



QCards

MY NAME: _____

Ed Tech Personas



SUPERINTENDENT

Alex is constantly fighting against time - he doesn't have enough time to keep up with the school board's requests, resolve issues for his administrators, and execute on his vision for the school. His day is filled with pressures about district financials and academic performance. He responds well to research-backed solutions. He's less interested in the details and wants to see evidence that something works.



CHIEF ACADEMIC OFFICER

Diana has a broad range of teaching and curriculum design experience. She stays on top of the latest developments and techniques in education. She is willing to check out innovative solutions, but also risk averse and looks for firm proof of impact. She often knows a bit about budget, but is spread too thin to be an expert and to know all of the funding sources.



CTO

Neill is always involved in technology decisions. He's constantly thinking about data security, data integrity, how new solutions will be compatible with their on-premise systems. He feels like he's always playing catch up and doesn't have enough resources to fix a problem when something breaks, so integrating systems the right way, even if it takes longer, really matters to him.



DIRECTOR OF LEARNING TECH

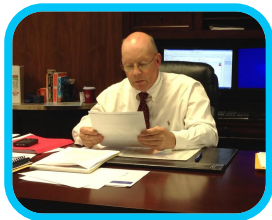
Paula is always trying to keep on top of latest developments in EdTech. While she is swayed by proof of impact, she is also willing to take risks and pilot new tech if she thinks they are promising. Paula has teaching experience, and she understands how difficult their jobs are, and how powerful great tools can be. She is in close touch with teachers to know their issues and help them be effective.



TEACHER

Marni's first concern is the well-being of the kids in her classroom. She wants to be able to put time toward finding new solutions, but barely has enough time to even plan her curriculum or grade homework. She wants to create compelling, interactive, lasting learning experiences - but there are a lot of stakeholders she needs to manage (administration, parents).

Superintendent



Alex Fields

Drivers:

1. IMPACT

2. ACTIONABLE

3. COST

WHAT THEY DO

Alex is constantly fighting against time - he doesn't have enough time to keep up with the school board's requests, resolve issues for his administrators, and execute on his vision for the school. His day is filled with pressures about district financials and academic performance. He responds well to research-backed solutions. He's less interested in the details and wants to see evidence that something works.

VALUE PROP

- Quick results
- Rock solid evidence that a solution works, that he can easily defend to the board
- Helps tell the story of supporting a broader academic vision
- Directly impacts measurable student outcomes
- Low cost
- Easy to implement

EMOTIONAL PAIN

- A lot of pressure to deliver results without help - sometimes feels isolated
- Must stay vigilant about optics (board, union, parents, etc.); feels exhausted
- Frustrated by org that moves too slowly with widely varying skill levels
- Determined to improve student outcomes

RATIONAL PAIN

- Data doesn't tell a clear and actionable story
- Limited by constant budget constraints
- Data takes too long to receive after a program is completed
- Wants more info about what is working

DAILY ACTIVITIES

- Monitor & understand progress against goals
- Communicate progress to the board
- Manage district staff
- Union negotiations, board management
- May be more actively involved in decision-making for a turnaround district



I need to see rock solid proof - we have high curriculum and testing standards to meet, and the board asks tough questions when it comes to bringing in new solutions.

Chief Academic Officer (CAO)



Diana Wentzell

Drivers:

1. IMPACT

2. INNOVATION

3. SUPPORT

Other titles:

Assistant
Superintendent for
Curriculum
Instruction,
Director of
Academics/
Curriculum

WHAT THEY DO

Diana has a broad range of teaching and curriculum design experience. She stays on top of the latest developments and techniques in education. She is willing to check out innovative solutions, but also risk averse and looks for firm proof of impact. She often knows a bit about budget, but is spread too thin to be an expert and to know all of the funding sources.

VALUE PROP

- Solid proof of improving student outcomes
- Innovative, fresh ideas
- Helps support the broader academic vision
- Helps unify all of the educators in the school
- Is something the teachers and educators can get excited about and feel is worthwhile

EMOTIONAL PAIN

- Trying to parse the latest fads from meaningful innovation
- Feels frustrated by new expenses that do not directly improve student outcomes
- Frustrated by staff's widely varying skill levels and district constraints
- Determined to improve student outcomes

RATIONAL PAIN

- Hard to track and get academic data back in time to take action quickly
- Too many variables at play at once, hard to determine cause and effect
- Hard to ensure fidelity of implementation

DAILY ACTIVITIES

- Determine effective curriculums for state assessments, Common Core adoption
- Assist in determining resource allocation for educational services and programs to fit in budgets
- Report on which academic programs are working & implement improvements
- Stay informed about innovations, test new ideas
- Serve as primary conduit to principal and teachers



I want innovative solutions that quickly have an impact and that teachers will support, so that our students have more opportunities to achieve.



Neill Kimrey

Drivers:

1. COMPATIBILITY

2. SECURITY

3. SUPPORT

Other titles:

CIO,
Director of
Technology

WHAT THEY DO

Neill is always involved in technology decisions. He's constantly thinking about data security, data integrity, how new solutions will be compatible with their on-premise systems. He feels like he's always playing catch up and doesn't have enough resources to fix a problem when something breaks, so integrating systems the right way, even if it takes longer, really matters to him.

VALUE PROP

- Data security
- Data integrity
- Seamless integration
- Robust technical support
- Vendors who understand the IT issues
- Helps support the broader academic vision

EMOTIONAL PAIN

- Overwhelmed by trying to support all of the district's goals while being resource constrained
- Feels immense pressure to keep district data safe
- Can feel both marginalized and glorified by the fact that he is the only one that truly understands the value he adds
- Feels invested in solutions he created

RATIONAL PAIN

- Has too many EdTech companies interested in selling their service to his team
- Difficulty maintaining the infrastructure that he has built due to constant changes from external vendors
- Hard to create solutions that are easy enough for all stakeholders to understand

DAILY ACTIVITIES

- Day-to-day management of IT & SIS, including network and infrastructure, telecommunications, knowledge management system, ensuring uptime
- Manage data privacy, data quality
- Vet vendors and ensure IT safety for the district
- Design and implement investments, strategies, and apps for instructional tech



I'm all for innovative new solutions - as long as they play well with our existing IT architecture and don't put more strain on our systems.

Director of Learning Tech



Paula Kent

Drivers:

1. IMPACT

2. INNOVATION

3. SUPPORT

Other titles:

Assistant
Superintendent,
Director of
Assessment,
Director of Curriculum
Instruction

WHAT THEY DO

Paula is always trying to keep on top of latest developments in EdTech. While she is swayed by proof of impact, she is also willing to take risks and pilot new technologies if she thinks they are promising. Paula has teaching experience, and she understands how difficult their jobs are, and how powerful great tools can be. She stays in close touch with the teachers to understand their issues and help them be effective.

VALUE PROP

- Solid proof of improving student outcomes
- Innovative, fresh ideas
- Helps support the broader academic vision
- Directly impactful for teachers in their everyday routines
- Is something the teachers and educators can get excited about and feel is worthwhile

EMOTIONAL PAIN

- Overwhelmed with volume of ed tech software (and vendors trying to sell)
- Frustration with slow adoption and varying readiness of staff to adopt new technologies
- Defeated by previous failed initiatives and lack of ability to “prove” success

RATIONAL PAIN

- Often difficult to prioritize given so many areas of need
- Hard to support too many products at one time

DAILY ACTIVITIES

- Oversee every aspect of curriculum development for the school/district
- Outline what knowledge and skills are needed for each grade level
- Ensure that the district’s curriculum meets all state and federal ed reqs
- Support pilot and rollout of new technologies
- Report on success and adoption of technologies



I’m always on the lookout for tools that will support our curriculum goals; they need to be flexible, easy to use and prove their worth.

Teacher



Marni Williams

Drivers:

1. IMPACT
2. EASE OF USE
3. SUPPORT

WHAT THEY DO

Marni's first concern is the well-being of the kids in her classroom. She wants to be able to put time toward finding new solutions, but barely has enough time to even plan her curriculum or grade homework. New tools sound great, but in practice she finds that they aren't worth the effort and are just a distraction. She wants to create compelling, interactive, lasting learning experiences - but there are a lot of stakeholders she needs to manage (administration, parents).

VALUE PROP

- Easy to use in the classroom
- Does not disrupt her existing curriculum or rhythm
- Easy to see that it works
- Helps her routine, doesn't hinder it

EMOTIONAL PAIN

- Difficult enough to stay on top of curriculum and classroom assignments
- Frustrated that there never seems to be enough budget for the technologies that actually work
- Wishing that there was more access to real solutions, rather than having to create hacks or workarounds

RATIONAL PAIN

- Difficult to prove success of new methods or tools
- Not enough time to teach or to plan, as well as implement and measure new tools
- High turnover at all levels makes it difficult to sustain constant, positive change

DAILY ACTIVITIES

- Develop classroom curriculum
- Provide an interactive, effective, safe environment for her students
- Monitor/report on test scores
- Communicate with parents
- Report back to administrators on what is effective in the classroom
- Serve on various teacher committees

“ Every day is a whirlwind. I'm managing the kids during the day, the parents' concerns after school, and administration needs to see results. So I need solutions that help make all of this easier.



Researching the Prospect

RESEARCH CHECKLIST

| MARKET-SPECIFIC | TARGET-SPECIFIC |
|--|---|
| <ul style="list-style-type: none"><input type="checkbox"/> Partner<input type="checkbox"/> School<input type="checkbox"/> District<input type="checkbox"/> EdWeek - website<input type="checkbox"/> EdSurge - website<input type="checkbox"/> Thought leaders such as Tom Vander Ark<input type="checkbox"/> Industry / association events<input type="checkbox"/><input type="checkbox"/> | <ul style="list-style-type: none"><input type="checkbox"/> greatschools.org<input type="checkbox"/> NCES National Center for Education Statistics at https://nces.ed.gov/globallocator/<input type="checkbox"/> District website<input type="checkbox"/> District needs assessment (if they receive at least \$30K in federal funding)<input type="checkbox"/> State / county department of education website<input type="checkbox"/> State teachers' union website |
| PROBLEM-SPECIFIC | PERSON-SPECIFIC |
| <ul style="list-style-type: none"><input type="checkbox"/> State department of education website<input type="checkbox"/> Subscribe to their newsletter (if applicable)<input type="checkbox"/> Submit a request for info (if applicable)<input type="checkbox"/><input type="checkbox"/><input type="checkbox"/> | <ul style="list-style-type: none"><input type="checkbox"/> Twitter, Facebook, other social media<input type="checkbox"/> LinkedIn profiles<input type="checkbox"/> Teacher / administrator profiles on district websites<input type="checkbox"/><input type="checkbox"/> |



Checklist for Discovery Calls

BEFORE THE CALL

- ☐ Check your technology: Dial in, set up your screen share, etc.
- ☐ Set Up your tabs: Close apps, switch-off real-time status updates
- ☐ Send out courtesy email: *"Whenever you're ready ... here is the dial in"*

OPEN THE MEETING

- ☐ Let people introduce themselves: Write down their names
- ☐ Introduce yourself: Helps you establish to control the meeting
- ☐ Establish social link: Mention mutual connections, interests (LinkedIn)
- ☐ Ask for approval to record: *We hired a number of new people, do you mind if...Since Jack can't join the meeting, do you mind if...*
- ☐ Inquire about their goals: *What would you like to achieve in this call?*
- ☐ Perform an AxNOT
 - ☐ APPRECIATE: Appreciate you making time for the call today
 - ☐ x - Check end-time: We are scheduled til the bottom of the hour
 - ☐ NATURALLY: Naturally you will have some questions for me
 - ☐ OBVIOUSLY: Obviously I have some questions for you
 - ☐ TYPICALLY: Typically this call concludes with...
- ☐ Take notes (and let them know): *Can you spell that for me*
- ☐ Present agenda - then ask: *Is there anything you like to add to the agenda?*

DIAGNOSE THEIR SITUATION: LISTEN AND LEARN

- ☐ Ask SPV questions: Few S, few P, build to V
- ☐ Check-off your "customer centric sales criteria"
- ☐ Decision Criteria: *Why is that important to you? what happens if you miss?*
- ☐ Critical Timeline: *What is driving the urgency?*
- ☐ Decision Process: *What are the steps to get you there?*
- ☐ Summarize: *To confirm...did I get that right? ... anything else?*

GIVING INFO / PRESENTING YOUR SOLUTION

- ☐ Demo/Present: Only demo what matches the customer's pain
- ☐ Link back to their need: *To your point...we address that with...*
- ☐ Use cases: Let your clients sell; use 3rd party references

CLOSE

- ☐ Summarize: 3-point summary; shorter = better
- ☐ Next steps: No more than 3 actions
- ☐ Verify goals met: *At the start of the call... did we meet your goals?*
- ☐ Questions: Ask if there are questions that arose from the demo
- ☐ Proper: No Columbo close... there is no turning back
- ☐ End everything: Close the bridge/switch-off the screen
- ☐ Follow up immediately: Actions: <60mins. Thank You note: < 8 hours



Discovery Call: Timeline - Visualized

REMEMBER TO USE...

- Ask Questions
- Listen!
- Repeat what you've heard
- Mirror using tone words
- Use 3rd party references
- DO NOT SELL
- Get personal - what do they care about?
- Prioritize **their** Decision Criteria
- Agreement on the next step
- ABC of modern sales:

Always Be Curious



1. OPENING: AxNOT

Appreciate you taking the time
x-time, are we still good till 2pm?
Naturally, you have questions for me
Obviously, I have questions for you
Typically, we agree to...

2. DIAGNOSE

Discovery questions (use SPV)
Identify Pain Points
Identify Needs and Benefits

3. SUMMARIZE

Summarize answers/discovery.
Ask *"Did I get that right?"*

4. CREATE A PICTURE

Share a story that depicts a better tomorrow.
Do not mention your service or your company.

5. OFFER YOUR HELP

Share a story how this will help your customer, empathize, use a third person (by name), share the benefits this person received
Do not overtly mention your company name or service

6. SHOW AND SHARE

Now show and share the customer your service (not a demo!)... and do this in context of their PAIN POINTS

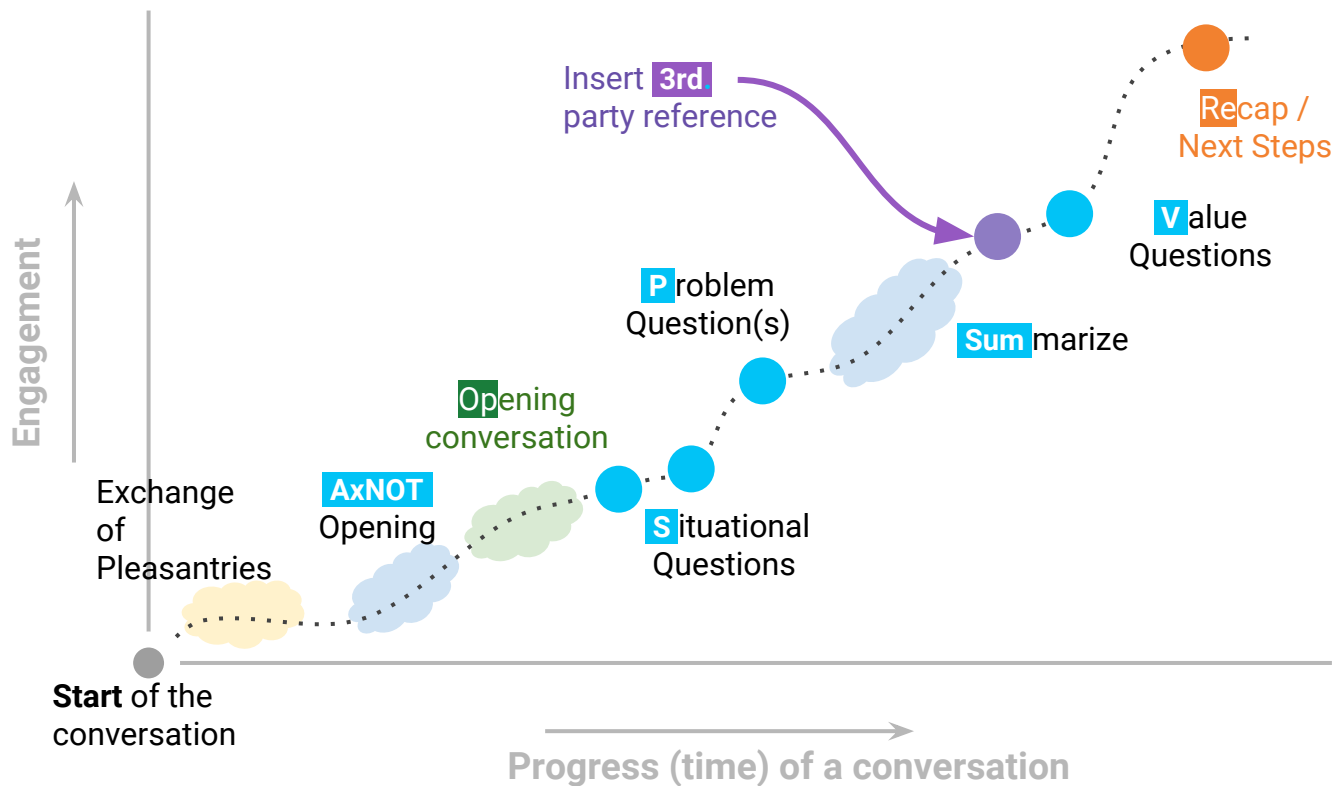
7. SUMMARIZE

Summarize if the pain points brought up were covered, and if there is anything else to address

8. YOUR TURN

You have earned it:
"May I ask you some questions?"
- Budget cycle/priority
- Timeline/ critical event
- Authority/ decision process

SPV Discovery: Engagement vs. Progress





Prescription before diagnosis is malpractice

SITUATION

WHAT: Closed-ended questions used to qualify and confirm if your research is accurate.

WHEN: Typically at the beginning of calls to help set the stage.

EXAMPLES:

1. How many students do you currently have in the program?
2. How many teachers do you have in the district?
3. Is your student information system on-premise?
4.
.....

PROBLEM

WHAT: Open ended questions used to identify pain points or challenges.

WHEN: Reference what you learned in "S", then expand. These are questions that allow the customer to explain their current process and what they are looking to solve

EXAMPLES:

1. How are your current programs trending to meet those goals?
2. Do you have clear visibility into what's working?
3. What have you tried to solve this problem?
4.
.....

VALUE

WHAT: Open ended questions used to expand their pain to other parts of their business they may have not considered.

WHEN: After summarizing you understood their situation and prioritized problems, ask a question pertaining to what you have learned.

EXAMPLES:

1. How would it affect your team if you weren't able to find a solution to meet your goals?
2. Sounds like {clarify pain} – how is that affecting XYZ?
3. What is the result when....
4. Does that ever lead to....
5. How often does that cause...



Objection Handling - Price

"Your price is too high"

1. **Clarify:** *"Compared to what?" or "Can you explain that?"*
2. **Confirm:** *"Is rollout timeline the only remaining issue? If we are able to adjust the timeline, are you ready to commit today?"*
3. **Compare:** *"Please share with me what deadlines you need to hit, and I'll do my best to narrow the gap."*

"So let me review: You indicated that you want to finalize your decision tomorrow, you are 100% convinced that we are the right solution for you and the only thing standing between us doing business is rollout timeline, correct?"

| OBJECTION | WHAT THEY SAY | STRATEGY |
|---|---|---|
| Not understanding the value | <i>"We don't need that"</i> | Establish value by asking questions on the impact on their business - keep asking. |
| Raising a concern | <i>"Your product is too complicated"</i> | Show it is not the case - literally SHOW them, and let them DO IT |
| Wrong perception | <i>"That does not pass our security profile"</i> | Provide them with proof how others overcame that issue |
| Lack of priority | <i>"That feature you offer is not a priority"</i> | Establish the impact of that feature, and present it back to them with examples of impact for your clients |
| Unclear about the decision process | <i>"That would eat up half our budget for the school year"</i> | You need to sell at a higher level - use organizational selling to get executives involved |
| Secret agenda | <i>"Our Superintendent worked with your competitor at a previous company, and it appears that he wants to use them again"</i> | Research beforehand - flush this out in the disco call and ask <i>"What did you not like working with..."</i> Learn if this is a (+) or (-) impact If (-) then you need to apply organizational selling |



RRRR How to write an Email that gets read

Research Reference Reward Request

Subject: RESEARCH // REFERENCE // REQUEST

R ESEARCH: An opening that shows you have done your homework, and that this is not a COLD call

R EREFERENCE: Refer to other customers who have had a similar experience and what they did

R EWARD: Offer value, such as a link to valuable insights, a relevant blog post, etc.

R EQUEST: Offer to share more insights, and ask for a meeting

Subject: *District turnaround* / *student outcomes* / *Talk Friday?*

Hi {{first name}},

Congrats on your recent move into the Pleasanton School District.

The big problem that Superintendents such as yourself encounter is quickly improving student outcomes.

HBR recently published an article on this topic, and I thought you would especially like {{mention a specific relevant section}}.

{{First name}}, are you available Friday morning to discuss how this can apply to you?

Best,
{{your name}}



Calendar, Voicemail, and LinkedIn Format



CALENDAR INVITE TEMPLATE

SendGrid Intro Call - Exec Briefing incl. in body of invite

Goal: To do a show and tell on the service and how it meets your requirements, to give your team the real UI experience, and to show integration w/ your CRM.

Join: One click dial: 408-123-4567,,765432 - Screenshare...

When: Tuesday 2pm EST (local time)

Invited: X, Y, Z

Agenda:

- Requirements review
- Show and tell (vs. requirements)
- Address any open issues

Insights: [Link to an article with insights](#)

In case of questions call me at _____

VOICEMAIL FORMAT

Key: Voicemails should be considered like a hyper-personalized email - except you can now match them to your online brand with your voice:

Remember: Voicemails **MUST** be delivered with high energy and passion in your voice!

Voicemail Example:

Hi Esther - This is Taylor from {{company}}. First of all, thank you for connecting with me on LinkedIn <pause> I noticed that you have grown to a team of 8, and that you launched a new service on April 1. You must be in super growth mode right now. I want to offer you some insights gained from others similar to you. Esther, I will send you an email to follow up, but feel free to call me at 123-456-7890 if that is better. Again this is Taylor from {{company}}.

LINKEDIN FORMAT

Personalize all of your connection requests, and approach them like an RRRR email (but limited to 300 characters).

Careful: You can not personalize connections 1) through the LinkedIn mobile app, or 2) on the search results page → Click into their profile to send a connection request.

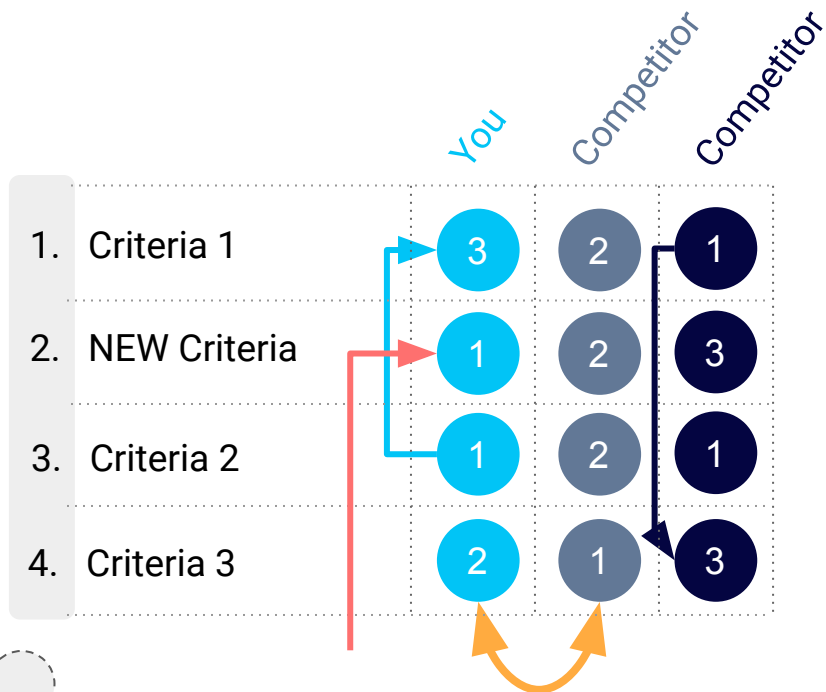
Example:

Hi {{first name}},
Thank you for stopping by on my LinkedIn profile. I noticed {{personalized}}. Based on your background, I shared some insights earlier this week via email - were any of the articles helpful for something you're currently working on?



● Process of Winning Deals

DECISION CRITERIA



SIX KEY STEPS TO WIN A DEAL

1. Determine decision criteria
2. Prioritize decision criteria
3. Move yourself up
4. Move your competitor down
5. Insert new decision criteria
6. Improve your ranking

Real-time Coaching

ASK FOR A
REFERRAL

CLARIFY

MORE
ENERGY

DOING
GREAT

ASK A QUESTION

SLOW
DOWN

MAKE HOW YOU SELL AS IMPORTANT
AS WHAT YOU SELL AND

YOU

WILL BECOME THE UNIQUE SELLING POINT

SHUT
UP