



# OSS Migrate Motion Playbook

Migrate from OSS AK to Confluent's  
complete, cloud-native solution  
available everywhere

<b>What is the OSS Migrate Sales Motion?</b>	<p>OSS Migrate is the sales motion we use to drive Open Source Apache Kafka users (pre-buyers) in level 3, or later, of the <a href="#">data in motion journey</a> towards building a central nervous system on Confluent. When relying solely on the open source distribution, OSS Kafka users often experience difficulty reducing development &amp; operational burdens/costs, minimizing business risk to mission-critical workloads, &amp; ensuring their streaming applications &amp; use cases go to market in a timely &amp; efficient manner. These challenges become more prominent as Kafka usage scales in an organization because:</p> <ul style="list-style-type: none"> <li>• Kafka expertise is difficult to find &amp; retain: Kafka skills are in high demand with a <b>38% increase in job postings</b> &amp; a <b>6% growth in compensation</b> YOY</li> <li>• Increased TCO: <b>~\$3-5M to operate</b> a Kafka environment when considering all infrastructure needs, development &amp; operations resources/burdens, &amp; downtime &amp; security risks</li> <li>• Delayed time to value &amp; ROI: <b>2+ years to build</b> a production-grade Kafka platform &amp; deploy apps efficiently at scale</li> </ul>	
<b>Why target pre-buyers?</b>	<ul style="list-style-type: none"> <li>• We land faster with pre-buyers; deal cycles are <b>4x more efficient &amp; effective</b> with pre-buyers</li> <li>• Pre-buyer new logo opps have <b>2.4x greater win rates</b> than pre-believers</li> <li>• Pre-buyer new logo wins have <b>~60% larger deal sizes</b> than pre-believers</li> </ul>	
<b>Who are we targeting with the OSS Migrate Motion?</b>	<p style="text-align: center;"><b>Land</b></p> <ul style="list-style-type: none"> <li>• Step 1: Prospect into &amp; leverage a <b>pre-buyer Architect</b> as a Champion (ideally Director/Head or above)</li> <li>• Step 2: Work with your Champion to navigate to the <b>Tech Exec</b> to sell the data in motion vision &amp; “Why Confluent” <ul style="list-style-type: none"> <li>◦ (For cloud opps) Work with the cloud provider to determine who owns the customer’s cloud spend &amp; align to their initiatives (See <a href="#">here</a> for more info on how to work with CSPs)</li> </ul> </li> </ul>	<p style="text-align: center;"><b>Expand</b></p> <ul style="list-style-type: none"> <li>• Step 3: Convert additional <b>pre-buyers in other teams/orgs/LOBs</b> or with <b>other use cases</b></li> <li>• Step 4: Convert <b>pre-believers</b> by showing the value of Confluent via solutions (e.g., SIEM optimization, messaging or Data Warehouse modernization)</li> <li>• Step 5: Tap into tech exec relationships across LOBs to reach the <b>CIO &amp;/or CTO</b> with the goal of aggregating all current &amp; future Kafka usage to Confluent</li> </ul>
<b>Pain Points (Before Scenarios &amp; Negative Consequences)</b>		
<p>At level 3, prospects begin to realize that running OSS Apache Kafka alone might not be able to meet their security, high availability &amp; management/monitoring needs, especially as they scale Kafka usage to multiple LOBs. Discovery conversations help us uncover these pain points &amp; enable customers to see that the ongoing costs, burdens &amp; risks of staying with OSS Apache Kafka outweigh the cost of moving to Confluent &amp; paying for a managed service (if CC) or a complete, enterprise-grade distribution (if CP).</p>		
<p><b>Tech Owner (Before Scenarios):</b></p> <ul style="list-style-type: none"> <li>• <u>Resiliency</u>: Difficult to minimize downtime &amp; ensure clusters are highly available to minimize business disruption</li> <li>• <u>Security &amp; Governance</u>: Sensitive data in Kafka is hard to encrypt/govern; need to ensure access is properly controlled</li> <li>• <u>Management</u>: Too much time spent ensuring clusters operate efficiently &amp; can scale to capacity</li> <li>• <u>Connectivity</u>: Time consuming to design, develop, test &amp; maintain connectors/integrations</li> <li>• <u>Internal expertise</u>: Difficult to hire &amp; develop Kafka expertise</li> </ul>		
<p><b>Business Owner (Negative Consequences):</b></p> <ul style="list-style-type: none"> <li>• <u>Cost</u>: Unable to optimize infrastructure spend, development &amp; operations costs, FTEs &amp; downtime/security risks</li> <li>• <u>Time-to-value</u>: Takes too long to get new use cases &amp; apps to market to avoid lost revenue/value</li> <li>• <u>Risk</u>: Unable to minimize business impact (e.g., brand damage, reputation risk) associated with possible outages, downtime, or security breaches</li> </ul>		
<b>Value Drivers</b>		
<p><u>Accelerate time-to-value</u>: Increase the rate of innovation &amp; capture your market opportunity to grow revenue quickly; deploy &amp; scale Kafka quickly</p>	<p><u>Maximize ROI</u>: Launch faster &amp; reduce operational burden &amp; costs with our fully managed services</p>	<p><u>Reduce TCO</u>: Operate more efficiently with reduced infrastructure costs, development &amp; operations demands/overhead &amp; downtime risk</p>
<p><i>**Note: Not all value drivers apply to all companies. A customer’s value driver(s) will depend on company type &amp; strategic initiatives. For example, high growth companies will care about revenue growth more than cost savings. Utilize the discovery questions in the <a href="#">Value Conversation</a> to help prioritize value drivers.</i></p>		
<b>Why Confluent</b>		
<ul style="list-style-type: none"> <li>• <u>Cloud-native</u>: Fully-managed, scalable, elastic, secure &amp; globally available, enabling rapid, agile development</li> <li>• <u>Complete</u>: Enable developers to build reliable &amp; secure next-gen apps faster; cost-effectively run business critical apps &amp; workloads</li> <li>• <u>Everywhere</u>: Spans all customer environments; everywhere your apps &amp; data reside - today &amp; in the future</li> <li>• <u>Data in Motion Blueprint</u>: Prescriptive best practices &amp; expertise focused on people, process &amp; technology driven by our over 1 million hours of experience</li> </ul>		

**Overview**

The OSS Migrate sales motion requires us to win over both the business & technical teams to prove the value of Confluent. Our success in achieving this consensus relies on our ability to:

- Help technical teams see that OSS Apache Kafka won't be able to meet their security, governance, high availability & management/monitoring needs, especially as Kafka usage scales across the organization
- Prove to the business that labor & infrastructure savings, along with minimized downtime risk & business disruption, lead to lower TCO with Confluent

While the approach we take to demonstrate our differentiation differs across each opportunity, this playbook offers best practices that you can use to gain both the technical & business wins.

**Best Practices**
**Securing the Business Win**

To secure the business win (for both **land** & **expand** opportunities), we need to align Confluent to the prospect's business initiatives & determine which Kafka use cases are mission critical.

Product Marketing has created the following tools to help identify key use cases & messaging:

- [Pre-buyer specific messaging & persona guides](#) to facilitate these customer conversations
- [Solutions guides](#)
- [Industry specific use cases](#) (slides 31 - 44):
  - [Financial Services Use Cases & Resources](#)
  - [Retail & Ecommerce Use Cases & Resources](#)
  - [Digital Native Use Cases & Resources](#)
  - [Gaming Use Cases & Resources](#)
  - [Telecommunications Use Cases & Resources](#)
  - [Manufacturing Use Cases & Resources](#)

**For Land opportunities:** Conversations should begin with a pre-buyer architect & focus on understanding the role Kafka plays in supporting the organization's business & technical initiatives. **For Expand opportunities:** The [Customer Strategy Roadmap](#) should be the guiding principle behind the strategy & the conversations should focus on either driving adoption through additional use cases or landing additional teams on Confluent. For both land & expand opportunities, we should focus on highlighting the value of Confluent via the approach outlined below.

**Value Based Selling**

Once you determine which Teams/LOBs to target (for both **land** & **expand** opportunities), you should:

- Follow the [Confluent Value Conversation](#) to gather an understanding of the prospect's current state & reasons for engaging with Confluent
  - The conversation should begin by focusing on understanding the role Kafka plays in supporting the organization's business & technical initiatives ([utilize the digital native pitch deck](#)).
- Focus discovery conversations around current Kafka usage & its impact on labor/resource efficiency & infrastructure complexity in order to position Confluent's reduced TCO value prop
  - Utilize the [TCO Cheat Sheet](#) & the [Building a TCO Business Case](#) module to help guide your conversation
  - Look to draw out the [OSS Kafka pain points](#) & a potential [compelling event](#)
  - If selling CP, spend time with the developers & architects highlighting the value of a complete, enterprise platform (i.e., multi-language development, rich pre-built ecosystem, data compatibility, security, etc.)
- Identify partners &/or other influencers within the account to help gather data & validate your business case
  - Align with CSPs that have enterprise agreements & credits to spare
  - Helping the CSP drive growth will strengthen our partnership & strategic alignment in the account
- Share [success stories](#) ([Dominos](#), [Ladder](#), [Bank BTPN](#), etc.) to highlight industry leaders who have achieved success using Confluent
  - Additional background information for Dominos ([deal overview](#), [win wire](#), [customer story slide](#)), Ladder ([deal overview](#), [customer story slide](#)), Bank BTPN ([deal overview](#), [customer story slide](#))
- Determine why they are hesitant to move to Confluent & utilize the [Confluent Cloud Objections Handling Playbook](#) (when selling cloud) to handle objections:
  - They have dedicated Kafka experts to maintain their clusters (uncommon)
  - Use cases are not actually mission critical
  - They believe Confluent is too expensive
  - They have an open source mandate
- Qualify the opportunity & determine the compelling event that will force the prospect to make the decision to go with Confluent
  - The prospect will not make a change if the delta (difference between where they are today & where they'd like to be) is not big enough
  - Dig deep into the pain points & help highlight potential (or future) compelling events to drive the prospect towards change (e.g., outage risks, future growth/scale, cloud migrations)
- Once we've gathered the information required to build a business case in Value Cloud, we present the business case ([CP deck](#), [CC deck](#)) to the Economic Buyer/Decision Makers. Throughout the conversation, highlight the

[value of the Data in Motion Blueprint](#) & Confluent's prescriptive framework for supporting our customers' adoption journey by focusing on people, process & technology

Identify Pain Points & Business Outcomes	Understand the Compelling Event
<ul style="list-style-type: none"> <li>● Use MEDDPIC (AEs) &amp; CLUSTERS (SEs) to qualify</li> <li>● Once you understand the OSS pain points, conduct intro meetings with stakeholders to confirm negative consequences, positive business outcomes &amp; required capabilities</li> <li>● Discuss the pros &amp; cons of a managed service (CC) and/or enterprise-grade platform (CP) to align on objectives &amp; avoid any feature parity conversations down the line</li> <li>● Prepare your Champion to answer the 'why Confluent' question with their executives</li> <li>● Work with your Champion to build a business case (TCO analysis), value story &amp; financials using <a href="#">Value Cloud</a> (bring in the Value Management team for large or complex deals)</li> </ul>	<ul style="list-style-type: none"> <li>● Seek to understand the compelling event - what will force them to change their stance?               <ul style="list-style-type: none"> <li>○ How will the business scale with their current staff managing Kafka? Is their platform fit to scale &amp; meet ever increasing business demands?</li> <li>○ How are they protecting themselves against outages, security breaches, &amp; other downtime risks? What impact would these events have on the business?</li> <li>○ How will the business objectives &amp; strategic priorities impact the use cases? At what point will they eventually become mission critical?</li> <li>○ What's their cloud strategy or overall data strategy &amp; how does their current Kafka usage align to this? Are there modernization efforts (e.g., DWHs, DBs, Data Lakes) we can align with?</li> </ul> </li> </ul>

*\*\*Note: If we don't have executive buy-in, we should position PAYG &/or nurture the account; POCs/Pilots should only take place when we have qualified the opportunity & executive alignment*

**Achieving the Tech Win**

To prove that we can solve the customer's problems & show Confluent's differentiation, we should position PAYG. A prospect's willingness to sign-up for PAYG & send data to Confluent signals the strength of the opportunity.

Option 1: Leverage PAYG for the POC	Option 2: POC/Pilot when PAYG isn't an Option
<ul style="list-style-type: none"> <li>● Have the prospect sign-up for CC to help position the tech win &amp; accurately size the opportunity               <ul style="list-style-type: none"> <li>○ Sign-up via their CSP's Marketplace (utilize the <a href="#">Marketplace Fundamentals Guide</a>)</li> <li>○ Point prospects towards self-service enablement resources &amp; share <a href="#">self-learning content</a></li> <li>○ Get them involved in <a href="#">SE-led activities</a>:                   <ul style="list-style-type: none"> <li>■ Getting Started with Confluent Cloud Workshop Series (Open to Enterprise &amp; Commercial Accounts)</li> <li>■ Path to Production Series</li> </ul> </li> <li>○ Measure PAYG usage in <a href="#">C360</a></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● The <a href="#">POC</a>/Pilot should take place in sales stage 3, once MEDDPIC &amp; CLUSTERS qualification is complete; POCs/Pilots should only happen after we've aligned with business users on the pain points &amp;/or compelling event</li> <li>● SEs need to complete the <a href="#">Cloud</a> or <a href="#">Platform</a> template &amp; review with their AE, RSD, SE Manager</li> <li>● Guidelines:               <ul style="list-style-type: none"> <li>○ Support the POC vs. run the POC</li> <li>○ Ensure the POC is properly scoped</li> <li>○ Paid pilots should involve PS</li> <li>○ Pilots vs. POCs: Pilots move to production, POCs are thrown away when complete</li> <li>○ Sometimes there's a need to run a pilot later in the sales cycle, even if the customer is already on PAYG</li> </ul> </li> </ul>

Our ability to drive customer growth & adoption begins with setting customers up for success. To ensure the prospect is set-up for success, SEs will lead prospects through the following steps:

- Build a blueprint with the customer & align on the definition of success using the [Joint Success Plan](#) or [Mutual Success Plan](#) (only if a CSM is on the account); AEs will help the SE to ensure the success criteria map back to the positive business outcomes & value drivers
- Host tech enablement sessions to ensure successful onboarding & office hours/tech talks to support continual customer enablement & ensure the customer's POC is successful

Tech Enablement Sessions	Continued Customer Engagement	Nurturing the Account
<ul style="list-style-type: none"> <li>● SE-led sessions designed to get customers onboarded &amp; seeing value quickly</li> <li>● Agenda will depend on the customer's familiarity with Kafka, but should include the following:               <ul style="list-style-type: none"> <li>○ Validate &amp; dig into use cases to ensure that the solution will</li> </ul> </li> </ul>	<p><u>Office Hours</u></p> <ul style="list-style-type: none"> <li>● Continuous point of contact throughout the POC</li> <li>● Ongoing education best practices &amp; Q/A sessions</li> <li>● Offered biweekly or once a month (minimum)</li> </ul> <p><u>Tech Talks</u></p>	<ul style="list-style-type: none"> <li>● When there's no immediate compelling event &amp;/or the pain is not great enough to make a change, continue to engage by promoting <a href="#">online talks/events</a>, connecting with Field Marketing to learn about upcoming events &amp; utilizing Lifecycle Marketing's</li> </ul>

	<p>enable the customer to achieve their positive business outcomes</p> <ul style="list-style-type: none"> <li>○ Demonstrate how Confluent can be leveraged for the customer's use case</li> <li>○ Walkthrough the cluster spin-up process</li> </ul>	<ul style="list-style-type: none"> <li>● Regular sessions to discuss differentiation, competitive landscape &amp; market position</li> <li>● Sessions led by SEs or DevX/product (large accounts where we are trying to establish a footprint)</li> </ul> <p><u>Slack</u></p> <ul style="list-style-type: none"> <li>● Create shared slack channel with the customer for additional touchpoints &amp; support</li> </ul>	<p><u>Nurture Programs.</u></p> <ul style="list-style-type: none"> <li>● Support the customer by building out a year long enablement plan (events, tech talks, etc.). Accelerate the plan when the prospect shows additional interest.</li> <li>● For customers with small clusters, follow the digital touch &amp; product-led growth motion</li> </ul>
<p>To help achieve the tech win &amp; remove potential blockers, we should:</p> <ul style="list-style-type: none"> <li>● Engage PS&amp;E to determine whether the customer will need help in achieving their objectives &amp; realizing success</li> <li>● Highlight the <a href="#">value of the Data in Motion Blueprint</a> &amp; Confluent's prescriptive framework for supporting our customers' adoption journey by focusing on people, process &amp; technology</li> </ul> <p>Additional onboarding resources:</p> <ul style="list-style-type: none"> <li>● <a href="#">Customer Onboarding Program wiki</a></li> </ul>			
<p><b>Mitigating Risk</b></p>			
<p><b>Engaging PS&amp;E</b></p> <p>The risk associated with the migration of production workloads can be a potential blocker. While the SE is responsible for creating the migration ramp model, the account team should engage PS to help eliminate the risk &amp; support the migration.</p> <ul style="list-style-type: none"> <li>● Account teams should <a href="#">engage PS&amp;E</a> when the opportunity reaches stage 3</li> <li>● Use the <a href="#">PS&amp;E discovery questions</a> to determine the level of support your customer will require to be successful             <ul style="list-style-type: none"> <li>○ Utilize the <a href="#">OSK/CP to CC Migration Services wiki page</a>, if PS is required to support the migration</li> <li>○ If PS is involved, PS is responsible for scoping &amp; delivering migration services</li> </ul> </li> </ul> <p><b>Support &amp; Escalation Process</b></p> <p>Oftentimes, we need to proactively talk customers through Confluent's support process to demonstrate how we will handle any potential issues that might arise. The <a href="#">New Relic Mutual Success Plan</a> (slides 13 - 27) demonstrates how we can help customers gain confidence in Confluent's approach.</p>			
<p><b>Driving Customer Growth</b></p>	<p>Once the customer sees the additional value Confluent has over OSS Kafka, we can position the commit (CC) or the subscription (CP). Regardless of whether the solution is self-managed (CP) or a fully managed cloud service (CC), our core mission is to increase the value our customers realize and grow their usage of our products.</p> <p>Driving utilization of a committed contract ultimately depends on the customer realizing value from our platform. While Kafka is the foundational component of Confluent, customers that adopt additional components from our broader product portfolio are associated with significantly higher growth rates &amp; reduced risk of churn. The <a href="#">Customer Growth GTM Model Playbook</a> highlights best practices for driving &amp; tracking customer growth.</p>		