



GridCORTEX

SoftServe's AI-Powered Utility Intelligence Framework
· Powered by NVIDIA

Sales Motion & Lifecycle Flow · INTERNAL
ONLY

GridCORTEX

Sales Motion & Engagement Flow

How the sales team runs a deal with GridCORTEX — from first signal to expansion, and where every partner enters the flow.
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PURPOSE

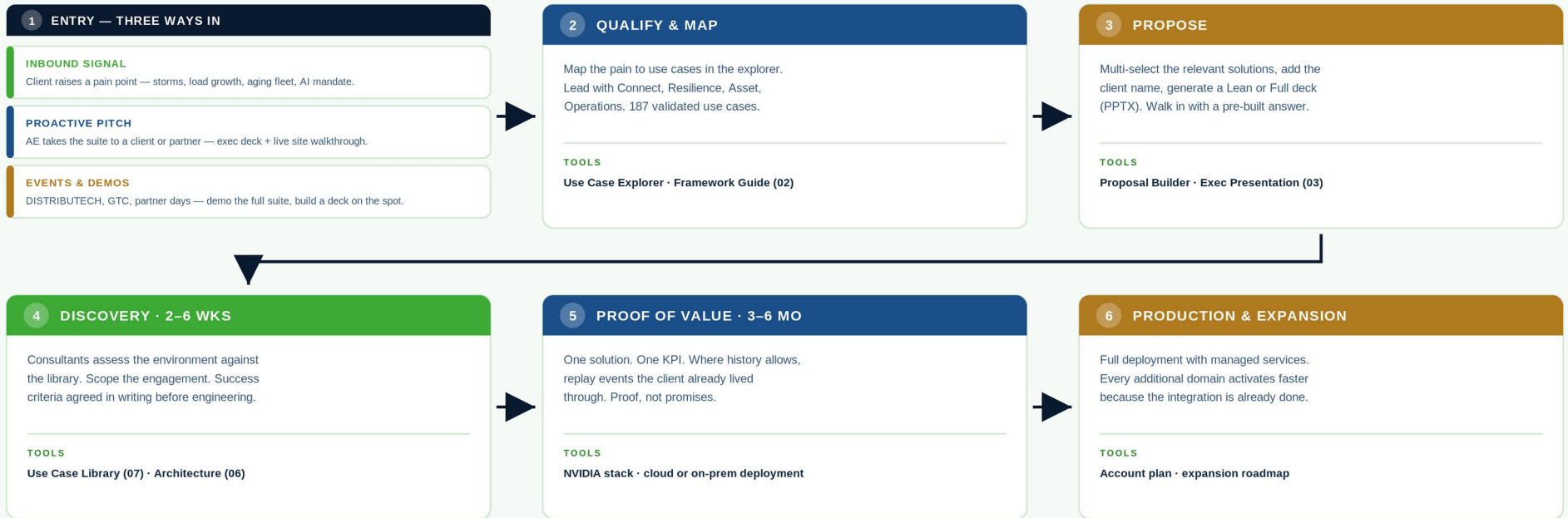
This document gives every account executive the same play. It walks the eight steps of the GridCORTEX lifecycle motion — from first signal through managed services and expansion — names the tool and the document to use at each step, and defines when NVIDIA, Siemens Energy/Noedra, and the cloud partners enter the conversation. Used together with the Document Packet Guide (00), it is the operating manual for the unified Power & Utilities message: one framework, one voice, every AE carries it. This document covers steps 1–8 of the lifecycle. For the managed services delivery model, pricing, pod structure, SLA tiers, and commercial packaging, see 09_GridCORTEX_GTM_and_Managed_Services_Model.

The motion in one sentence: listen for the pain, map it to the library, walk in with a pre-built answer, prove it against the client's own history, then expand domain by domain on the foundation already laid.

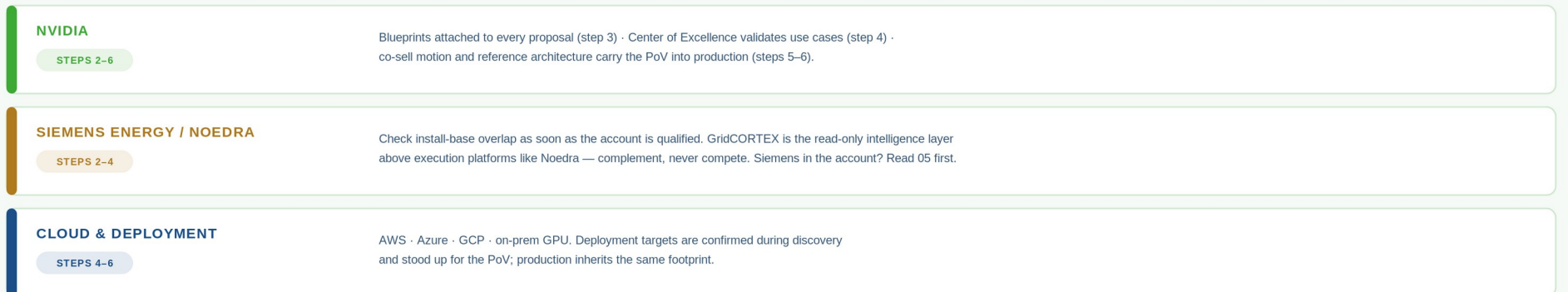
THE FLOW AT A GLANCE

The diagram on the next page is the whole motion on one sheet. Steps 1–6 are the deal motion. Steps 7–8 are the account lifecycle. Step 1 has three doors — inbound signal, proactive pitch, and event demos — all converging on the same play. Steps 1–3 happen before or during the first meetings and take minutes, not days; steps 4–6 are the engagement model. The partner lanes below the flow show when to bring each partner in.

How the sales team runs a deal — from first signal to expansion



WHERE PARTNERS ENTER THE FLOW



THE EIGHT STEPS

01 · ENTRY — THREE WAYS IN

The motion does not wait for the phone to ring. There are three doors into the same play: a client brings us a pain point, we take the suite to a client or partner proactively, or we demo the full suite at an industry event. Whichever door opens, everything converges on step 2: map it to the library.

INBOUND SIGNAL — THE CLIENT RAISES A PAIN POINT

- Listen for domain trigger language: outage response, wildfire/PSPS, DGA and fleet health, hosting capacity, large-load interconnection, NERC compliance, nuclear life extension.
- Position SoftServe as practitioners: 33 years of utility operations, every seat at the table. Lead with grid credentials, not AI credentials.
- Leave the One-Pager (01) — the whole story on one page.

PROACTIVE PITCH — WE TAKE THE SUITE TO THE CLIENT OR PARTNER

- Book the meeting on the unified message: ten domains, 187 validated use cases, read-only above OT — a working suite, not a slideware vision.
- Present the Executive Presentation (03), then switch to the live site and walk the Use Case Explorer in the client's own domain language.
- The same play works for partners: NVIDIA account teams, cloud partners, and ecosystem allies see a suite that drives demand for their stack — that is what turns a partner briefing into a co-sell.

EVENTS & DEMOS — DISTRIBUTECH, GTC, PARTNER DAYS

- Demo the entire suite live from the booth or a breakout: explorer → multi-select → generate a deck with the prospect's name on it while they watch. That sixty-second build is the wow moment.
- Demo kit: laptop or iPad with the site cached offline (the Proposal Builder works without conference Wi-Fi), printed One-Pagers, QR code to the site.
- Capture the domain that made them lean in — that is the entry pain point for step 2. Follow up within 48 hours with a deck generated for their utility.

Exit criteria: A named pain point or a sparked suite interest, and a follow-up meeting on the calendar.

02 · QUALIFY & MAP

Before the next conversation, translate the pain into specific solutions. The Use Case Explorer on the GridCORTEX site filters all 187 use cases by domain; every entry names the buyer, the budget line, the pilot design, the NVIDIA stack, and the executive pitch.

WHAT THE AE DOES

- Shortlist 3–7 use cases. Lead with the four Lead domains — Connect, Resilience, Asset, Operations — unless the pain clearly sits elsewhere.
- Identify the named buyer for each use case and confirm you are talking to them (or can get to them).
- Check the partner map: is Siemens Energy or Noedra in the account? If yes, read 05 before the next meeting and align with leadership on positioning.

Exit criteria: Use-case shortlist mapped to named buyers; partner posture confirmed.

03 · PROPOSE

The Proposal Builder turns the shortlist into a client-ready deck in minutes. Multi-select the use cases, enter the client name, and generate a Lean Deck for a working conversation or a Full Deck (PPTX) for a formal presentation.

WHAT THE AE DOES

- Use Client View when presenting; Internal View adds positioning notes for your prep.
- Rehearse the executive pitch line for each selected use case — they are written to be spoken.
- Anchor the meeting on the two-layer model: CORTEX thinks, GRID does. Read-only, human-in-the-loop, nothing below OT is touched.

Exit criteria: Tailored deck delivered; client agrees to a discovery conversation.

04 · DISCOVERY · 2–6 WEEKS

SoftServe consultants assess the client environment against the 187-solution library, map gaps, and design a scoped engagement. Success criteria are agreed in writing before any engineering begins — this is the discipline that separates GridCORTEX from AI experiments.

WHAT THE AE DOES

- Run the discovery workshop against the Use Case Library (07); validate architecture fit with the Solution Architecture doc (06).
- Submit selected use cases for NVIDIA Center of Excellence validation — this strengthens both the solution and the co-sell.
- Confirm deployment posture: AWS, Azure, GCP, or on-prem GPU.

Exit criteria: Signed scope for a Proof of Value with one KPI agreed in writing.

05 · PROOF OF VALUE · 3–6 MONTHS

One solution. One KPI. Where history allows, the proof replays events the client has already lived through — last year’s storm, a known transformer failure — so the value is undeniable and the comparison is against their own record, not a vendor benchmark.

WHAT THE AE DOES

- Integration is read-only; no control pathways. Repeat this at every technical session — it ends the security conversation.
- Run a weekly cadence with the named buyer. The KPI from step 4 is the only scorecard.
- Document everything: the replay results become the reference story for the next account.

Exit criteria: KPI met and documented; client sponsor willing to reference.

06 · PRODUCTION & EXPANSION

Full deployment with SoftServe engineering and managed services. The compound advantage kicks in here: every additional domain activates faster because the data fabric and integration work is already in place.

WHAT THE AE DOES

- Build the multi-domain account plan: which of the 9 solution domains follows, and which budget line funds it.
- Feed deployment learnings back into the library — every engagement sharpens the next pitch.
- Introduce the quarterly roadmap cadence with the client executive team.

Exit criteria: Multi-domain account plan in motion; reference story published internally.

07 · MANAGED RUN & CONTINUOUS IMPROVEMENT

The production engagement does not end when the solution goes live. It converts to a managed services contract — SLA-based, auto-renewing, and expanding as the utility adds workflows, agents, and domains. This is the step that defines SoftServe’s long-term position in the account. If SoftServe builds but does not manage, another vendor owns the run relationship and eventually captures the enhancement roadmap.

THE MANAGED SERVICES SALES HOOK

GridCORTEX should never be positioned as build-and-leave. Every Proof of Value should include a path to production and every production discussion should include managed run, continuous improvement, and domain expansion. The AE’s job is to make managed services feel like the natural continuation of the pilot — not a separate upsell.

WHEN MANAGED SERVICES ENTERS THE SALE

Stage	AE Action
Discovery	Ask who will own run, support, model governance, and enhancements after go-live. Plant the seed early.
Proof of Value	Introduce the managed services transition model. Show the Pilot-to-Run path. Make managed services feel like the natural next step, not a new conversation.
Production	Include managed services in the production proposal. Sign the contract before go-live or activate the Pilot-to-Run transition clause. Do not leave this gap open.
Post-production	Use quarterly roadmap sessions to drive expansion to the next GridCORTEX domain. Each new domain activates faster and at a lower cost than the last.

Four tiers, SLA structure, pod model, commercial packaging, and 3-year revenue math are in **09_GridCORTEX_GTM_and_Managed_Services_Model**.

WHAT THE AE DOES

Propose the managed services tier during production scoping — not after go-live. The Pilot-to-Run contract structure in 09_GridCORTEX_GTM_and_Managed_Services_Model has a transition clause built in. Use it.

The managed services contract auto-renews annually with a 90-day cancellation notice. It covers agent operations, model governance, data pipeline monitoring, and a quarterly enhancement backlog.

Introduce the quarterly roadmap session as part of the managed services contract. This is the mechanism for scope expansion and the most important recurring touchpoint with the utility executive team.

Exit criteria: Managed services contract signed before production go-live, or transition clause active in the pilot contract.

08 • EXPANSION — DOMAIN BY DOMAIN

Each new domain activates faster and cheaper than the last because the data connections, semantic grid model, and NVIDIA intelligence engines are already in place. The compound integration advantage is the account retention mechanism: every domain added makes the full stack more valuable and more expensive to displace. The account roadmap, driven by quarterly managed services sessions, is the mechanism for structured expansion.

WHAT THE AE DOES

Use the quarterly roadmap session to identify the next domain activation target. The expansion conversation is easier than the original pitch because the relationship is established and the integration foundation exists.

Lead with the four lead domains (Connect, Resilience, Asset, Operations). Then offer the expansion modules (Edge, Customer, Enterprise, Nuclear). Robotics enters through Asset or Resilience, not as a standalone. Nuclear enters through Connect (data center co-location PPA) or as a standalone for nuclear utilities.

Each additional domain follows the same motion: map it against the Use Case Library, propose it through the Proposal Builder, price it with the compound domain discount (\$200K–\$600K for each additional domain vs. \$500K–\$1.5M for the first), activate it under the existing managed services contract with an expanded scope annex.

EXPANSION TRIGGER QUESTIONS

Use these in every quarterly roadmap session to identify the next domain activation target:

- What workflow do operators ask to add next?
- What data source is missing or unreliable?
- What reports are still being done manually?
- What model needs tuning based on operational feedback?
- What adjacent GridCORTEX domain now has enough integration data to activate?
- What executive KPI should be added to the quarterly roadmap this cycle?

Exit criteria: The motion has no final exit. A Tier 3 account with a dedicated pod and an annual innovation roadmap is the destination. Rerun step 8 on every new domain.

WHERE PARTNERS ENTER THE FLOW

NVIDIA • steps 2–6

NVIDIA is not a logo on the last slide; it is engineered into the motion. Blueprints are attached to every proposal the builder generates (step 3). The Center of Excellence validates selected use cases during discovery (step 4). The co-sell motion and reference architecture carry the Proof of Value into production (steps 5–6). Every deal that closes makes the NVIDIA stack stickier in power and utilities — which is exactly why the partnership compounds.

SIEMENS ENERGY / NOEDRA • steps 2–4

Check install-base overlap the moment an account is qualified. The rule is complement, never compete: GridCORTEX is the read-only intelligence layer *above* execution platforms like Noedra — it analyzes, predicts, and recommends; execution stays with operators and the systems they already own. Where Siemens Energy is present, this is a co-sell opportunity against their install base, not a conflict. **REQUIRED: If Siemens Energy, OUC, or Duke Energy appears anywhere in the account, read 06_GridCORTEX_Noedra_vs_GridCORTEX before any meeting and confirm positioning with leadership. SoftServe is named as a collaborator in Siemens Energy's Grid AI Lab. Proceed with care until the internal relationship is confirmed at QBR.**

CLOUD & DEPLOYMENT PARTNERS • steps 4–6

AWS, Azure, GCP, or on-prem GPU — GridCORTEX is deployment-neutral. Targets are confirmed during discovery, stood up for the Proof of Value, and production inherits the same footprint. Where the client has an existing cloud commitment, use it: the enterprise agreement often becomes the budget vehicle.

RULES OF ENGAGEMENT

- **Never say platform.** GridCORTEX is a suite of solutions and blueprints — a framework. The word platform triggers product comparisons, licensing questions, and IT procurement. (Rule 4 in the Packet Guide.)
- **Lead with read-only.** Above OT, no control pathways, human-in-the-loop for every decision. Said early, it ends the security objection before it forms.
- **One KPI, in writing, before engineering.** If success is not defined, do not start building.
- **Proof over promises.** Replay events the client already lived through whenever history allows.
- **Respect document classification.** Documents marked INTERNAL never leave SoftServe + NVIDIA. The Packet Guide (00) governs who gets what.

DOCUMENT MAP · WHICH TOOL AT WHICH STEP

STEP	TOOL / DOCUMENT	WHY
1 · Entry (all three doors)	01 One-Pager · 03 Exec Presentation · live site demo	Leave-behind, proactive pitch deck, and event demo kit.
2 · Qualify & Map	Use Case Explorer · 02 Framework Guide	Filter 187 use cases; ground the conversation in the framework.
2 · If Siemens present	05 Noedra vs GridCORTEX	Positioning and the architectural argument. Read before meeting.
3 · Propose	Proposal Builder · 03 Executive Presentation	Generate the tailored deck; the exec deck carries the full narrative.
4 · Discovery	07 Use Case Library · 06 Solution Architecture	Working reference for the workshop; architecture validation.
5 · Proof of Value	06 Solution Architecture · NVIDIA reference architecture	Deployment design and stack mapping.
6 · Production & Expansion	08 This document · account plan	Full production engineering. Integration depth. Transition to managed services.
7 · Managed Run	09_GridCORTEX_GTM_and_Managed_Services_Model · Managed services contract template	Tier selection, contract structure, SLA tiers, pod composition, and Pilot-to-Run transition clause.
8 · Expansion	08 This document · 09_GTM_Managed_Services · account roadmap	Rerun steps 1–5 on the next domain. Compound discount applies. Expansion governed by managed services roadmap session.

Objection Upgrade: Security / NERC-CIP (NemoClaw Runtime)

The security response is now stronger than architecture diagrams. Script: concede the concern, then: “Every GridCORTEX agent runs in NVIDIA’s OpenShell secure runtime — sandboxed, under signed policies that govern what it may see, what it may do, and where its inference runs. Human-in-the-loop isn’t a promise; it’s a signed policy the runtime enforces. And NeMo Relay records every decision the agent makes as a replayable audit trace — evidence your compliance team gets for free.” Then invite their CISO to the workshop. For no-cloud clients add: Nemotron open models run entirely on-premises.