

# Catapult Playbook

Consistent execution of the things that matter most

## 1. Market Development



### Plan to Win

The engine that drives growth and profitability is excellence in sales execution. And sales execution is improved through effective planning and collaboration both internally and in partnership with Microsoft. So we PLAN to win. The economy, industries, competition, strengths of our team, and strengths in our ties to Microsoft vary by market. We need to have a market-specific sales strategy for each of our business units that is documented and used to guide the activities and priorities of the sales team. There is great value in the collaboration and accountability that comes through the account planning process. 2 or 3 or 4 heads working together are almost always better than one. There should be an account planning process in place with a regular review cycle that involves the GM, AE, DM, and any other key individuals.

#### Key elements:

- Market-specific strategy and tactics are defined
- Key target accounts are selected
- Account planning process is used for all key accounts with regular review cycle



### Align with Microsoft

Part of our “secret sauce” is to partner with Microsoft more effectively than our competitors. Elements of this partnering include co-marketing, regular “rhythm of business” meetings, leadership in partner sales support programs, establishing a visible presence, and active account planning around our target accounts. We need to have identified the Microsoft sales team members that are assigned to our target accounts and have regular communication rhythms with each of them.

#### Key elements:

- Regular rhythm of business meetings established with PAM, PTA, and STU
- Visibility with local Microsoft team through regular attendance at quarterly regional events, awards, etc.
- Account planning process is used for all key accounts with regular review cycle
- For target accounts, Catapult and Microsoft teams are strategizing together in unified pursuit
- Sales team is leveraging MVP, VTSP, PAC and IAMCP Programs jointly with MS field teams and expert Catapult resources
- Offerings relevant for Microsoft and in the forefront of their thinking have been identified and are in joint pursuit
- A Go-to-Market strategy including campaigns that will optimize our offerings is established with the local MS team

## 2. Opportunity Pursuit



### Take Dead Aim

One of the top bits of advice from legendary golf instructor Harvey Penick is to “Take Dead Aim,” which meant to very carefully and precisely aim at the target. It is critical that our proposals and sales messages are carefully tailored to the client, business need, and competitive situation at hand. We need to “Take Dead Aim.”

#### Key elements:

- Client business problem, potential solution value, and budget are well understood
- Technology goals and constraints are well understood
- Competitor position is well understood
- Solution has been scaled to match business value and constraints
- Proposal begins with client needs



### One Voice

We “bring the whole team”...when we sell and when we deliver. That means each of our clients experiences our best thinking, our best expertise, and our best experience...company-wide. We sell and deliver as a team...and that produces better results. So we speak with “One Voice.”

#### Key elements:

- All Catapult Value Chain elements have been considered
- Pursuit team has been assembled; proposal represents team best thinking
- Win themes, differentiators, and benefits clearly defined and communicated
- Latest and best proposal content and credentials used from sales portal
- Negotiation strategy has been defined



### Package Level Negotiation

The concept of package level negotiation is to place ALL the relevant issues “on the table” as a package and negotiate them together, rather than one issue at a time. If we “give” on one issue, then we should “get” on a different issue.



### MESOS

MESOS is an acronym for Multiple Equivalent Simultaneous Offers. When we employ MESOS, we give our clients multiple offers, rather than one. MESOS enables us to gain more control in a competitive situation and differentiate ourselves from the competition. It changes the conversation from “my offer” to “my 3 offers.” It allows us to highlight our strengths and can draw the client into a different kind of conversation.



### BATNA

BATNA is an acronym for Best Alternative to Negotiated Agreement. In other words, Plan B. In establishing our negotiation strategy we want to assess our client’s BATNA. If they don’t do the deal with us, what is their next best option? The better we understand our client’s BATNA, the better we will know how to price our solution and negotiate terms.



## Iterative, Synchronous Communication

The idea behind synchronous communication is that we want to present our proposals and SOWs to our clients in a forum where there is real time (synchronous) communication. In other words, we should always present our proposals in person or via a call. We should also communicate with our clients in iterations, building client buy-in for the proposal/SOW that is to come.

## 3. Initiating the Work



### The Set-Up Routine

Executing a Catapult Systems engagement is much like hitting a golf shot...the set up to the shot has a VERY significant impact on its success. The right set-up routine is an important success factor for our engagements. Critical elements of that set-up routine are listed below.

**a. Have a regular routine – *Run the Catapult Playbook checklist at SOW creation and project start-up.***

A consistent, repeatable process for ensuring the most important success factors are considered in each of our engagements will increase our long-term success and reduce issues. Each of our engagements should apply the "Opportunity Pursuit Checklist" and "Initiating the Work" checklists at the planning steps during SOW creation and project start-up.

**b. Choose a shot you can hit – *Solution, deliverable, budget, and schedule commitments have been confirmed as achievable.***

It is easy to slip into making commitments and setting expectations that will be difficult or impossible to achieve. It is essential to our long-term success that we ensure that the solutions, budgets, and timelines we propose to our clients are achievable. We need to ensure we have involved the right expertise and that they have invested the appropriate time to validate that the solution, deliverables, budget, and timeframe are achievable.

**c. Visualize the shot – *Success criteria and acceptance criteria are clearly defined.*** One of the most common ways for an engagement to get "off track" is for our client and our team to have different expectations of how "success" will be defined. This issue most commonly occurs when the very broad objectives of an engagement are in alignment but there are different expectations at a more detailed level. This risk is best mitigated through having a clear definition of the project success criteria and deliverable acceptance criteria defined in the Statement of Work. These criteria should be assessed at project start up and refined with the client if appropriate. Clear deliverable acceptance criteria is an absolute MUST for any fixed fee engagement.

**d. Adjust for the wind – *The client environment has been defined and the project plan adjusted accordingly.***

The working environment at each of our clients is unique and impacts the amount of time that will be required to deliver a solution. Technical skills, organization dynamics, maturity of the technical environment, demands of other initiatives, and other factors all impact the rate at which we can accomplish our work. It is critical to assess the environment and adjust our plan accordingly.



## Set the Baseline

An essential element of managing a project successfully is to effectively manage scope. And one of the keys to managing scope is to establish a scope “baseline”...a well-defined, measurable definition of the scope of the project. A well-defined, measurable scope baseline provides the ability to determine whether the scope of the project has grown. Vague scope definitions often lead to contentious client relationships as we attempt to reconcile client expectations with our expectations as the project progresses. We should also establish regular communication with the client about our scope measurement at the outset of the project, which should lead to collaborative, non-contentious scope management. The first key to effective scope management is to “set the baseline.”

### Key elements:

- Scope baselines are well-defined and measurable
- Scope measurement communication with the client is established at the outset of the project



## Plan the Work, Work the Plan

We anchor our engagements in the discipline of a solid project plan. Every engagement needs a project plan that defines the tasks and deliverables that will be executed to achieve the scope and objectives of the project. The plan must be based on the scope and approach defined and agreed to in the Statement of Work. Once the project begins we “work the plan,” which means that ALL project activity must be in alignment with the plan. We don’t work on anything that isn’t in the plan. If we need to work on something that isn’t in the plan, then we change the plan. We track all of our time against tasks in the plan. So we “plan the work,” then we “work the plan.”

### Key elements:

- Project plan is in place and being used to guide project activity
- Tracking processes link all project activity to the plan



## Bite-sized Chunks

How do you eat something large ?...One bite at a time. Projects can be much more effectively managed when the body of work is divided up into small “chunks” of work. It enables project leaders to assess what has been accomplished and determine the project’s true status. If project tasks are defined too broadly, problems can go undetected for too long. Also, a series of interim milestones (within major milestones) should be established and the team should be managed to achieve the interim milestones. This approach reduces the likelihood of missing major deadlines and of sustained periods of long hours. So we successfully deliver complex projects by managing them in “bite-sized chunks.”

### Key elements:

- Tasks in the project plan are 40 hours or less in size
- Interim milestones have been established
- Project management approach drives activity to interim milestones



## Start at the End

One of the Seven Habits of Highly Effective People is to “Begin with the End in Mind.” A key success factor for our projects is to create great clarity with our clients about the final deliverables. We should not just list the deliverables in the SOW but also provide a description of the content that will be included. We should create deliverable templates at the start of each major phase and confirm them with the client. So at the beginning of our projects and at the beginning of each major phase, we “start at the end.”

### Key elements:

- Deliverable content is described in the SOW
- Deliverable formats and content are defined/confirmed with the client at the beginning of each major phase



## The One Chef

The staffing of the team is a huge factor in project success. “Too many cooks in the kitchen” can be an issue, and so can “no cooks in the kitchen.” We need an assigned expert in each area of expertise, and then we need to leverage that person’s expertise to more junior team members. So in each area of expertise, we have “The One Chef.”

### Key elements:

- Each key area of expertise has an assigned expert accountable for technical quality
- The team has been structured for leverage of experts to less experienced resources



## Don't Bring a Nuke to a Knife Fight

It is critical to scale our solution to match the scale of our client’s need. We need to understand their business problem, budget, schedule requirements, and people constraints, and most importantly, we need to understand the business value of our proposed solution. If our client needs help with a “knife” and we propose providing them a “nuke,” we will always lose the deal. We should be sure to not “bring a nuke to a knife fight.”

### Key elements:

- Client budget, schedule, and people constraints are well understood
- Business value to the client is well understood
- Solution has not been over-engineered (it has been scaled to match business value and constraints)



## The Carpenter

When you are a hammer, everything looks like a nail. The problem is when we use our “hammer” in a situation that calls for a “screwdriver.” It is critical to get the technical choices and architecture for our solution right at the outset. And so it is critical to involve a solution architect with broad enough expertise across the Microsoft technical stack to recommend the best solution for that situation. So we always use a “carpenter” to make sure we’ve got the right tool for the job.

### Key element:

- Consultants with broad enough expertise are defining the solution architecture



## Perfect 10 Plan

Clients that are strong advocates and loyal customers are essential to our growth and success. Our goal on every engagement is to achieve a Net Promoter Score of “10.” We apply the discipline to define project success factors in our SOWs and discuss those success factors and other key client expectations at project launch. Then we define a set of action steps to achieve or exceed each of the success factors and key expectations. These action steps are embedded in our project quality plan, resulting in a ...“Perfect 10 Plan.”

### Key elements:

- Project success factors and key client expectations have been defined
- D > E: Delivery plan established to achieve or exceed each success factor and key expectation



## All the Bricks in the Wall

A major success factor in our engagements is achieving the right level of sponsorship and involvement from our clients. We need to understand who the key sponsor and decision maker is. And we need to ensure both sponsorship and involvement from each impacted group at the client. So our plan looks like a matrix...with a row for each impacted group and a column for the sponsor role and a column for the user involvement role. It's like a brick wall where we are ensuring there is a brick in every slot...so we make sure we have “All the Bricks in the Wall.”

### Key elements:

- Critical decision maker(s) have been identified
- Plan established for sponsorship and user involvement of each impacted user group
- All sponsors and users identified in impact group matrix are participating per the plan

# 4. Managing the Work



## Know Your Nums

A clear understanding of our current status on a project helps a project leader lead more effectively and make better decisions. A project leader should be clear about how the project is tracking against the plan. There should be a weekly discipline in place to estimate the remaining work on in process tasks and update the project budget and schedule variance. If one of our project leaders is asked to “Show me the Nums,” they should always be prepared.

### Key elements:

- Process for weekly tracking of budget and schedule variance has been established (remaining work is being estimated weekly)
- Project lead should always know his budget variance and schedule variance



## Watch the Glass

Executing an engagement can be like filling a glass of water...we want to completely fill the glass (i.e., deliver all of the agreed upon scope). But it is easy to lose track of the scope baseline and end up “leaving the water running” (i.e., deliver too much scope, which would likely result in budget

### Key elements:

- Scope is being measured against baseline criteria established in SOW
- Scope measurement vs. baseline criteria is being reported to client on regular basis

and schedule issues) or “turn off the water too soon” (i.e., leave out some of the agreed upon scope items, which would likely result in client satisfaction issues). We need to keep line of sight to our scope baseline throughout the project and “watch the glass” to fill it without spilling the water.



## The Four Legged Stool

Effective management of change is essential for delivering successful projects. As a project progresses, it is typical for the scope and other parameters of the project (such as schedule and staffing) to evolve. We should always anticipate the need to manage change, put processes in place for change management, and manage our client’s expectations on how those processes will be executed. Any change should be assessed in terms of its impact to project scope, cost, and schedule. On fixed fee projects, the impact to payment schedules and acceptance criteria should also be assessed. It is like a “four legged stool” where the change to one of these four “legs” likely impacts the other three.

### Key elements:

- Process is established for Catapult internal, then client management of scope change
- For T&M work: Scope/Schedule/Cost trade-offs are assessed
- For fixed fee work: Scope/Schedule/Cost/Payment trade-offs are assessed



## Phase Containment

A foundational technique for managing project cost and risk is to create client review checkpoints for acceptance of decisions and deliverables as the project progresses. For example, if requirements can be clarified and approved before performing design and development work, then re-work will be reduced. Likewise, if design issues can be addressed and confirmed before time is invested in development, then re-work of development can be reduced. In agile, iterative methodologies, it is particularly important to determine the right points for client review and approval of design and development work.

There are trade-offs to be managed between flexibility and cost predictability. Particularly on fixed fee projects, we must have an approach that includes client acceptance as the project progresses. So with the right checkpoints, we can achieve the appropriate level of “Phase Containment.”

### Key element:

- Process is established for client review and deliverable sign-off at phase milestones



## Testing Tieback

Close alignment between requirements and testing will improve project success. We should define requirements in a way that is testable with defined acceptance criteria during up-front requirements validation. And our testing processes should be structured to test the requirements. So we create a “Testing Tieback.”

### Key elements:

- Requirements are testable with acceptance criteria defined up front
- Plan established to test requirements

## 5. Client Relationship



### 2nd Set of Eyes

One of our core values is "Teamwork." We believe that 2 or 3 or 4 heads are almost always better than one. So we ALWAYS make sure to get a "2nd set of eyes" on key decisions, deliverables, and communications. We review for both content and format. We assume that there will always be a way to improve a document or communication. We work together to deliver as a team and improve quality.

#### Key elements:

- Reviewers are identified for key decisions, deliverables, and communications
- Document quality review process (format, grammar, etc) is established



### Communication Highway

Effective, regular communication processes are essential for creating successful projects and satisfied clients. If our client perceives that we are not communicating well, then we will typically have a delivery or client satisfaction issue. We need to establish regular rhythms of communication at the outset of each engagement. Our typical guideline is a weekly status report, weekly status meeting, and monthly steering committee meeting. We want to build a "communication highway" that enables the rapid, 2-way flow of information.

#### Key elements:

- Communication processes established for status and decisions (weekly minimum)
- Executive communication process established (monthly minimum)



### The Marriage Contract

Most of our engagements are based on an agreement in which our client assumes certain responsibilities. They may be required to provide elements of the technical environment, project resources, user participation, converted data/content, etc. It is critical that the responsibilities of each party have been clearly defined and that these responsibilities are discussed and agreed upon with client leadership. Also, a process must be put in place to monitor the execution of responsibilities and address any that are not being upheld. It is likely a marriage in that each party is dependent on the other party to achieve success... we are "in it together." But it is a business contract...so we put processes in place to uphold "the marriage contract."

#### Key elements:

- Responsibility of each party has been defined and agreed upon
- Accountability for responsibilities has been established



### Engage & Steer

Our most influential position is when we are engaged in an account. Often the best way to influence an outcome is to find a way to get engaged in an account and then influence it from the inside...we "engage & steer."