Avalara Certified Implementer Sales Playbook

TOOLS, TIPS, AND RESOURCES TO HELP CIP PARTNERS SELL IMPLEMENTATION SERVICES

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INTRODUCTION

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WELCOME TO CIP!

The Avalara Certified Implementer Program (CIP) was developed to help you build powerful customer experiences by effectively implementing Avalara solutions. CIP connects your organization with online training, continuous education, and in-depth support so your consultants can attain new skills and keep them sharp.

This playbook will help you start selling implementation services with best practices, document and messaging templates, and guidance on how to structure and describe your offerings.

Avalara was built on partners. We're invested in your success.

LET'S WORK TOGETHER TO BUILD YOUR AVALARA PRACTICE

STRATEGY	EMPOWER YOUR TEAM	CONNECT WITH HELP
Set goals for your Avalara practice – opportunities, projects, revenue, and profitability Assign and align your resources across marketing, sales, delivery, and support	Get CIP training for consultants Train sales and delivery teams on positioning and scoping projects	Drive opportunity creation and collaboration with Avalara Sales Executives to scope and close sales opportunities Seamlessly deliver projects to customers and refine by leveraging expert support from Avalara Partner Success team

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OVERVIEW OF CIP CERTIFICATION

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WHAT TO KNOW ABOUT ACHIEVING AND MAINTAINING CERTIFICATION

Training is the foundation of CIP. We help your consultants become the experts, so you can work with customers confidently and on your own terms.

REQUIREMENTS FOR YOUR ORGANIZATION

- Have at least two CIP consultants on the Avalara products you implement
- Maintain active status in the Avalara Partner Program

REQUIREMENTS FOR YOUR CONSULTANTS

- **Initial certification:** Consultants need to be certified by Avalara before leading any implementations
- **Ongoing:** Consultants are expected to lead at least two implementations per year to maintain product certifications

CERTIFICATION BENEFITS FOR YOUR ORGANIZATION

- Ability to broaden offerings
- More control over project pace and timelines
- Enhanced reputation
- Listing on Avalara.com
- Reduction in need for customer support

CERTIFICATION BENEFITS FOR YOUR CONSULTANTS

- Implementation support hotline direct to Partner Success team
- Certificate and badging for promotion
- CPE credits

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HOW TO MARKET YOUR CERTIFICATION

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CIP BADGES AND CERTIFICATES

Digital badges and certificates are a great way for your organization and consultants to communicate your expertise. Only partners with consultants who have successfully completed one or more CIP courses have access to Certified Implementer program badges and certificates.

HOW ORGANIZATIONS AND CONSULTANTS CAN USE BADGES



Spread the word about your expertise by using the Avalara Certified Implementer badge. You can use your badge anywhere you're talking to customers – for example, on social media, in email, on your website, or in marketing campaigns.

For more visibility, when posting about your CIP certification, include hashtags for visibility: #AvaTax #Avalara

WANT TIPS ON HOW BEST TO USE BADGES?

See the badge guidelines for more information.

See the badge guidelines for more info GO

WHAT CONSULTANTS NEED TO KNOW ABOUT BADGES

Your consultants will receive a badge via email when they complete a course specific to that area of expertise.

WHAT CONSULTANTS NEED TO KNOW ABOUT CERTIFICATES

Consultants can access their certificates by signing in to PartnerTraining.Avalara.com.

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CIP MESSAGING FOR TALKING TO PROSPECTIVE CUSTOMERS

We've crafted messaging and sample templates that can help you talk to your customers. Feel free to add your company name to the following examples and use them in your customer communications – or adapt them to fit your particular needs.

SAMPLE OVERVIEW OF CIP

SHORTER VERSION

When you work with **[your organization's name]**, you're not only getting a solution provider who already knows you, your business, and your technology stack – you're also getting a tax software expert, trained by Avalara, who can ensure you're set up to get the most from your tax automation solution. Relax. This is tax compliance done right.

LONGER VERSION

Why work with an Avalara Certified Implementer?

[Your organization's name] can help you make sure that you're getting the most from your Avalara software. By working with us, you're not just getting a solution provider who knows you and your business – you're also getting a tax software expert, trained by Avalara.

We're already familiar with your technology stack, so that makes for a quick discovery process. We also know what questions you'll need to answer to get your software set up correctly. And if you're not sure about the details you need for your specific tax requirements, we can direct you to the right resources to help you get them entered correctly from the start.

We provide you with a single point of contact throughout the implementation process. We know how all the pieces will fit together to maximize your automation capability and potential across multiple applications and systems. That goes for what you need today as well as what you might need down the line, as your business evolves and grows.

From a smooth implementation process to ongoing, worry-free sales tax automation and compliance, working with **[your organization's name]** is the smartest way to free up resources and focus on what you do best: growing your business. Relax. This is tax compliance done right.

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HOW TO MARKET YOUR CERTIFICATION

SAMPLE AVALARA OVERVIEW COPY

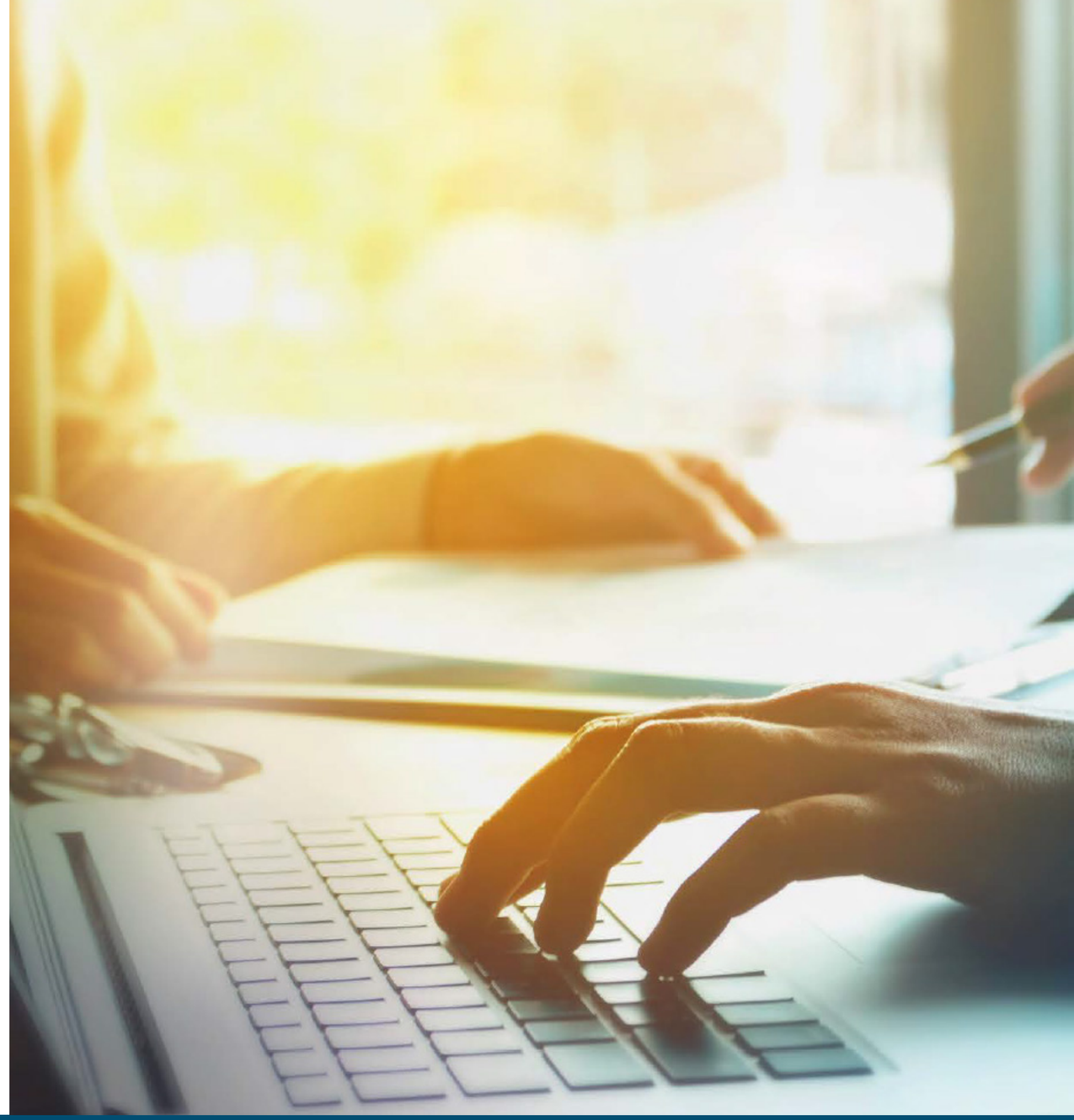
Avalara helps businesses of all sizes get tax compliance right. In partnership with leading ERP, accounting, ecommerce, and other financial management system providers, Avalara delivers cloud-based compliance solutions for various transaction taxes, including sales and use, VAT, GST, excise, communications, lodging, and other indirect tax types. More information at **avalara.com**.

SAMPLE WEB COPY

[Your organization's name] is proud to be an Avalara Certified Implementer. We've undergone in-depth training from the tax software experts at Avalara to ensure a smooth implementation process – and that you're getting the most from your automation software.

We know what questions you'll need to answer to get your software set up correctly – and if you're not sure, we can direct you to the right resources to help you get all your info entered correctly from the start.

For ongoing, worry-free sales tax automation and compliance, working with an Avalara Certified Implementer is the smartest way to free up resources and focus on what you do best: growing your business. Relax. This is tax compliance done right.



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HOW TO SELL AVALARA IMPLEMENTATIONS

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IDENTIFYING AND TALKING TO CIP PROSPECTS

WHAT MAKES A BUSINESS A GOOD PROSPECT FOR AVALARA PRODUCTS?

You probably already know what makes a good prospect for tax automation. Avalara customers often face one or more of the following challenges:

- Doing business in multiple states, especially states with complexity
- Expanding sales tax obligations
- Introducing a new system or new CFO/controller
- Handling complex product taxability

(See this Avalara **prospecting datasheet** for more details.)

WHAT MAKES A BUSINESS A GOOD PROSPECT FOR CIP SERVICES?

Anyone who purchases Avalara with you is a good CIP prospect. Many businesses underestimate the time, complexity, and cost of implementation. The resources below can help you explain these challenges and sell the benefits of your implementation services.

CIP DATASHEET..... GO

A co-branded, to-customer datasheet that gives an overview of CIP services and benefits.

CIP PITCH DECK SLIDES..... GO

Co-branded slides for you to include in your to-customer presentations that give an overview of CIP services and benefits.

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OVERVIEW OF THE CIP SALES PROCESS

The ideal CIP workflow usually follows these steps, with Avalara Sales Executives and CIP partners teaming up for mutual sales engagements:



1. REFERRING

If you have a lead for Avalara software, you can refer them to Avalara.



2. DISCOVERING

We both meet together with the client, and then Avalara works with you to discuss the proposed product solution, requirements, and your implementation approach.



3. SCOPING

You develop an implementation scope and share it with us for feedback, and Avalara develops a software scope and does the same. (Note: If you learn that a customer needs tax advice, Avalara Tax Research or an accounting partner are great resources.)



4. PROPOSAL

You deliver your implementation proposal with statement of work to the customer at the same time Avalara delivers the software proposal.



5. IMPLEMENTATION

Avalara shares best practices on implementing, but you lead the process with Avalara there for support.

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TIPS FOR MAKING A REFERRAL

Have a lead for CIP services that you want to refer to Avalara?
Follow these steps:

1. IDENTIFY THE PROSPECT

Do you have customers or prospects who could benefit from sales tax compliance automation? (See this **prospecting datasheet** for more details.)

2. RECOMMEND AVALARA

Offer a free consultation with Avalara. When your customer agrees to an appointment, it's important to let them know that Avalara will be reaching out in the next few days to confirm.

3. COMPLETE THE REFERRAL FORM

Enter your customer's information in the **referral form**. If you have any engagement instructions, don't hesitate to share them. Avalara will connect with you once the prospect is sold on the solution.



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TIPS FOR DISCOVERING

Schedule a discovery meeting with the customer. Avalara can share best practices with you beforehand and join the meeting. After the meeting, we can debrief together and discuss the proposed solution, requirements, and implementation, as well as the proposal options and schedule.

WHAT IF YOUR CUSTOMER NEEDS TAX ADVICE?

Sometimes in discovery, you'll learn that a customer needs additional tax expertise. For example, maybe they're missing important tax information, such as proper tax codes or an understanding of where they have nexus.

Take the time to make sure they know what information they'll need for a successful implementation. If they need help beyond what your firm offers, you can recommend that they add **Avalara Tax Research** to the scope of the project. Or your Strategic Alliance Manager can help you refer them to one of **our accounting partners**.

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TIPS FOR SCOPING

You probably won't know enough at first to successfully estimate the effort required for an implementation. But don't worry! We're here to help. Start with these ideas and best practices:

GET GUIDANCE ON YOUR FIRST FEW DEALS

We've learned that a collaboration meeting can be enormously helpful on each of your first few deals. Your Strategic Alliance Manager (SAM) can own these meetings and facilitate, and your Avalara Sales Executive (SE) can provide insight on pricing. We recommend that you include your Sales Leader, Sales Representative, Service Delivery Manager, and Delivery Consultant in these initial meetings.

PLAN FOR QUICK-TURN PROPOSALS

The Avalara sales process is typically rapid and time-sensitive. To be successful, you'll need to provide implementation proposals to your Avalara Sales Executive quickly (often within 48 hours), so you can present together and close the deal.

PRICE IT RIGHT

In general, you want to develop service offerings priced less than 75% of the software cost. Download the **CIP Implementation Toolkit** to get our free, "road-tested" JumpStart Questionnaire and CIP Estimator tools, which provide scoping guidance. The JumpStart Questionnaire will help you gather the information you need to complete the CIP Estimator and fully scope the project.

HAVE A FALLBACK PLAN

Lead with a comprehensive, higher-service offering (your consultant configures the software with customer providing requirements and tax decisions), but be ready to provide a more economical, lower-service offering (your consultant provides support to the customer while the customer configures the software). Generally, there's a trade-off. The lower-service offering typically comes in around half the price of the higher-service offering, but the amount of time the customer needs to invest can triple or even quadruple, as the customer is responsible for learning the software and configuration.

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TIPS FOR SCOPING

EXAMPLES OF CIP PRICING

It's important for customers to understand that implementing software by themselves can be a heavy lift – with lots of time, increased audit risk, and the like. The following are examples of pricing implementation services for an SMB customer.

RECOMMENDED

OPTION 1: PARTNER MANAGED **$12,000 –$15,000**

Partner manages the implementation and configures and tests the configuration.

TIME INVESTMENT

Partner: 50–60 hours Customer: 16–24 hours

- Customer gathers their information
- Partner configures the software
- Partner and customer test

Note that these pricing examples are for the implementation of Avalara software only. Partners will often propose additional services such as tax advisory, customer database cleanup, process improvement, and so on.

It can take a customer hundreds of hours to self-implement. Even then, they may not feel confident that they got it right.

OPTION 2: PARTNER ADVISORY **$6,000 –$7,500**

Partner provides an implementation plan and support for the customer.

TIME INVESTMENT

Partner: 24–30 hours Customer: 40–60 hours

- Customer learns the software
- Customer gathers their information
- Customer configures the software
- Customer tests

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TIPS FOR PROPOSALS

As you develop your proposal and statement of work, you'll want to collaborate closely with your Avalara Sales Executive. You'll develop an implementation scope and share it with us for feedback, and we'll develop a software scope and do the same.

The goal is to arrive at two proposals and statements of work, which will be delivered to the customer at the same time – one from Avalara to cover software costs and one from you for implementation. We'll be present at the delivery to answer any questions.

It's important that your proposal and statement of work clearly define what's included, along with any tiered options. Stay aligned with your Avalara Sales Executive, so you can be sure that you're both using consistent terms and language.

SAMPLE PROPOSAL

The statement of work samples in the **CIP Implementation Toolkit** are based on real-world implementations, but with identifying information removed. It's a good reference for understanding some of the particular aspects of an Avalara implementation. Feel free to use it as a starting point for developing your own.



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TIPS FOR IMPLEMENTATION

You should take the lead in the closing process, but your Avalara Sales Executive will be available and can offer advice and best practices.

Once the deal is won, our Partner Success Team will reach out to your consultant leading the implementation. We'll stay in touch throughout the implementation project, providing support and guidance.



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PLAN FOR THE FUTURE

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GROW YOUR PRACTICE

We hope the CIP program can help you build a successful and profitable Avalara services practice.

If you want more help setting goals, identifying opportunities, or collaborating on selling, connect with your Sales Manager or Strategic Alliance Manager.



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CIP RESOURCES

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MARKETING RESOURCES

- PartnerTraining.Avalara.com — GO
- Badge usage guidelines — GO
- To-customer email template — GO
- More marketing resources in the Partner Resource Library — GO

SALES RESOURCES

- Co-branded, to-customer CIP datasheet — GO
- Co-branded, to-customer CIP pitch deck slides — GO
- More sales resources in the Partner Resource Library — GO

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CIP TOOLKIT

CIP Implementation Toolkit GO

Download the CIP Implementation Toolkit, which includes:

CIP TOOLKIT WEBINAR
Recording and slide deck from live CIP Toolkit webinars.

SAMPLE STATEMENTS OF WORK
Sample SOWs based on real-world implementations.

CIP PROJECT PLAN+
Detailed project plan template for implementing AvaTax, ECM, and Returns. Additional tabs in workbook provide implementation tools to support the process.

CIP JUMPSTART QUESTIONNAIRE
To be filled out by a prospective customer and used to build the estimate. Once the deal is won, it can be used by the consultant to jumpstart the project.

CIP SOW ESTIMATOR
Calculates an estimated time to implement based on customer's business characteristics and scope of implementation.

SAMPLE WELCOME CALL PRESENTATION
PowerPoint slides to guide your project kick-off call.

SAMPLE EMAIL TEMPLATES AND MEETING AGENDAS
These are examples we use in our training scenarios where the consultant (Adam) works with his customer (Paula).

SAMPLE TESTING GUIDE
Sample test guide providing some general guidance, used by our Professional Services team.

AVATAX CONNECTOR (ERP) FEATURE MATRIX
Overview of the features supported/not supported by our more common connectors.

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SALES SUPPORT

Contact your Strategic Alliance Manager. If you don't know who is on your Avalara team or how to reach them, contact **partners@avalara.com**.

TECHNICAL SUPPORT DURING IMPLEMENTATION

PartnerSuccess@avalara.com or call (877) 826-4383 and use your PIN.



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