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**RICK  
HOEYE**

CREATIVE DIRECTOR  
LEADER  
DESIGNER



**THIS  
IS MY  
PORTFOLIO**

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# Case Study

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# Sales Cycle Case Study

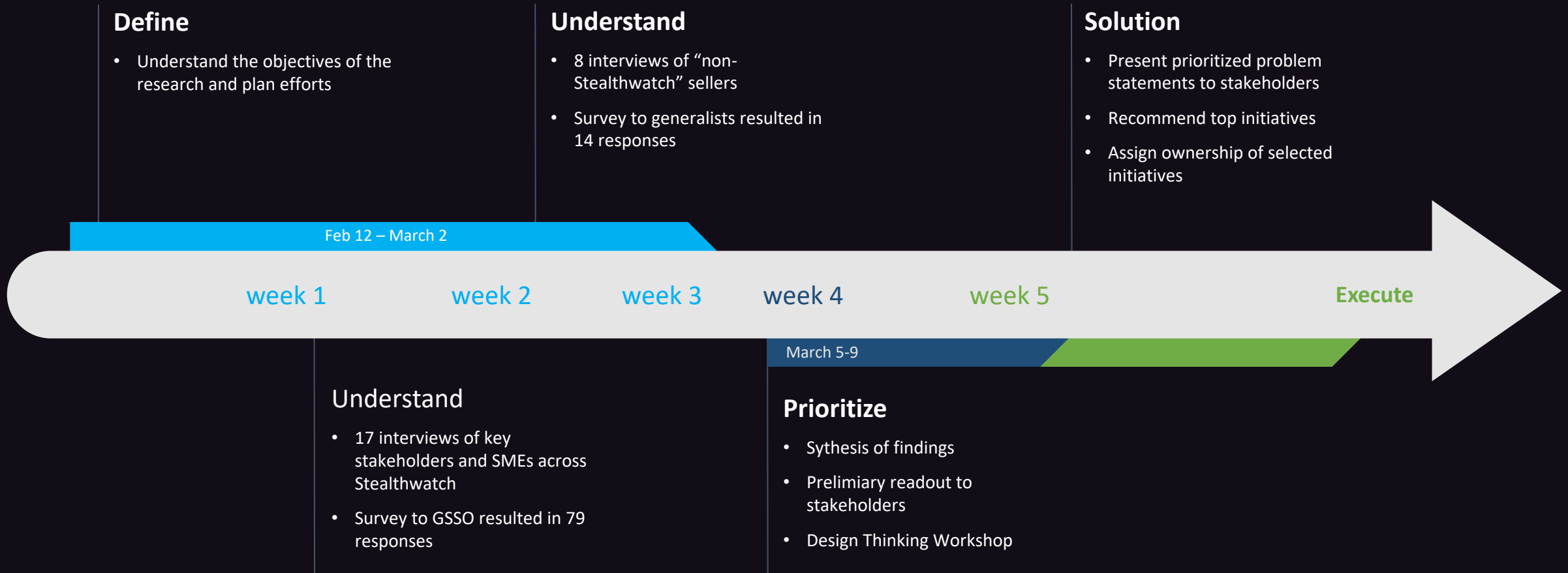
## Challenge:

Why have Sales for our Security product **gone down** if the product itself **hasn't changed**?

## My Role:

Design Thinking Facilitator, Responsible for All Visual Design Artifacts, Presentation to Leadership

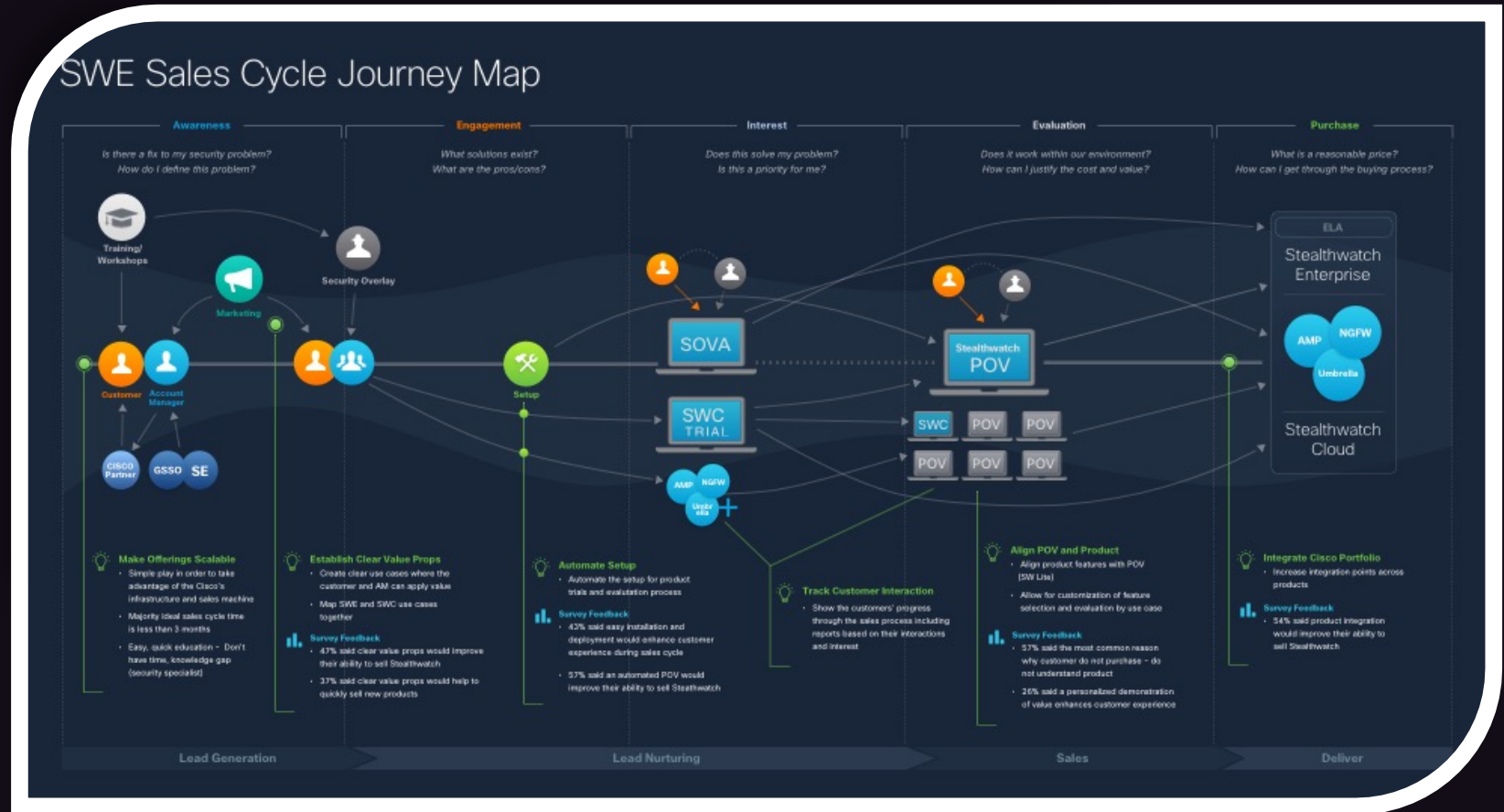




## The Outcome

After conducting over 25 interviews and 2 surveys with the various types of Sales groups, the outcome was a **Sales Cycle Journey Map**.

The Journey map was designed to better understand how the process went from start to finish and identify where Sales were falling short, along with identifying what they needed to be successful.



## What Roles?

We were asked to identify the main **Sales Personas** and show how they operated within the Sales Journey Map.

We learned the different dimensions of the Sales process and how we needed to help market to Sales.

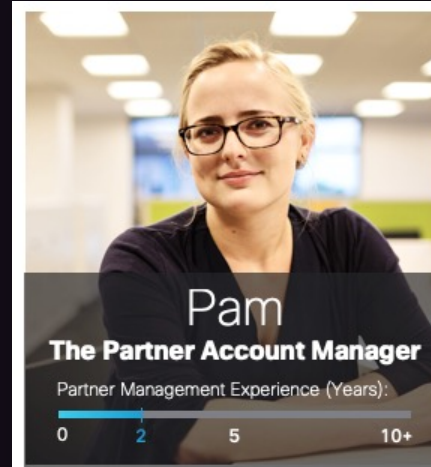


### Goals

- 1 Protect customer account relationships
- 2 Prioritize and coordinate opportunities per account
- 3 Ensure overall account satisfaction

### Needs

- Simple, Consistent Message
- Clear Value
- Broad Stories
- Speed
- Accessible Training
- High Level Summaries

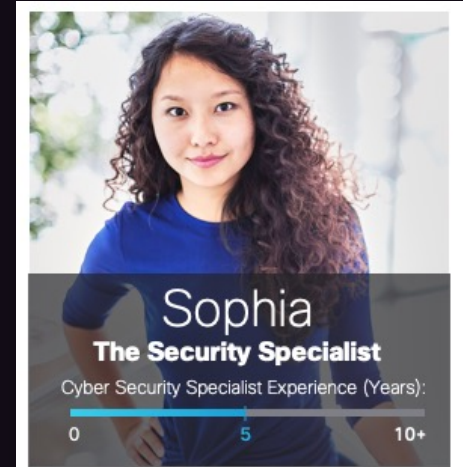


### Goals

- 1 Enable partners to move Cisco product
- 2 Ensure partner needs are being met
- 3 Proactively provide product resources and training

### Needs

- Simple, Consistent Message
- Vendor Support
- Integrated Story
- Scalable Pricing and Packaging
- Accessible Training
- Flexible Marketing



### Goals

- 1 Sell security products as part of integrated Cisco solutions
- 2 Grow Cisco security brand
- 3 Build customer trust

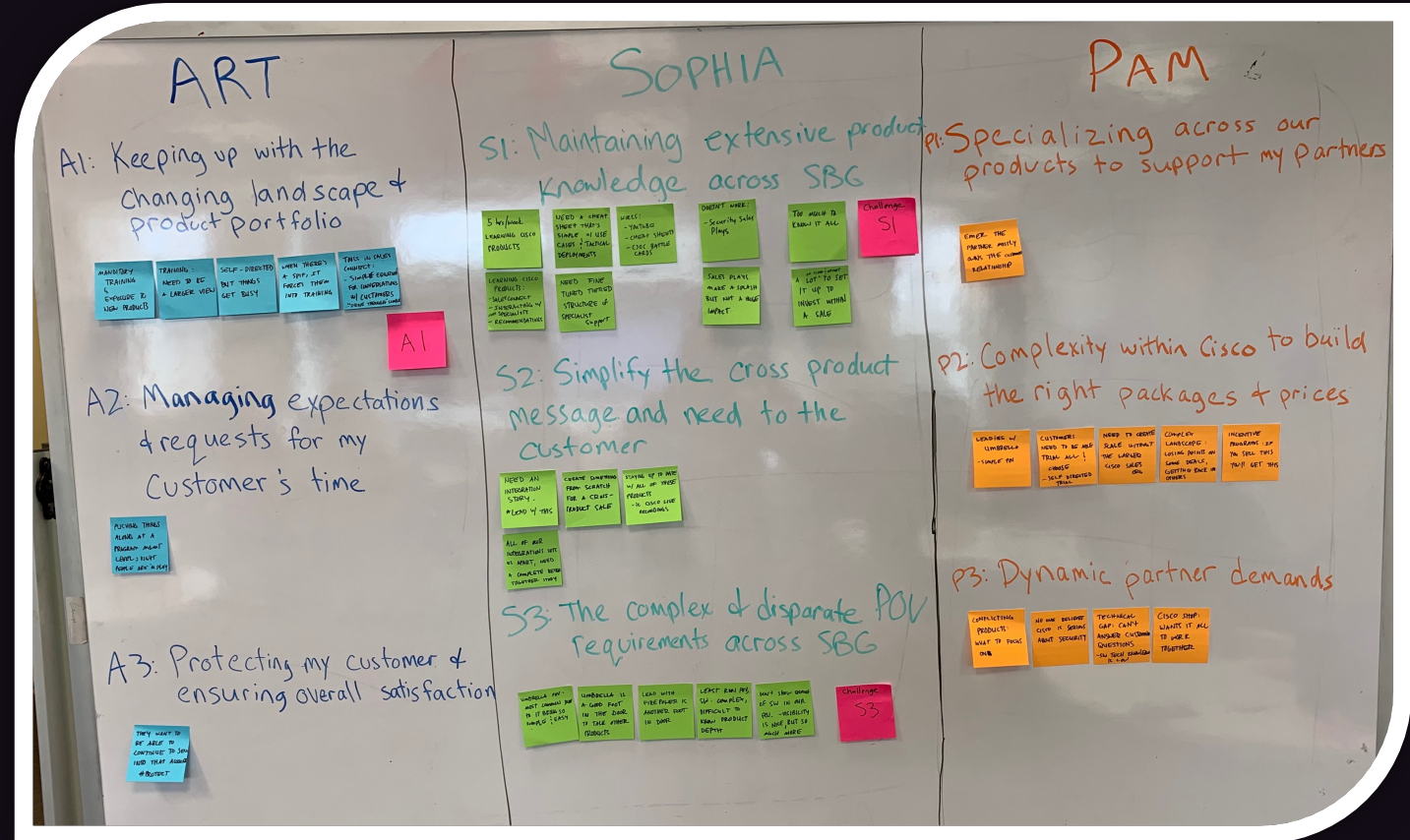
### Needs

- Simple, Consistent Message
- Clear Value
- Account Visibility
- Product Integration
- Comprehensive Training
- Accessible POVs

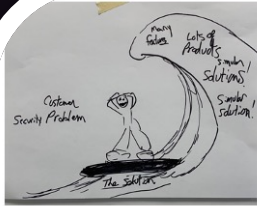
# Discover Needs

We conducted a 1 Day Design Thinking workshop around the 3 main personas to discover their personal needs.

My role: Facilitator



# Identify Problems & Opportunities



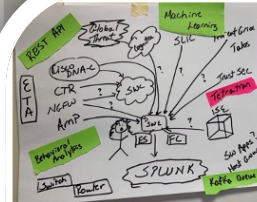
## Art's Challenge:

Keeping up with the changing landscape and product portfolio

### OPPORTUNITIES

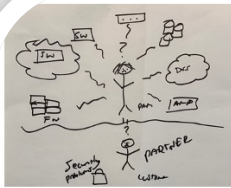
Art needs packaged technologies to solve business needs efficiently through an integrated suite of tools.  
TO: → displace comp. → Own the core/Network

today: challenges -  
→ Bundles don't work → Manage a complex  
→ We don't solve right → LACK integration problems  
→ depend on GSSO for info



### OPPORTUNITIES

**Sophia**  
Needs to... understand what integrations are available today and make the most sense for her clients...  
Because... She needs to solve problems for the client and demonstrate the ROI for the product set she can offer.



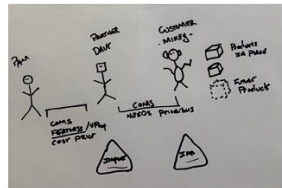
## Pam's Challenge:

Specializing across products to support my partners

### OPPORTUNITIES

AS A PAM  
NEED TO: ENCOURAGE PARTNERS TO SELL IN  
BECAUSE:  
- Choose partner who can be encouraged to specialize  
- MSP  
- Reseller  
- MESSAGING → EASY TEACHER  
- TRAINING → DIFFERENTIATION  
- CAMPAINING?

BECAUSE!  
I NEED TO MEET REVENUE GOALS



### METRICS

- # of Campaigns Trials + Opportunities Created
- \$ Incentives Offered Amount Closed
- Who Originated Sales (Are we choosing the right partner to train and campaign?)

- \$ / Account
- # Sec Products Sold into Account
- Increase in Share of Wallet
- \$ / Buying Programs
- Integrated Demo (e.g. ISE, NGFW, CRT)



# The Next Step

The next step in the process was to take the the **Sales personas** we identified and show how they operated within the Sales Journey Map.

We learned the different dimensions of the Sales process and how we needed to help market to the sales group at large.





## Dark Mode Engaged

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The result was a completely re-thought out and re-designed customizable dashboard the Sales group could promote including an all-new Darkmode version.

Note: This was for salespeople to pitch with. As of 2022, this design was getting prioritized by PM to release in Q3 of 2023.



## The Results...

At the start of FY18 the dedicated sales team was lost. In Q2 FY18 we began the initiative to understand the new go-to market.

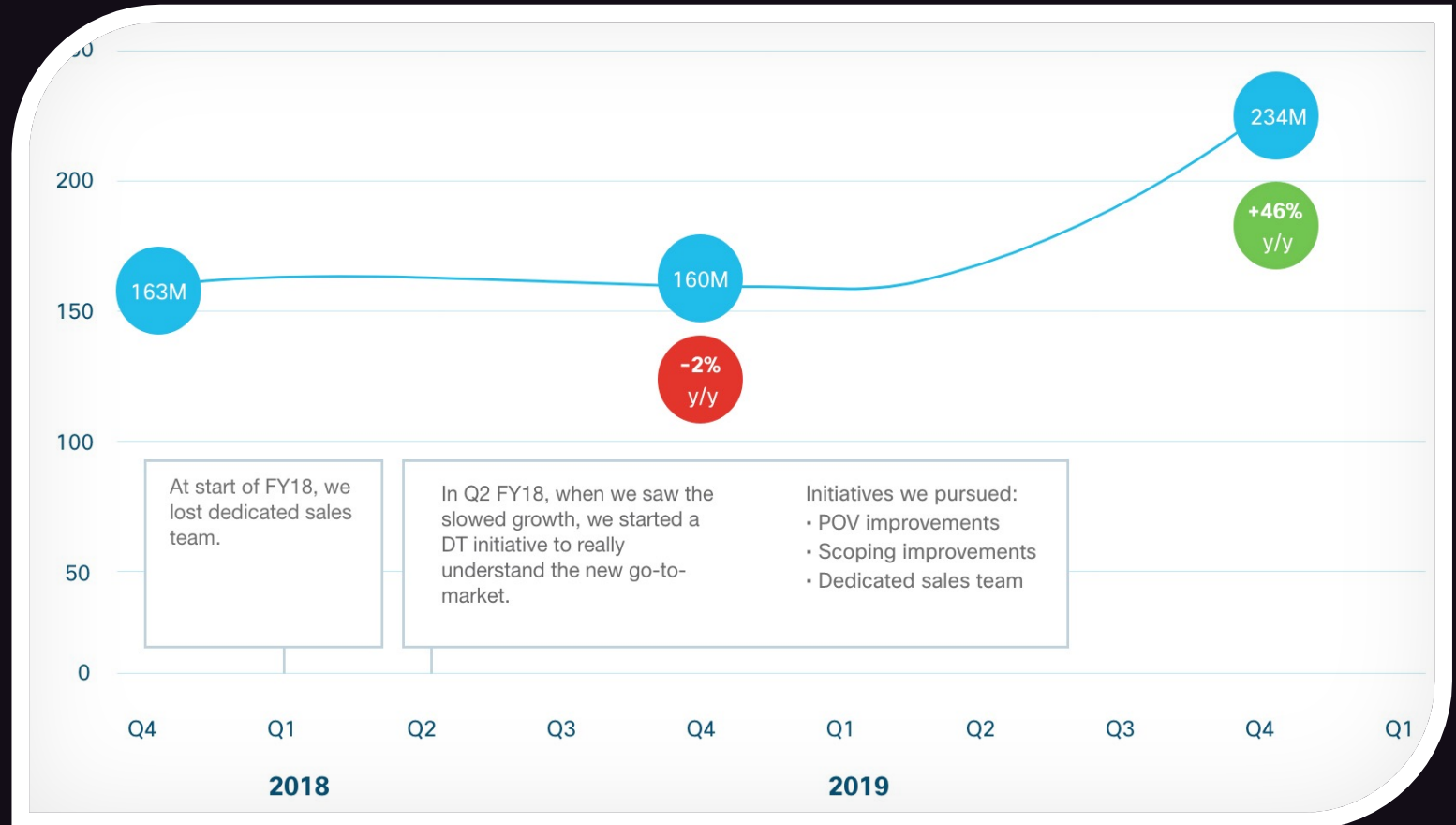
Initiatives pursued:

- POV Improvements
- Scoping Improvements
- Dedicated Sales Team re-established
- Dark Mode Dashboard to assist in sales pitches.

Resulting in a

**\$74,000,000**

Increase in sales



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**Thank you!**

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