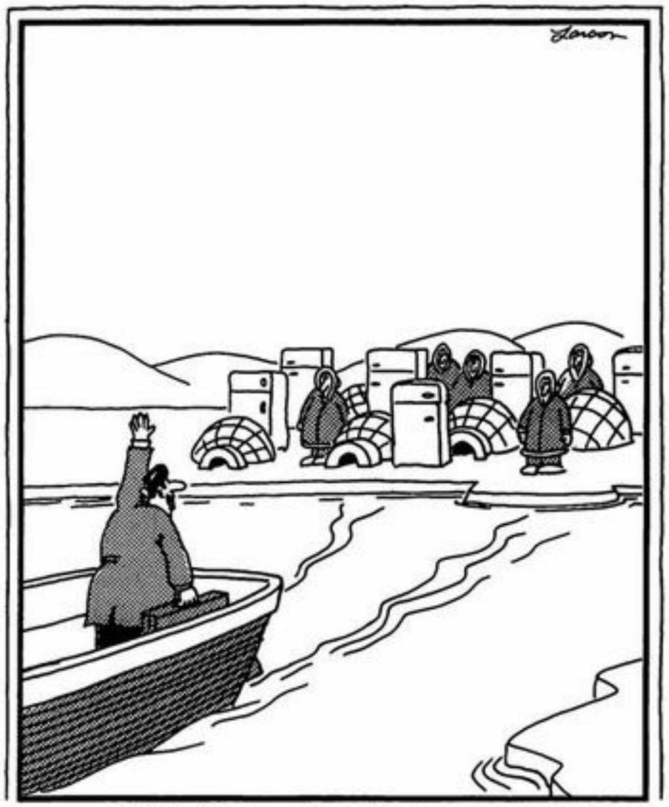
Each question below contains the initials of words that will make it correct. Find the missing words. For example: “26 L of the A” would be “26 letters of the Alphabet.” There is no time limit on this. Very few people can answer half of the questions.

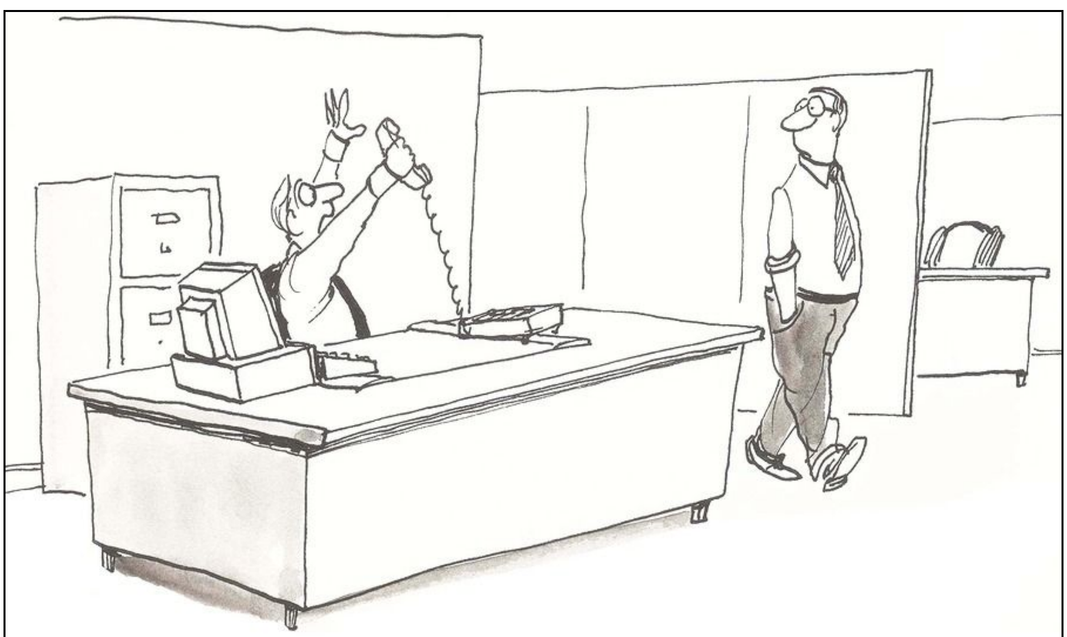
1. 26 L of the A ______
2. 7 W of the W ______
3. 1001 A N ______
4. 12 S of the Z ______
5. 53 C in a D (with the J) ______
6. 9 P in the SS ______
7. 88 P K ______
8. 13 S on the A F ______
9. 32 D F at which W F ______
10. 18 H on the G C ______
11. 90 D in a R A ______
12. 200 D for P G in M ______
13. 8 S on a S S ______
14. 3 B M (S H T R) ______
15. 4 Q in a G ______
16. 24 H in a D ______
17. 1 W on a U ______
18. 5 D in Z C ______
19. 57 H V ______
20. 11 P on a F T ______
21. 1000 W that a P is W ______
22. 29 D in F in a L Y ______
23. 66 S on a C B ______
24. 40 D and N of the G F ______
25. 66 B of the B ______

Word Search

S	A	N	F	R	A	N	C	I	S	C	O	A	B	C	K
D	C	L	J	A	I	H	J	G	F	G	C	S	E	D	I
C	S	M	K	M	L	M	A	N	D	B	N	R	O	B	T
T	A	R	S	R	R	J	S	Q	O	K	A	P	P	O	C
U	V	R	X	A	Y	A	M	D	R	E	R	A	D	U	H
E	L	O	O	K	E	R	I	S	M	Y	T	I	T	L	E
D	M	C	B	R	T	F	N	L	T	B	A	L	A	D	N
C	S	F	G	V	L	I	E	H	O	O	N	O	I	E	T
L	O	O	K	M	L	L	L	K	K	X	I	N	J	R	A
I	M	N	S	O	P	E	Q	P	Y	R	S	D	T	U	B
E	D	C	E	B	A	J	Y	B	O	X	W	O	D	V	L
R	B	Q	D	A	T	A	F	L	U	X	L	N	I	D	E
D	F	G	N	J	G	V	D	U	B	L	I	N	G	B	R
S	H	R	E	D	F	A	N	O	U	T	M	L	K	J	I
N	O	R	Z	B	S	A	N	T	A	C	R	U	Z	P	Q
S	C	H	I	C	A	G	O	R	N	E	W	Y	O	R	K

CSM	GBR	KEYBOX	QBR	DUBLIN
CSA	GCS	KITCHEN TABLE	RVM	LONDON
DataFlux	GRR	LMS	SHRED	BOULDER
DBNR	IDE	LOOKER IS MY TITLE	SDR	NEW YORK
DCL	JARFILE	LOOKML	SE	TOKYO
DIG	JASMINE	MRR	SINATRA	CHICAGO
DSL	JAVA	ORM	ZENDESK	
ETL	JDBC	PBL	SANTA CRUZ	
Fanout	KARMA	PDT	SAN FRANCISCO	


Ralph Harrison, king of salespersons


"I have a customer on the line,
but I'm not trained on what to say to them!"


WHEN YOU HIT YOUR
QUARTER SALES GOAL EARLY
imgflip.com

Bingo Sheet

Saw a movie this summer	Enjoys hiking	Is a Marvel Universe fan	Does not drink soda	Speaks 2 or more languages
Already has a Halloween costume picked out	Loves to read books	Plays video games	Traveled abroad in the past year	Had gone SCUBA diving
Never played Monopoly	Likes watching sports		Has a dog	Plays a musical instrument
Likes to Dance	Has freckles	Has children	Goes Surfing	Has seen the same movie more than 5 times
Loves to Travel	Has a cat	Shops Online	Is a DC Universe fan	Has been in a parade


OUTBOUND
OUTSELL
SALES CAMP
OUTSHINE