

Catalant Community Champions – Principle Subject Matter Expert (PSME)



Catalant Champion's Summit



Outline



Context behind the PSME role



Detailed description and how PSMEs plug in to sales process



PSME deliverables



Ways of working



Compensation model

Principle SME – The anchor and utility player



Context behind the role

- Often times during client development, deeper credibility or knowledge is required. The Principle Subject Matter Expert role was created to ensure that in any configuration of client development teams, there is complete coverage of topics and a deep roster of experts who have led similar efforts previously



Expectations / tactics

- Join client meetings when needed and enrich conversation
- Supplement initial insights with tribal knowledge and deep experience
- Support benchmarking, and top-down opportunity sizing based on high level signs of opportunity
- Provide well-articulated case studies and example projects that will give client confidence that we can successfully execute



Benefits

- Wide audience to radiate your deep expertise (including publications, co-branding and forums)
- Low hands-on effort needed during development and execution
- Flexibility to create role for self and accumulate expert days across a wide range of clients

Principal SME: Expectations & Benefits

★ Initial focus / highest value



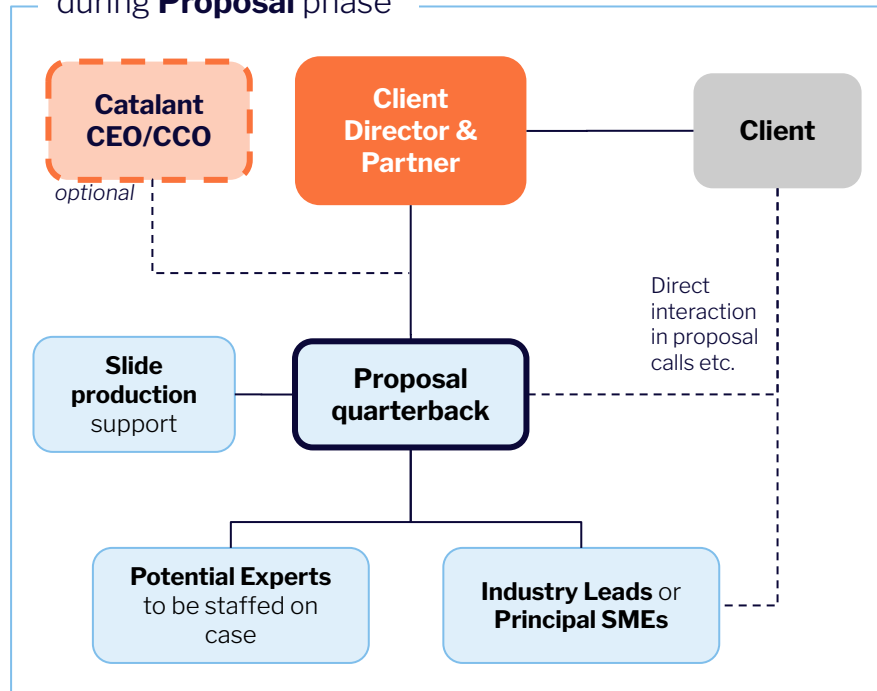
Typical Catalant role configurations

external

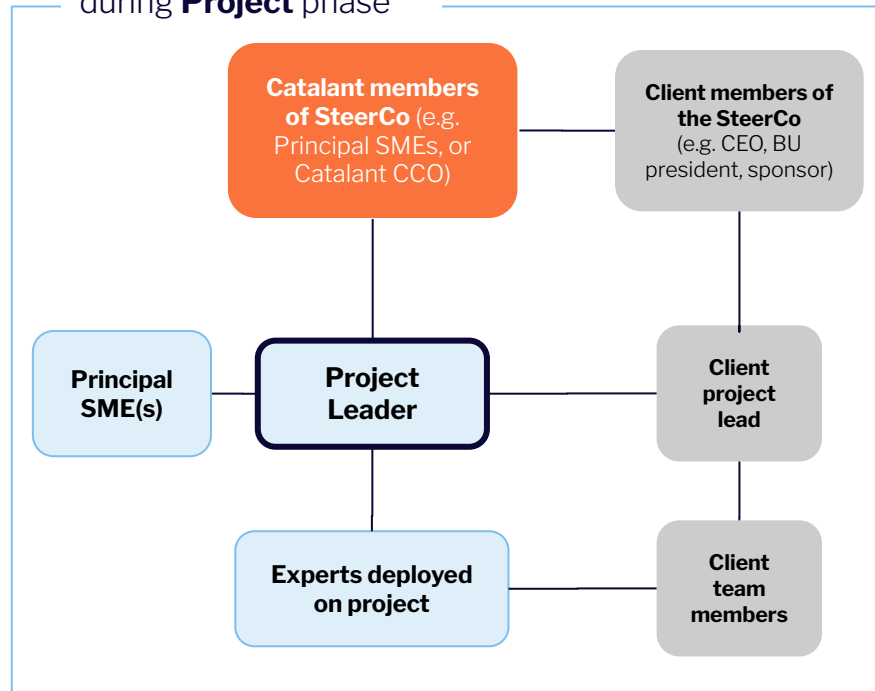
Catalant

Client

during **Proposal** phase



during **Project** phase

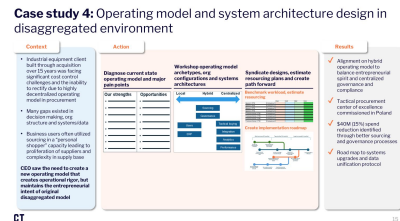


PSME deliverables – Have these ready, and enjoy a smooth process

Case studies



Well articulated and organized , description of the problem, what exactly you did, the quantitative impact you drove – should be easily understandable by anyone



Benchmarks



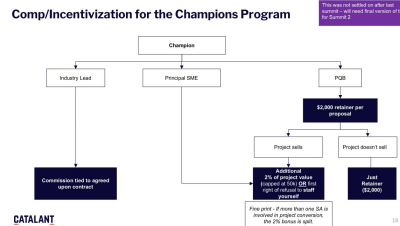
Take a stand on the expected effort, timeline and impact based on the client's current situation



Presence



Make time to join client meetings, team problem solvings and present views on top of mind issues (eg. tariffs) – be a valuable problem solving partner that leaves the team wanting more



Principal SME: Ensure alignment with the project team

Ensure to align with...

Level of Support

Different **projects** or **proposals** require a **different level of support**. For large proposals, for example, we start early to collate input material, and ensure we have enough time for iterations.

Communications

Some teams prefer **email chains**, others **Slack** or **WhatsApp**. Clarify channels, distribution lists, etc.. Make sure notifications are set up correctly

Formats

At Catalant, most work is done in **Google Slides**. The biggest advantage vs. **PowerPoint** is real-time, collaborative editing and avoiding of compatibility issues across systems and platforms. Some teams prefer to work with PowerPoint files, though.

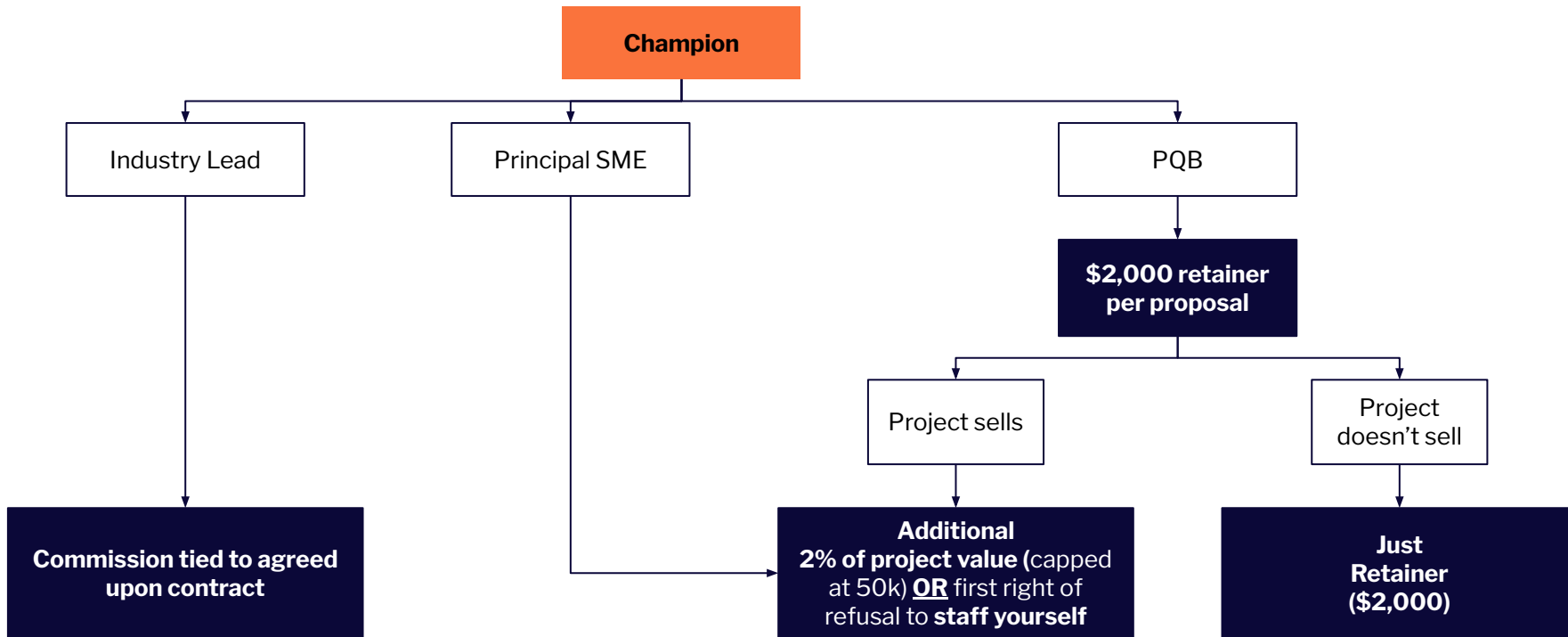
Timelines & Availability

Many proposals require **tight turnaround time**, perhaps only a few days. Clarify what is expected, and communicate your availabilities. A calendar-sync tool such as Calendly can save a lot of time!

Confidentiality

Ensure you are handling **sensitive data** appropriately.

Comp/Incentivization for the Champions Program



Fine print:

If more than one SA is involved in project conversion, there is up to a 4% bonus shared amongst PSMEs