

Juniper Networks
Partner Experience

March 2022

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Partner Experience Workstream Overview

- **What?**
  - » We conducted research with Juniper Networks, focusing heavily on CPQ, to understand the current Partner experience and determine how we might better serve their needs and meet goals in the future.

- **Why?**
  - » To better understand the needs and expectations of current Partners in order to develop strategic recommendations to optimize resiliency, growth, and Partner and customer satisfaction.
  - » To better position Juniper to blaze new trails as the world's premier experience-led networking company; focused on meeting Partner (and customer) needs by making it easy and enjoyable to do business anytime, anywhere.

- **Outputs**



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Broad and Knowledgeable Participant Pool Yielded Valuable Insights

Approach

Over three weeks, we interviewed 69 users across 8 personas. Our participants:

- Covered Juniper Employees and Partners that currently participate in CPQ in some way.
- Relayed all aspects of the CPQ experience, from internal perspectives to blended views like Distribution Partners.
- Represented Partners of all sizes and types with a wide variety of needs and concerns.
- Covered multiple channels and sales methods and approaches from virtual to direct and in-person.

During interviews, we discussed..

- The CPQ experience for employees and partners
- Process pain points & opportunities
- Platform pain points & opportunities
- Future State goals & priorities

Outputs

Our key findings and recommendations are divided into five main categories:

Research Results

Personas & Journeys

SOW Requirements Deep Dive

Future State Possibilities

Next Steps

"I've never understood why visibility is blocked for so many people."

–Juniper Virtual Sales Executive

"A good experience encourages the salesperson to continue to sell Juniper whereas a bad one makes him not want to go down that road again."

–Distribution Partner

"I think the biggest issue I have overall is the speed and responsiveness being pretty poor."

–"Challenger" (Smaller) Partner

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Broad and Knowledgeable Participant Pool Yielded Valuable Insights (cont.)

1. Research & Analysis

- **Determined top use cases, segmented employees and Juniper Partners**
- **Journey Map Use Cases:**
  - BOM to Deal Reg
  - Expired Quotes
  - Escalations
  - Guided Selling
  - Quote Modifications
  - Low Dollar/One-Off Deals
  - Password Reset
- **Persona Groupings:**
  - Juniper Disty Partner Account Manager
  - Juniper Partner Account Manager
  - Juniper Sales Engineer
  - Juniper Virtual Sales Executive
  - Juniper Sales Support Representative
  - Partner Disty Account Manager
  - Partner Account Manager
  - Partner Sales Engineer
- **Evaluated end-user configure, price and quoting tools and processes**

2. Future State Definition

- **Facilitated Collaborative Workshop with Stakeholders**
- **Conducted 1:1 Employee and Partner Experience Feedback Sessions**
  - 1 sessions with a Juniper SE
  - 6 sessions with Juniper Partner
- **Conducted Small Group Employee and Partner Experience Feedback Sessions**
  - 5 sessions with Juniper Partners
  - 14 sessions with Juniper Employees
- **In total spoke to 69 individuals**
- **Identified and Documented solutions for many current pain points**
- **Developed prioritized recommendations**
- **Drafted findings and insights report**

3. Experience Partner

- **Consult and assist both Juniper and NTT Data stakeholders on impacts to Partner and Customer Experience**
- **Connect Juniper to broader NTT CX Services and Capabilities**
- **Connect Juniper to innovative and forward-looking NTT Data Capabilities**

Juniper Distributors

Juniper Reseller Partners

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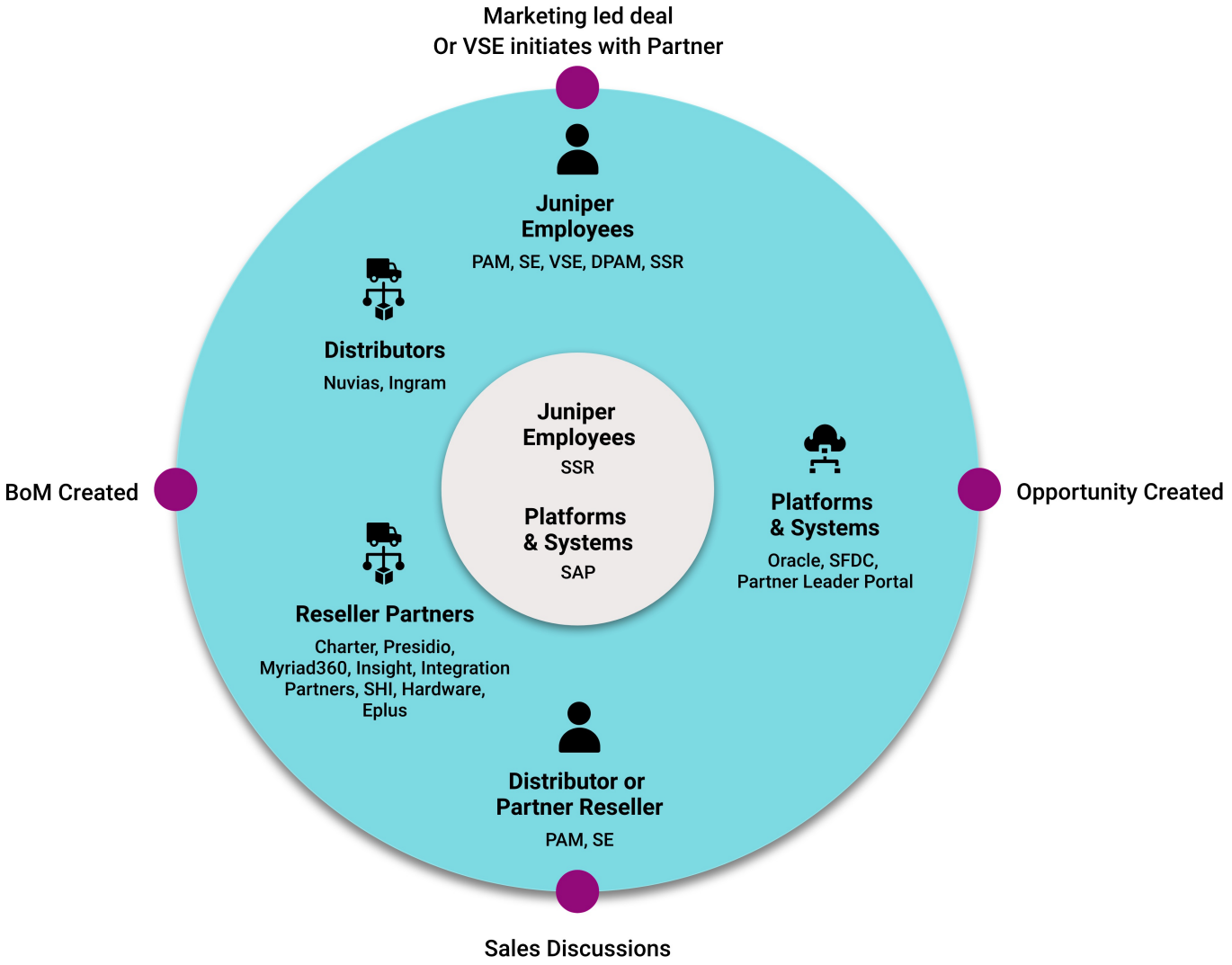
CPQ Ecosystem

Ecosystem Legend

- Visible to Partners
- Invisible to Partners
- Customer Lifecycle for Juniper



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Research Results

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Overall, Both Expected and New Areas of Concentration Came Into Focus



Information Management

- Commonly sought information is frequently unavailable (lead times, accurate prices, etc.)
- There is no “common language” of information in the Juniper ecosystem



Self Service

- Partners and Employees lack the agency to act for themselves and are reliant on others
- Make it easier to do business with Juniper by anticipating needs before they are realized



Visibility & Transparency

- Both Partners and Employees have almost no ability to track anything – a black box
- Where visibility does exist, there is often no transparency to next steps or procedure



Process Improvement

- The inability to edit or update most items leads to significant rework and duplication of effort
- Manual activities and routing exponentially increase risk and failure rates

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Overall, Both Expected and New Areas of Concentration Came Into Focus



Guided Selling

- A lack of alternative and suggested products for out-of-stock items leads to missed revenue
- Partners and employees alike are used to commercial experiences that push and pull



User Generated Specific Requirements

- Specific Needs like Include all SKUs for Bundles in Product Listing and Description
- Specific Upgrades like Enable users to import/attach BOMs when and where needed



Heuristics and Training

- Both Partners and Employees have almost no ability to track anything – a black box
- Where visibility does exist, there is often no transparency to next steps or procedure



Strategy & Planning

- The current CPQ process and associated tools are not intuitive or user friendly, inhibiting business
- Slow turnaround times are exacerbated by contributing factors that drive frustration unintentionally

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High Level Research Themes

- **What Works:**
  - Juniper employees go above and beyond to support their partners and it shows
  - The people who partner with Juniper love Juniper products and want to sell them
  - Partners with bigger internal and external networks of support are served most efficiently and effectively

- **What Needs Work:**
  - Broken, manual, and counter-intuitive process abounds throughout the buying experience
  - Beneath the process, systems and information are disjointed, inhibiting the flow of work
  - Today, it can be hard to do business with Juniper, especially if you are not a large Partner

- **What Should Change:**
  - Make it easy to do business with Juniper, especially for those customers competitors ignore
  - Prove that Partners truly are Partners by meeting their needs before they are even realized
  - Be strategic, holistic, and intentional in everything, all the time, from process to comms to training and more

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Categorization of Research Themes by Urgency

Top Experience Areas for Improvement

Immediate

- **Information Management:** *Making sure the right information is where it's needed, when it's needed*
- **User Generated Specific Requirements:** *Specific needs and requests and upgrades from research*
- **Self-Service***: Help Partners and Customers help themselves, increase awareness and adoption*
- **Process Improvement:** *Eliminating redundancies and gaps to ensure simple and efficient workflows*
- **Visibility:** *Make it effortless to find anything required to equip and empower Partners and employees*

Mid-to-Long-Term

- **Hueristics and Training***: Improved training and educational materials for Partners and employees*
- **Guided Selling:** *Automate the process of understanding, interpreting, and meeting Partner needs*
- **Strategy:** *A holistic and intentional approach with an eye to the end goal and desired outcomes*

Findings are based on a combination of received data and stakeholder + user feedback. Immediate and Mid-to-Long-Term prioritizations are suggested and can be reprioritized based on stakeholder feedback. More details for each improvement area can be found in their sections within this report.

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Theme: Information Management

Information is Often Hard to Find and Difficult to Utilize



Current State:

Basic, vital, and necessary information is often hard to find and difficult to utilize. This includes everything from lead times on inventory, to reliable, accurate SKUs, to the data sheets that enable engineers to integrate Juniper products into solutions.



Future State:

Partners and Employees have the information they need, when they need it, where they need it, how they need it. This moves beyond simply providing the information to thinking holistically and intentionally about its use, location, and more.



Critical Strategy & Activities:

- Make as much information available as possible, including process flows and reporting, to set expectations and curb worry
- Talk to Users, both Partners and Employees, regularly, to make sure the information they need is there
- Empower Users, with tiers and levels of access as necessary, to determine what information they regularly receive

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Theme: Self Service

Partners and Employees are Either Unaware or Unable to Help Themselves



Current State:

Even where Partners and employees do know what to do or how to proceed, they are typically unable to help themselves and are dependent on others for common needs like approvals, escalations, task completion, and more.



Future State:

Partners and Employees can take needed action for themselves in the same central location where they undertake most of their work and activities with Juniper; and have an easy way to request action where they can't take it themselves.



Critical Strategy & Activities:

- Make it easy to do business with Juniper by giving Partners and employees the tools they need, e.g. ability to attach a BOM
- Find ways to empower Partners and Employees through natural process chokepoints like Discounting and Approvals
- Allow Submitters to send Approvers reminders, and provide some level of contact for anything requiring Approval

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Theme: Visibility & Transparency

Frustration with the Inability to See is Compounded by a Lack of Coherence



Current State:

In many instances, available and visible information is restricted due to permissions or access, requiring users to involve others or find information via unsanctioned alternative paths; this is exacerbated by a lack of clarity around valid approaches.



Future State:

Users have clear knowledge of what they can and cannot see and how to request additional access; employees and Partners work collaboratively to eliminate “black holes,” standardizing information, knowledge, and methods to share and display.



Critical Strategy & Activities:

- Enable users by letting them know when they can’t see something and not simply blocking or removing it
- Provide clear and traceable pathways for users to acquire expanded visibility with simple, understandable requirements
- Empower users by putting everything they need front and center in a dashboard that easily connects to other tasks

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Theme: Process Improvement

Processes Across CPQ are Highly Manual, Repetitive and Lack Holistic View



Current State:

Multiple manual touchpoints in most processes, limited quality assurance measures, and a near absence of notifications or communication around status lead to significant frustration, confusion and ultimately, lost revenue.



Future State:

The automation of repetitive and manual tasks enables users to reliably complete their work with confidence, while a holistic approach to the interlock and exchange of different processes maximizes efficiency, sales, and production.



Critical Strategy & Activities:

- Find every manual step of every process and automate them, if that's not possible, minimize their impact on other items
- Empower Partners and employees by automating repetitive work and standardizing concrete repeat business
- A holistic and intentional approach to why and how processes connect and how they operate benefits all

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Theme: Guided Selling

Without Assistance to Navigate Gaps and Issues Sales are Lost Regularly



Current State:

Partners and employees frequently reach points of uncertainty through the sales cycle where the need for and lack of alternatives and options, knowledge and other items leaves them unable to assist their customer and finalize sales.



Future State:

When points of uncertainty are reached, Partners and employees can easily access and sort through options to continue to move forward; situations and interactions are logged and analyzed so that upgrades and improvements are continuous.



Critical Strategy & Activities:

- Commitment to understanding where Partners and Employees need assistance and planning to integrate the two.
- Empower Partners and employees to request assistance where it is currently missing by providing channels and methods
- Make it easy to identify alternatives, or estimated leads, for any item that is out of stock for any reason.

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Theme: Heuristics & Training

Partners Often Lack the Knowledge and Direction Needed to Maximize Efficacy



Current State:

Partners, and to some extent employees, are largely on their own to understand, interpret, and navigate the buying experience, leading to confusion and uncertainty over everything from best practices to standard procedure.



Future State:

Partners receive an annual overview of the Juniper tools they use and associated technology and process, as well as regular updates regarding improvements, leading to an open environment of continuous growth and shared knowledge.



Critical Strategy & Activities:

- Like employees, Partners must be consistently updated with improvements to their tools and systems
- Improved Partner efficacy via training means additional sales and revenue to Juniper and should be treated as such
- Empower Partners by tying DIY training aids and learning by doing methods to real world sales, providing incentive for all

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Theme: Strategy & Planning

As the Buying Experience is Unified, Strategy Must be Holistic and Intentional



Current State:

While Partners and employees strive to make sales and grow business relationships, they are often inhibited by the lack of an overarching, integrated, and forward-looking strategy to unite their efforts and foster collaboration that benefits all.



Future State:

A unified strategy binds the buying experience together in the same way unified architecture binds process and tech; upgrades and improvements are holistic and focused on maximizing successful, comprehensive use while minimizing risk.



Critical Strategy & Activities:

- Set strategic Experience Imperatives for all process, product and technical owners throughout CPQ and UBE
- Define strategy succinctly and clearly, and ensure alignment towards it and understanding of it down to the individual
- Continually seek to incorporate feedback from both Partners and employees, adapting to emerging changes

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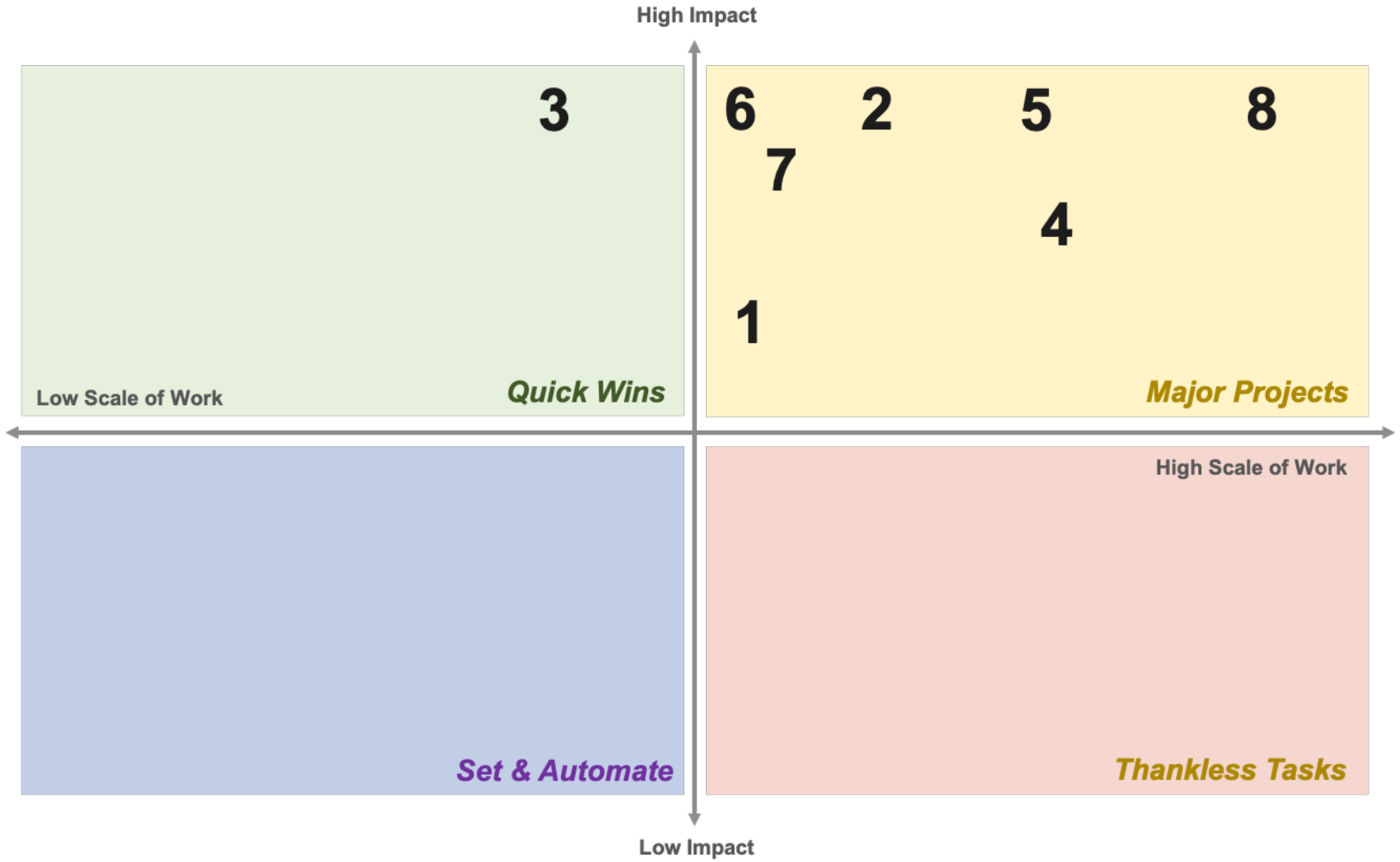
Prioritized Research Themes



#	Item
1	Information Management
2	Self Service
3	Visibility & Transparency
4	Process Improvement
5	Guided Selling
6	User Generated Specific Requirements
7	Hueristics & Training
8	Strategy

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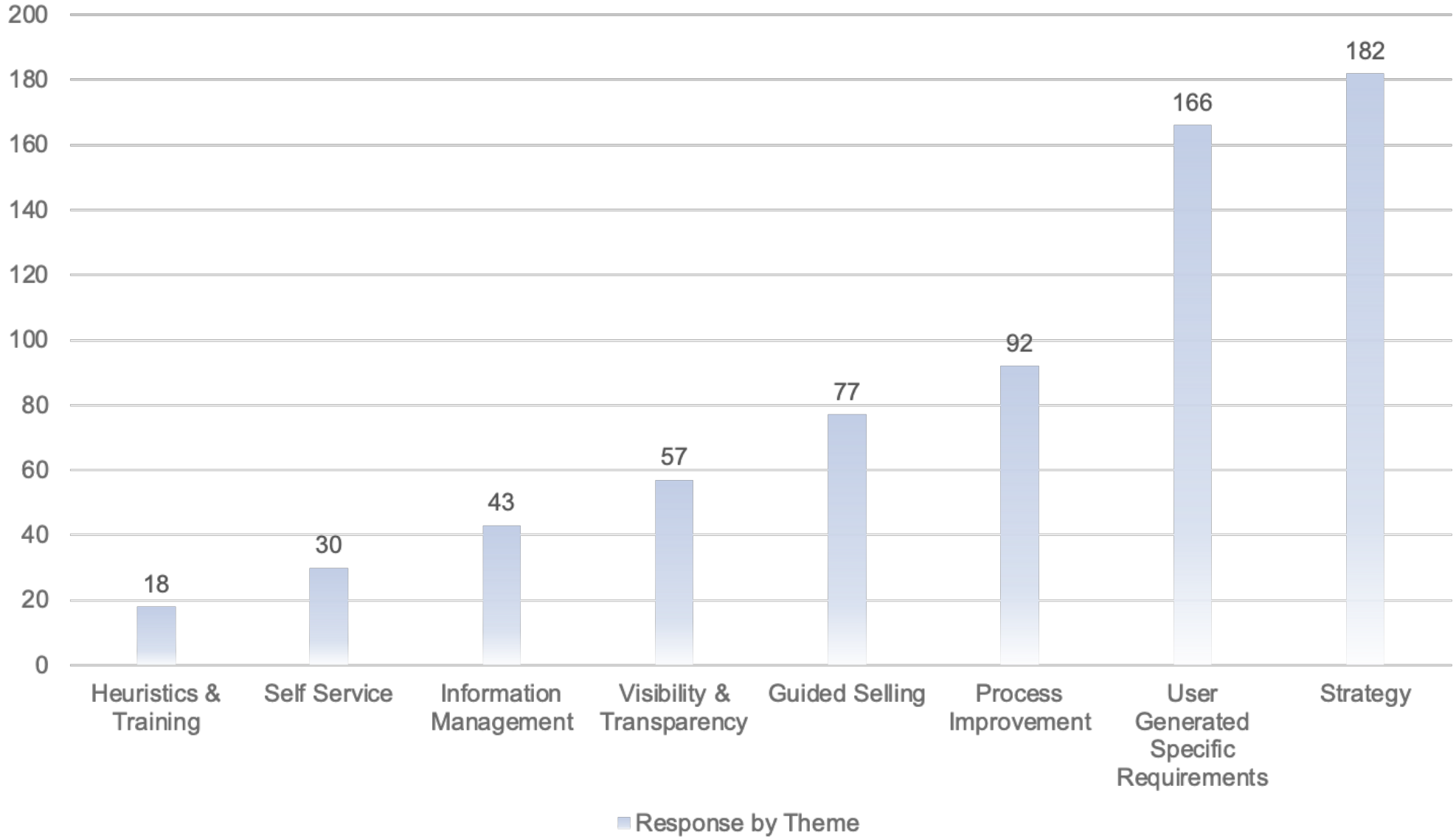
Feedback Items by Theme



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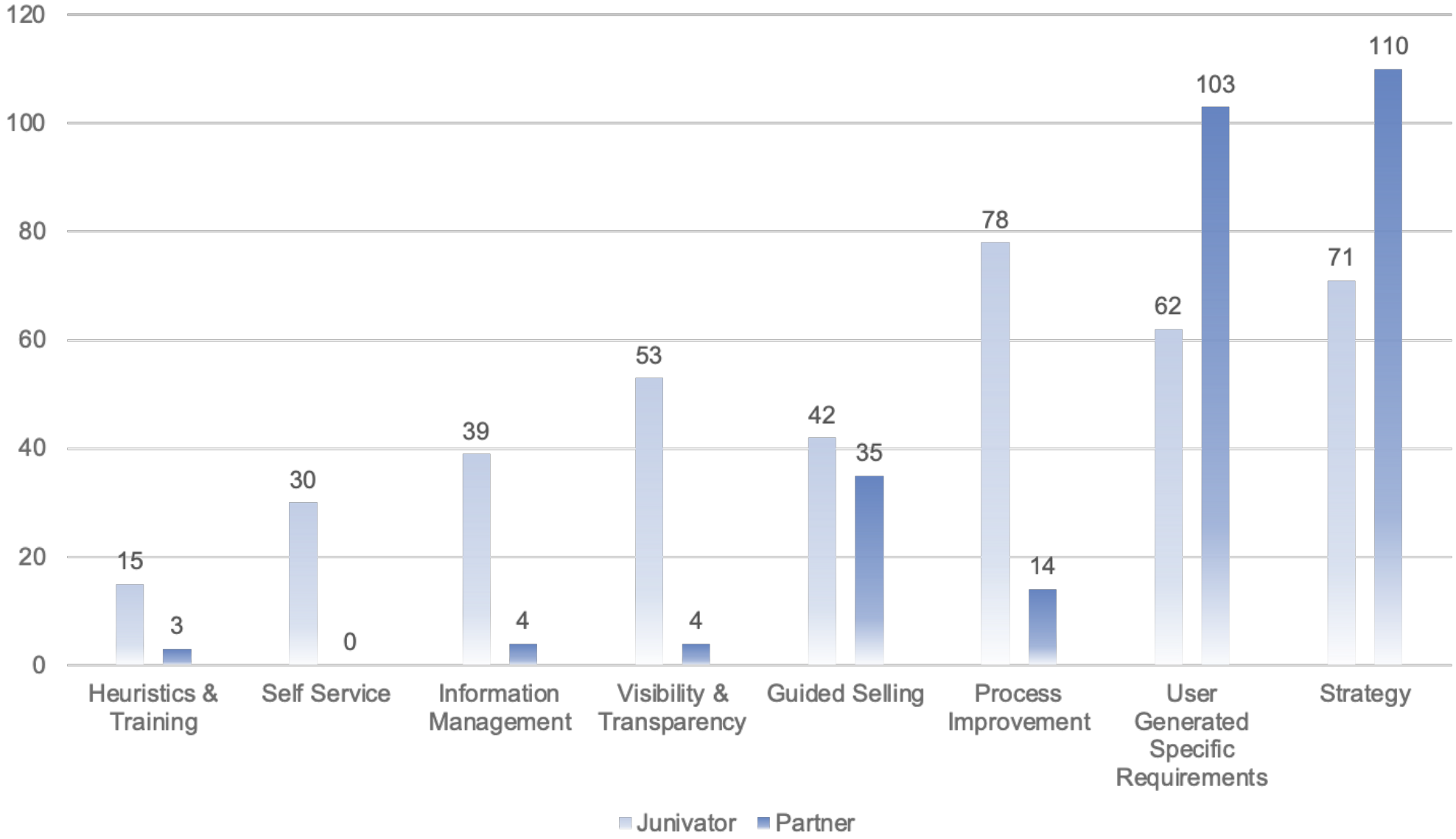
Feedback by Partner & Junivator



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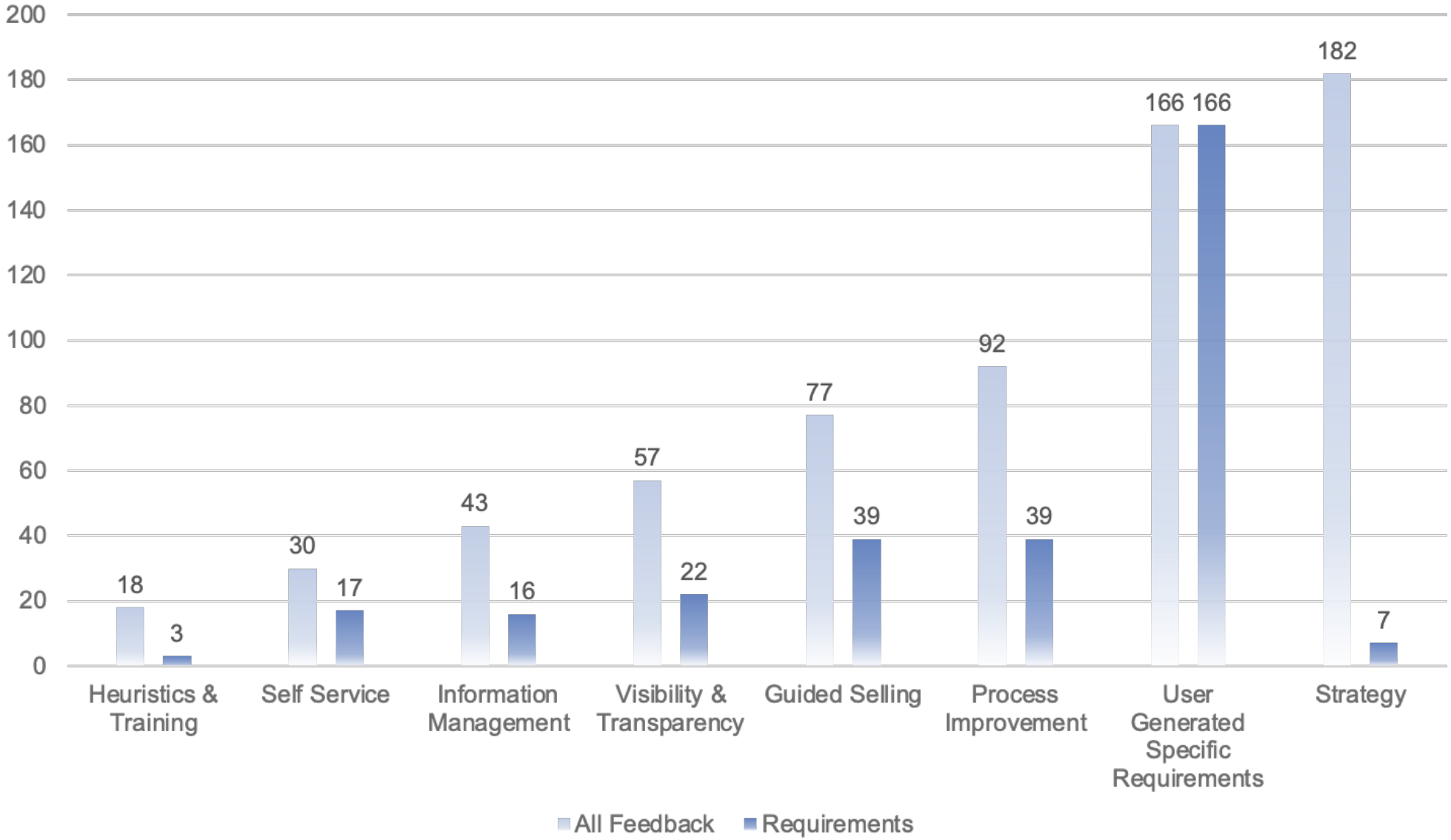
Percentage of Feedback Yielding Requirements



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Personas

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Persona Overview

*Personas are **distilled, characterized profiles of representative employee segments**, and are **based on insights from various employee research.** These personas are design tools that will…*



Align teams around employee segment:

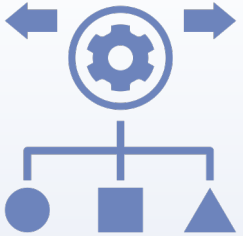
- Needs
- Perceptions
- Behaviors
- Work contexts



Eliminate tasks and tools that don't directly aid employees in accomplishing their goals



Leverage real needs/ behaviors of employees as basis of service designs, not assumptions



Support roll-out and change management of future offerings according to persona groupings

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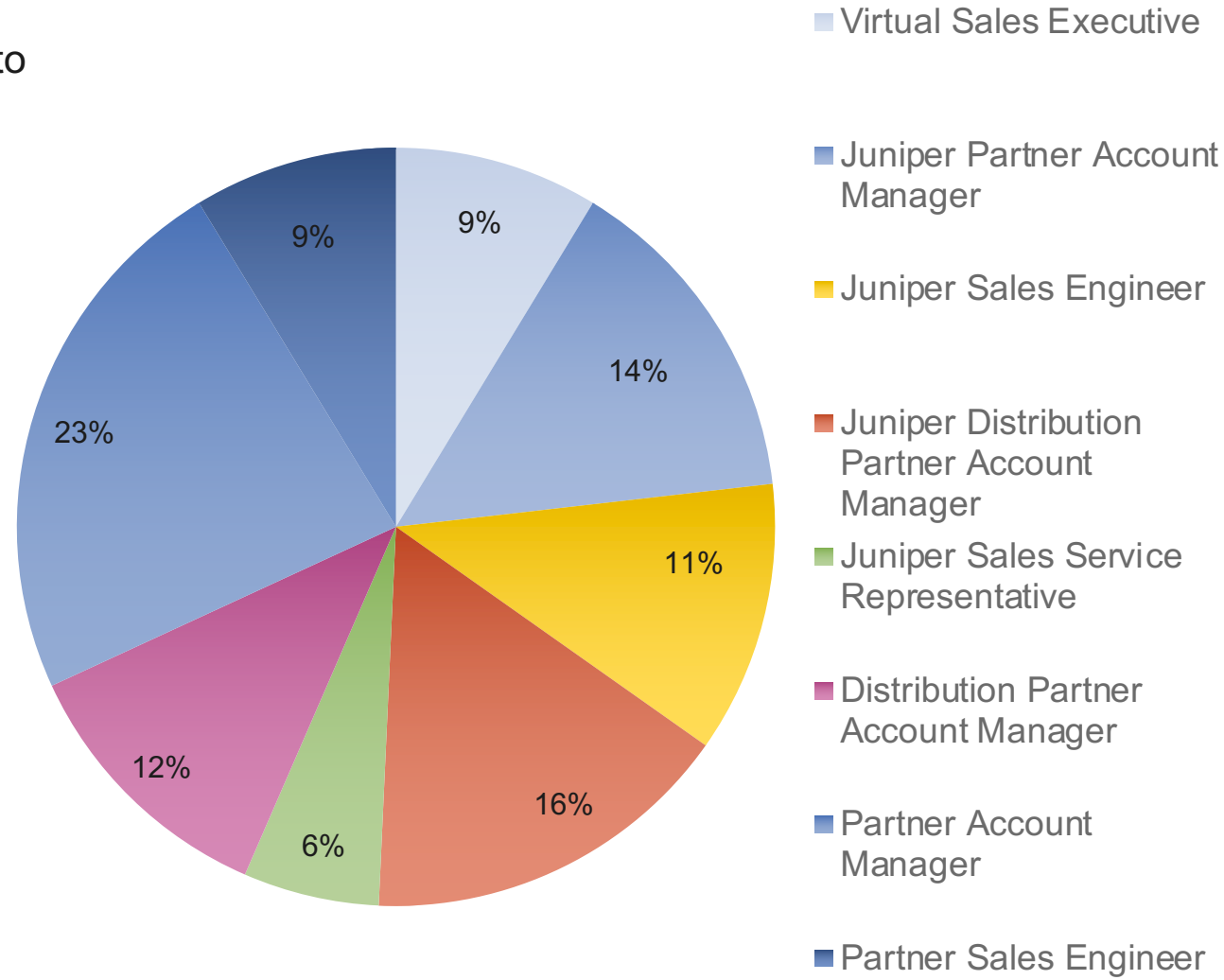
Research Participants Spanned All Personas, Providing Broad Understanding

- We settled on an approach that segmented participants into groupings based on Persona, Partner Size, and Location.
- Juniper Employees fall into one of five Personas…
  - Virtual Sales Executive
  - Sales Engineer
  - Sales Support Representative
  - Partner Account Manager
  - Distributor Partner Account Manager
- While Juniper Partners fall into three primary groups…
  - Partner Account Manager
  - Partner Sales Engineer
  - Distributor Partner Account Manager



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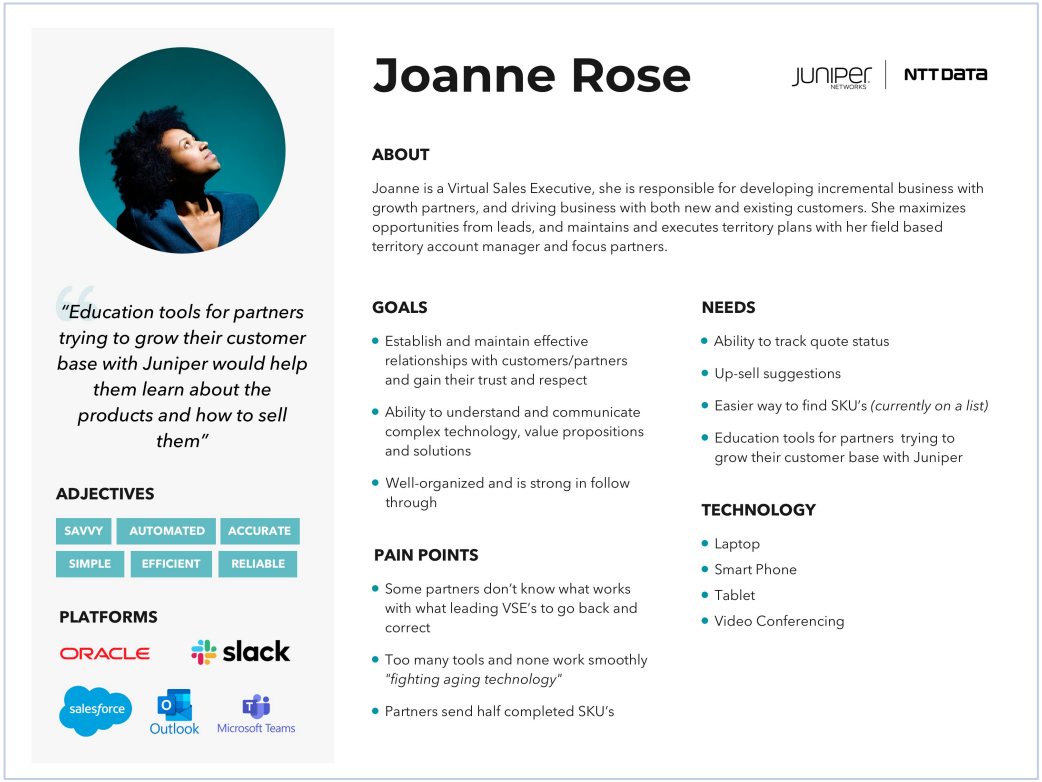
Employee Personas

During our workshop with Juniper employees, we developed Personas for the top Juniper employee groups and detailed their top needs and frustrations.



Joanne Rose

JUNIPER NETWORKS | NTT DATA

"Education tools for partners trying to grow their customer base with Juniper would help them learn about the products and how to sell them"

ADJECTIVES

SAVVY | AUTOMATED | ACCURATE | SIMPLE | EFFICIENT | RELIABLE

PLATFORMS

ORACLE, slack, salesforce, Outlook, Microsoft Teams

ABOUT

Joanne is a Virtual Sales Executive, she is responsible for developing incremental business with growth partners, and driving business with both new and existing customers. She maximizes opportunities from leads, and maintains and executes territory plans with her field based territory account manager and focus partners.

GOALS

- Establish and maintain effective relationships with customers/partners and gain their trust and respect
- Ability to understand and communicate complex technology, value propositions and solutions
- Well-organized and is strong in follow through

PAIN POINTS

- Some partners don't know what works with what leading VSE's to go back and correct
- Too many tools and none work smoothly *"fighting aging technology"*
- Partners send half completed SKU's

NEEDS

- Ability to track quote status
- Up-sell suggestions
- Easier way to find SKU's *(currently on a list)*
- Education tools for partners trying to grow their customer base with Juniper

TECHNOLOGY

- Laptop
- Smart Phone
- Tablet
- Video Conferencing

EG Varying Needs and Pain Points across Persona Groups:

- Virtual Sales Executives need visibility to track quote approvals
- Partner Account Managers need a faster turn-around time on quotes to match the competition
- Sales Engineers face challenges with invalid SKUs holding up the process
- Sales Support Reps need discounting and pricing guidance
- DPAM's need a better process for quote revisions as they currently require another full round of approvals

All Personas can be found in the Appendix.

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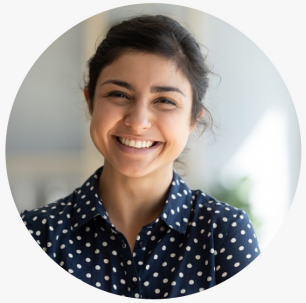
Persona #1 - Juniper Partner Account Manager (PAM)



"I care deeply about getting quotes over efficiently to the team so our customers are given an undisrupted experience"

ADJECTIVES

TRANSPARENT | CONSISTENT | SLICK | SIMPLE

PLATFORMS

ORACLE, slack, salesforce, Outlook, Microsoft Teams

Jane Smith

JUNIPER NETWORKS | NTT DATA

ABOUT

Jane is a Partner Account Manager that works for a Juniper Networks in Europe. She is responsible for growing sales of Juniper products and solutions in EMEA, taking care of the development of EMEA Partners, their opportunities and supporting the sell through business.

GOALS

- Develop quick and efficient partner collaborations where relevant in Telefonica Spain
- Provide accurate and timely forecasts for her business to sales management
- Hunt new business opportunities within Telefonica Spain to lead Juniper to new market shares

PAIN POINTS

- Partners not having access to applications with frequent password requests
- One approver for many quotations slowing down the process
- Quotes coming back with incorrect pricing

NEEDS

- Looking for readily access to quotes and status details
- Visibility and transparency to see line item information and faster approvals
- Better UX similar to what customers are used to with e-commerce websites

TECHNOLOGY

- Laptop
- Smart Phone
- Tablet
- Video Conferencing

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Persona #2 - Juniper Distribution Partner Account Manager (DPAM)



"It would be helpful for consistent pricing globally with the ability to pull up the same discount/pricing when ever you are quoting"

ADJECTIVES

RELIABLE | AUTOMATE | SIMPLIFIED | FAST | FLEXIBLE

PLATFORMS

ORACLE, slack, salesforce, Outlook, Microsoft Teams

Andy Warren

JUNIPER NETWORKS | NTT DATA

ABOUT

Andy is a Distribution Partner Account Manager, he develops and implements joint business plans with his distribution partners to grow revenue and add value to the business. His primary role is to drive revenue growth through collaborative development and execution of strategic account plans with the assigned Distribution Partner/s.

GOALS

- Monitors distributor bookings, shipment, and invoices to ensure timely book to bill processes
- Establish, develop, and maintain sales relationships with assigned Juniper's Distributors & drive revenue growth
- Ensures that the appropriate business resources are engaged for project scoping, development, and go-live activities

PAIN POINTS

- No visibility on stock or back orders *(lots of requests for delivery dates)*
- Struggle to trust data from SalesForce; no reporting capabilities
- Quote revisions require another full approval process

NEEDS

- Ability to upload bulk contact details
- Recieve notifications on quote submissions
- Less manual processes and less approvers
- All in one tool and automation

TECHNOLOGY

- Laptop
- Smart Phone
- Tablet
- Video Conferencing

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Persona #3 - Juniper Sales Engineer (SE)



"Plenty of bundle SKU's missing - have to be added via spare parts which leaves room for human error"

ADJECTIVES

SIMPLE | LOGICAL | AGILE | CLEAN | EFFICIENT | TANGIBLE

PLATFORMS

ORACLE, slack, salesforce, Outlook, Microsoft Teams

Amy Holland

JUNIPER NETWORKS | NTT DATA

ABOUT

Amy is a Sales Engineer, she partners with Account Managers to drive revenue growth for Juniper by delivering business success to customers and partners. She is also responsible to build strong professional relationships with the technical skills to develop compelling network solutions that accomplish Juniper customers' business imperatives.

GOALS

- Provide pre-sales technical support for the development and implementation of complex products/applications/ solutions
- Industry and product knowledge to provide technical expertise to sales staff
- Assist sales staff in assessing potential application of company products to meet customer needs and product specifications

PAIN POINTS

- No visibility after BOM is configured
- In order to add things like an additional power supply, have to navigate through list of componets
- Plenty of bundle SKU's missing - have to be added via spare parts which leaves room for human error

NEEDS

- Integration with lead time on stock
- Faster quoting process and visibility on all steps
- E-rate section and bundles already configured
- Better information on bundle package with everything included; listed for reference

TECHNOLOGY

- Laptop
- Smart Phone
- Tablet
- Video Conferencing

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Persona #4 - Juniper Virtual Sales Executive (VSE)



"Education tools for partners trying to grow their customer base with Juniper would help them learn about the products and how to sell them"

Joanne Rose

ADJECTIVES

SAVVY | AUTOMATED | ACCURATE | SIMPLE | EFFICIENT | RELIABLE

PLATFORMS

ORACLE, slack, salesforce, Outlook, Microsoft Teams

ABOUT

Joanne is a Virtual Sales Executive, she is responsible for developing incremental business with growth partners, and driving business with both new and existing customers. She maximizes opportunities from leads, and maintains and executes territory plans with her field based territory account manager and focus partners.

GOALS

- Establish and maintain effective relationships with customers/partners and gain their trust and respect
- Ability to understand and communicate complex technology, value propositions and solutions
- Well-organized and is strong in follow through

PAIN POINTS

- Some partners don't know what works with what leading VSE's to go back and correct
- Too many tools and none work smoothly *"fighting aging technology"*
- Partners send half completed SKU's

NEEDS

- Ability to track quote status
- Up-sell suggestions
- Easier way to find SKU's *(currently on a list)*
- Education tools for partners trying to grow their customer base with Juniper

TECHNOLOGY

- Laptop
- Smart Phone
- Tablet
- Video Conferencing

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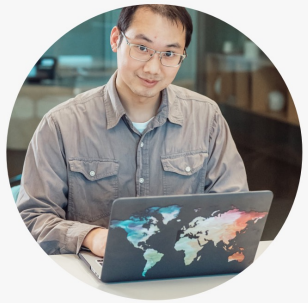
Persona #5 - Juniper Sales Support Representative (SSR)



"Ability for Partners and Account Managers to generate their own quotes and build them like IKEA"

ADJECTIVES

TRANSPARENT | CONSISTENT | SIMPLE | RELIABLE | AUTOMATE

PLATFORMS

ORACLE, slack, salesforce, Outlook, Microsoft Teams

Lance Griffin

JUNIPER NETWORKS | NTT DATA

ABOUT

Lance is Service Sales Representative, he reports to and supports the GS Sales Lead in executing the services strategy and delivering the services sales targets, in line with the common vision of the organization and always maximizing the Customer Satisfaction.

GOALS

- Work in complete alignment with the chosen outsourced renewals partners to maximise renewal rates
- Interact with the sales teams to drive on time renewals and maintenance at point of product sale
- Assist in the positioning and sale of Juniper Networks services through Juniper Networks Authorized Partners and Resellers

PAIN POINTS

- Not enough information on quote requests - *causes delay in turnaround times*
- Logic behind discounting to meet margins is confusing
- No visibility for Account Mangers to see what is happening

NEEDS

- Discounting and pricing guidance
- Self-service / minimal interactions with Account Manager & Partners
- Manadatory information completed for quote submission
- Training/guidance for Account Managers and Partners on FAQ's

TECHNOLOGY

- Laptop
- Smart Phone
- Tablet
- Video Conferencing

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Partner Personas

During our workshop we developed Personas for the top Partner groups and detailed their top needs and frustrations.



"Would like to see suggestions for replacement of SKU's coming up on end of life"

ADJECTIVES

SIMPLE | LOGICAL | AGILE | CLEAN | EFFICIENT | TANGIBLE

PLATFORMS

ORACLE, INTANGI, salesforce, CISCO

Sarah Dale

Juniper Networks | NTT DATA

ABOUT

Sarah is a Sales Engineer at Cadenza. She is responsible for building compelling network solutions enabled by strong business relationships with critical partners like Juniper Networks.

GOALS

- Provide pre-sales technical support for the development and implementation of complex products/applications/ solutions
- Industry and product knowledge to provide technical expertise to sales staff
- Assist sales staff in assessing potential application of company products to meet customer needs and product specifications

NEEDS

- Integration with lead time on stock
- Faster quoting process and visibility on all steps
- E-rate section and bundles already configured
- Better information on bundle package with everything included; listed for reference

TECHNOLOGY

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PAIN POINTS

- No visibility after BOM is configured
- In order to add things like an additional power supply, have to navigate through list of componets
- Plenty of bundle SKU's missing - have to be added via spare parts which leaves room for human error

Varying Needs and Pain Points across Persona Groups:

- Partner Account Managers need a faster turn-around time on quotes
- Sales Engineers want to attach BoM to deal reg
- DPAM's want a way to easily search and connect with their Juniper Rep

All Personas can be found in the Appendix.

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Partner Distribution Partner Account Manager



"Accounting team will not approve order over the limit - we have to spend alot of time to reconfigure"

ADJECTIVES

RELIABLE | AUTOMATE | SIMPLIFIED | FAST | FLEXIBLE

PLATFORMS

ORACLE, INTANGI, Outlook, salesforce, Teams, CISCO

Tony Sparks

JUNIPER NETWORKS | NTT DATA

ABOUT

Tony is a Account Manager at Ingram Micro, a key distribution partner of Juniper Networks. He develops and implements joint business plans with his distribution partners to grow revenue and add value to the business. His primary role is to drive revenue growth through collaborative development and execution of strategic account plans with the assigned Distribution Partner/s.

GOALS

- Monitors distributor bookings, shipment, and invoices to ensure timely book to bill processes
- Establish, develop, and maintain sales relationships with assigned Juniper's Distributors & drive revenue growth
- Ensures that the appropriate business resources are engaged for project scoping, development, and go-live activities

PAIN POINTS

- No visibility on stock or back orders *(lots of requests for delivery dates)*
- Struggle to trust data from SalesForce; no reporting capabilities
- Quote revisions require another full approval process

NEEDS

- Ability to upload bulk contact details
- Recieve notifications on quote submissions
- Less manual processes and less approvers
- All in one tool and automation

TECHNOLOGY

- Laptop
- Smart Phone
- Tablet
- Video Conferencing

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Partner Sales Engineer



"Would like to see suggestions for replacement of SKU's coming up on end of life"

ADJECTIVES

SIMPLE | LOGICAL | AGILE | CLEAN | EFFICIENT | TANGIBLE

PLATFORMS

ORACLE, INTANGI, Outlook, salesforce, Teams, CISCO

Sarah Dale

JUNIPER NETWORKS | NTT DATA

ABOUT

Sarah is a Sales Engineer at Cadenza. She is responsible for building compelling network solutions enabled by strong business relationships with critical partners like Juniper Networks.

GOALS

- Provide pre-sales technical support for the development and implementation of complex products/applications/ solutions
- Industry and product knowledge to provide technical expertise to sales staff
- Assist sales staff in assessing potential application of company products to meet customer needs and product specifications

PAIN POINTS

- No visibility after BOM is configured
- In order to add things like an additional power supply, have to navigate through list of componets
- Plenty of bundle SKU's missing - have to be added via spare parts which leaves room for human error

NEEDS

- Integration with lead time on stock
- Faster quoting process and visibility on all steps
- E-rate section and bundles already configured
- Better information on bundle package with everything included; listed for reference

TECHNOLOGY

- Laptop
- Smart Phone
- Tablet
- Video Conferencing

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Partner Account Manager



"I like how easy it is to search on Ciscos configurator and would like clearer editing options when building something specific"

ADJECTIVES

SIMPLE | LOGICAL | AGILE | CLEAN | EFFICIENT | TANGIBLE

PLATFORMS

ORACLE, INTANGI, salesforce, CISCO

Tracey Tailor

JUNIPER NETWORKS | NTT DATA

ABOUT

Tracey is a Partner Account Manager at SHI. She is responsible for the sales of Juniper products and solutions at SHI, taking care of the development of SHI as a Partner, the managed services opportunities and supporting the sell through business.

GOALS

- Provide pre-sales technical support for the development and implementation of complex products/applications/ solutions
- Industry and product knowledge to provide technical expertise to sales staff
- Assist sales staff in assessing potential application of company products to meet customer needs and product specifications

PAIN POINTS

- No visibility after BOM is configured
- In order to add things like an additional power supply, have to navigate through list of componets
- Plenty of bundle SKU's missing - have to be added via spare parts which leaves room for human error

NEEDS

- Integration with lead time on stock
- Faster quoting process and visibility on all steps
- E-rate section and bundles already configured
- Better information on bundle package with everything included; listed for reference

TECHNOLOGY

- Laptop
- Smart Phone
- Tablet
- Video Conferencing

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Journey Maps

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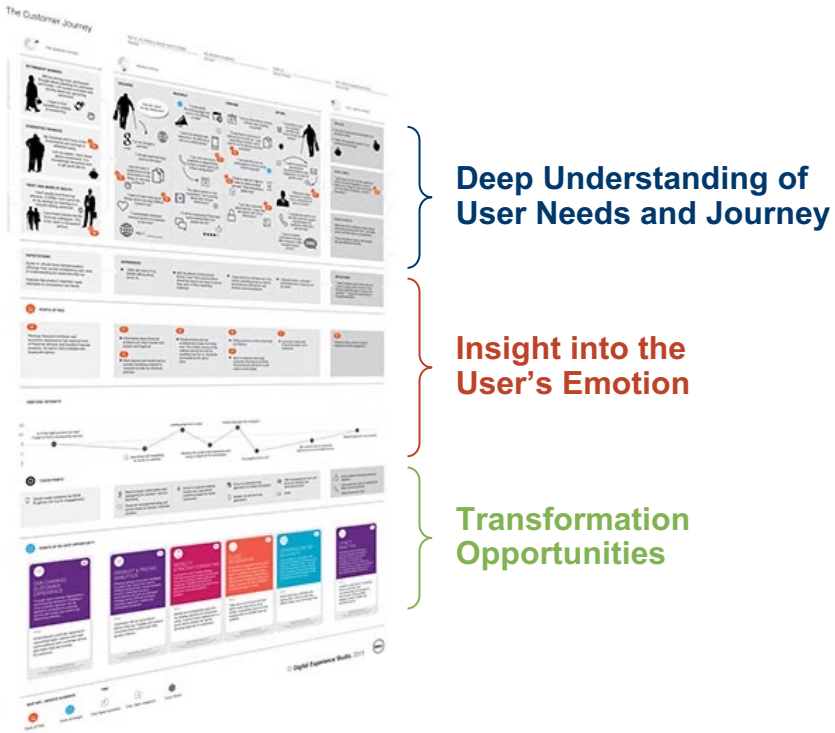
Personas Tell Us About People, While Journey Maps Illuminate Everything Else

Journey maps are a crucial tool to clearly and effectively identify issues in a process, service, or experience, and to help design the best future state.

Journeys visually represent the area of focus, highlighting issues in a clear and concise format, and providing detail on how to improve problem areas.

Journey Mapping Includes:

- Review of existing feedback and documentation
- Personas of key user types
- Identification of pain points and problem areas
- Incorporation of emotion, experience and empathy
- Powerful and clear visual representation of issues in the current state
- Future-state journey maps that demonstrate what the process *should* be



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Journey Maps can be Utilized in a Myriad of Ways to Gain Insight

1. Understand how your audiences behave and feel
2. Understand what is critical to improve and what should not change
3. Uncovers opportunities at the individual interaction level, across their flow
4. Easy to understand for all stakeholders; often boiling down a lot of research findings into a digestible format
5. Allows different groups to collectively find solutions to improving the experience
6. Can be a foundation for roadmaps by using the outcomes to prioritize improvements
7. Fills in gaps between what you think are the problems and what is the true experience
8. Serve as a great way to convey the story and importance of improvement plans to different groups
9. Helps people consider the holistic nature of delivering the optimal experience (e.g. offline vs. online)

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Journey Map: Current State End to End



Karl Spencer

34 Years old, Male
Partner

Karl is a Partner Account Manager, who is submitting a deal for approval and is hoping for it to be completed within 72hrs.

In this example:

- Slow Approval Process
- Lack of Visibility & Tracking
- Lack of Automation / Manual Processes

Needs

- Approval Automation
- Automatic Escalation Check-points
- Faster Approval Window
- Visibility and Transparency in Approvals
- Notifications

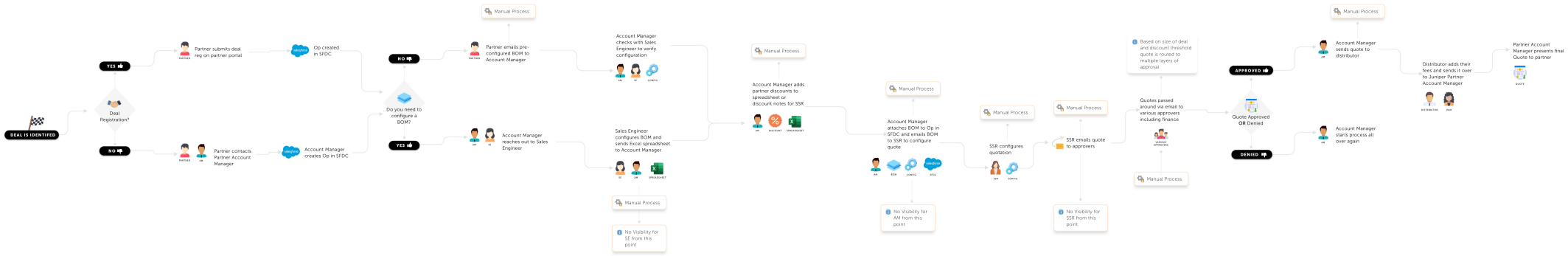
Legends



Journey Map

Current State Journey

JUNIPER NETWORKS | NTT DATA



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Journey Map: Future State End to End



Karl Spencer

34 Years old, Male
Partner

Karl is a Partner Account Manager, who is submitting a deal for approval and is hoping for it to be completed within 72hrs.

In this example:

- Partner is submitting for approval
- Automatic Check-points

Needs

- Approval Automation
- Automatic Escalation Check-points
- Faster Approval Window
- Visibility and Transparency in Approvals
- Notifications

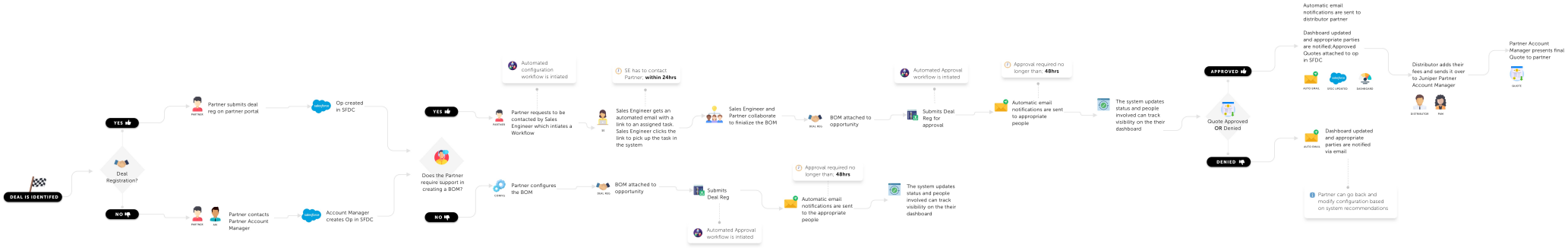
Legends



Journey Map

E2E Journey

JUNIPER NETWORKS | NTT DATA



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Journey Map: Attach BOM to Deal Reg



Jane Smith

36 Years old, Female
Partner Account Manager

Jane is a Partner Account Manager who needs to get a Deal Reg approved quickly.

Currently the experience is manual with turn around times being lengthly due to multiple approvals and limited visibilty.

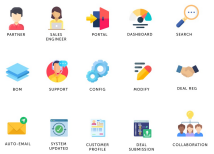
In this example the Partner is:

- Using a duplicated BOM
- Creating a new BOM

Needs

- Looking for readily access to quotes and status details
- Better UX similar to what customers are used to with e-commerce websites
- Visibility and transparency to see line item information and faster approvals
- Order history

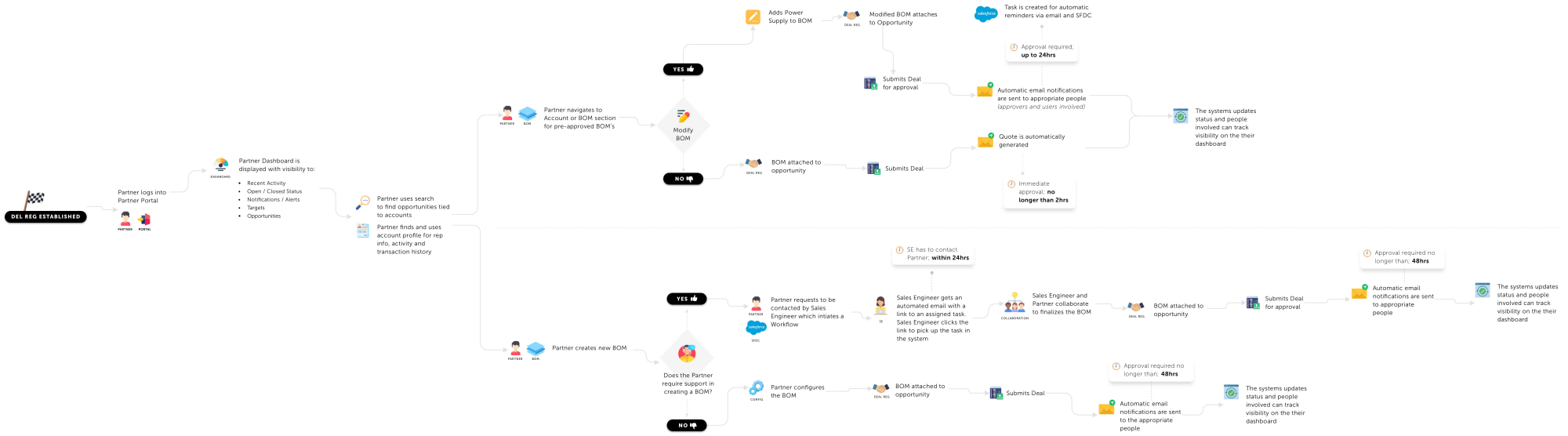
Legends



Journey Map

Attach Bill of Materials to Deal Registration

JUNIPER NETWORKS | NTT DATA



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Journey Map: Escalations



Emma Swan

37 Years old, Female
Partner

Emma is a Partner, who is submitting a deal for approval and is hoping for it to be completed within 72hrs.

In this example:

- Partner is submitting for approval
- Automatic Escalation Check-points

Needs

- Approval Automation
- Automatic Escalation Check-points
- Faster Approval Window
- Visibility and Transparency in Approvals
- Notifications

Legends

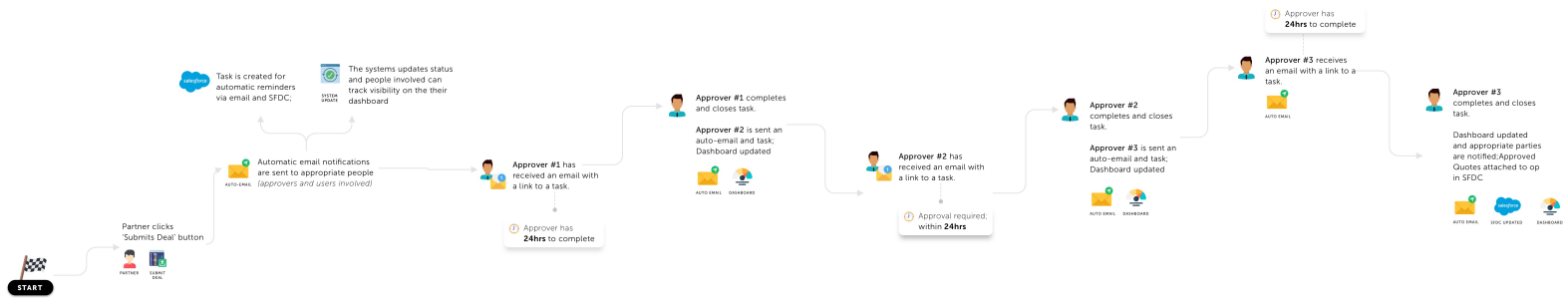


Journey Map

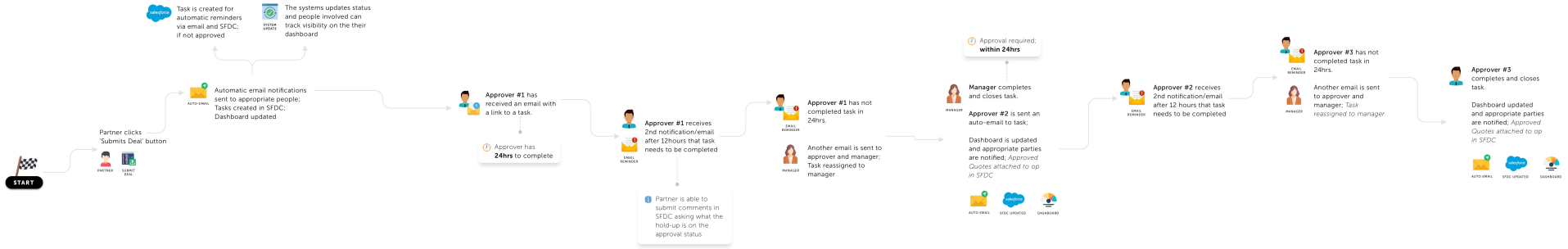
Escalations

JUNIPER NETWORKS | NTT DATA

Scenario 1 *- Approvers who follow directions*



Scenario 2 *- Approvers who don't follow directions*



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Journey Map: Lead Times & Guided Selling



Joanne Rose

29 Years old, Female
Virtual Sales Engineer

Joanne is a Virtual Sales Engineer, when creating a BOM she would like to see what inventory is available along with the lead times.

She may need suggestions on what to quote if something on her list is unavailable.

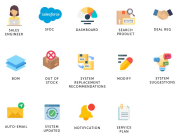
In this example:

- Out-of-stock Products and Lead Times
- Guided Selling

Needs

- Ability to track availability and lead times
- Suggestions for out of stock items
- Up-sell options on service agreements
- Products added that are not compatible
- Notifications

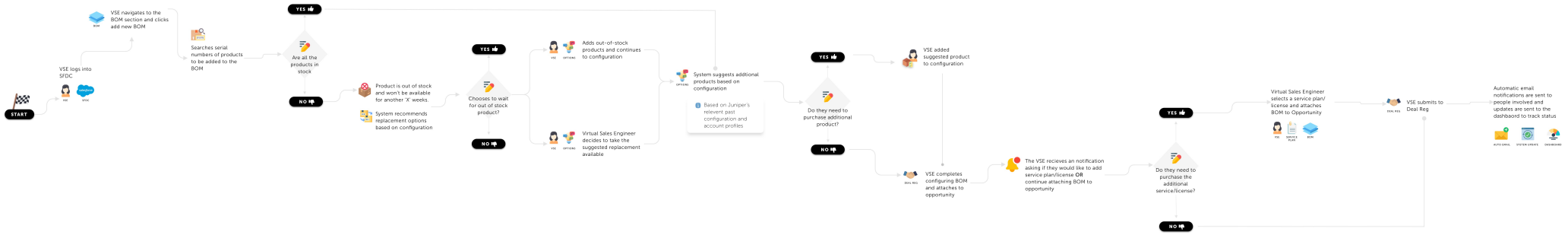
Legends



Journey Map

Lead Times/Guided Selling During BOM Creation

JUNIPER NETWORKS | NTT DATA



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Journey Map: Modify Quote



Lance Griffin

38 Years old, Male
Sales Engineer

Lance is a Sales Engineer, needs to modify an approved quote based on customer request.

He may need to replace or add a product which will require approval if product is not on the approved quote already

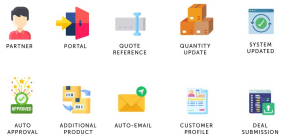
In this example the Partner is:

- Replacing/Adding a product
- Modifying quantity

Needs

- Notification of quote changes
- Visibility and transparency to see line item information and faster approvals
- Self-service when modifying quantity

Legends

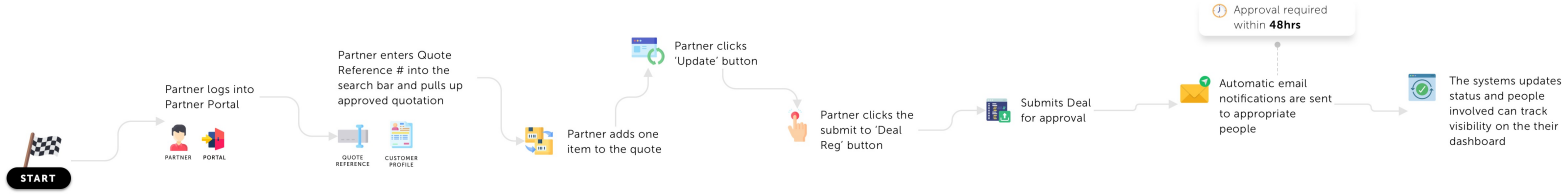


Journey Map

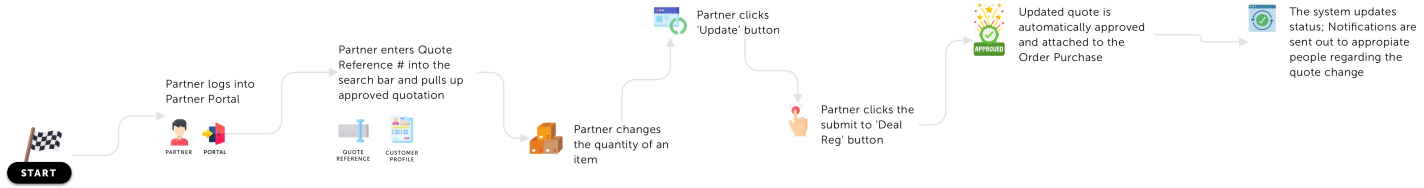
Modify Approved Quotation

JUNIPER NETWORKS | NTT DATA

Scenario 1 *- Replacing/Adding a product*



Scenario 2 *- Modifying the quantity*



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Journey Map: Quote Expired



Amy Holland

31 Years old, Female
Account Manager

Amy is a Account Manager, who has a customer wanting to move forward on a recently expired quotation.

She will need to duplicate the existing quote.

In this example:

- Duplicate Expired Quote
- Approval timeframes

Needs

- Ability to duplicate a quote
- Auto approvals for recently expired quotes
- Notifications

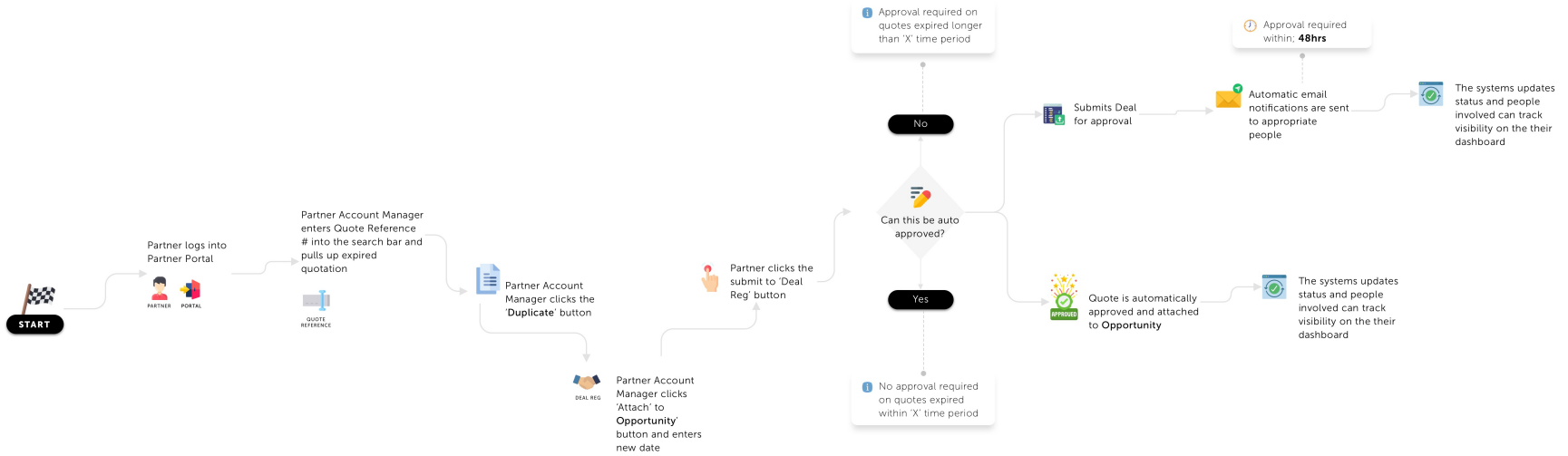
Legends



Journey Map

Quote Expired

JUNIPER NETWORKS | NTT DATA



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Journey Map: Low Dollar Items



Justin B

31 Years old, Male
Juniper Customer / End-User

Justin is a End User, who wants to purchase low dollar items without needing approval.

He may need to purchase popular bundles and add products by modifying pre-configured bundles.

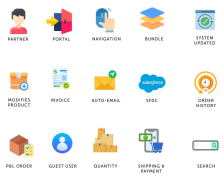
In this example the Partner is:

- Purchase Low Dollar Items / One-offs
- Checking out as a Guest User

Needs

- Auto approval
- Ability to modify bundles
- Notifications
- Self-service

Legends



Journey Map

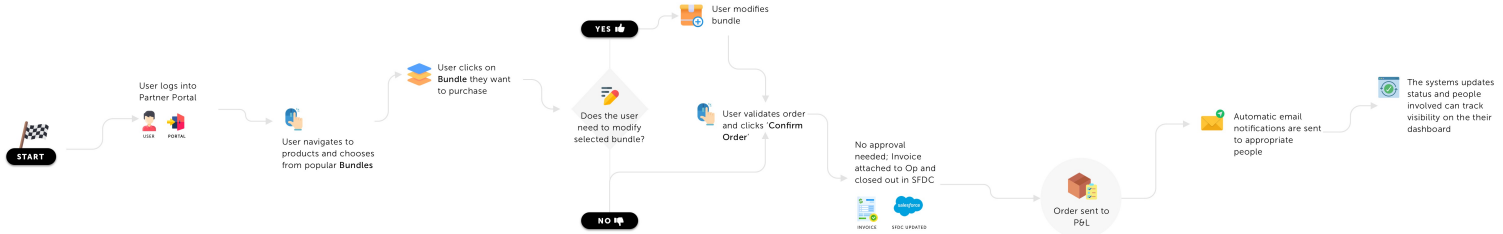
E-Commerce

JUNIPER NETWORKS | NTT DATA

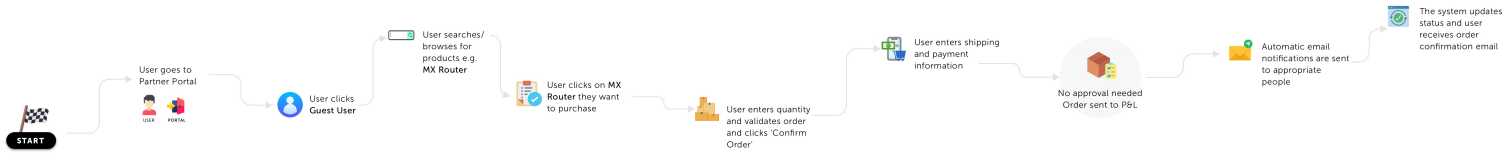
Scenario 1 *- Individual Item (replace power cord)*



Scenario 2 *- Small Bundle Deal*



Scenario 3 *- Checking out as a guest*



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Journey Map: Partner Profile Password Change



Dean Herbet

40 Years old, Male
Virtual Sales Engineer

Dean has become a new partner with Juniper and is excited to build his business and challenge incumbents.

In this example the Partner is:

- Creating a New Partner Account
- Forgot Password
- Password Expired

Needs

- Self-service
- Easy Approvals for new users
- Notifications

Legends

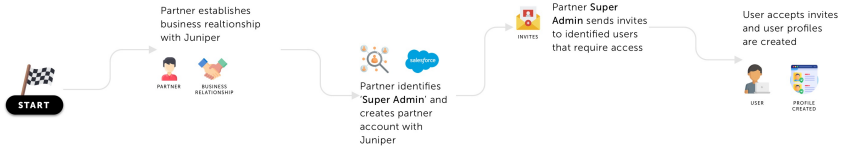


Journey Map

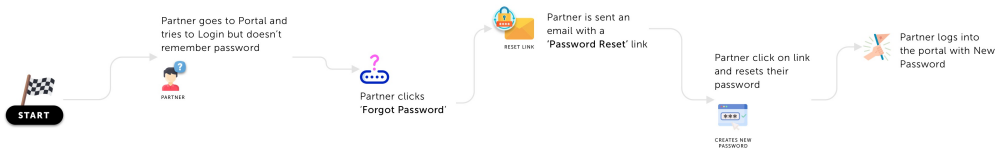
Partner Profiles & Changing Passwords

JUNIPER NETWORKS | NTT DATA

Scenario 1 - New User / No Relationship With Juniper



Scenario 2 - Forgot Password



Scenario 3 - Password Expired



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Requirements Deep Dive

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SOW Requirement #1 (CPQ-PE-010)

Partner and Distributor CPQ Empowerment



Requirement

Partners and distributors are empowered and encouraged to generate business with a tool that is intuitive, responsive, modular, and transparent; ready to easily and quickly solution any problem for any Partner (and customer).



Root Problem

A lack of best practices in place and manual processes with limited or no visibility resulting in long turnaround times, room for human error and unreliable outputs.



Remedy

Seamless, automated workflows with easy navigation and up-to-date information that enables self-service and empowers partners and/or distributors. Today, Partners have no visibility into status, location and custodian of their request; rendering them incapable of acting to push their case forward.

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Partner Experience Requirements Necessary to Meet SOW Requirement #1

1. Users need to easily identify all individuals involved with specific accounts, deals, opportunities.
2. Users need to have the ability to view any targeted, specific piece of information, anytime, anywhere.
3. Users need awareness of and visibility to Status regardless of stage, location, disposition, or channel.
4. Users need clear understanding of process steps and tech requirements necessary to progress.
5. Users need the ability to seek and authorize approval outside of standard process when and where appropriate.
6. Users need visibility to historical configure, price and quote data as appropriate for reference and duplication.
7. Automate manual process and tasks, including approvals, wherever possible, to reduce errors and approval times.
8. Develop and empower APIs wherever possible, ensuring data pull is automated and not open to human error.
9. Automate communication and notifications for updates and changes to core systems, processes, and information.
10. Ensure all users, both employees and Partners, understand critical sales policy and functionality (e.g. Autosnap).
11. Users need the ability to easily and seamlessly modify quotes on the fly.

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SOW Requirement #2 (CPQ-PE-010)

Visibility to Reseller & Distributor Pricing & Quoting



Requirement

Partners and Distributors can view any targeted, specific piece of information relevant to appropriate Reseller or Distributor.



Root Problem

No visibility after submission and no notifications or updates getting sent out leaves partners in the dark.



Remedy

Grant permissions in SFDC to appropriate partners and distributors and enable notifications wherever and whenever possible. Today, any updates are requested manually.

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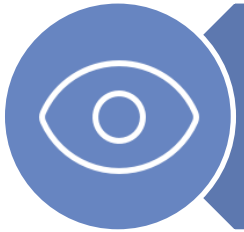
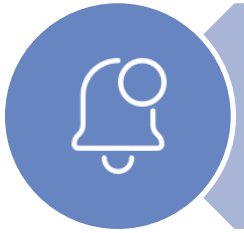
Partner Experience Requirements Necessary to Meet SOW Requirement #2



Partners and Distributors need to have the ability to view any targeted, specific piece of information relevant to appropriate Reseller or Distributor.



Partners and Distributors need to have the ability to request quote modifications and/or pricing on behalf of Reseller or Distributor where applicable.



Automated notifications are sent to appropriate Partner or Distributor regarding updates and/or changes to Reseller or Distributor information.

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SOW Requirement #3 (CPQ-PE-010)

Distributor Configuration & Visibility



Requirement

Empower distributors to manage and track configurations and quotes for their resellers from end to end.



Root Problem

The lack of visibility and an inability to self-serve leaves the distributors to rely on manual processes outside of their purview.



Remedy

Align process to strategy and empower distributors with the appropriate permissions to view and act as necessary. Today, lack of visibility and automation leave the distributors reliant on others.

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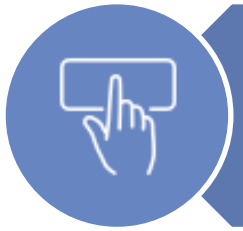
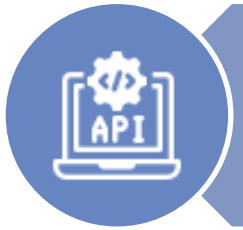
Partner Experience Requirements Necessary to Meet SOW Requirement #3



Distributors need to have the ability to self-serve on behalf of Reseller when applicable



Develop and empower API's wherever possible, enabling seamless collaboration between Juniper, Resellers and Distributors.



Distributors need visibility into specific Reseller historical data for the purpose of tracking updates and changes to core systems, processes, and information

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SOW Requirement #4 (CPQ-PE-010)

Empower Resellers to Manage Subscribers



Requirement

Authorize Reseller to oversee their customer subscriptions.



Root Problem

Inadequate permissions leave resellers with no visibility to customer accounts.



Remedy

Grant permissions to appropriate partners and distributors; empower them through training and education and promote self-service.

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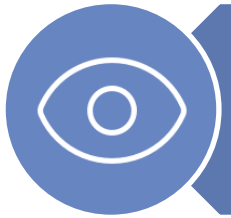
Partner Experience Requirements Necessary to Meet SOW Requirement #4



Resellers need ability to view, manage and update price and quote data as appropriate for renewals



Resellers need ability to view historical data where applicable for renewal



Ensure both Partners & Distributors understand critical sales policy and provide access to education and training materials.

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SOW Requirement #5 (CPQ-PE-010)

Improve Reseller & Distributor Visibility



Requirement

Permit Resellers and Distributors access to all quotes and opportunities (including Juniper's) related to their business.



Root Problem

With limited or no access to the account, Resellers cannot view their account activities including quotes and opportunities.



Remedy

Grant permissions to appropriate partners and distributors; empower them through training and education and promote self-service. Today, Resellers and Distributors have no visibility.

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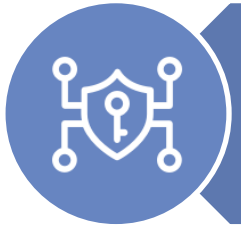
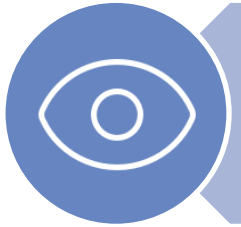
Partner Experience Requirements Necessary to Meet SOW Requirement #5



Resellers and Distributors need the ability to assess targeted or business specific information regardless of stage, location, disposition or channel.



Resellers and Distributors need ability to view any Juniper information as it relates to their business.

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SOW Requirement #6 (CPQ-PE-010)

Distributor Preference Enablement



Requirement

Provide Resellers with appropriate preferred Distributor options on quote.



Root Problem

Resellers currently have no option to select from a preferred distributor(s).



Remedy

Provide an option for resellers to rank preferred distributors on quote.

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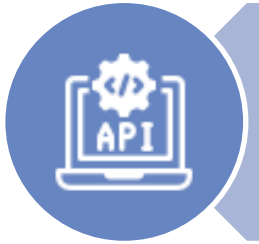
Partner Experience Requirements Necessary to Meet SOW Requirement #6



Resellers need the ability to choose from a drop-down list of their preferred Distributors in the quoting process



Develop and empower APIs wherever possible, ensuring data pull is automated, accurate and able to maintain current preferred-vendor status

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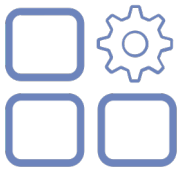
SOW Requirement #7 (CPQ-PE-010)

Attach Bill of Materials to Deal Registration



Requirement

Upon deal reg approval, enable partner or distributor to proceed to configuration and quote, citing deal reg with attached BOM on all new configurations and quotes.



Root Problem

Partner and Distributor Account Managers must enter BOM contents manually at both deal reg and then again at configuration.



Remedy

Enable or empower Partners and Distributors to import BOM information as part of deal reg approval.

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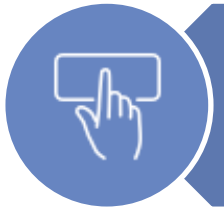
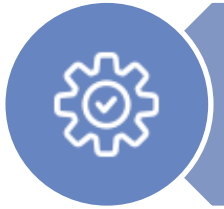
Partner Experience Requirements Necessary to Meet SOW Requirement #7



Partner and Distributor need the ability to submit BOM and deal-reg approval concurrently



Partner and Distributor need the ability to move forward with a new configuration using and citing existing deal reg approval



Partner and Distributor will need the ability to create opportunities under existing approved deal reg and attach BOMs to those opportunities.

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SOW Requirement #8 (CPQ-PE-010)

Partner & Distributor Access & Permissions



Requirement

Allow partner and distributor to manage opportunity process from configuration to quote and/or deal registration.



Root Problem

The lack of visibility and an inability to self-serve leaves partners and distributors reliant on blind manual process post configuration.



Remedy

Align process to strategy and empower distributors and partners with the appropriate permissions to view and act as necessary.

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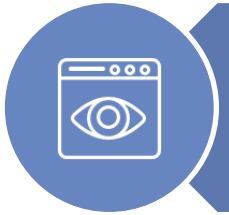
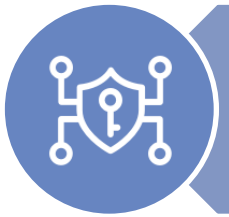
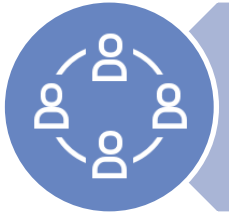
Partner Experience Requirements Necessary to Meet SOW Requirement #8



Partners and Distributors need awareness of and visibility to status of opportunities at any given stage



Partners and Distributors need ability to access and manage an opportunity at any stage



Empower Partners & Distributors to collaborate, strategize and align process

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SOW Requirement #9 (CPQ-PE-010)

Ability to Save Information for Repetitive Tasks



Requirement

Grant Partners and Distributors the ability to save quotes for future reference.



Root Problem

Partners and Distributors have no way of saving quotes or repetitive information.



Remedy

Ability to save quotes to account or opportunity as a template or reference for future use.

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Partner Experience Requirements Necessary to Meet SOW Requirement #9



Partner and Distributors need visibility to historical configure, price and quote data as appropriate for reference and duplication.



Partners and Distributors need to have an easily accessible repository to create and store templates.

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SOW Requirement #10 (CPQ-PE-010)

Partner & Distributor Status & Notifications



Requirement

Enable notifications for quote changes and or status updates to be sent to appropriate Partner or Distributor (based on partner and distributor credentials).



Root Problem

Because approval processes are currently manual and not strategically aligned, there is no ability to trigger auto-notifications to be sent.



Remedy

Create a systemic workflow process where notifications can be sent out as wanted and or needed.

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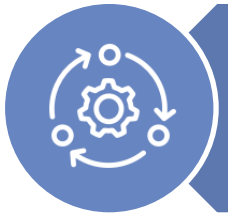
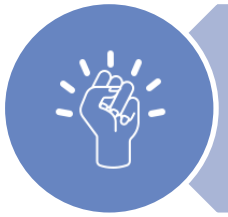
Partner Experience Requirements Necessary to Meet SOW Requirement #10



Automate communication and notifications to Distributors and Partners for status updates and changes.



Automate all communication and notifications to Distributors that are relative to cost.



Empower Distributor to make the necessary changes before sending to Partner as part of an automated workflow.

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SOW Requirement #11 (CPQ-PE-010)

Self Service Support for Distributors and Resellers



Requirement

Empower Resellers and Distributors to connect with Juniper Account Manager and or Support regarding self-service quoting and configuration issues.



Root Problem

Inability to self-serve leaves Resellers and Distributors totally reliant on SE and others for configuration and quoting.



Remedy

Provide guidance and ability to self-serve while enabling assistance and providing resources for resellers and distributors as needed.

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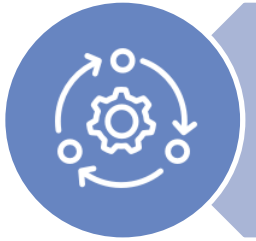
Partner Experience Requirements Necessary to Meet SOW Requirements #11



Partners & Distributors need the appropriate guidance and tools to enable self-service.



Automate easily accessible guidance where Partners and Distributors collaborate with support for assistance when self-serving

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CX KPIs Empower Everyone to Measure Success Visibly and Clearly

With a clear view to real performance over any duration, KPIs reveal evidentiary optimization routes

- KPIs provide the visibility and tracking necessary to measure and improve processes...
  - Time to Deal Approval
    - Without modifying an approved quote
    - With modified product items on a previously approved quote
    - With modified product quantities on a previously approved quote
  - Number of Deals Past Due
  - Number of Escalations Tied to an Approved Deal
  - Number of Password Resets Executed by Impacted Individual
  - Time to Complete BoM
    - When adding Juniper suggested products
    - When adding Juniper upsell products such as services/licenses
  - Number of BoMs
    - When Adding Juniper Suggested Products
    - When Adding Juniper Upsell Products

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Future State Possibilities

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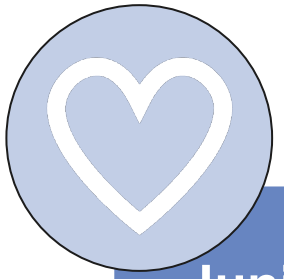
FS Strategic Experience Guiding Principles



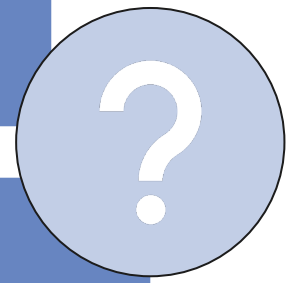
Juniper is preferred by almost everyone; take advantage of that preference…



Partners and Distributors don't know the latest if you don't tell them…

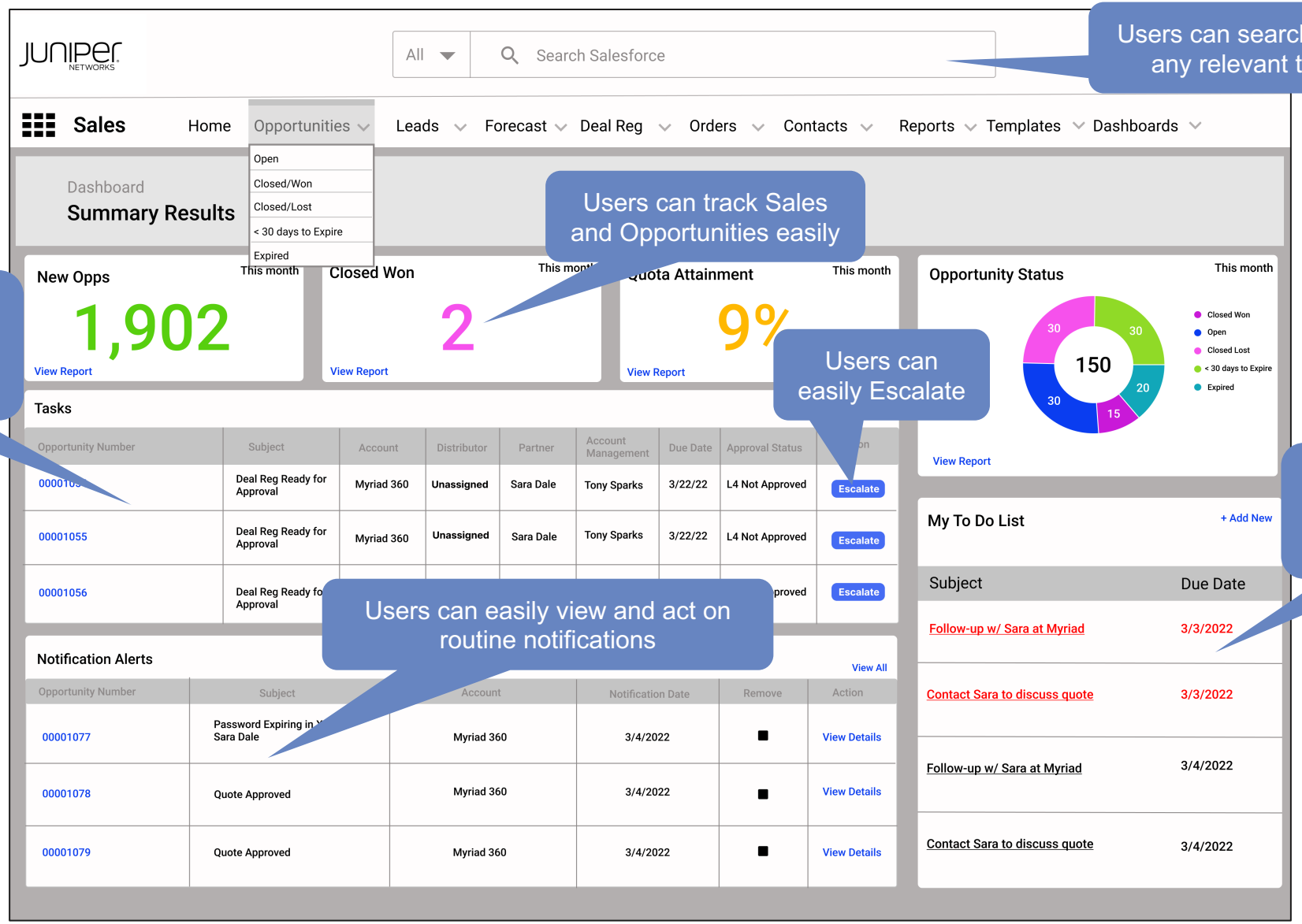


E-Commerce is the standard and what most people globally expect…



Does this make it easy to do business with Juniper?

Dashboard Example



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Next Steps

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The Experience Partner will Consult and Guide into the Next Phase and Beyond…

Experience Partner Priorities Include…

- Consult and assist Juniper and NTT Data stakeholders
- Identify and Navigate impacts to Partner and Customer Experience
- Connect Juniper to broader NTT CX Services and Capabilities
- Connect Juniper to innovative and forward-looking NTT Data Capabilities
- Interface with Juniper employees as needed to receive feedback
- Provide Juniper with Design Thinking expertise

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Next Steps

- Receive Feedback from Ken and team
  - Feedback due 3/11
- Conduct Read Outs for…
  - Stakeholders (Juniper and NTT)
  - Broader Impacted Audiences

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NTT DATA

Trusted Global Innovator

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