

From Access to Influence

Value Selling Activity for Upselling Acrobat Studio

IT Conversation Strategy Worksheet

This worksheet helps you plan a high-value IT conversation that positions an upsell to Acrobat Studio, balances retention, displaces any competition, and drives account growth.

Part 1: Turn IT Into an Advocate

Objective: IT becomes an advocate who facilitates access to Line of Business (LOB) stakeholders and helps drive the upsell opportunity.

Account Context

Customer Type: Small-Medium-Business (EDU team only: Mid-Size Public Institution)

Customer Status: Existing customer

Primary Challenge: Low growth and low AI adoption

Stakeholder (s) You're Engaging: VPs, Directors, and Managers of IT

TIP: Use the Acrobat Studio PDF Space as your AI-powered knowledge hub for use cases, product information and competitive insights.

1. IT Stakeholders & Priorities

What matters the most to IT and why? Consider security, governance, tool sprawl, risk, cost, scale, etc.

Accessibility, user/tech stack/version consolidation, data security, data management/visibility, managing Adobe tools/licenses, connect/collaborate/share, Adobe's approach to ethical AI (commercially safe, transparent, ethically safe, citations), research

How will you prepare for the conversation? Data, resources, and people you would access.

Look at the institution's strategic plan (top 5 initiatives of school linked to Adobe tools), past purchase history (perpetual, Pro), what's going on in the news with the institution, FTE count/current solution stack (competitive, MSFT, CRM, Google, etc. - Adobe may integrate), IPED data, strategize with your CAMs and sellers

2. Establishing Credibility

How will you establish credibility with IT early in the conversation? What signals trust, relevance, and confidence? Security, trusted Adobe brand, AI ethics (sandbox, safe, investment in security), integration workflows, connects teams, always innovating, your customer knowledge/prep/key issues the school is facing (empathy)

Opening Message / Proof Point:

What will you say first to earn trust? Customer knowledge/prep/key issues the school is facing (empathy), helping the institution be successful, "what challenges are you facing?", "new solutions", let the customers vent (AI push back), your users are using AI - faculty feel unprepared, businesses are hiring AI skills, students are using AI, employability, Adobe has made the entry point easier for AI-forward apps

3. Retention & Growth Mindset

What is the current value being delivered today?

Why they continue to renew. Adobe has made the entry point easier for AI-forward apps, let us show you the value, early conversation, use school enrollment data, scheduled check ins (partnering), do account planning with us every few years, value engineering

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4. Positioning Acrobat Studio with IT

How will you position an upsell to Acrobat Studio? Focus on the key business issues it solves.

Consolidation, accessibility, equity for student success, targeting admin/staff/faculty (knowledge workers), make easier for IT, look great...no design experience needed, "how are your users using Acrobat today?"

How will you differentiate Acrobat Studio from any competition?

Consider direct PFD competitors, Canva and even Acrobat Pro. Security, trusted brand, complete package

Positioning Message / Demo Strategy:

What will you say to IT to position Acrobat Studio and highlight its differentiation? What would you demo?

Generate presentation feature, admin console, SSO, unlimited expert sessions, identify pain point to dig deeper (form, use cases, - admissions form, research dept, procurement/RFPs, career services), domain enforcement

5. IT as an Advocate

How could IT help influence or open access to business stakeholders?

Who could IT introduce you to or support internally? Introduce me to your stakeholder to demo pain point - admissions, procurement

What would motivate IT to advocate internally?

What's in it for IT, priorities, pain points, or wins? Easier management, control, visibility

If IT is not motivated to advocate internally, how could you still gain access to business stakeholders?

Other ways to reach LOB influencers without IT support. Business imperative, partner with AMs, show benefits to influence IT, admin console contacts

6. Conversation Outcome

What does success look like at the end of this IT conversation?

What outcome or agreement are you aiming for? Scheduling next call/demo

What is the logical next step?

The follow-up action to move the account forward. "Who else do you want to attend this demo?", mutual close plan, timeline, budget

Evaluation Criteria

1. Establish Adobe credibility early
2. Balance retention with upsell/expansion
3. Position Acrobat Studio value clearly and differentiate from competitors
4. Leverage IT to access business influencers

Keep these in mind as you finalize your strategy and prepare for the walkthrough.