

SMB Action Plan: Putting theory into action through engagement

Strategic Objective

Validate and capture a reachable segment of under-served IBM i SMB customers by offering a low-risk, phased modernization and continuity model tailored to small-team operating realities.

Strategic Premise

The target segment is not failing to act because it does not care. It is failing to act because most current offerings are misaligned with SMB economics, staffing constraints, and operational risk tolerance.

This problem is compounded as the SMB customer base being thought of as homogenous instead of a group of subtypes with more separate and distinct needs than the others.

Priority 1: Validate the Market Thesis

Goal: Confirm that a reachable, fundable segment exists.

Actions

- Define target profile by geography, vertical, revenue band, and staff size.
- Build an initial target list of 100 accounts.
- Conduct 20–30 structured discovery interviews.
- Complete 5–10 readiness assessments.
- Identify 3 pilot candidates.

Owner

- Strategy lead / market development lead

Milestones

- Target segment defined: 30 days
- Discovery interviews complete: 60 days
- Pilot candidates identified: 90 days

Success Measures

- Interview completion rate
- Percentage confirming succession or modernization pain
- Percentage willing to consider a phased assessment
- Number of qualified pilot prospects

Priority 2: Define the First Commercial Offer

Goal: Create a practical entry point that SMB buyers can say yes to.

Actions

- Package an “IBM i Readiness and Continuity Assessment”
- Include current-state review, succession-risk analysis, tooling/supportability score, and phased roadmap
- Create pricing, scope, sample deliverables, and sales narrative
- Build executive and technical versions of the assessment output

Owner

- Product/offer lead

Milestones

- Offer definition complete: 30 days
- Sales materials complete: 45 days
- First offer live: 60 days

Success Measures

- Number of assessment conversations started
- Assessment-to-pilot conversion rate
- Buyer clarity on deliverables and value

Priority 3: Build the SMB Modernization Maturity Model

Goal: Standardize diagnosis and roadmap design.

Actions

- Create scoring dimensions for:
 - platform currency
 - tooling maturity
 - source control/change discipline
 - database practices
 - code modularity
 - documentation
 - testing/deployment
 - staffing resilience
 - security/supportability
- Define score bands and recommend next steps
- Use the model in all assessments and pilots

Owner

- Architecture lead / methodology lead

Milestones

- Draft model complete: 30 days
- Field-tested model complete: 75 days

Success Measures

- Consistency of scoring
- Ease of customer understanding
- Usefulness in shaping phased roadmaps

Priority 4: Prove Early Value Through Pilots

Goal: Demonstrate measurable results within 90 days.

Actions

- Select 3 pilot customers
- Deliver the readiness assessment and phased roadmap
- Implement one safe modernization pattern or readiness improvement per pilot
- Measure before/after outcomes

Owner

- Delivery lead

Milestones

- Pilot selection: 90 days
- Pilot launch: 120 days
- Pilot results documented: 180 days

Success Measures

- Reduction in identified continuity risk
- Adoption of supported tooling or practices
- Team confidence improvement
- Executive approval for next-phase work
- At least 2 publishable case studies

Priority 5: Build the Proof Pack

Goal: Support market trust and conversion.

Actions

- Create an executive overview
- Create a technical architecture brief
- Create a learning-path overview
- Publish example patterns and sample outputs
- Add “what this is / what this is not” guidance
- Package early case studies

Owner

- Content/enablement lead

Milestones

- Initial proof pack: 60 days
- Pilot-enhanced proof pack: 180 days

Success Measures

- Use in sales and partner conversations
- Stakeholder comprehension
- Conversion support effectiveness

Priority 6: Design Delivery for Low-Capacity Teams

Goal: Ensure the model works for one-person and very small teams.

Actions

- Break training into short modules
- Provide recorded sessions and office hours
- Create templates, starter patterns, and checklists
- Limit required customer-side lift
- Avoid dependence on large-project governance overhead

Owner

- Education/program lead

Milestones

- Modular curriculum draft: 60 days
- Delivery model tested in pilot: 150 days

Success Measures

- Training completion rate
- Customer-side effort required
- Applicability to 1–3 person teams

Priority 7: Establish Partner Scale Model

Goal: Prevent delivery bottlenecks if demand emerges.

Actions

- Identify potential regional and specialist partners
- Define certification or enablement path
- Package methods, templates, and delivery standards
- Build a simple partner operating model

Owner

- Partner/channel lead

Milestones

- Partner profile defined: 90 days
- First partner conversations: 120 days
- Pilot partner enablement: 210 days

Success Measures

- Number of qualified partner candidates
- Partner readiness to deliver consistently
- Reduced dependence on founding team capacity

Priority 8: Strengthen Executive Positioning

Goal: Make the offer fundable at leadership level.

Actions

- Reframe all technical outcomes into business language
- Build CFO/CEO messaging around:
 - succession risk
 - business continuity
 - supportability
 - onboarding
 - security posture
 - preserved application value
- Avoid leading with architecture jargon in executive materials

Owner

- Strategy lead / executive communications lead

Milestones

- Executive narrative finalized: 45 days

Success Measures

- Executive meeting progression
- Clarity of business case
- Reduced need to “translate” technical value in sales conversations

Summary Timeline

0–30 Days

- define segment
- build first-offer package
- draft maturity model

31–60 Days

- launch discovery outreach
- finalize sales/proof materials
- finalize executive narrative

61–90 Days

- complete discovery interviews
- score initial prospects
- identify pilot customers

91–180 Days

- execute pilots
- capture metrics
- publish case studies
- refine delivery model

181–270 Days

- begin partner enablement
- expand into adjacent segments
- standardize repeatable delivery

Key Metrics

Track these monthly:

- number of target accounts contacted
- number of discovery calls completed
- number of readiness assessments sold
- assessment-to-pilot conversion rate
- pilot completion rate
- number of publishable case studies
- average time to first customer value
- partner pipeline count
- percentage of customers approving next-phase roadmap work

Final Recommendation

Proceed, but do so as a **validated market-entry program**, not as a broad market assumption. The thesis is strong enough to justify immediate structured action, but the emphasis should be on proving demand, packaging a low-risk first offer, and building repeatable evidence before scaling.