

Technical Sales Support Matrix

How to use



**Start with
Self-Serve**



**Escalate
one step
at a time**

Technical Sales Support Matrix

Activity	Self Service ¹	Customer Success	Sales Guide	Sector Managers	LubeTek	PTS	Lube Specialist	Industry Specialist ⁴
Identify Sales Scripts for specialized products (Playbooks)	1		2					
Chevron LubeWatch®: Initial customer set-up, pricing & package information	1							2
LubeWatch: Oil Analysis Report Customer Presentation Support ²							1a	1b
LubeWatch: Fluid Analysis Trending Report Request	1	2						
Existing Technical Product Documentation	1		2		3			
Proof-of-Performance Brochures	1		2	3				
Technical Documentation to support value models or competitive product differentiation	1		2					3
Technical Sales Process Execution ³			2				3	1
Customer Technical Presentations or Product & Applications Training ³			3				1	2
Unique Marketing Content Requests (New content or modification of existing)			1	2				
Promotion Inquiries	1	2						
Enhanced Technical Support for Equipment Surveys and other RBL-related			3				2	1
Product Cross-Reference & initial equipment list to support a bid or proposal	1				2	3		

Footnotes:

- ¹ "Self-Service" generally indicates SFDC or CBP embedded options such as the Support App, RBL+ tools, mPower, or Opportunity-level content
- ² Work with either based on factors such as: history with customer, Opportunity size, availability, Opportunity type (Net New or SOW)
- ³ On own where capable or necessary due to factors such as time or availability
- ⁴ In Canada, this would be the Indirect BC



How to read this Matrix:

- 1: First Point of Contact, or Step
- 2: First escalation step
- 3: Secondary escalation step



UP TO THE CHALLENGE
Monday Morning Kickoff 2020

Technical Sales Support Matrix

Activity	Self Service ¹	Customer Success	Sales Guide	Sector Managers	LubeTek	PTS	Lube Specialist	Industry Specialist ⁴
Technical Service Request "TSR" (Sales initiates in SFDC to engage LubeTek)					1	2		
Product Compatibility					1	2		
Product Technical Support Training Content (formerly Richmond Technical Products Training – <i>to be digitized and added to Lubricants University</i>)	1					2		
RBL+ tool or value-calculator enhancement requests			1					
Product Integrity concerns					1	2		
Warranty Claims					1	2		
Exception Letters for off-spec sheet Product Applications				1		2		
Lubricants University	1						2	
Field Trial Support for a sales presentation or prospect	1						3	2
Local or Regional Trade Show Support	1						3	2
** Self-Service Options ** (generally SFDC CRM-enabled)	Chevron Marketing Hub, Chevron Brand Center, RBL toolkit, SFDC-based Support App, Product Match tool, SFDC-embedded Playbooks, SFDC Oppty-level embedded content							

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Technical Sales Support Matrix - Marketer

Activity	Chevron Business Point	Business Consultant	Customer Success	Sales Guide	LubeTek	BDS	Lube Specialist	Industry Specialist ²
Identify Sales Scripts for specialized products (Playbooks)	1		2	3				
Chevron LubeWatch®: Initial customer set-up, pricing & package information			1			3		2
LubeWatch: Oil Analysis Report Customer Presentation Support ¹							1a	1b
LubeWatch: Fluid Analysis Trending Report Request			1				2	
Existing Technical Product Documentation	1		2		3			
Proof-of-Performance Brochures	1		2	3				
Technical Documentation to support value models or competitive product differentiation	1						3	2
Technical Sales Process Execution				2			3	1
Customer Technical Presentations or Product & Applications Training				3			1	2
Unique Marketing Content Requests (New content or modification of existing)				1				
Promotion Inquiries	1		2					
Enhanced Technical Support for Equipment Surveys and RBL-related				3			2	1
Product Cross-Reference & initial equipment list to support a bid or proposal					1			2

Footnotes:

- ¹ Work with either based on factors such as: history with customer, Opportunity size, availability, Opportunity type (Net New or SOW)
- ² In Canada, this is your Business Consultant
- Chevron Business Point is the central point for self-service options including the Support App, mPower, and our RBL+ toolkit



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Technical Sales Support Matrix - Marketer

Activity	Chevron Business Point	Business Consultant	Customer Success	Sales Guide	LubeTek	BDS	Lube Specialist	Industry Specialist ²
Technical Service Request "TSR"		2			1			3
Product Compatibility testing or inquiry		2			1			3
RBL tool or value-calculator enhancement requests				1			2	
Product Integrity concerns		2			1			
Warranty Claims		2			1			
Exception Letters for off-spec sheet Product Applications					1		2	
Lubricants University	1						2	
Field Trial Support for a sales presentation or prospect ¹						1b		1a
Local or Regional Trade Show Support		1				3		2
Chevron Business Point: Access to mPower, the Support App, RBL+ tools on mPower Opportunity content tab	Chevron Marketing Hub, RBL toolkit, Support App, mPower-embedded Product Match tool, mPower-embedded Playbooks, mPower Opportunity-level content on "Content" tab							

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