We Design, Build, and Scale Sales Organizations

Winning by Design

THE SALES PLAYBOOK

A CUSTOMER CENTRIC METHODOLOGY PREPARED FOR REACH CAPITAL

Revision 4.2 October 2016

Prepared with passion for the portfolio companies of

Reach
Newschools Capital

The contents of this book were created in the United States of America

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INTRODUCTION

Welcome to the Winning By Design Playbook, custom-made for the portfolio companies of Reach Newschools Capital.

As leaders in this constantly changing space, we have seen firsthand the effects of building great teams correctly - which leads to explosive growth - and incorrectly which often leads to an existential crisis.

The notions contained in this playbook are the aggregated learnings from years spent designing, building and scaling teams for rapid growth startups. We have gained insights working with thousands of people inside hundreds of companies and found that the companies that do it right are doing several key things consistently.

This playbook offers you the blueprint, drawn from industry best practices, drawing on experiences from thousands of individuals that learned from doing it. The key thing we need to remember is that we are no longer *selling to a customer*, but instead we are *assisting customers to buy*, AND that today, our customers are buying a lot faster than they used to.

Here's a quick overview of what you will find in these pages:

I. METHODOLOGY	This covers the philosophy of a customer-centric organization, how a customer progresses through a journey, and how to build a customer-centric sales organization. CEOs, executive staff and sales leaders - take note!
II. CUSTOMER	Consider this your go-to industry primer. Learn the structure and nuances of the edtech industry, understand the concerns of the key decision makers at schools and districts, and learn how to define a relevant value proposition.
III. PREP & ORGANIZATION	For the high-performing sales professional, preparation is paramount: learn how to properly set up your online identity, and organize your time and your workspace so that you can be as efficient as possible.
IV. CUSTOMER INTERACTION	Learn frameworks and best practices for interacting via email, voicemail, phone, social, messaging and meetings.
V. PROSPECTING	SDRs and AEs should be able to perform certain processes in their sleep. Learn the processes, strategies and tactics for inbound leads and outbound outreach. Dig even deeper and understand how you adjust those motions for target account selling and trigger-based selling.
VI. WINNING	This is the bread and butter for every AE: Once you are given a qualified lead, learn how to diagnose the situation, qualify and prescribe a solution, and then navigate the deal to close - all while providing enormous value to your customers along the way.
VII. SALES LEADERSHIP	This section provides guidance to company and sales leadership on how to build your own customer-centric sales team, including how to manage your sales funnel metrics, pricing strategies and compensation for your team.

Win By Design Not by chance

CHAPTER I. METHODOLOGY

I. METHODOLOGY

1.1 Customer Centric Organization

The goal of a customer centric approach is to give customers an appropriate experience that results in the customer staying longer, buying more, and spreading the word. It's very simple to claim to be customer-centric; it's something else to truly **BE** customer centric.

The best and most successful companies understand the difference and they work to actually be customer-centric by focusing on what their customers want.

Being truly Customer Centric means having Customer Success at the forefront of everything you do: from acquiring Good-Fit Customers in the first place, to Orchestrating and Operationalizing engagement with your customer across the entire lifecycle.

This playbook describes a sales and engagement methodology based on a customer centric approach - an approach that is ideal for an industry such as EdTech that often may have an adverse reaction to typical sales motions. For reference, the EdTech customers referred to throughout this playbook are the administrative decision makers and educators at schools and districts.

So what does a modern EdTech customer want?

1. **Help administrations of schools and districts solve their problems** - Find and identify customers in EdTech that have the symptoms of the problem that your service can help solve.

2. **Ask meaningful questions** - Customers are willing to help you if you are asking the right kinds of questions with the intent to understand their problem. They are not interested in giving you information so you can optimize your pitch.

3. **Educate them on the situation**...as well as the possible solutions and their trade-offs, based on valuable insights and tangible data. They do not want to be sold based on your abilities to convince them to buy something they do not need.

4. **Share stories from other EdTech customers -** Teachers and administrators want to hear how others solved the same problem, and what the outcomes were. They do not want to see your PowerPoint presentation.

5. **Meet online** - They prefer to meet you online versus you showing up on site. I know this sounds counterintuitive. But a district Chief Academic Officer (CAO) does not want to spend an hour meeting with you. Yes, there are key meetings you need to attend to in person early on. But after that it is better to meet online vs. waiting till your next visit.

Customer Centric Time

6. **For you to help them right now** - They are not interested in waiting for an Account Executive ("AE") to meet.

7. **For you to value their time with shorter meetings** - No need for an hour-long meeting with 10 actions. They prefer a short meeting with 1 action item, and follow up with another short meeting.

8. **For you to communicate with shorter messages** - They do not wish to receive long-winded emails with multiple links to click and documents review. Shorter messaging in real-time is winning over emails with paragraphs

1.2 A Journey Of Experiences

A customer centric sales process starts with the customer who has a problem that you are helping to solve - not with a deal you are looking to close.

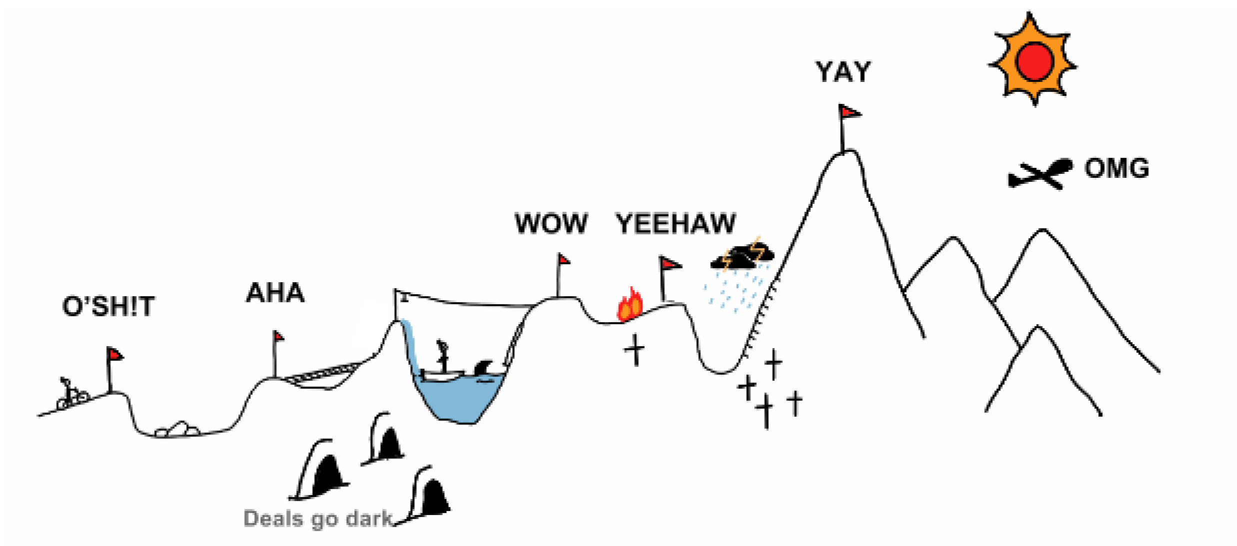


Figure 1.1: The Journey of Six Distinct Experiences

The journey for an EdTech customer is riddled with challenges that you have to help navigate both your customer AND your company through. It follows six experiences a customer wants to have, as outlined in the picture above and described next.

The Six Experiences A Customer Wants to Have

EXPERIENCE	DESCRIPTION	OUR RESPONSIBILITY
O'SH!T I have a problem	The customer realizes they have a problem (we can provoke this realization)	We have to make the customer **aware** of the real problem
AHA there is a solution	The customer identifies a potential solution to the problem	We have to **educate** the customer on the impact/implications
WOW This team really knows their stuff	During the education process, the customer gains great insights that spurs the first purchase	We have to help the customer understand the **tradeoffs** of not doing anything
YEEHAW it works	The service works as advertised, delivered on time, within budget, solving the problem discussed. Anything less leads to "buyer's remorse".	We have to make sure the customer **onboards** and achieves first value, quickly. We must rapidly move them past the **WTF!?! moment** and **Design the next 6-12 months, managing expectations along the way.**
YAY problem solved	Customer uses the service constantly and can't imagine living without it.	We have to help the customer **use it the right way and expand usage**
OMG I need to share this experience	The customer comes back for more and shares their experience with the world.	We have to help the customer **share their experience**

1.3 Key Experiences Explained

Below the six experiences are transposed over a traditional land-and-expand funnel as used in most cloud businesses today.

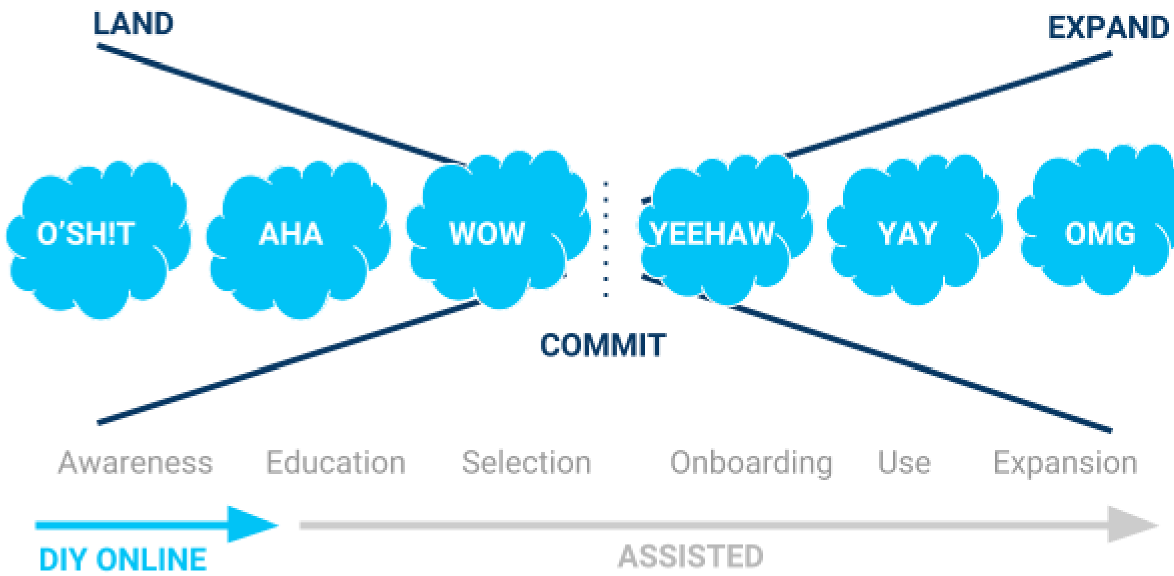


Figure 1.2: Six Key Experiences and the role of online

KEY #1 THE IMPORTANCE OF THE ONLINE EXPERIENCE (O'SH!T)
The picture below shows how the experience can be implemented in a header on a webpage. A customer navigates with a series of clicks through the entire experience.

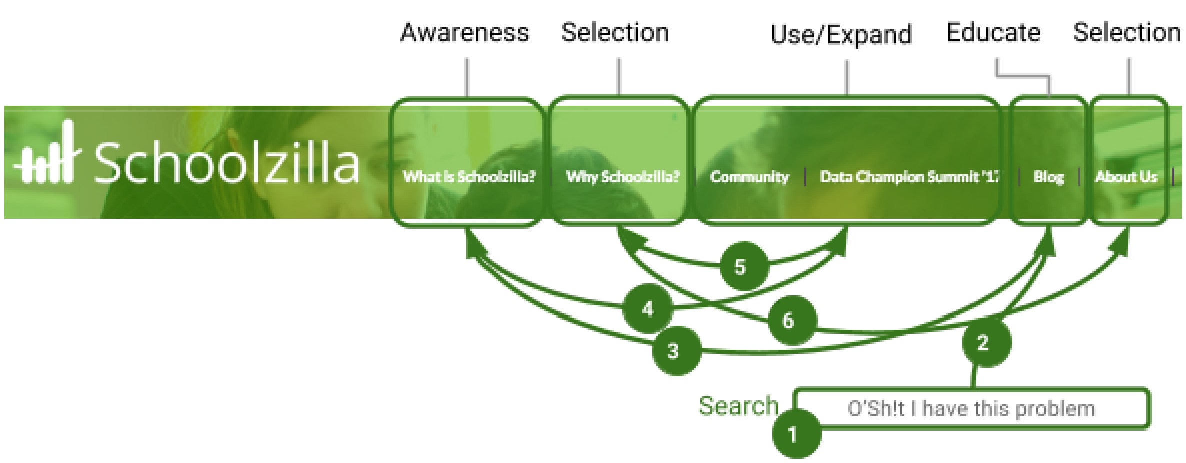


Figure 1.3: Journey of a Customer on your Website

A normal online customer journey goes through the "O-SH!T" experience as follows. The customer...

1. Googles a problem like "*schools all data in one place*". Search results show a blog post from a company "Schoolzilla". This is where they get their first small AHA experience.

2. Finds a link in the google search results to www.schoolzilla.com/blog/ post, which outlines this problem and takes you through the "AHA" experience.

3. Finds more insights on the website and understands what Schoolzilla does.

4. Checks out what others have to say, to get an idea of what's involved.

5. Likes the experience and goes back asking themselves "Why do I need this company?"

6. Checks out the people and culture of the company that built this solution.

KEY #2 THE VALUE CREATION POINT (O-SH!T - AHA)
Customers become more aware when they realize there is a problem – or – the potential for an economic benefit in a critical part of their school/organization. They search, discover, and make a decision if the issue is pressing enough to warrant action. This is the AHA moment, and this AHA moment is best achieved through education (not marketing nor selling). The education process allows an EdTech customer to put the pieces of the puzzle together. Solution providers want to be a part of this education process, so marketing teams raise awareness by creating infographics, conducting webinars, publishing blog posts, tweeting insights - all to promote content that contains the company's insights.

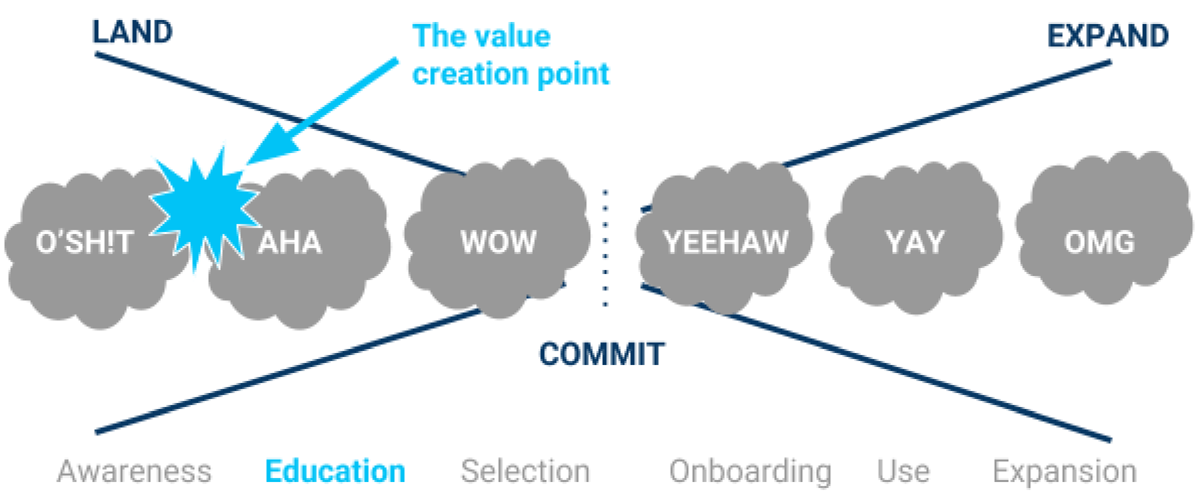


Figure 1.4: The Most Important Moment In The Customer Journey

By providing EdTech customers who are at this stage with valuable insights, you can earn enormous trust - and with that, access to a deeper understanding on the underlying impacts.

Value creation is the process of understanding your EdTech customer's needs so well that you are able to match the strengths of your solution with the customer's "key decision criteria". If this happens, then the right trade-off for the customer results in a decision for your solution. This can be a painstaking effort and has 2 key elements:

1. Your company's solution offers a wide range of benefits - some of them are understood, some of them are misunderstood, and others are completely forgotten.

2. On the other hand, an EdTech customer's problem is not always what it appears, or what the customer tells you it is. Finding out what the *real* problem is requires their situational knowledge paired with your insights. This is where "with great power comes great responsibility". Your

powers should be focused on finding the customer's real problem - their Desired Outcome - not forcing your solution onto them.

In a perfect world, your unique selling points match the buyer's key decision criteria, in the right order of priority. Managing the value creation points traditionally was done by a consultative sales professional who, through a series of in-person meetings, went along with the customer in discovery. Today, this instead takes place online

KEY #3 CUSTOMERS ACHE TO BE INFORMED - NOT TO BE SOLD (AHA)
The most common mistake in sales today is that Marketing and Sales both believe they are responsible for educating the customer. The truth is that, in most cases, it's neither. It's not a function that aligns with one department or another - it's a mindset that should be inherent in all customer interactions. It must be noted that this often leads to one of two major mistakes:

- **Never Sell to a person in the Education stage:** This leaves a very bad taste for the customer, and this is especially true in EdTech: they feel they are being led along, as if they are cattle. When you educate, your primary objective should be to help your customer - diagnose and prescribe (you'll hear more about this later).
- **Never Educate a person in the Selection stage:** Similarly, never educate a customer who is about to make a decision. A common mistake of a newbie salesperson is to be so excited with the impending close they start educating a customer about all the upcoming features and benefits that are on the roadmap. And then the customer delays the purchase until the release date.

This is such a critical lesson that companies have started to separate the experience when customers come to them online. See the example below in which Nearpod established in your first visit, what to help you with, e.g., assist you with a purchase (WOW) or are you still in education (AHA).

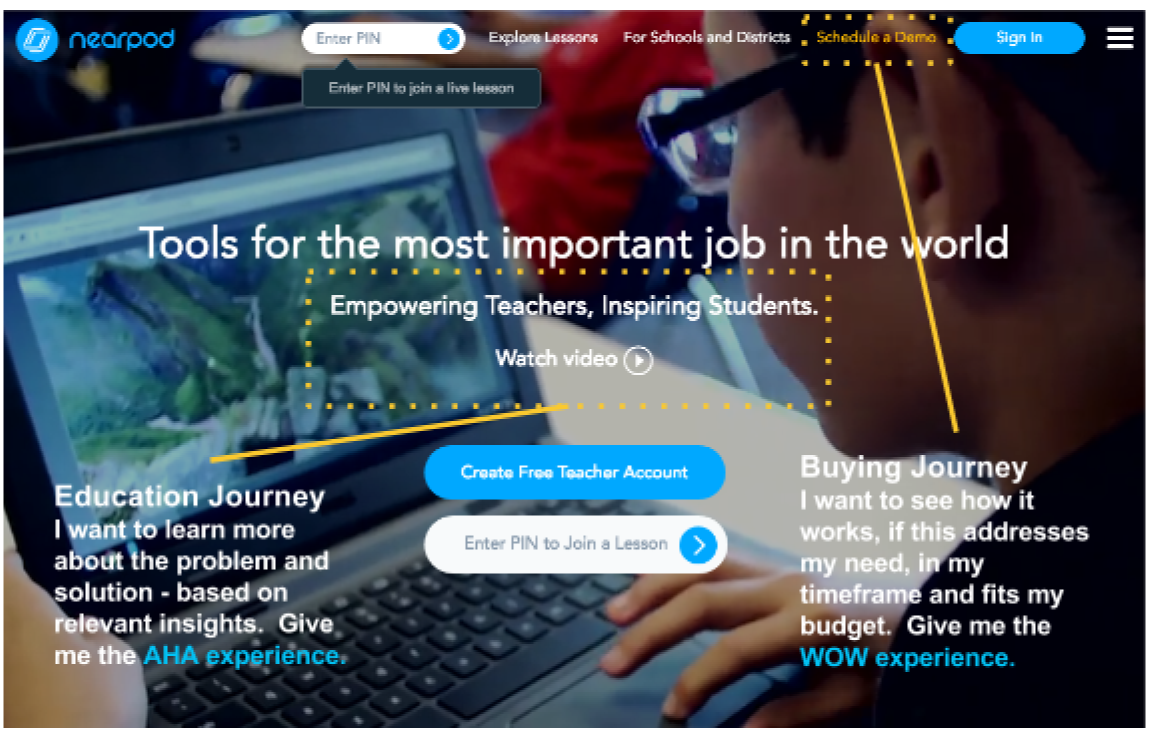


Figure 1.5: Screen shot of the Nearpod.com homepage

KEY #4 THE CLIENT IS MAKING A TRADE-OFF, NOT A DECISION (WOW)

Once a customer has determined this is important, they will select one or two trusted vendors identified during the Education phase. These trusted partners are asked to provide a proposal that outlines a solution. The various solutions are compared against their selection criteria. The key here for the sales professional is to realize this is a process of trade-offs, not one of a clear winner. There is no perfect solution, and each solution has its pros and cons. The key for the EdTech sales pro is to match their value proposition to the needs of the customer - and thereby create a trade-off in favor of choosing his service. **This is a WOW experience.**

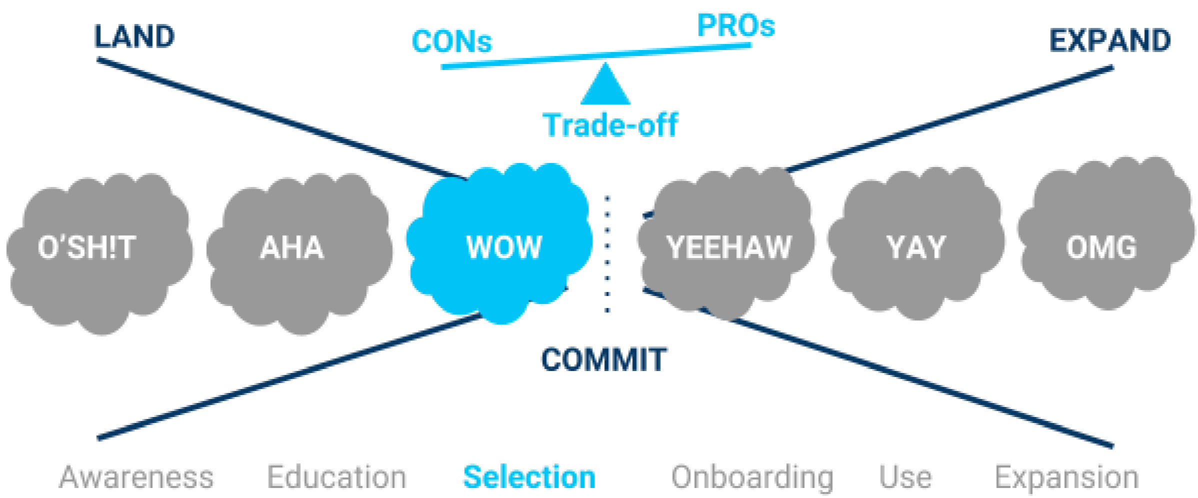


Figure 1.6: Help Your Customers Make A Trade-off

KEY #5 UPSELL AND CROSS SELL (YEEHAW)

Right after the customer has (verbally) committed, comes an incredibly important point: The customer may have some worries about the commitment they just made. As a professional you need to hold their hand and help them to a successful path.

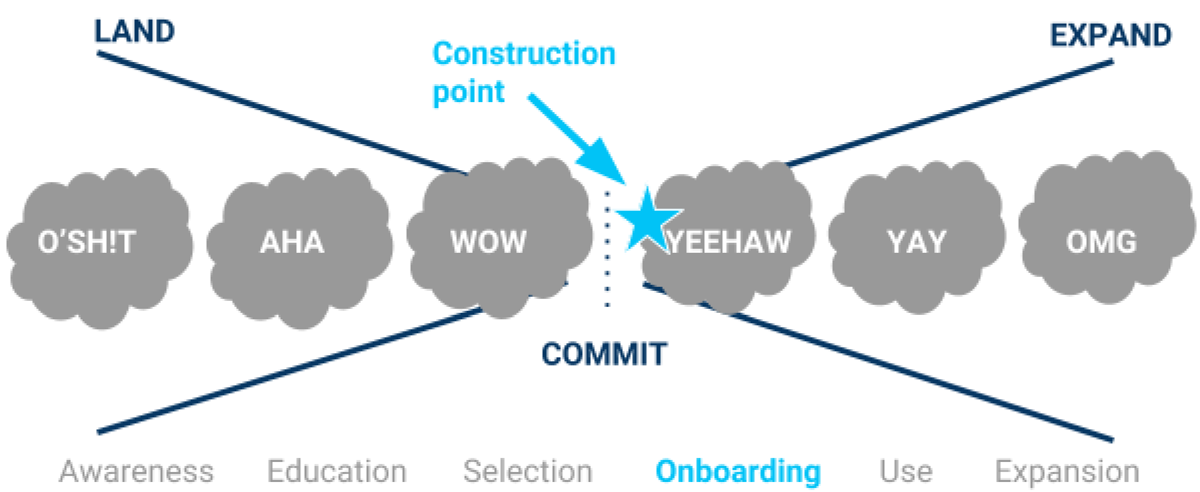


Figure 1.7: At The Point Of Construction You Set The Stage For The Relationship

Similar to the value creation point (between O'Sh!t and Aha) there is a unique moment that allows for building a great experience. This moment is called the Construction Point.

This is the unique opportunity for the edtech solution vendor to manage expectations and construct how the next 6-12 months will look like, including the kick-off, onboarding, usage and even the expansion plans.

KEY #6 CLIENTS MAKE AN EMOTIONAL DECISION AND RATIONALIZE WITH FACTS

Humans tend to first make an emotional decision, they then rationalize with facts and figures. This is well understood human behavior. You first fall in love, and then you think it through, and decide if you are willing make the investment.

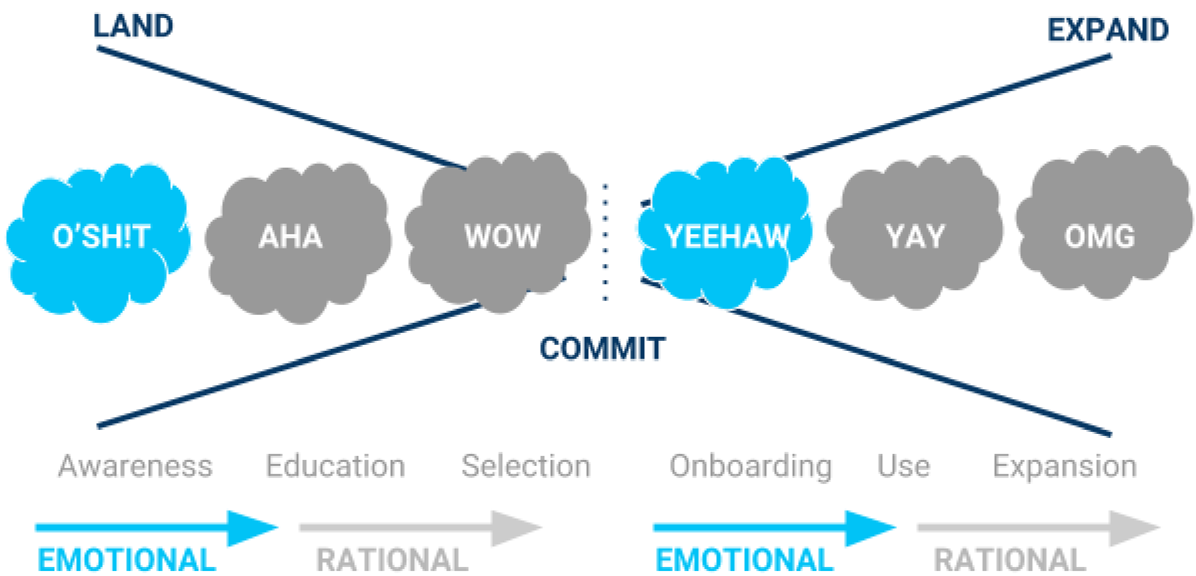


Figure 1.8: First Make An Emotional Decision

- **Emotional Decision Process** – In the emotional decision process, people are open to out-of-the-box ideas, and these ideas are easiest to relate to if they are visualized. Humans emotionally connect a lot faster through visuals. So, typical activities in this phase are whiteboard selling and brainstorming. Typical content types in this phase are white papers, videos, research materials, a vision pitch, and so on. At the end of the emotional decision process, buyers feel like they "want this".
- **Rational Decision Process** – At this point, the rational part of the brain takes over, and we say things like "the devil is in the details" or "let's go over the facts and figures". This is where a customer starts to think about trade-offs, and weigh costs against benefits.

There are two times a customer goes through a tremendous emotional experience. First, early on in the sales cycles as they experience the problem, and then again right after they've committed.

These two experiences demand very different content. For example, for rational decision-making, we often look for content such as pricing, product specification sheets, speeds and feats, competitive matrix, and so on. The rational decision process is successfully concluded when the customers think "I want this", and "research shows it's the right thing to do". Most companies have ample rational content.

Content that helps with an Emotional decision is more visual - think of vision videos and whiteboard sessions during the sales cycle, and best practice videos, use-cases and speaking to a peer during the onboarding experience.

To be successful, you have to be successful in winning emotional decisions. This requires that Marketing, Sales and Customer Success organizations become intimately involved with each other, leveraging each other's knowledge and customer touchpoints as much as possible.

KEY #7 IS THERE ANYONE ELSE WHO CAN BENEFIT? (OMG)

You've worked hard, the entire organization delivered. Maybe there were some issues, but you resolved them and the customer is happy. This is the time to spread the word:

- Ask for it: "Is there anyone else you think that can benefit from this service?"
- Socialize: "Love the way you are using the service. Would you be interested in being featured in a blog post where we showcase you and what you are doing? / socialize during a coffee / etc."
- Academic: "The data we see coming out of your service is changing the way people look at this. Would you be interested in working on a publication / speaking at a local event / doing a webinar for other teachers and administrators?"

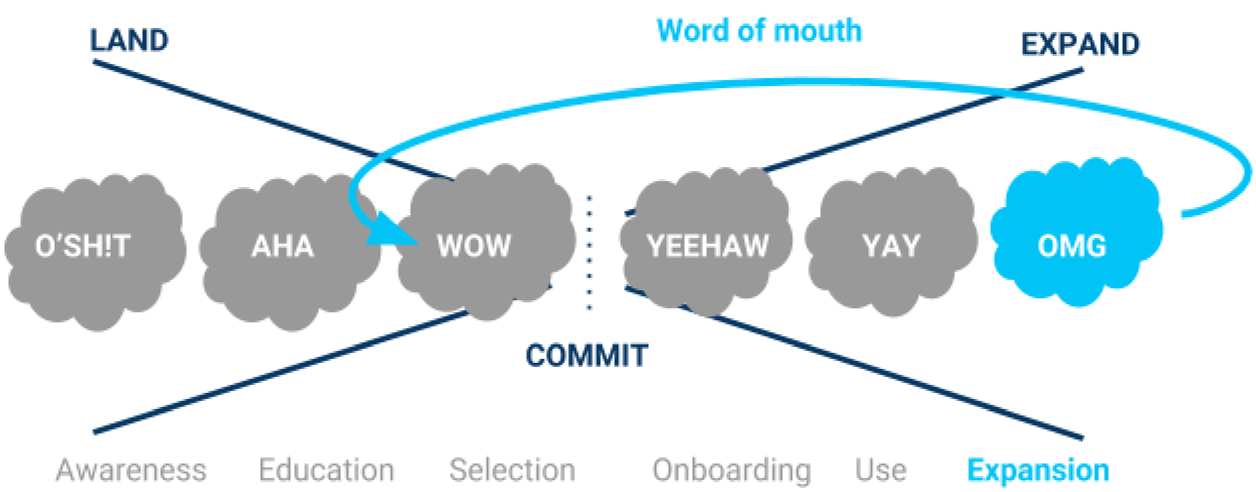


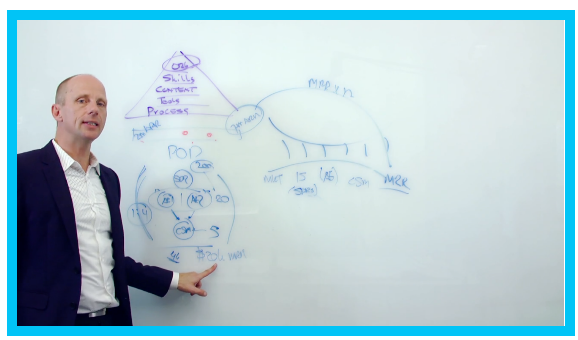
Figure 1.9: Happy Customers Share Their Experience and Generate New Customers

TO SUMMARIZE

- **Create value:** Help your customer diagnose the problem, don't feed them the answer
- **Educate - do not sell:** Prescribe a solution to their problem
- **Help them make a trade-off:** Assist the selection process, be the one they call for more info!
- **Emotional over rational:** Consider using more video/visuals
- **Construct:** Share how the next 6-12 months will look like, taking away their worry, and extending the great experience
- **Earn word of mouth:** If you do the above, you will come to find that they will talk about you anytime in the process and not just after they deployed your solution!

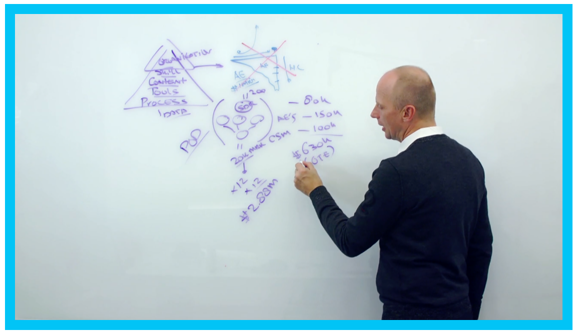
1.4 Building a Customer-Centric Sales Team

If you're a sales leader who is just getting started, building out your strategy, scaling out the team, or making adjustments to your sales process, there is a lot to consider.

JACCO'S ADVICE	BUILDING A CUSTOMER-CENTRIC SALES TEAM
#1 SAAS: A CUSTOMER CENTRIC EXPERIENCE The educational sector does not appreciate a hard sales methodology. Instead, they need a more educational driven, consultative sales approach in which sales assists the buying process.	 Link: https://vimeo.com/151492397
#2 GROWTH: WHAT IS IT AND HOW DO YOU GET IT Understanding the key elements of growth, and why it is so important to learn how to grow BEFORE you hit the growth multiplier (get funding to hire a sales team)	 Link: https://vimeo.com/151492477
#3 HOW TO SET UP A POD SAAS SALES STRUCTURE How to design and build an SDR/AE sales organization that can win schools and districts.	 Link: https://vimeo.com/151492478

#4 GROWTH: DIFFERENT SALES POD STRUCTURES

POD structures allow you to change your GTM strategy as you adapt to changing market situations and/or new service offerings.



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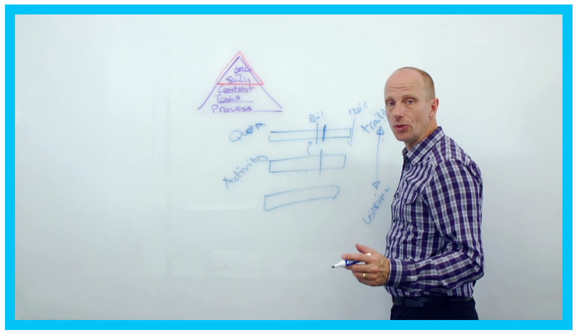
#5 HOW TO DEVELOP A DEVELOPMENT PROGRAM

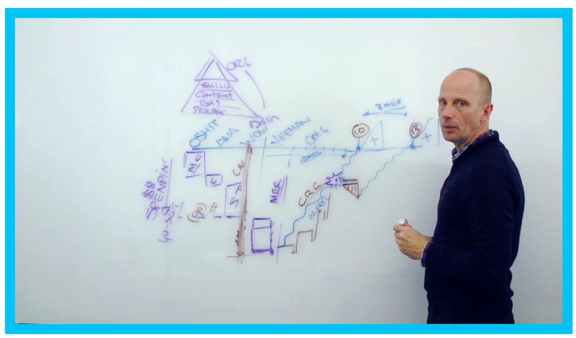
How to set up and structure your sales development function to efficiently work leads and set up meetings for your AEs.



Link: https://vimeo.com/151492395

#6 TRUE COST OF ACQUIRING AND RETAINING A CLIENT

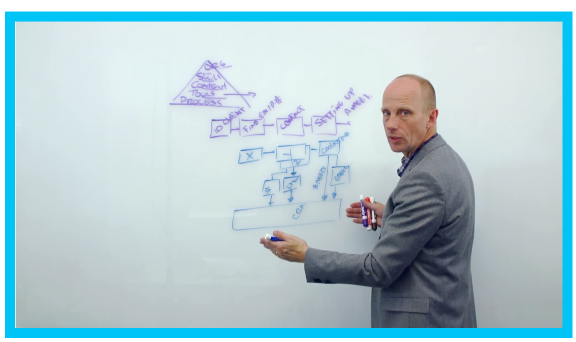
Historically acquiring clients at any and all cost used to be the mantra. But today, startups are tasked to achieve profitability quickly. This requires you to build a deep understanding of the client acquisition AND client retention cost.



Link: https://vimeo.com/151492506

#7 HOW TO BUILD A SALES STACK

Tools are useful to scale rapidly. But at what cost? This episode reviews how to build a sales stack based on process and measurable data.



Link: https://vimeo.com/151492403

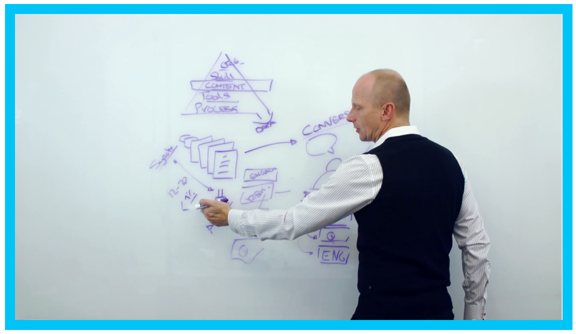
#8 SEPARATING SALES DESIGN FROM IMPLEMENTATION

You designed your sales organization - now it is time to recruit, hire and enable them.

Link: https://vimeo.com/151492405

#9 CONTENT AS THE OUTBOUND SALES CALL

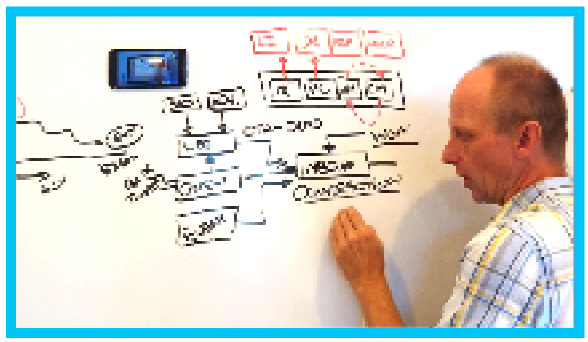
Your sales PODS are in place, but EdTech may not respond very well to outreach. Instead, use content to educate your prospective client.



Link: https://vimeo.com/151492404

#10 GET STARTED WITH INBOUND

Understand how to set up an inbound sales model - what type of content to use, the process to route your leads, and how to set up an inbound sequence in this model.



Link: https://vimeo.com/184154810

A modern organization excels in providing a customer with a great experience 24/7 and online.

CHAPTER II. CUSTOMER

II. THE CUSTOMER

2.1 Know the Industry

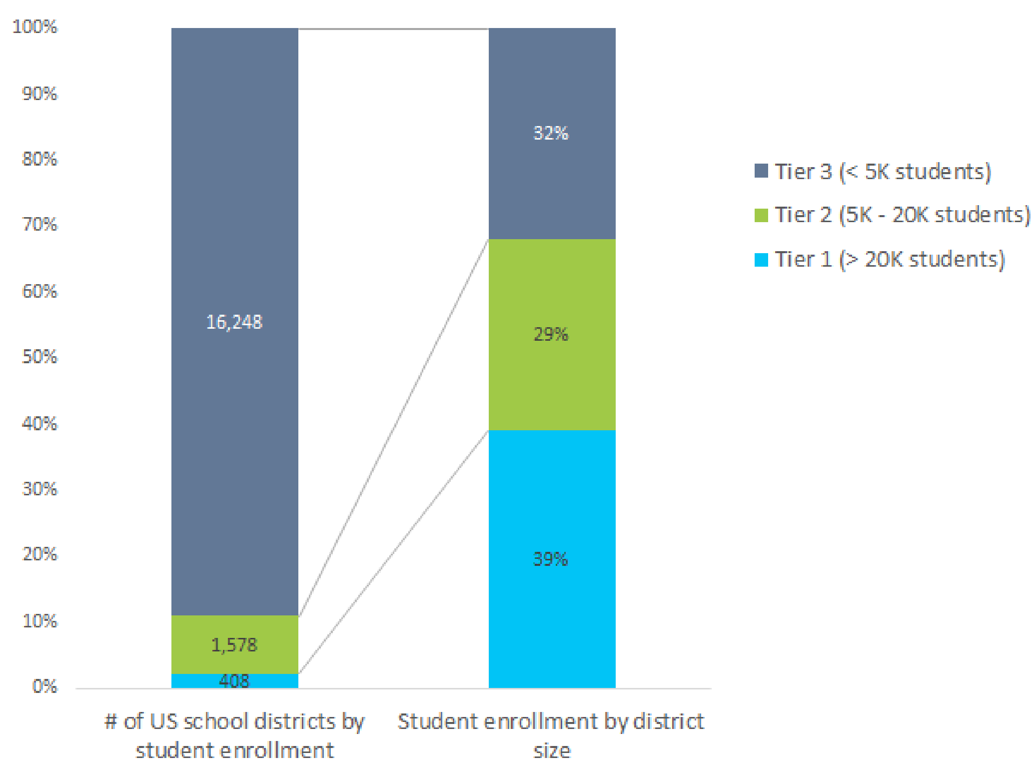
Before you start selling in the world of education, it is absolutely essential that you become an expert in the Education space. That may sound intimidating if you're just getting started and not yet familiar with Ed Tech, but you can quickly become very knowledgeable about the industry, key players, market dynamics and more, by using the resources and guidelines outlined in this playbook.

You may read through this chapter and think, "I don't really need to know all about these complex funding sources - the district or school will know if they have the money or not". But be careful in making this assumption! One of the interesting things about this industry is that the decision makers in the district/school office often don't actually know all of the sources where they can get funding. There is an entire industry of educational consultants that exists to help schools and businesses navigate categorical funding. There is a lot of funding available but it will require some research on your part to help school leaders access it.

Which means . . . you have the opportunity to be a source of crucial information for your customer! If you can help them navigate the complex arena of funding and help them understand where they can find resources, you will easily become a trusted advisor, which is exactly what you want. You don't need to be an expert in all of the details, but you should have a high level understanding of the types of funds that are available for use.

2.1.1 Market Segmentation

The chart to the right shows how an ed tech company focused on K-12 can think about segmenting the market. However, each company should adjust their own segmentation as needed based on their sweet spot and how they go to market.



School districts in the U.S. are quite concentrated: 39% of U.S. student enrollment is concentrated in just 2% of school districts.

Tier 1 districts represent 39% of student enrollment, but only make up 2% of the number of US districts.

The top 100 districts account for roughly 20% of total US enrollment.
Here's how this breaks down further in detail:

- 129K total schools (98K public and 31K private) in 13.5K public school districts, implying an average of 7 public schools per district (see NCES for more detail)
  - 66K public elementary schools, 24K secondary, 6K combined
  - 56K Title I public schools (57% of total) - with at least 40% of children from low-income families
  - 6K Charter public schools (6% of total) - governed by an organization under a legislative contract that exempts them from state rules, but requires certain accountability standards (more on charter schools below)
- 3.5M teachers (3.1M public and 0.4M private), implying an average of 36 teachers per public school and 13 teachers per private school
- 55M students (50M public and 5M private), implying an average of 16 students per public teacher and 13 students per private teacher (see NCES)

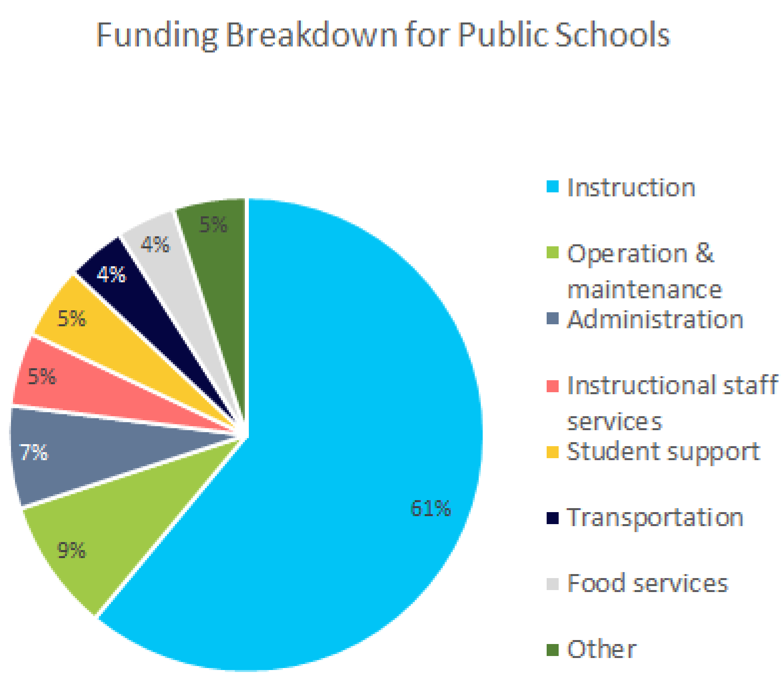
2.1.2 Funding

The K-12 market consists of students in elementary (K-5th) and secondary (6th-12th or 7th-12th grade) schools (for an in-depth overview of the K-12 landscape, check out the BMO Education and Training Report 2016.

The funding structure of the K-12 market is crucial to understand, and will be very different than the type of dynamic that you're familiar with if you've sold in any other industries before.

Here's a snapshot of what funding looks like in U.S. for public schools:

- $607B total funding for public schools (see NCES)
  - 10% comes from federal programs
  - 45% comes from state programs
  - 45% comes from local programs
- Total funding implies $11K / student (see NCES)



Now let's look at each of the three funding sources above in more detail.

GENERAL FUND

State funding and local funding together are known as the “general fund”.

State Funding

85% of state funding must be used for personnel, which means that there is only 15% left over for the remainder (textbooks, workbooks, “consumables” (and of course many of these need to be refreshed every year).

Local Funding

Similar to state funding, the majority of this fund must be used for personnel. Which means that there is a smaller chance of being able to rely on this as a source of funds for the software or curriculum solution you are selling.

Federal Funding

Unlike the general fund, the majority of this budget is NOT used for personnel. So what does this mean? ***This is by far the largest source of funding for the tools/software/programs that you represent***.

Let’s break down some key areas of federal funding that you will likely come across.

TITLE I

In the past, this has been the biggest source of funds that has been used to buy technology. It’s a federal program that provides financial assistance to Local Educational Agencies (LEAs are district roll-ups and have different names by state, for example in CA they are called “county offices of education”, in PA, “intermediate units IU’s”, and in NY, “BOCES”. Their purpose is to support districts via special education, professional development, standards alignment, and other services) for schools with a high percentage of children from low-income families, to help ensure that all children meet the state academic standards. Bear in mind that 51% of all students in our public schools are considered low-income, meaning they are eligible for the Federal free and reduced lunch program. Eligibility is based on family income and determined by multiplying the year 2016 Federal income poverty guidelines by 1.30 and 1.85, respectively.

Title I money has been a powerful tool for technology growth in schools. For example, iPads grew primarily through the use of Title I funds. Key stats at a glance:

- U.S. Dept of Ed page on Title I
- $15.7B fund
- ~80% of districts in the country have Title 1 students
- This fund can be applied to solutions such as:
    - Software, hardware, and professional development in any of the core academic areas (reading/language arts, math, STEM), for preschool through high school
        - Curriculum / academic tools
        - Parent components

SPECIAL EDUCATION

Special Education is the second largest fund that could be applied to technology solutions. There are several areas within Special Education, and these are meant to help improve results for children with learning challenges as identified with an IEP (Individual Education Plan).

- U.S. Dept of Ed page on Special Ed
- $12.2B fund
- Specifically, 15% of this funding is set aside for "Response to Intervention", meant to be used to keep children out of Special Ed who are hovering just on the outside of the testing results border (known as the "bubble students"). This fund is a great place for digital solutions, so that responses to intervention can be tracked.

TITLE II

The aim of Title II is to improve academic achievement by improving teacher and principal quality. This fund is generally used for recruitment and retention of teachers and principals, professional development, as well as the administrators in the district office. This is also used for reforming teacher and principal certification programs.

- U.S. Dept of Ed page on Title II
- $2.25B fund

TITLE III

Title III is intended to help schools provide programs to English Language Learners (ELL). Schools are expected to hold limited English proficient students to the same challenging state standards in core subjects required of all students. ELL students are the fastest growing sub-population of students in our public schools.
ELL - English Language Learners

- U.S. Dept of Ed page on Title III
- $700M and growing
- Title III funds are intended to provide professional development and curriculum, including technology and supplemental programs.

TITLE IV A

ESSA refers several times to a "well-rounded education", and a fund was established to help students achieve this.

- Overview of "well-rounded education" in ESSA
- $1.65B. Includes 3 components:
  - 20% can be used for a Well-Rounded Education: This could include software for the arts, STEM, reading (essentially any type of curriculum content)
  - 20% is for Safe and Healthy Schools - This is to help teachers help their students to feel part of a community. This could include efforts to stop bullying, or developing community programs (anything in the space of Social & Emotional Learning (SEL) and school culture). This could also be used for professional development (e.g., to help teachers learn how to talk through these issues with parents)
  - 60% can be used for Effective Uses of Technology
    - Of this, only 15% of this can be used for infrastructure (tablets, PCs, routers, etc.)
    - The remaining 85% is reserved for digital content and software
  - These means that digital solutions could qualify in multiple areas of this fund.

Competitive Grants

There are several types of competitive grants that are outside of federal and state funding. One example of this is Investing in Innovation (I3), which provides grants of $3M, $12M or $20M for scaling innovative practices that can lead to successful student outcomes.

Generally, grant writing time happens in the period January - June. This means that if a school or district is interested in buying in, say January, but doesn't have any more funds available - competitive grants are another source to look to as an alternative option.

2.1.3 Key Legislation

You should be familiar with the relevant legislation in ed tech, and how that could affect the industry, and therefore your ability to penetrate schools and districts.

- **No Child Left Behind**: NCLB grew out of concern that the American education system was no longer competitive relative to the rest of the world. It significantly increased the federal role in holding schools responsible for students' academic progress. It also put a special focus on ensuring that states and schools boost the performance of certain groups of students, such as English-language learners, students in special education, and poor and minority children, whose achievement, on average, trails their peers. States did not have to comply with the new requirements, but if they didn't, they risked losing federal Title I money. NCLB was signed into law in 2002.
  - Department of Education page on NCLB
  - A thorough breakdown of NCLB and its implications from EdWeek
- **Every Student Succeeds Act (ESSA)**: From EdWeek: ESSA was, signed into law in December, 2015. It rolls back much of the federal government's big footprint in education policy, on everything from testing and teacher quality to low-performing schools. For context, that federal footprint was previously supported by initiatives such as the Race to the Top (aka R2T or RTTT) - a $4.35B competitive grant created to reward innovation and reforms in state and local district K-12 education, such as adoption Common Core standards, teacher evaluation systems and state data systems. This particular initiative was initially fairly well received, but later was highly criticized.

  ESSA gives more leeway to the states than they previously had under NCLB (ESSA is essentially the replacement/update of NCLB). ESSA takes full effect in the 2017-18 school year, which means that the 2016-17 year is a bit of a transition year. There will be some bellwether states (e.g., CA, FL, CO) who start to act on this early - they have already started making their plans. But the bottom line is - much more of the power has been shifted to the states, compared to under NCLB. What does this mean for you? It means that it's more important than ever to be knowledgeable about the sources of funding in the states where you are selling, as well as those states' approaches to improvement (e.g., standards, accountability, evaluation).
  - Department of Education page on ESSA
  - A thorough breakdown of ESSA and its implications from EdWeek

2.1.4 Industry Dynamics

Now that we have a baseline understanding of the landscape, we need to dig into the key dynamics at play that are unique to the K-12 space.

Public schools vs. charter schools

Public school districts operate with the help of state tax dollars. They must operate according to the educational standards set by each state - for example, they must follow state guidelines on what they can teach and how children are evaluated.

Charter schools are publicly funded institutions that operate under their own standards of conduct and curriculum. Although they are funded by tax dollars, charter schools are ultimately given the freedom to establish their own curriculum and ways of operating, similar in a way to private schools. They generally are governed by their own board of directors, although some state statutes still apply to these schools. Charter schools represent only 5% of enrollment in the US.

Charter management organizations think and function quite differently from public school districts, when it comes to buying behavior. Charter schools are generally much more progressive, direct and flexible, and they aren't afraid to spend money on a solution that they think will drive a positive outcome.

Public schools districts, on the other hand, are often bound by more restrictions (e.g., state department of education), have longer sales cycles, and are more hesitant to spend their budget.

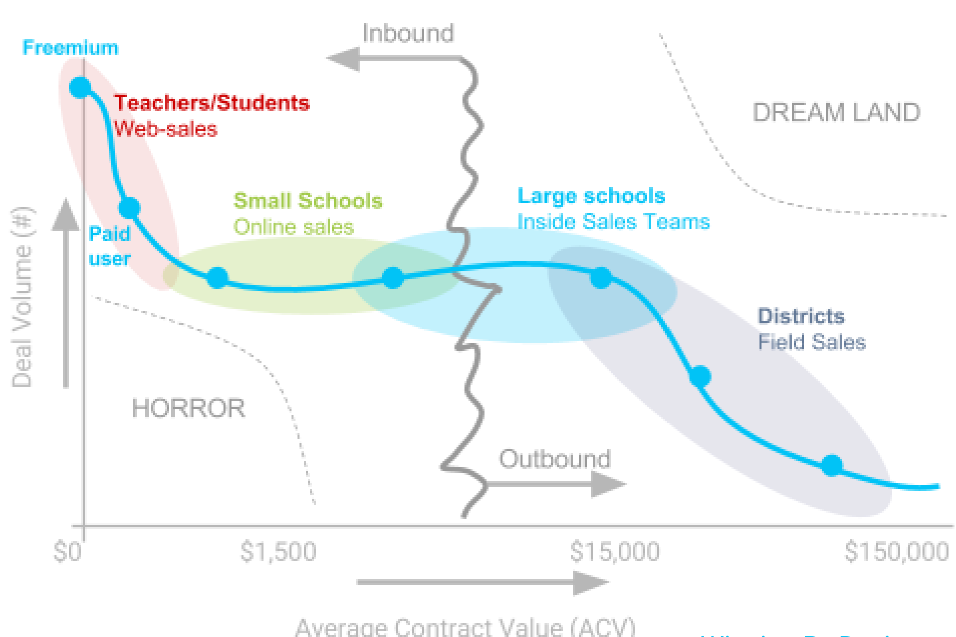
Private schools are can be religious schools, college preparatory schools, or independent/alternative schools. They generally are not subject to federal and state curriculum and testing standards, since all of their funds come from private sources. Private schools represent about 10% of all students in the US. See here for a brief overview of the types of schools.

Selling to schools/districts vs. teachers

It is a very different sales strategy and sales motion to sell to a district or school (more similar to an enterprise play), compared to selling using a freemium model directly to teachers. You may find that when you sell to a district, if the end user of your product is teachers, it's possible that no teachers will actually be involved in the budgetary decision-making process. Instead, you may be speaking with a committee that includes the CAO, CTO, and external curriculum consultant. You may find that you have success with the enterprise play on its own, or that you also need to use a bottoms-up approach by getting groundswell support from teachers at the same time. Depending on which strategy you use, that will have different implications for how you sell. More on that in later chapters - but, you should actively work with your manager to determine the best strategy for your product and account list.

First, you need to determine what go-to-market strategy you should use, given what type of product you have, customers you target and at what price you sell. Be sure to watch this video on how to determine your go-to-market strategy.

DEFINING YOUR GO-TO-MARKET



Various GTM Models:
Web Sales In this GTM approach, you attract freemium users, which you then convert into paying users. Often requires a sophisticated automated mailing campaign.
Online Sales In this GTM approach, you attract customers to come to your website/app where you initiate a conversation using in-web/in-app chat. This allows you to centralize a salesforce and control cost.
Inside Sales In this GTM outbound approach, you leverage a group of SDRs to develop leads, which you then hand over to AEs who convert the leads into deals. This is capital intensive, as you must have a location, and hire quite a few salespeople.
Field Sales In this GTM outbound approach, you target specific districts with a field sales organization. You are likely to have a senior sales executive living in the center of their region and working closely with the districts. This is the most capital intensive, as these salespeople are higher priced, as well as may need a local office.

Annual budgeting
There are many nuances to funding and budgeting that you must be aware of. We will talk more about this later in this chapter, but for now, just note that there are several things you need to keep in mind with regard to the budgeting process. They include seasonal buying periods, spending limits for bigger districts, and funding formulas by state.

Small vs. large
Similar to the differences between a small and large company, the ways that an individual school vs. a large district operate can be quite different. A school buying on its own can make faster decisions and will have fewer stakeholders. A district buying a solution for several schools will have a heavily centralized and longer buying process, likely with a broader group of stakeholders. That said, it does not necessarily mean that one size has a better opportunity than another - refer to Tomasz Tunguz's blog post on ideal ACV.

- Typical ACV: for a school ($0-5K) -- small district ($5K-20K) -- large district ($20K+) (note that these ranges are highly dependent on your product and go-to-market strategy)

Wealthier vs. resource-constrained districts
In general, you may find that it's easier to get smaller, wealthier school districts to engage in a strategic, forward-looking conversation. This is because of the simple fact that they have more resources, more budget, and they have better information about the types of resources they can use and the solutions that are available to them. They can focus more of their time on constant improvement. In contrast, resource-constrained districts are spending much more of their time simply struggling to keep up - they likely are dealing with more community issues, more discipline issues, students going through a crisis, even trying to make sure that they have enough basic school supplies for their students. Improving academic outcomes is what they are struggling to do, in the midst of all of those other issues. So keep this in mind as you think about how you want to structure your message for different types of school districts, because a different messages may resonate in different ways.

Turnaround district vs. steady state
A district or school may be what's known as a "turnaround" district - meaning that the district/school had poor performance (test scores), and more drastic changes are being made by the administration to try to turn the situation around and meet state requirements. Often a new superintendent is brought in to bring those changes into effect. It also likely means that federal funding is tied to the school to assist with the

turnaround, as well as school improvement grants and other sources of funding. This will likely mean that the superintendent is more involved than usual in specific initiatives, especially when they have to do with academic performance and curriculum. Therefore, this could be a good signal that the school or district is more willing to consider new solutions that can help drive better outcomes, if you were having trouble getting their attention prior.

Availability of information
Salespeople who sell to most other industries can often feel like they don't know enough about their target customer before they start reaching out to them. The K-12 space is quite unique, in that almost all of the demographic information, performance data and contact information you would ever need is all publicly available, and generally quite easy to find. For instance, you can find information about every public school and district in the U.S. at the NCES website here, or at greatschools.org (and see playbook section 5.1 for more data sources). So while you won't have a problem figuring out who you need to talk to at one of your target accounts, you may need to focus more energy on other elements of the sales process.

2.1.5 School & District Budgeting

There are few key things you should know about the budgeting process at a district or school before you start to reach out to them.

Budget Timing

It's very important to understand budget timing, so that you know when schools have funds available to spend. This is especially important for large deals (e.g., >$50K) that need to planned for ahead of time. For smaller deals, it's possible that you can run a pilot and the funds will come from a general pool of money from the school's budget that is meant for ad hoc smaller spend. But regardless, you should be familiar with these broad budgeting guidelines. Here's what you need to know:

The school budget year is from July 1 - June 30. However, the Federal budget is from Oct 1 - Sept 30. Meaning, the FY17 budget starts on October 1, 2016. So, there can be a bit of misalignment. Furthermore, the federal budget may not be approved on time, or it may be delayed due to a major election (e.g., presidential).

The federal government will usually send out 25% of the budget on July 1 (to apply to the summer term). From there, every state is required to put together a Consolidated Report (by school/district - includes the # of students that show up in September, breakdown of demographics, ELL, homelessness, etc.). Based on these numbers, Federal will determine how much each state gets for the rest of the year. And once each state receives its funds, the state then doles the funds out to the districts.

Buying Cycles

There are three significant buying periods throughout the calendar year.

(1) Because some states may not get federal funds out to the districts until November, this means that October/November is a significant buying period (about 50% of the money is allocated then).
(2) The last 25% arrives after the budget is finalized - sometimes as late as March or April - which means that another big buying cycle is in April/May. This is even more crucial, because schools know that these funds are "use it or lose it" - if they don't spend the money, it doesn't carry over into the budget for the following year.

(3) The last significant buying period is in July/August, when the summer term is finishing up, and administrators are preparing for the start of the school year in September.

Also keep in mind that every district will have some price threshold that will trigger sending a purchase through a formal bid process, which can expand the length of the sales cycle. This threshold is often generally somewhere between $25-50K. Some districts are more rigorous about this than others. Typically, school level purchases kept under $10K will not require district involvement. But this depends on whether the district allows schools to operate with some level of autonomy (which varies widely from district to district). It will be important for you to establish that understanding early on in the process. If it is required, a typical RFP process could take anywhere from 2-12months.

2.1.6 Key resources

In addition to the overview above, you should be very familiar with the following resources:

Information Sources

- Ed.gov: the main website for the US Department of Education
- NCES: National Center on Education Statistics: The primary federal entity for analyzing data related to education in the US
- BMO Education and Training Report Sep-2016: An equity research report that reviews the Education space from an investor's perspective
- "Teachers Know Best" Gates Foundation report: Reviews how teachers use digital instructional tools, and their perceived effectiveness of those tools
- Edsurge Index: A product index of hundreds of edtech products - Taxonomy of edtech products
- Ingersoll report: A review of the hidden costs of teacher turnover, and what schools can to do fix the issue
- Budget tables by program/state (updated every 6 weeks)

Key Legislation

- No Child Left Behind
- Every Student Succeeds Act (ESSA)

Professional Communities (this is just a sample of some well-known communities, but there are many more)

- ASCD
- League of Innovative Schools
- Education Research & Development Institute
- learningforward.org
- Teacher/administrator meetups
- State and national ed tech conferences: ISTE, FETC, TCEA, CUE, CETPA
- Regional/state services providers (e.g., BOCES in NY)
- State associations of education CTOs and ed tech directors
- Ed tech blogs and newsletters
  - EdWeek
  - EdSurge
  - Smartbrief
  - Educational Leadership newsletter

EdTech key influencers to follow:

- Steven Anderson - cofounder of #EdChat on Twitter

- Rafranz Davis, instructional technology specialist and the author of The Missing Voices in EdTech: Bringing Diversity into EdTech (Twitter, website)
- Angela Maiers, founder of Maiers Educational Services
- Eric Sheninger, senior fellow at the International Center for Leadership in Education (Twitter, website, blog)
- Tom Whitby, cofounder of #EdChat
- Tom Van Der Ark - author of Getting Smart, and first Executive Director of Education for The BIll and Melinda Gates Foundation (blog)
- Edutopia - A comprehensive website and online community that increases knowledge, sharing, and adoption of what works in K-12 education
- Peter DeWitt - has a Blog with EdWeek called "Finding Common Ground"

  For a much more extensive list of key influencers, see here: The Top 200 influencers and brands in EdTech

2.1.7 What you should know

Based on the above, what must you go and do now, before you start engaging with customers?

CHECKLIST

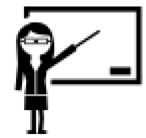
- [ ] **DO** know at least the top 5 sources of Federal funds that can be used to buy your product (find grant info on the U.S. Department of Education site here)
- [ ] **DO** know at least the top 3 state funds that could apply to your product (search for the state's department of education website to find out more)
- [ ] **DO** know at least the top 3 grants that could apply to your product (research the top grants in the state that would apply)
- [ ] **DO NOT** assume that your buyers will already know all of the ins and outs of sources of funding and budget process
- [ ] **DO** be the trusted partner for the schools/districts that you are working with
- [ ] **DO** stay on top of what is happening in the Ed Tech space, as well as with new funds and legislation

NOTE: states will often get federal funding for natural disasters to rebuild, and they need to spend this money quickly when they receive it; you can be a partner to help them get up and running again!

2.2 Know the Customer

This section provides a framework, and illustrative examples, for how your should think about your customer, their journey and their use-cases.

2.2.1 Segments

	 **Districts**	 **Schools**	 **Teachers**
Descrip-tion	Districts are a collection of schools, which in the US are public, and in Canada may be public or Catholic. In Canada, districts may be comprised of a single city/county or be an aggregate of many. In the US, districts may comprise a whole county, or may be a single city or town, or set of towns, within a county. Some large urban US districts, notable NYC and LA, are divided into sub-districts. Generally governed by an elected school board, districts are managed independently and appoint a Superintendent to oversee the schools. Note that in Canada, a District may actually be referred to as a Board. Key roles may include: ● SUPT: Superintendent ● CAO: Chief Academic Officer ● CTO: Chief Technology Officer ● ASCI: Assistant Superintendent for Curriculum & Instruction	A school is a single entity, generally housed in a single building or campus. Schools may belong to a larger district, or operate independently (private schools). Charter schools are specialized schools within a school district, usually supported by public funds. Schools are generally divided by grade band into primary or elementary (grades K-5 or K-6), middle (grades 6-8 or 7-8), and high schools, called senior high schools in Canada (grades 9-12). Enrollment and other factors may sometimes dictate a blending of these grade groupings (K-9 or K-12 schools). Note that in Canada, a high school may be referred to as a college. Often involved in the decision are: ● Teachers: Who use the solution ● SUPT: Superintendent (or Asst. Sup) ● Principal	Individual teachers are often the primary / original users of a freemium model. They may provide feedback to the school administration about the types of technology and tools that they want to use for their classrooms, though don't be surprised if there are no teachers involved in the decision-making process. Instead, sometimes they are represented in the decision-making process by someone such as the CAO or CTO. Another situation would be where a Teacher Lead or a teaching consultant is asked for their input in a technology decision.

Partners

Partners are companies who currently are already selling into the targeted District/School. This means that they already have an established relationship and a sales force calling on them. So, it's possible that you may be working with a partner throughout the sales process - but at the very least, you should be aware that this dynamic may exist, especially in the larger school districts.

There are a few types of partners:

- **Student Information System (SIS) providers**: Include PowerSchool, Skyward, and Aeries (see https://www.g2crowd.com/categories/student-information-system-sis)
- **System Integrators (SIs):** Most common is Clever
- **Learning Management Systems** - The key LMS providers are Blackboard, Edmodo, Moodle, Canvas and Schoology.
- **Platforms:** Companies that "sell" their end-user technology in an effort to increase adoption: Microsoft, Apple, Verizon, and Google.

2.2.2 What's on their minds?

There are common pressures and topics that are top of mind for all administrators in general, regardless of the specific role that they play on the administration team. Make sure that you take the time to learn about these topics, as they will come up frequently in conversations, events and forums.

- Curriculum and standards
    - State Assessments
    - Common Core adoption
    - Transition away from textbooks to Open Educational Resources
- Pedagogical trends (these are just a few)
    - Response to Intervention (early identification and support for students with special needs)
    - Social-Emotional Learning (focus on teaching life skills and building character)
    - Positive Behavior Interventions and Support (improving school culture and student behavior)
    - Project-Based Learning (PBL) (a dynamic classroom approach in which students actively explore real-world problems)
    - Blended / Flipped classrooms (focusing class time on student understanding rather than lecture)
    - Personalized learning (movement away from one-size-fits-all toward greater attention to the individual)
- Digital devices / tools
    - The surge of new EdTech products and platforms (see Edsurge Index)
    - 1:1 device / digital classrooms (see Gates Foundation report)
    - Broadband connectivity
- Teacher churn / development
    - High new teacher churn rate and high retiring rate (see NCES and Ingersoll report)
    - Professional development (see Gates Foundation report)
    - Market map of professional development

2.2.3 Key Personas

The majority of our customers fall within the following general customer profiles, or "personas". You must internalize these personas so that you can understand their challenges, diagnose their issues and help them find a solution.

Persona	Superintendent (SUPT)	Chief Academic Officer (CAO) Ass't Sup't for Curriculum Instruction (ASUPT)	District Chief Technology Officer (CTO) / Chief Information Officer (CIO)
Goal	**Wants to make an impact**	**Wants to drive academic gain with effective curriculum and instruction**	**Wants to create and protect a reliable and secure infrastructure**
What they do and how they think	• Swamped with financial concerns, appeasing the board and trying to drive results • Often thinking about student equity, student well-being and academic performance • Cares about research-backed solutions • Less interested in the details, wants to see how solutions support his vision • 75% male, Average age 55 • Avg tenure: 5 yrs max • 60% have a doctoral degree	• Has teaching, school leader, and curriculum design experience • Confident in pedagogical knowledge, stays on top of the latest developments and techniques • Risk averse - will conduct due diligence on new solution, looks for proof of impact, may look to consultants and teacher leads to validate and pilot • Often knows a bit about budget, but spread too thin to be an expert and to know all of the funding sources • Seeks info via #SatChat, Professional orgs, ASCD, League of Innovative Schools, ERDI, Meetups	• Degree in computer science • Always involved in technology decisions to vet security and compatibility • Often male; generally very long tenure in this role (though this shortening now and more Generation Xers are coming into these roles) • Especially for a public school district - can have relatively limited buying experience, particularly when it comes to SaaS. Why? Because the majority of core info systems are on-premise, and those systems have a life cycle of~10 years. • Has scars from technologies and products that went awry - deployment, support, and integration matter to him
Communication	• Professional orgs, ASCD, League of Innovative Schools, ERDI • State association of superintendents (e.g., TASA in TX, FASA in FL) • Generally uses social media very little	• ASCD, plus state and national ed tech conferences • Education blogs and e-newsletters (Smartbrief and Educational Leadership newsletter) • Very interested in what education thought leaders have to say	• State and national ed tech conferences - ISTE, FETC, TCEA, CUE. Also reach through regional service providers in states such as NY (BOCES), TX, WI, etc. • State associations of CTOs and ed tech directors • Ed tech blogs and e-newsletter

Vision	• Set focused vision and inspire others to commit to it • Define success with actionable and aligned goals • Decide on the investments and strategies	• Translate the academic vision into innovative curricular / instructional programs & lead implementation process • Fulfill state level requirements (e.g., performance goals, special initiatives)	• Articulate Tech Vision that will support the district's desire to provide a 21st century education • Create a secure infrastructure to 'power' the school/district • Support teaching, learning, and assessment
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	• Determine effective curriculums for state assessments, Common Core adoption • Assist in determining resource allocation for educational services and programs to fit in budgets • Understand and report on which academic programs are working & implement improvements • Stay informed about innovations and bring in new ideas • Coordinate professional development for teachers	• Day-to-day management of IT & SIS incl. network and infrastructure, telecommunications, knowledge management system, ensuring uptime, etc. • Manage data privacy, data quality • Vet vendors & ensure IT safety for the district • Design and implement investments, strategies, and apps for instructional tech
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	• Can be exhausted from trying to parse the latest fads from meaningful innovation • Feels threatened 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	• Overwhelmed by trying to support all of the district's goals while being resource constrained • Can feel both marginalized and glorified by the fact that he is the only one that truly understands the value he adds • Feels immense pressure to keep district data safe • Invested in solutions he created
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	• 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	• 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

Persona	Director of Learning Tech (ASUPT/Director of Assessment/Curriculum Instruction)	Teacher
Goal	**Wants to drive learning technology adoption**	**Wants to use technology to help students excel**
What they do and how they think	• Keeps on top of latest developments in EdTech • While swayed by proof of impact, also more innovative and willing to take risks/pilot new technologies • Often has teaching and potentially school leader experience • Tries to stay in close touch with teachers and how they are using technology to make their curriculums more effective	• Would like to be able to stay on top of new classroom technologies, but often doesn't have the time • Could be on either end of technology: ○ Excited about adopting new tools, and wants to make sure that they are worth the effort of implementing, OR… ○ Doesn't want to change how they are already operating, feels that new technology will just be distracting and a waste of time • Wants to create compelling, interactive, lasting learning experiences • Swamped with teaching, curriculum, monitoring test scores, and managing parent expectations • Keeps a tight network in her own school/district, but less so outside • Usually not clued into how budgeting at the school/district works • Will try new things, but not very technical
Communication	• Local, State and National ed tech conferences -ipadpalooza, iNACOL, ISTE, FETC, TCEA, CUE. • Also reach through regional service providers in states such as NY (BOCES), TX, WI, etc. • Ed tech blogs & e-newsletter	• Blogs, Professional Development communities • Word of mouth, teachers in school • Local workshops and events • Social networks • Leadership programs such as Teach to Lead • Local teachers' unions
Vision	• Support the academic vision with the selection and promotion of learning technologies	• Create compelling, interactive, lasting learning experiences • Contribute to advancing the teaching profession • Build a comforting, safe, encouraging environment for the students
Activities	• Oversee every aspect of developing and assessing the	• Develop classroom curriculum • Monitor and report on test scores

	curriculum development for the school/district • Work with other school administrators to outline what knowledge and skills are needed for each grade level • Ensure that the district's curriculum meets all state and federal education requirements • Support pilot and rollout of new technologies • Report on success and adoption of technologies	• Implement new methods and technologies made available by the school/district • Communicate with parents • Report back to administrators on what is effective or not in the classroom • Serve on various teacher committees
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	• 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	• Often difficult to prioritize given so many areas of need • Hard to support too many products at one time	• 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 • Additional detail on some of the pressures faced by teachers: http://www.npr.org/sections/ed/2015/03/30/395322012/the-hidden-costs-of-teacher-turnover

EXERCISE Build your own Personas

If you have any specific personas outside of the ones listed above, feel free to outline them here.

Persona	....	....	....
Goal	....	....	....
What they do and how they think	....	....	....
Communication	• .... • .... • .... •	• .... • .... • .... •	• .... • .... • .... • ....
Vision	• .... • .... • .... •	• .... • .... • .... •	• .... • .... • .... • ....
Activities	• .... •	• .... •	• .... • ....
Emotional Pain	• .... •	• .... •	• .... • ....
Rational Pain	• .... •	• .... •	• .... • ....

2.3 The customer situation

2.3.1 Why we solve this problem

Why are we in business? What is the core business challenge that our customers have?

EXAMPLE

K-12 schools are unable to accurately and easily map a child's learning journey in a way that helps improve student outcomes. Most schools are still searching for a way to do this that is engaging for students, accessible for parents, and empowering and efficient for teachers. Many schools and districts are doing this manually, which results in lost time, inaccurate measurements, and frustration from inefficiency and lack of transparency of the child's true learning.

YOUR ANSWER

………...……

……

………………...

……

………...

2.3.2 How we solve this problem

What is the solution that we offer our customers to solve this problem that they have? This is what is commonly called your "elevator pitch." Keep it to no more than 3 sentences.

EXAMPLE

We help teachers and students capture and view evidence of student learning over time by providing a suite of easy-to-use mobile and web apps for digital student portfolios. Teachers are able to document student progress over time against learning standards by providing a flexible and standards-based gradebook, and parents can remain informed and engaged with their child's learning and school with notifications and opportunities to communicate directly through the apps. Schools are able to improve student outcomes by using this technology in a way that engages students and parents, and helps teachers track specific learning paths.

EXAMPLE

We believe that data done right is a game changer for district and school leaders, teachers, parents, and students. With accurate, timely, visual data, you can better understand your students' needs, see if your strategies are working, have constructive conversations that, save time, and get laser-focused on growth.

EXAMPLE

We strive to empower educators to create learning experiences that engage and inspire millions of students around the world.

YOUR TURN!

2.3.3 The Value Proposition

What do we do better than anyone else? How do you know that you should be so proud of this product that you are selling?

EXAMPLE

WE OFFER...	
Insight	We help teachers and students capture and view evidence of student learning over time by providing a suite of easy-to-use mobile and web apps.
Communicate	We help parents remain informed and engaged with their child's learning and school by providing notifications and opportunities to communicate.
Engage	We help parents, students and teachers understand learner progress by recognizing both the process and products of learning.
Proof	We help teachers document student progress against learning standards by providing an easy-to-read dashboard of progress.

EXERCISE Identify your Value Propositions

WE OFFER...	
....	....
....	....
....	....

2.4 The Customer Journey

Here is where we lay out the steps that a customer takes to find us. We do this because we need to understand their perspective and help them continue on a smooth journey from the moment they start to interact with us.

EXAMPLE

STEP	The customer experience
STEP 1	A teacher goes to a conference and hears about this product there. She reads a blog post the next day where this product is mentioned again. It sounds interesting so she goes to the product web site.
STEP 2	A few other teachers read the blog post and try it out.
STEP 3	After having tested the product a bit, the teacher shares her experience with a few other teachers at her school..
STEP 4	The number of teachers at that school who sign up increases (penetration rate).
STEP 5	Word is spreading around in the district. More teachers start to join at other schools.
STEP 6	The district (CAO/CTO/Superintendent) hear about it and want to take a closer look to verify if this falls in line with its broader strategic technology initiatives.
STEP 7	A leader is nominated to spearhead the review and get a select group of teachers to do a more formal pilot.
STEP 8	Pilot begins
STEP 9	They compare this to other options out there, and validate that this would be the right solution for the issues they are trying to solve in their district
STEP 10	The district determines when and how to roll it out
STEP 11	The leader identifies budget that can be allocated to this project
STEP 12	The board provides its approval for the capital outlay at the next monthly board meeting
STEP 13	Legal reviews and contract is signed!

Keep in mind that this journey doesn't all happen in two weeks - it will take months, or in some cases more than a year. Keep with it and stay persistent - your influence may be indirect in some cases, so trust that those blogs, videos and conference workshops along the way will all come together to help make something happen!

EXERCISE **What are the typical steps your customer takes in their journey?**

STEP	The customer experience
STEP 1	
STEP 2	
STEP 3	
STEP 4	
STEP 5	
STEP 6	
STEP 7	
STEP 8	

2.5 Customer Use-Cases

Now we must collect what we know about our personas, and apply the use-cases to each of them. This way, we can best match what the customer needs with what they value most and with how they will use our product.

EXAMPLE

PERSONA	SUPERINTENDENT	CHIEF ACADEMIC OFFICER	CHIEF TECHNOLOGY OFFICER
Name	**Alex Fields**	**Lisa Toll**	**John Chung**
Use-cases	• Measure student outcomes over time • Meet state testing standards	• Bring effective academic tools and programs to teachers and students • Measure student outcomes over time and show progress against testing goals	• Provide technology that integrates with SIS and other infrastructure • Ensure data security and privacy

EXERCISE Build your own use-case stories

PERSONA	....	....	....
Name	....	....	....
Use-cases	....	....	....

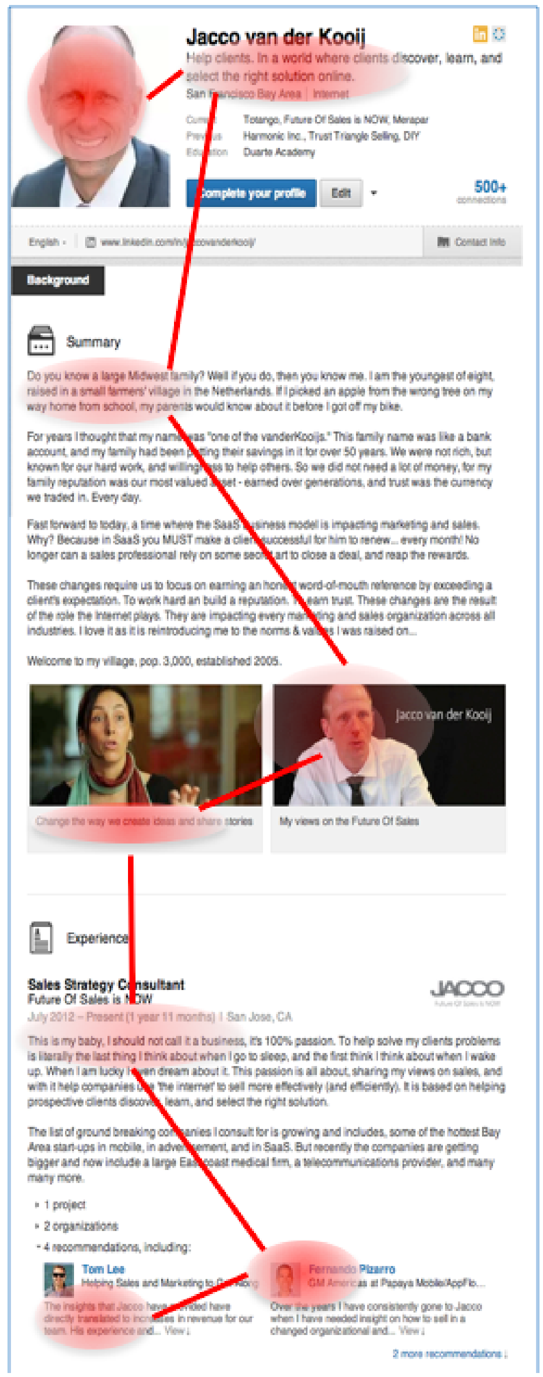
CHAPTER III. PREPARATION AND ORGANIZATION

III. PREPARATION AND ORGANIZATION

3.1 Create your online identity

A WORD FROM YOUR CUSTOMER:

As your customer, I need to trust you on some basic level. If the issue you are solving is important to me I will check your LinkedIn profile before I ever want to talk to you, but also before I respond to your email, click on that link, or accept your LinkedIn request. I need a satisfactory answer to four basic questions, and in the online world, I will make up my mind in the 2.7 seconds it takes for me to look at your profile to determine the answer to that question.



The four key points visitors subconsciously check when they are on your LinkedIn profile:

1. Look at your picture: are you an professional authentic?

- Photo: an isolated, professional picture of yourself with a smile
- Does this person look like they know what they can help solve my problems
- Competent, friendly, and influential?

2. Look at the "headline": are you a person who helps others?

- A tagline that captures what you are passionate about
- Recurrence of keywords across your profile

3. Go over your profile: do you sincerely provide value?

- What's your story?
- A story that is recognizable and provides connection points for a discussion
- References that say the same thing again and again
- Do you offer valuable insights to your customers?
- Do you have relevant connections

4. Do you know what you are talking about? The following content is most valuable:

- Blog or Video of what your company does
- A white paper that provides further depth
- Research material that provide insights

PRO TIP Only provide two pieces of content on your current job to avoid overcrowding your profile.

- JACCO VAN DER KOOIJ

BEST PRACTICES

- **DO** get a professional headshot
- **DO** personalize the background photo of your profile (match it to the color of your headshot)
- **DO NOT** use a prom picture! It makes you look junior - need we say more?
- **DO NOT** make your LinkedIn profile look like a corporate billboard, so remove as much of the logo work as you can. Your corporate content should only be under your current job.

EXERCISE Look at your profile and ask yourself:

- [ ] Is it clear what problem I help solve?
- [ ] Do I look like a professional?
- [ ] Am I authentic in my write-up?
- [ ] Does it shows that I care?
- [ ] Do I come across as an expert?

> “To be great in sales,
> You don’t have to be incredible
> **You have to be credible.**”

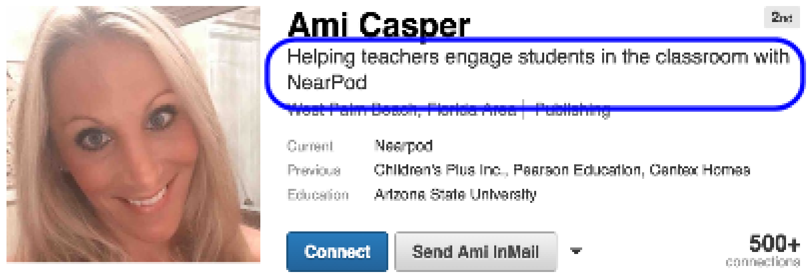
- Dan J. Adams

WHAT PROBLEM DO YOU SOLVE?

HEADLINE EXAMPLE #1 AMI CASPER

Question: What problem does Ami solve?
Answer: Help teachers engage students

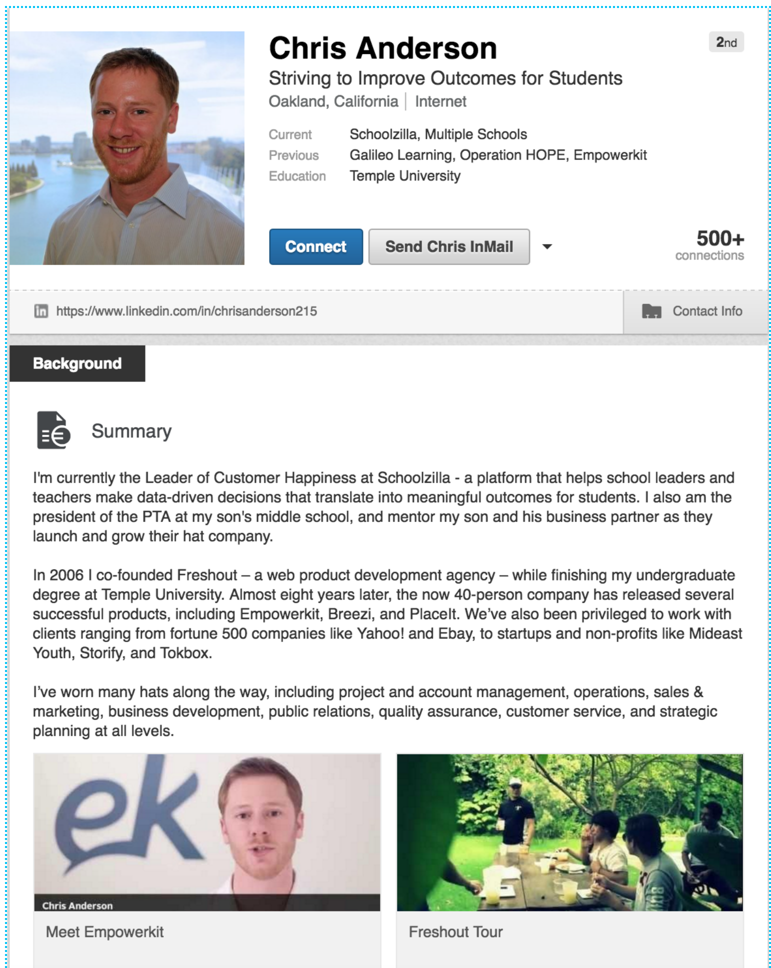
It contains *who* (teachers), *what* (engage students), and she could add more detail on the *how* ("with interactive lessons for K-12 …")



Your Summary: Tell a story, connect on a human-level

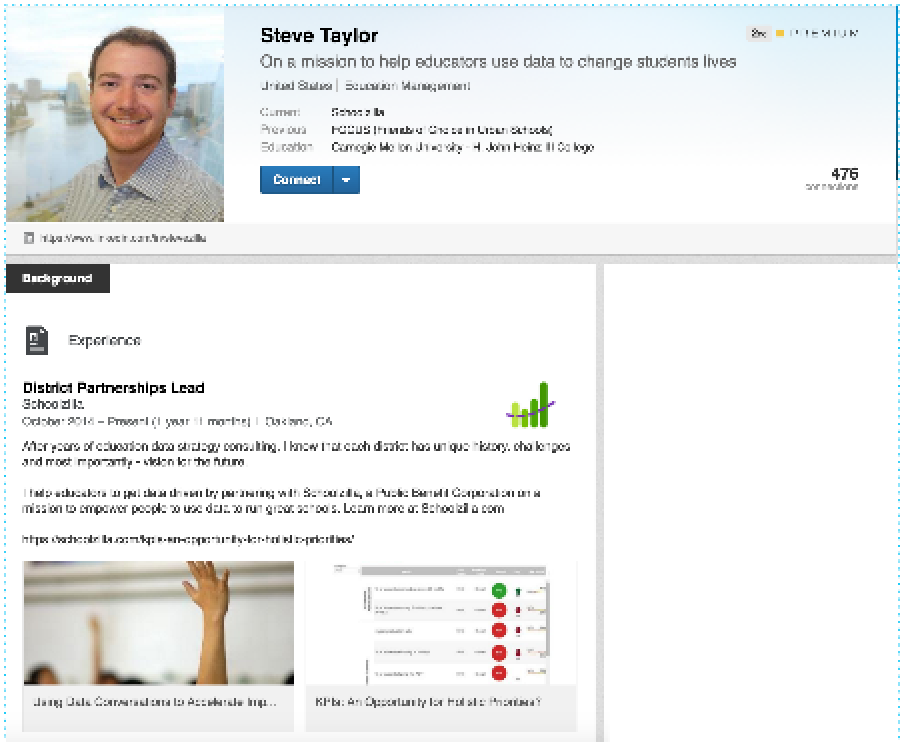
SUMMARY EXAMPLE CHRIS ANDERSON

- Professional
- **Authentic:** Chris' summary shows his passion as a person and relates this back to his daily work. It shows he is a real person. This summary provides all kinds of anchor points for his customers.
- Cares
- Expert



VALUE EXAMPLE STEVE TAYLOR

- Professional
- Authentic
- **Cares about the edtech space:** Steve offers great value on his profile as if it is a microsite. Customers visiting his profile receive instant value.
- Expert

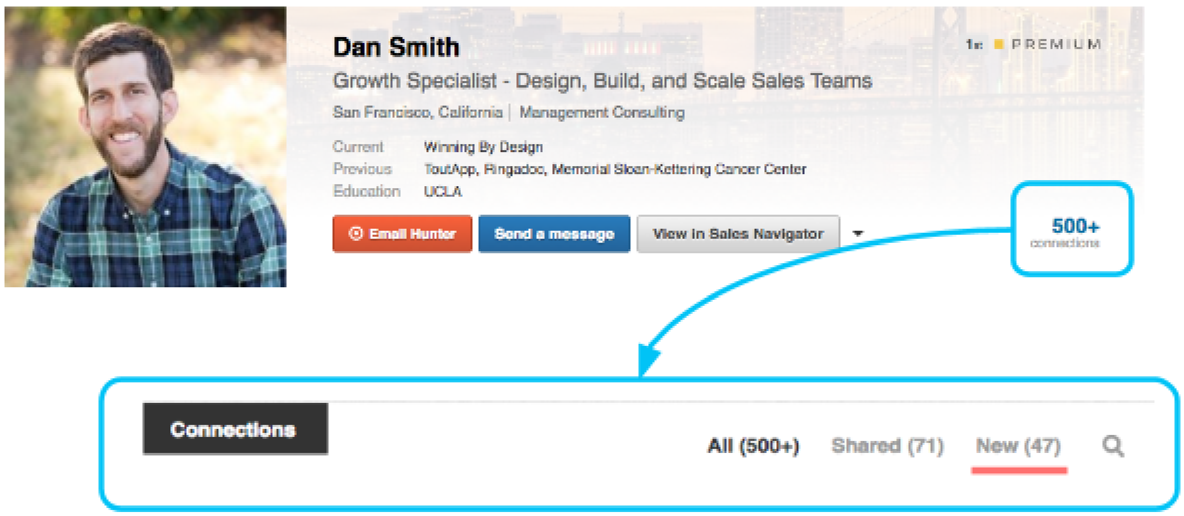


Congratulations! You look professional, are authentic in your interest in helping others, care about the business, and providing expertise when customers visit your profile.

3.2 Secure your LinkedIn profile

You must update the following security settings to appear trustworthy, yet not give away your connections to competitors that are snooping around.

PROBLEM: In this case, Dan is leaking confidential information!



People can snoop and see who you connected with (leads, customers, partners, etc.)

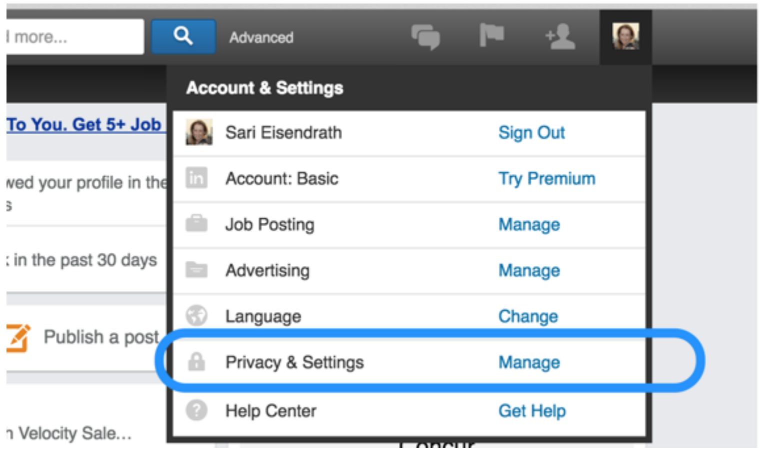
Once you accept my LinkedIn invite, I receive a message from LinkedIn inviting me to view your profile. As I click on the connections - and being a first degree - I can now click and get access to your entire roster of customers (customers) and even your pipeline of leads (those who are in **New**).

CHECKLIST

- ☐ **DO NOT** share profile edits
- ☐ **DO** make sure that ONLY YOU can see all of your connections
  (your first degree can see shared connections)
- ☐ **DO NOT** display viewers of this profile
- ☐ **DO** make your name and headline VISIBLE
- ☐ **DO** allow anyone on LinkedIn to follow you

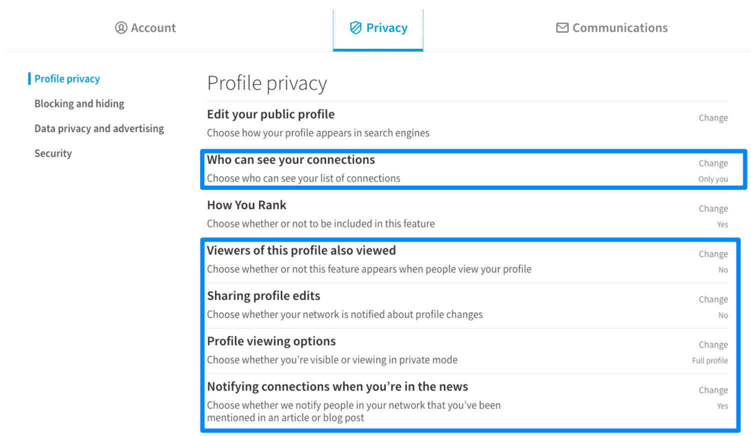
STEP BY STEP

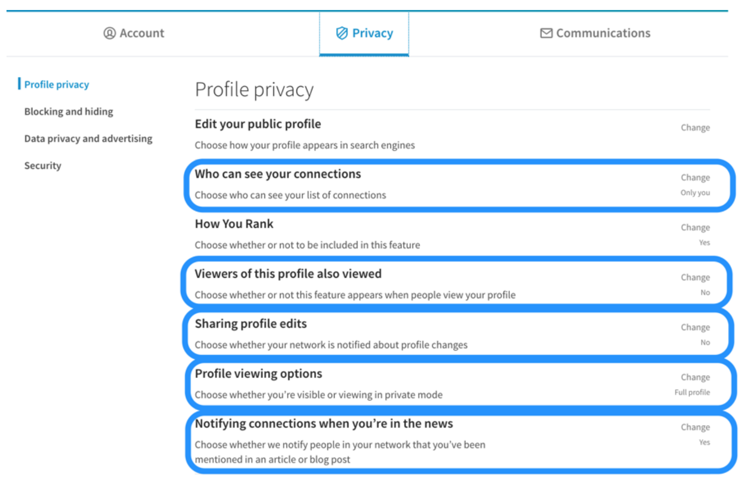
STEP 1 Under "Account & Settings" (hover over your picture in the top right) open Privacy and Settings by clicking "Manage".



STEP 2 In the Profile Privacy segment, make the following updates:

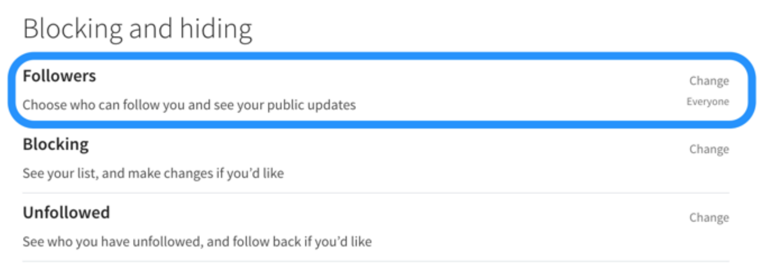
- In "Who can see your connections", select ONLY YOU
- In "Viewers of this profile also viewed", select NO
- In "Sharing profile edits", select NO
- In "Profile viewing options", select YOUR NAME AND HEADLINE
- In "Notifying connections when you're in the news", select YES





STEP 3 In the Blocking and hiding segment, make the following updates:

- In “Followers”, select “Everyone”



Well done. You are now a professional user of LinkedIn, ready to interact with a customer!

3.3 Manage Your Time

Time is your most valuable resource. Being in sales means that you have 20 things to do, each taking 4 hrs/week, and you have to fit it in a 40-hr week. It does not fit!! You need to become a master at prioritizing.

PRIORITIZE = PICK WHAT NOT TO DO

By analyzing time usage on a regular basis, you can understand how to optimize your time. You should set aside time each day to review and prioritize the demands on your time. The Time Management Matrix can help you discover how much time you might be wasting. The Matrix (an edited version of Dr. Stephen Covey's) has four quadrants: [print your own version here: https://goo.gl/DQDRJJ](https://goo.gl/DQDRJJ)

TIME MANAGEMENT MATRIX

	URGENT	NOT URGENT
IMPORTANT	**MANAGE** *QUADRANT OF NECESSITY* These are the daily tasks that are high priority, with a sense of urgency, and completely necessary to for performance in your role: • **Return phone calls** • **Calendar meetings/send invites** • **Check LinkedIn visits** • **Discovery calls prior to demo** • **Deadline-driven projects** • **Scheduled internal meetings**	**FOCUS** *QUADRANT OF QUALITY* These are the daily tasks that if you do not writ them down, you will forget about. And forgetting about them will cost you 2x more time the next day: • **Planning your day/week** • **Studying your use-cases** • **Playing with your own product** • **Account research and preparation** • **Quiet time/break time** • **Responding to flagged emails** • **Focus on key accounts** • **SDR/AE conversations** • **Updating CRM**
NOT IMPORTANT	**MITIGATE** *QUADRANT OF DISTRACTION* While you may feel these activities need your attention right away, this is in general where you spend too much time and what will leave you feeling pulled in too many directions at once. Temper these activities by setting strict time limits/day: • **Chat (Slack, GChat etc.)** • **Social media updating** • **Checking and answering emails** • **Most 60-minute meetings** • **Writing reports**	**AVOID** *QUADRANT OF WASTE* Many of the activities in this quadrant are we known to be a time-suck. They are just so addicting. Know that doing too much of thes activities is what is causing stress in your lif every day: • **Texting** • **Surfing, online shopping** • **Excessive breaks/long lunches** • **Selecting your music list** • **Chatting 15 mins w/ 20 people every day**

The most productive CEOs in the world tend to organize their day naturally in the following format. Instead of writing a laundry-list of everything that needs to be done, they prioritize based on 4 areas: Urgent or Not Urgent, Important or Not Important. This creates 4 quadrants.

Which quadrant do you think has the biggest long term impact on success?

BEST PRACTICES

Plan! Plan your day. Plan your week. Plan your month.

- **Plan your day:** Every day, start with a 15-minute talk with your SDR/AE/CSM and agree to what is **important** that day that needs to happen.

PRO TIP Successful people not only plan what to do - more important, they plan where they should NOT spend their time.

- JACCO VAN DER KOOIJ

- **Plan your week:** Block hours every day across the week for repetitive tasks (see the exercise below). Pick 2-3 urgent tasks that week that must be done!

- **Plan your month:** Create a kick-off every month at the start of the month with your POD including your SDR, AE and CSM. Agree on how the team will achieve the goals for the month.
    - What are the events (webinars, tradeshows, etc.) that need multi-week prep
    - What are the key accounts
    - Create a path to your number based on the # accounts to win
    - Agree to a workload (3 meets a day, 50 calls a day, 2 customers onboarded a day, etc.)
    - Briefly look 1 month ahead so you know what's coming

  But also...
    - What is the book we will be reading
    - When will we have team events etc.

- Think time zones. Work East to West. Understand your territories and plan accordingly.
- When working on important activities, don't let yourself be interrupted by colleagues wanting to hang out, getting stuck in answering internal emails, online chatting, etc.

PRO TIP Every day set aside distraction-free times to tackle your "laser focus" exercises and activities. Put your headphones on and get it done! Or go for a walk. Stretch your legs. Taking a step back from your desk 1-2 times a day will recharge your internal batteries and ultimately make you more productive.

- DAN SMITH

- Maximize account strategizing and research during off-calling hours.
- An instant change that can improve efficiency: clean/organize your work area.

- Continuously improve yourself and manage a path of continuous learning: Establish a regular reading program. For many people, commuting by public transport or car (audio books) is an ideal time for this.
- Keep your emails short and to the point. Sending a short email to a colleague, for example, shouldn't take any more than a few seconds. Internal emails don't need to be done excellently.
- Spend 10-15 minutes at the end of the day to decompress and plan for the next day.
    - Shortcut: keep an open doc/spreadsheet from the get-go to note items as they happen.
    - Make sure that your AM list for the next day is queued up, cleaned, and ready to go, so that you can get to a quick start.
- Do not be afraid to pick up the phone on Monday.

3.3.1 Time block

Sales professionals have so much they can spend their time on, that it is important to prioritize and design your day around completing everything that needs to be done.

> Work expands so as to fill the time available **for its completion.**
>
> *- Parkinson's Law*

Make a list of bad habits that are stealing your time, sabotaging your goals, and blocking your success. Work on them only a limited time every day. Use your phone's timer to prohibit excessive waste. The easiest way to eliminate a bad habit is to replace it with a better habit.

Use timeboxing techniques to dedicate a set amount of time to a specific task - like emailing a target group, or doing cold-calls. Taking short breaks, inspired by the Pomodoro technique (typically 25 minutes of sustained focus on 1 specific task, followed by a short break) has proven to be effective to getting more things done.

Find where you are spending your time, and optimize your day to get done what you need to be done.

Good sales professionals just make it happen. Great sales professionals don't leave it to chance. They design their day. They schedule themselves for tasks.

Take control. Running out of time is the result of you choosing not to prioritize. Don't let outside factors "force" your hand - plan ahead and organize what you need to get done.

EXERCISE Do this once a week:

STEP 1 Create a list of all your activities you do every day. Log how your spend your time each day.

STEP 2 Divide the activities into four quadrants:

NECESSARY WORK	QUALITY WORK	DISTRACTING YOU	WASTING TIME
Urgent & important. Keep an action list.	Important but not urgent. Set time aside for these every day so that you don't forget.	Urgent but not important. Use a timer to minimize waste.	Not urgent and not important. Create a list so you know what activities will suck your time, and avoid them.
....	....	....	....
....	....	....	....
....	....	....	....
....	....	....	....
....	....	....	....
....	....	....	....

Mind blowing: By just knowing what tasks are a waste of time, you will save hours every week… which you start to apply to quality work. It's so simple, but totally mind-blowing!

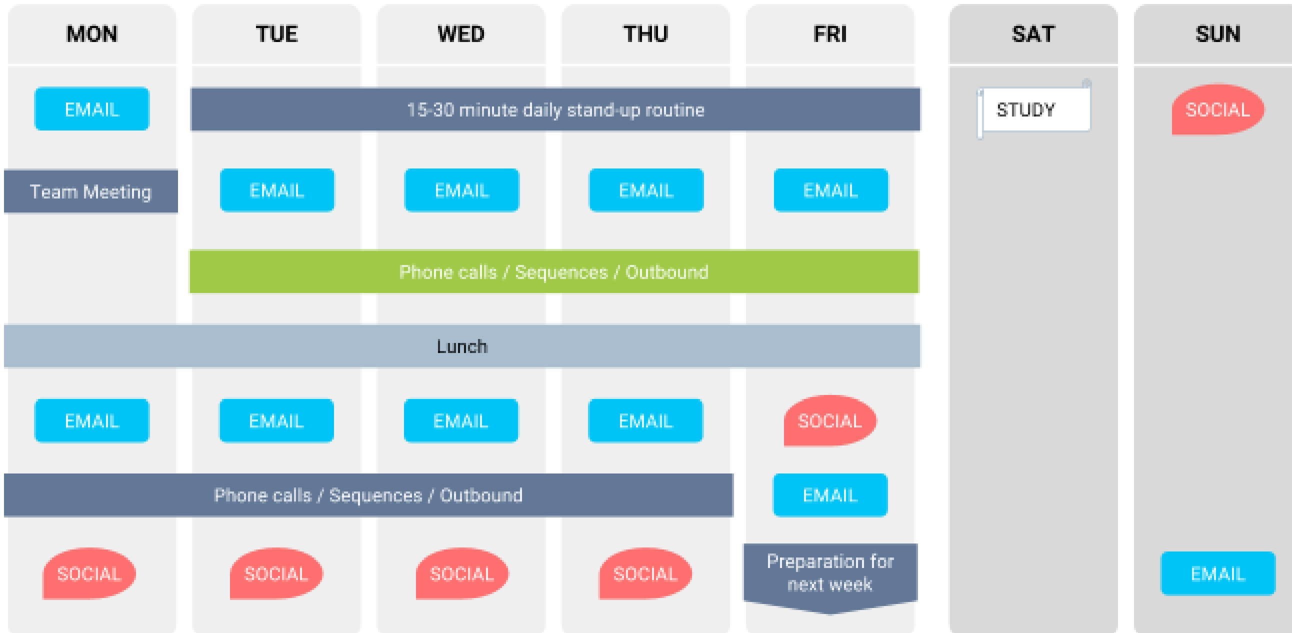
STEP 3 Build your day. In Annex A you will find an example.

MORNING:
- 15 minute stand-up with the team every morning
- Social Media Scan: 30 minutes
- Research and preparation for your meetings: 30 mins
- PRODUCTIVE WORK: Calls/Meeting: 2x 60 minutes with 15 minute break in between
- Important email block

AFTERNOON:
- Research and preparation 30 mins
- PRODUCTIVE WORK: Calls/Meeting: 2x 60 minutes with 15 minute break in between
- Social Media Scan: 30 minutes
- 15 minute review of the day + prep for the next day. Summarize your day (calls, emails, discovery calls, quotes, etc.).

STEP 4 Organize your weekly schedule; use colors and start blocking your schedule. Your team should be able to access your calendar so they know when you're free for meetings.

Other things to add to your schedule:
- Obtain the marketing event calendar - schedule 3 weeks ahead
- Obtain the marketing content calendar - use content as part of your blog posts
- Schedule your weekend emails in the productivity windows (culturally adjusted!!!! Don't send emails to contacts in a country/culture where it is not appropriate)



STEP 5 Stop doing what doesn't work. Do more of what works well.

MANAGER CHECK: We train your managers to check your schedule for 1, 2 even 3 weeks out. If your schedule looks wide open 2 weeks out, this means that you are either a) an absolute Einstein-level superstar (0.01%) or b) prone to time waste, like all of us normal human beings.

PRO TIP Start a weekly book club where you read a book and review the key takeaways from that book in your pod or peer group.

- JACCO VAN DER KOOIJ

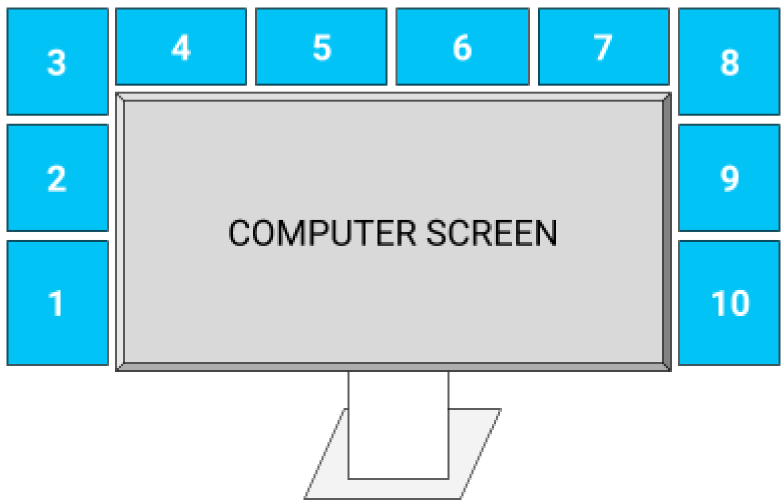
If you think we're kidding, ask any top performer (athlete, doctor, executive) about their schedule and you instantly recognize they are 100% committed to keeping on a set schedule, not wasting time, and bringing complete focus to what is IMPORTANT vs. what is URGENT.

3.4 Set Up Your Workspace

The lessons contained in this playbook are so dense and so thorough that you won't have time to absorb absolutely everything. You need to retain all of this knowledge we're dropping on you right away, but how? It will take a normal person years to fully master this playbook through repetition and muscle memory, but you need to be ramped in weeks!

Simply setting reminder notes in a Google Doc or on a Post-It is NOT GOOD ENOUGH. Yes, that will give you a cheat sheet for when you need it. But when you need it, you forget about it. You need constant visual triggering. Below is an example how you can arrange the best plays, checklists and reminders from this playbook around your computer screen, so they are always at the ready whenever you need them.

SETUP OF YOUR COMPUTER SCREEN WITH CHECKLISTS



Here are a few lists you should have

- Your Use cases
- Your Value proposition
- Your Qualification criteria
- WBD Sample voice mail script
- WBD RRRR Message
- WBD RRRR Golden email message
- WBD AxNOT opening
- WBD Questions to ask
- WBD FFF responses
- WBD SDR/AE daily schedule

BEST PRACTICES

- **DO** consider putting this in the flow of a deal from first contact to discovery call (left to right)
- **DO NOT** rely on a digital document - takes too much time for you to pull it up
- **DO** update frequently with new/latest best practices

3.5 Team Up

In a sales POD, the dynamic between the SDR, AE and CSM is SO important - not only to your own success, but also to the success of the entire sales organization. Gotta have a good camaraderie! Below are a few examples of some best practices we have found on various teams to help teams find their groove.

BEST PRACTICES

- DO **work together:** The SDR and AE role is all about teamwork that leverages each other's specialties. Not about Batman telling Robin what to do! In a working team, the SDR is a specialist in online research - finding the right person, contacting, and gaining their interest; the AE is a specialist in identifying the underlying problems for a customer and remedying that with potential solutions. Work together, use your strengths, and MAGIC will happen.
- DO **research:** Research what worked for you over the past 30/60/90 days. Build a heat map of which customers were responsive to your inquiries. But also create an overview of which markets were NOT responsive. Identify what made the hot opportunities hot, and what made the cold opportunities cold. Don't overanalyze.
- DO **map it out:** Identify and write down all the steps you take in your daily sales process… and I mean EVERY step (see example below). Then figure a way to do it better and faster in fewer steps. Most teams are – without realizing it – delaying the sale. This is your time to question every step (e.g., do we really need to put every customer on a 30-day trial?) Take just 30-45 mins for this. You can always come back to it.
- DO **meet regularly**: Now create a plan where you do more of what works, and less of what doesn't. Simple, right? Take 10-15 mins to do this together. Commit this to your schedule:
  - Meet every day for 15 minutes at the start and end of the day
  - Meet at the start of every week to set your goals for the week
  - Meet every week at the end to verify if goals were established
  - Play Ring-Ring to practice openings, rejections, word emails, etc.
- DO **plan**:
  - Pick your top 20 accounts based on your territory and target list
  - Next, find 3-5 people within these accounts; these are the 3-5 people that the sales rep wants to meet with at that company
  - Send a weekly outreach campaign that is industry-specific with relevant messaging
    - Note that in other industries, often this weekly outreach would be via email. If you're contacting administrators at a school or district, often they are less heavy email users but can be reached by phone - so pick up the phone and dial!
  - SDRs can address those that have received these emails but also they will go after other individuals that are in the territory
  - Mix up who is talking to the prospect: if the AE reaches out and they said no, then have the SDR reach out and speak with the same prospect so you validate each other and give the prospect two different personalities on the phone
  - Make sure you use your resources (look at LinkedIn profiles to get something to reference on the call - what school they went to, groups they are in or previous employers. Add that information to your CRM so you have helpful intel at your fingertips, and you both can reference it to break the ice on calls or in meetings.
- DO **problem solve:** Identify a list of 10 of the most common and difficult questions by your customers. For the SDR, those questions generally are around objections. For the AE, those are mostly about proving value. Work on a response together. My advice… start with an easy objection, before you move up to hard ones.

- **DO teamwork:**
  - **Together is more fun:** Sit in on demos together. It doesn't have to be every time, but it builds a rapport. Have the SDR come into the meeting at the beginning to introduce you and build that rapport.
  - **Role reversal:** Practice with each other. Practice. Practice. Practice! Role play "ring-ring" games where you practice opening lines, and addressing concerns and objections. When it gets boring, reverse roles. We realize that many of you are not on the phone a lot these days. However "ring-ring" is a very productive way of learning together.
- **DO master your tools:** You most likely are pretty good at LinkedIn. And maybe SalesLoft, ToutApp, or ShowPad, even Prezi! But are you a specialist? Do you truly "master it"? The next few weeks are an excellent time for advanced education on some of the tools you use daily, and/or identifying new tools that can help you.
- **DO create a video response:** Create a video response to your customer's question. When a customer has a question, it sometimes can take a day to write the response. Why not set up the camera – iPhone/Android phone + a tripod – go to the whiteboard, and explain it. No big deal.

- **DO blog:** When you are getting the hang of creating "custom" videos, why not create a video blog as a team, where you are addressing common customer questions you hear out there. Put it on YouTube and link to that video on your LinkedIn profile. Show your customers you care about them and your customers will care about you.
- **DO attend an event:** Attend a regional event together, such as a SalesHacker, SaaStr event, or a Social Selling Meetup.
- **DO develop content:** Create content together; remember, you always feel like "this piece of content is missing" and "that piece of collateral is out of date" – take a shot and create it. Chances are either a) you nailed it (everyone's happy), b) Marcom freaks out and realizes they need to do it, they do it (everyone's happy).
- **DO have fun:** Last but not least, schedule the first get together with your AE/SDR, and make it FUN. No need to lock yourself up in a dark room at the office - go out and meet over a coffee outside. Forget the PC and bring a notebook instead – better yet – go for a hike together (carry a pen/notebook to capture ideas).

3.5.1 Game Tape - How to give feedback to each other

Recording calls is one of the most valuable ways for individuals to improve as well as share best practices with the team. When reviewing new skills or video recordings, it's important to be clear and helpful with your feedback as you continue to learn from each other.

The hardest part by far is listening to your own voice. Don't worry, you don't actually sound like that! Just kidding, you do. But after forcing yourself to focus on how you speak, tone, word choice and what you actually say, you will improve 10 times faster than waiting to get feedback from your manager.

Here's a way to quantify your feedback so you can track improvement, where you need work, and allow data to help guide you to where to focus.

Figure 3.2: The Peer Review Rubric (example rubric you can you use: https://goo.gl/n1n7ia)

PEER REVIEW RUBRIC					
Description	**Exceptional - 5**	**Skilled - 4**	**Proficient - 3**	**Developing - 2**	**Inadequate - 1**
Clarity – explain the information in a manner that is easily understood by the customer (clear and concise vs. meandering with multiple answers rolled into one?)	The answer is focused and succinct. They demonstrate sophisticated understanding, use advanced skills like mirroring, tone, clarification and are customer centric.	The answer is correct and not missing any parts. There are at least 1-3 parts that have minor issues - for example tone, word choice, meandering answer etc. Parts are ambiguous or hard to understand	The answer is mostly correct, but there is significant clarity issues in at least 1 part. This includes answers that meander, or do not directly answer the question	The intent is correct, but the actual delivery is hard to understand. This could include unprofessional language (i.e. too casual), incorrect answers or other significant gaps.	The answer shows limited understanding of the topic, or does not answer the question in an identifiable way.
Knowledge – demonstrate knowledge of the topic. Look for fact specific examples where they demonstrate understanding	The answer shows without a doubt that they have mastered the topic. They demonstrate advanced understanding with a precise response covering all aspects of the question	Technically correct with only a minor error due to potential ambiguity. This is a sufficient answer that shows strong understanding of the material	Mostly correct, but missing 1 important area of the topic. Introduces a topic that is arguable to the skill being tested	Misses an important fundamental part of skill being tested. The answer attempts to back up claim, but does not show true understanding.	The answer demonstrates minimal understanding of the topic or is clearly incorrect
Confidence – state of certainty that the solution is the best and can be delivered with self-assurance.	Exemplary delivery with engaging, and persona relevant tone. The answer shows a true professional that fosters a consultative sales approach.	The answer is presented in an appropriate way. The tone is clear and thoughtful and appropriately matched to the persona. There are no unnecessary filler words	Contains too many "uhms, uhs", or informal fillers like "awesome, cool, dudeski". Could also have inappropriate sentences that end with question tone that show lack of confidence.	The words used are mostly correct, but the delivery shows lack of certainty. More practice is needed before a customer call demonstrating this skill	Their answer is borderline painful to watch - they may be on the verge of tears with anxiety and would be difficult to hold a conversation with.
Enthusiasm - demonstrate a passion for the solution with a positive tone and voice inflection.	The answer exudes passion for both the customer and the solution. The answer demonstrates likability, professionalism and expertise all rolled into one	Either starts or ends with strong enthusiasm, but not cohesive throughout entire answer. There are strong glimpses of passion, and only a small glimmer of 'going through the motions'	Answer shows low energy or warmth. Despite if they are knowledgeable or confident, this could use more empathy	Lacks fire or glow in the answer. Too "to-the-point". The answer is mostly mono-tone or uninspired.	The answer merely tells in a one way conversation and lacks progression or identifiable passion
Goal Achieved - All things considered, was the answer indicative of mastery of the skill delivered in a customer centric way?	Nailed it. This video should be publically viewable and an example on how great you are at this skill, and for all new hires to learn from. This is exactly on point in every way.	Technically correct with only a minor error due to potential ambiguity. This is a sufficient answer that shows strong understanding of the material. Could be used in training.	Intent was correct, but missing 1 or more important parts of the question or skill. This video should not be used to train new hires, but is mostly accurate.	Missing a significant part of the answer. Provides an attempt at the correct answer, but is done inaccurately or inappropriately.	The answer appears to be off target and not relevant to the question. This could happen if no training or understanding of the topic occurred.

Leverage this rubric to show progress over weeks and months on a specific skill.

EXERCISE Do this every week in pairs, and during team meetings

STEP 1 Select a qualification or discovery call you've had recently

STEP 2 Listen to the start and identify the tone and personality of the customer.

STEP 3 Agree to listen to specific parts of the call - how was opening? What was the first question asked? What question that really got the customer speaking?

STEP 4 Identify both positive and constructive feedback.

Invest in reflection to maximize progression.

3.5.2 Drills: Ring-Ring™

Sales is a profession that requires building skills and practice. Like a professional athlete, you need to be great at the fundamentals before you jump into the olympics. In order to prepare you for the real customer conversation, just reading won't be enough - you need to perform practice drills with your team.

Practice with each other. Practice. Practice. Practice!

Role play Ring-Ring simulation are where you practice opening lines, and addressing objections and sharing use cases.

Even if you are not personally on the phone very much, the "Ring-Ring" is a very productive way of learning together.

PRO TIP Practice with your team spontaneously - if you have an upcoming call, ask a coworker to help you practice your opener and initial questions. This will help you get into the flow easily when you're on the real call with your customer.

- JACCO VAN DER KOOIJ

EXERCISE Do this every day for 15 minutes:

STEP 1 Stand in a circle of 3-6 of your team.

STEP 2 Select a particular practice topic: (i.e. ask a series of questions to uncover a particular challenge, objection handling, share a customer use-case)

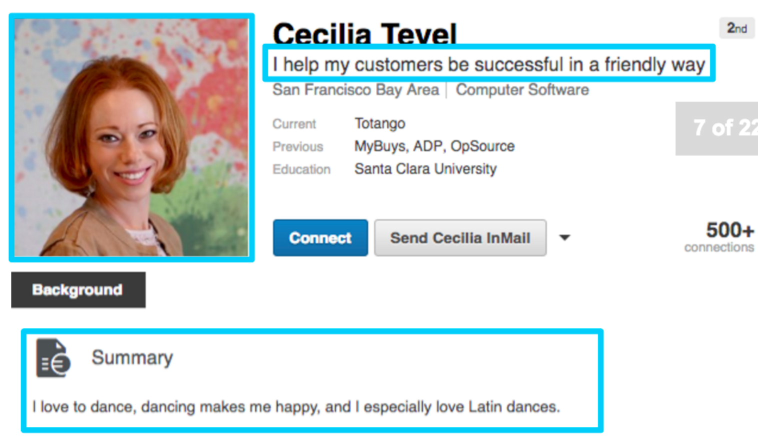
STEP 3 Start with two adjacent people - 1 will be the customer, and the other will be the sales person

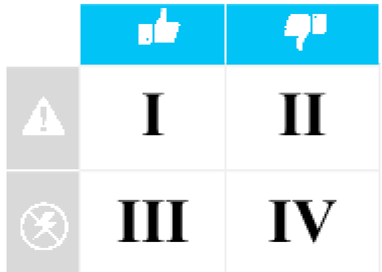
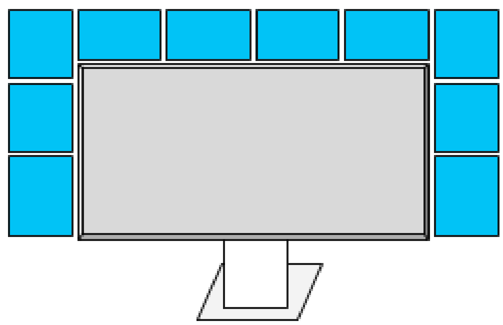
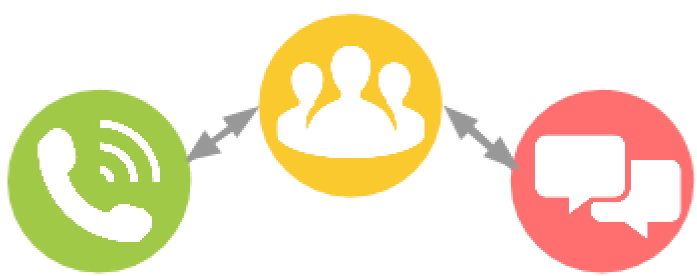
STEP 4 Sales person kicks it off by saying "Ring-Ring"... and let then the customer says "Hello, this is [name]"

Just like the best athletes still warmup before a game, your team should warm up together before your call block of the day.

Summary Chapter III

Build Online Identity	Time Management	Teamwork
LinkedIn Profile	Calendar	Ring-Ring
Customer Centric	Prioritize	Drills / Game Tape
Secure	Workspace	Feedback

PROCESS	PLAYS	PREPARE
Online Identity	Create your identity - LinkedIn, Twitter, Video, Blog	Customers make decisions based on research and information available online. In today's world, professionals need to provide insight and share best practices that are available 24/7.
LinkedIn	Headline Summary Secure	Your headline defaults to your job title. But when you visit a customer profile, it's more valuable to share how you help, not what you do.  This drives them to visit you back - share a story about why you do what you do in the summary. Share insight through posts and updates, and they'll get to know who you are as a valuable expert before ever speaking with you.

PROCESS	PLAYS	PREPARE
Time Management	Quadrant of Quality Pomodoro Time Block	Time is your most important asset. It's easy to waste on social media for research. Optimize your day in small chunks of sales activities with specific goals.  Budget time for important but not urgent tasks - these are easy to push off until you realize there is no more time to complete.
Workspace	Tools Queues	During this training, you will be given too much information to remember.  Use visual cards around your desk and monitor to highlight important templates, questions, crutch words to avoid.
Team Up	Game Tape Drills Ring Ring	Practice, collaborate, and continue to improve. Leverage your team to understand what's working - and what's not.  Ring Ring exercises are important daily exercises with your team. LIke an athlete warming up for a game, sales professionals need to warm up before a call. Practice objection handling and referencing use-cases.

CHAPTER IV. CUSTOMER INTERACTION

IV. Customer Interaction

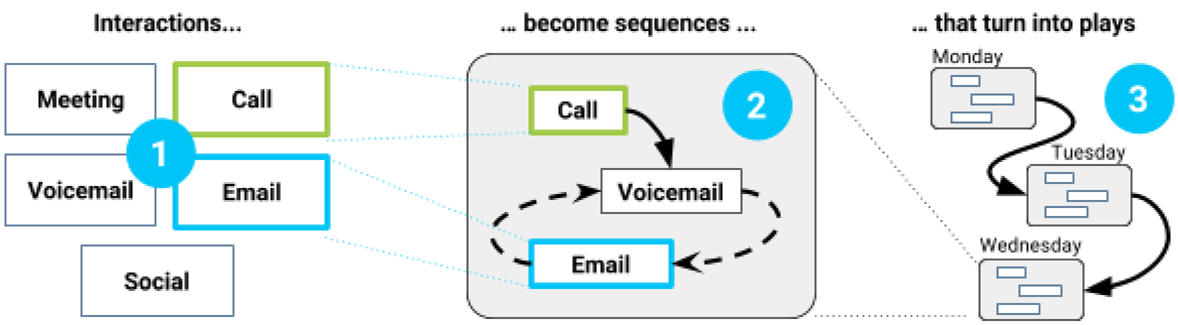
Before you start interacting with your customer, you must master three basic elements:

- **Know what a customer-centric methodology is:** Put yourself in their shoes, and approach them always keeping this in mind
- **Understand your customer:** Do your research - understand their role, their persona, their industry, and specific use-cases and customer stories that will help you relate to them
- **Be a customer-centric professional**: Show up every day on time, energized and ready to perform. Your workplace - both online (LinkedIn) and physical (desktop) are set up to help you and your customer succeed.

To engage a customer, we use three elements:

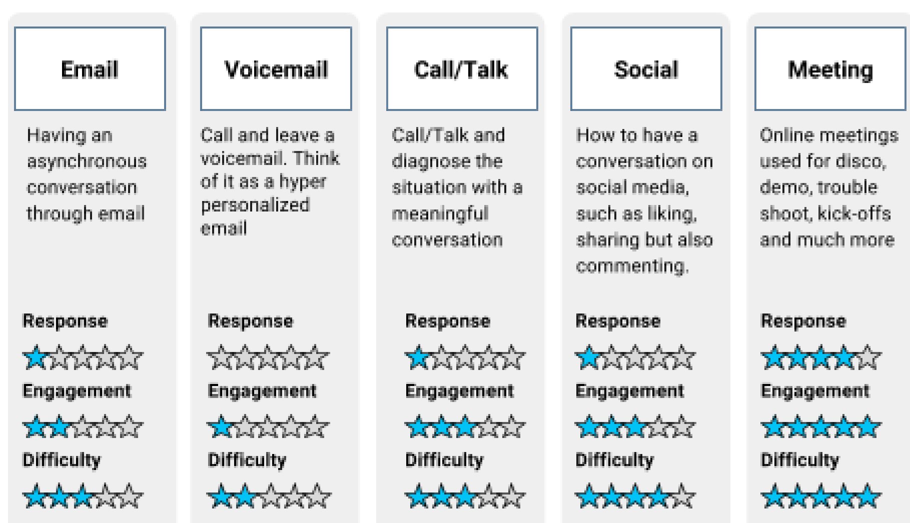
1. We string five forms of **Interactions** together in...
2. ...**Sequences** that are applied across stages (such as Prospecting, Winning, and Growing)...
3. ...into a series of **Plays**

Relationship between Interactions, Sequences and Plays



Above you see in step how 5 different kind of interactions can be turned into a sequence consisting of a call, followed by a voicemail that draws attention to an email. By applying that sequence across several days you get a play. And applied across different roles on your team:

- for an SDR to follow up on an inbound
- for an AE to confirm a meeting, or
- for an CSM to follow up on a ticket.



4.1 Outbound Emailing

"Nobody cares how much you know, until they know how much you care."

- Theodore Roosevelt

Writing an email is a skill. The fact that less than 10% of all people have been trained on how to write an email explains why we have an email problem. We will tackle writing an email as follows:

- **Preparing to email:** You need to do research to understand your customer
- **Selecting valuable insights:** Offer your customer something of value to them
- **Writing an email:** You need a format to work from to write quality personalized emails
- **Using video in your email:** Stand-out and save time with a short video
- **Measuring engagement:** Learn what works, so you can do more of what does work and stop doing what doesn't work

4.1.1 Preparing to email

If you know more about the customer, the impact and consequences of the imminent decision – and you have the right solution – you will win! This power is earned with thorough online research, which signals to your customer that you care about them.

The fact that you care opens up a door to a room full of new insights. This does not require you to do a 6 week deep dive. The online world is powered by search tools, and the information you desperately seek is often laying around in plain sight.

EMAIL PREPARATION CHECKLIST

MARKET-SPECIFIC	TARGET-SPECIFIC
☐ Partner ☐ School ☐ District ☐ EdWeek - website ☐ EdSurge - website ☐ Thought leaders such as [Tom Vander Ark]() ☐ Industry / association events ☐ .... ☐	☐ greatschools.org ☐ NCES National Center for Education Statistics at https://nces.ed.gov/globallocator/ ☐ District website ☐ District needs assessment (if they receive at least $30K in federal funding) ☐ State / county department of education website ☐ State teachers' union website
PROBLEM-SPECIFIC	**PERSON-SPECIFIC**
☐ State department of education website ☐ Subscribe to their newsletter (if applicable) ☐ Submit a request for info (if applicable) ☐ .... ☐ .... ☐	☐ Twitter, Facebook, other social media ☐ LinkedIn profiles ☐ Teacher / administrator profiles on district websites ☐ .... ☐ ....

BEST PRACTICES

- **DO** Make sure that you check all of the publicly available information about the school / district
- **DO** Check out LinkedIn references – find out what the references say about the decision maker
- **DO** Understand the neighboring schools / districts in the area
- **DO** Schedule a briefing with your team to take them through your findings and prepare for the call
- **DO** include a link to your research in your email; it signals to their organization that you have done your research, which increases the chance that they will value your opinion.

4.1.2 Selecting valuable insights

Once Value props have been given for each persona, find valuable content you can share with them that either 1) helps them be better at their job or 2) shares insights about something someone in their role typically cares about.

Use the exercise below to identify use-cases that pertain to specific markets identified above, or content geared to specific personas (e.g., articles that grab the interest of teachers will be different than those that grab the attention of superintendents).

EXERCISE Identify use-cases that are relevant by market or persona

	WHAT DO YOU HAVE TO OFFER YOUR CUSTOMER? (use-case, link, etc.)	MARKET OR PERSONA?
1		
2		
3		
4		
5		
6		
7		
8		

4.1.3 Writing an email

The key to a great customer-centric email is providing value, and resisting the urge to sell. Don't try to always get one swing home runs. Focus on starting a conversation and helping your customer solve their problems.

Structure your email to evoke appreciation and response

Songs, movies, books: they all have a structure. The proper structure of an outbound email consists of the following:

R	Research	An opening that shows you have done your homework, and that this is not a COLD call
R	Reference	Refer to other customers who have had a similar experience and what they did
R	Reward	Offer value, such as a link to valuable insights, a relevant blog post, etc.
R	Request	Offer to share more insights, and ask for a meeting

BEST PRACTICES

- **DO** Keep it short. Half as long, twice as powerful
- **DO** Optimize for mobile phone. Make effective use of the Subject: and the first 50 characters
- **DO NOT** Start with a "Hi my name is … and I work for…" Instead get to the point!
- **DO NOT** Start opening sentence with "I". Make it about them, not you
- **DO** In the reference section, talk not about "great feature a, b and c our service offers", but instead talk about "Customer X and Y experienced great benefit A and great benefit B."
- **DO** offer valuable insights
- **DO NOT** include attachments - always links to content
- **DO** Address a person by name when you start your request to draw their attention to a key point
- **DO** Close with a mutual social connection, such as being from the same school
- **DO NOT** try to close with an immediate meeting - primary goal is to gage interest
- **DO** Use the PS. (Most read part of an (email) for example add a link to a short video

PRO TIP Try adding a "P.S." after you sign off - it's a super effective way to draw your customer's attention to something valuable specifically about them. Give them something unusual but relevant. "P.S. Since you are into time management, here's an article I think you'd like."

- DAN SMITH

STEP 1 Write your first RRRR message.

R esearch ....

....

R eference ....

....

R eward ....

....

R equest ....

....

BETTER EXAMPLE This ends up looking something like this (but still not perfect) - this could apply to a company like Freshgrade:

Rantz,

I was looking at your LinkedIn profile this morning, and noticed that you lead technology innovation for your district.

I've worked with other people with similar responsibilities to help them implement and apply technology to drive better student outcomes.

I've attached a case study which shows how one of our customers, similar in size to your district, was able to use custom dashboards to create visualizations that drove better decisions and better outcomes for their students.

Could we discuss this feature in depth on Tuesday at 3 PM EST?

STEP 2 Apply Do's and Don'ts

- Inspect all "I", "We", "Our", etc. Remove as many as you can.
- Add the customer's first name to the request.

GREAT EXAMPLE Turn the "I" Statements into "You"

	Jennifer,
R esearch	*Your LinkedIn profile shows that you lead technology innovation for your district.*
R eference	*The big problem that **CTOs** such as yourself encounter is to **find technologies that support the district's goals and can be proven effective.***
R eward	***Your peer at the school district of _______ experienced the exact same challenge. I wanted to share a link that** shows how he used custom dashboards to create visualizations that drove better decisions and better outcomes for their students.*
R equest	***Jennifer, is this relevant for you?***

STEP 3 Add a subject

Remember to avoid generic or bland "marketing-esque" subject lines. Instead, create subject lines that spark curiosity and are relevant to the body of the message. Always test your subject lines.
One way to start is to Pick 1 or 2 words from each sentence to make it your subject

Subject: Research / Reference / Request

Would become:

Subject: Dashboards / Meeting district goals / Talk on Friday?

STEP 4 Review it with a peer

- Review it with a peer - say it out loud
- Do an A/B test to tune it and improve response rate

EXERCISE Identify the RRRR in this email: Write out the full "R"

	Hi Paul,
....	This month's newsletter from your school district mentioned that your team _______ is leveraging technology to improve student outcomes.
....	We often see district CTOs, much like yourself, having trouble finding the right technologies that will give administrators the data they need to make better decisions. This lack of information makes it difficult to have a positive impact on students and to meet district goals.
....	_______, for example, leveraged [my company] to help collect and centralize their data in one place to transform their data visualization and finally see the patterns that they needed in order to make more effective decisions for progress.
....	Paul, do you think this could have value at _______?
	Cheers, Sarah

4.1.4 Monitor engagement

For SDRs: Engage and Respond Immediately - Call them in < 5 minutes

- Respond within 5 minutes! It has been shown time and time again that immediately reaching out by phone results in higher connect rates and great conversations
- However, if you send them a 6-page use-case… you can't expect them to read it. With this, don't call them to ask if they read the article (clearly), but they probably would not read it anyway. You call them to give them the cliff notes and see what is important to them!!!

For AEs/CSMs: Get Executive Engagement - but it's on their time, not yours

The best results come from immediate engagement. If a C-level executive responds on a Wednesday evening that he wants that white paper, and you send it the next day at 9am, it will not get through his email clutter. HOWEVER if you you send him that white paper 3-4 minutes after he request it, there is a likelihood he forwards that paper immediately to the decision maker on the team!

This requires you to carefully plan your outbound schedules. If you have a campaign that goes out to 200 CAOs at 9:56am, you better block the next two hours for "immediate response". But also on a Sunday morning at 9am. If you burden them with your email, you better step up if they respond!

SDR/AE/CSMs Increasing Engagement

You need to monitor engagement: this means that you need to learn which factors will improve your open rates and click through rates.

BEST PRACTICES

- **DO** Keep it short. Shorter = better
- **DO NOT** use bullets in your email smells like marketing; minimize using them
- **DO NOT** hide a link under a word. It makes it “suspicious”; people like to know what they click on, and a link to a company domain is more trusted
- **DO** test windowing of your email. Response rates vary by time of day; schedule your outbound emails based on this knowledge:
    - Weekdays 9pm (evening working exec)
    - Sunday at 9am (catching up/prep for the week)
    - Wednesday at 8am (generally best response rates)
    - Tue-Thu-Wed at 7am (mainstream window right before coffee)

4.2 Call and Leave a Voicemail

Why do we still need phone calls? In B2B, when a customer makes a decision, they make a choice that can impact them, their job, their career, and potentially the future of their family (please don't let your customer get fired for the wrong decision!). B2B buying decisions often involve a 12-month contract.

In comparison, in B2C, the impact of a decision is primarily transactional.

This simply makes an experienced B2B customer want to know you. They are about to make a long-term commitment with some long-standing implications, and they want to know not just **what** they are buying, but **who** they are buying from. And a voice provides a lot more depth to a person versus an email. It leaves an impression. Of course, they are not buying based on the sound of your voice alone. But as you will learn, your ability to control that voice, and to have a conversation, makes ALL the difference in the world.

During Outbound Calling, the following happens (FYI we realize this is ridiculously simple):

- You call a customer
- They pick up the phone and you have a conversation

  OR
- You leave a voicemail followed by an email

Sounds simple enough, right? Yet as many will attest, this is the most difficult all sales activities.

We primarily use phone calls in the following use-cases:

1. **As follow-up to any response/engagement from the customer:** for example, when a customer asks to learn more, our response is to call them.
2. **In order to draw attention to any other activity we took/research:** for example, by saying you already sent the customer a quote and want to talk it over.
3. **Outbound COLD calls:** Cold calls in today's world are considered a nuisance, because so many untrained people are targeting customers them with irrelevant stuff.

Is there a trick to success? Yes!

Never make it *__COLD__*. A cold call means you know nothing about the person you are calling and this is the first connection. To them, it sounds like this:

> *Hi Mary, I am someone you don't know. I really don't know anything about you, I don't really care, I just want to sell you something you probably will never use. Do you want to buy from me?*

Clearly we are not saying you should minimize outbound calling! Absolutely not, phone calls are awesome! We are saying that you should always try to make your phone call WARM, not COLD.

The trick is to get better information, to help you unpeel the layer faster. To accomplish this, you need to master the following elements of a phone call:

1. Preparation
2. Dialing
3. Leaving a voicemail

4. Opening
5. Handling objections
6. Asking questions
7. Active listening
8. Getting to next steps

But first, you need to understand that in a phone call, your voice is the most powerful tool of all, and it is an instrument you need to learn how to play.

EXERCISE Watch this video
goo.gl/Dd2gCN

Julian Treasure
How to speak so that people want to listen
6.9M views • Jun 2014

ACTION Identify the different ways to control your voice. What are they?

1. ....
2. ....
3. ....
4. ....
5. ....

4.2.1 Preparation

GIVE them something they see as valuable BEFORE you ask for them to attend a meeting with a specialist! This requires you to do two things:

STEP 1 Perform basic research for the call - at a minimum:

- Look up their school/district website ....
- Look up all public info about the school/district ....
- Look up their LinkedIn profile ....
- Look up their role in the administration ....
- Subscribe to the district newsletter ....

STEP 2 Identify something of value to them that you can give:

GIVE	WHAT IS IT?	WHY IS THIS VALUABLE TO THEM?
Use case	Find an example of a 3rd party that has a similar problem (same job title, nearby school district, similar problem)	This helps them see who is doing what in the market, and how they can stay on top of new trends and best practices. The customer is selling, not you, which builds trust with your prospect.
Research data	Research or interesting stats that they might find interesting in their role/function/industry	Who doesn't love quick, snappy stats that can help them look smart in front of their boss?
White paper	An in-depth report on a specific topic	White papers can provide some valuable perspective and save a lot of time for people who are looking for solutions, vendor evaluations or simply looking to increase their knowledge in their industry. Try browsing The National Center for Education Statistics or similar websites
Event	Need we explain? ;) Okay, then: An industry or functional gatherings for networking, training and knowledge enhancement	Industry events are a great way to customers to network, increase their knowledge, and generate business. Find out what events are happening that they might be interested in, and you can even suggest that you meet at an event in person if possible. Look up the relevant national, state and regional conferences (e.g., the state association of regional administrators)

4.2.2 Dialing

Exactly how to make a call will be dependent on your company's phone server/system. We hope that you have this integrated into your CRM, so that all outbound call attempts are logged and all calls and voicemails are recorded.

Navigating the customer's phone server

As you dial you may hit the company's phone server. Below an overview of a variety of servers and how to get to your customer by moving across the server (much needed in ABM). Please take note that hitting the phone server should resound in a solid YES from your end. Essentially you are able to circumvent many road blockers and get straight to who you are looking for. Most phone servers only require the first three letters of the last name, enabling you to leave a personal message.

Some quick tips for navigating: Often the voicemail servers indicate which system they are; if not, try to hit *, #, or 0 in that order. You should be taken to some additional prompts, which will help you navigate the automated system. This can also be used to reach out to other people.

PHONE SERVER	OPERATING PROCEDURE
Audix	*8 to transfer by extension, #2 to transfer by name
Avaya	To transfer to a mailbox, press 8, then follow the prompts to dial by name
Cisco Unity	Hit * and it will tell you to "*Enter Your ID, Followed by #.*" Just press # and it will take you back to the main menu. From there, most of the time it's 4 to get to the employee directory, but just listen to the prompts.
Inter-tel Axxess	Once you reach the voice mailbox, press * and it will take you back to the auto attendant. Follow directory prompts from there.
Meridian Mail	You have two options: Either dial *70* or *7#, this should take you back to the auto attendant. If you get a message stating *"This person does not subscribe to this service"* then hit the 1 key repeatedly and it will take you back to the extension or dial-by-name options.
Octel	This is a legacy system and the toughest to navigate. Pressing * or # will prompt you for a mailbox number to access your internal voicemail. However, many times if you press 0 during the voicemail, you'll get an auto attendant.
Siemens HiPath Xpressions	If you try hitting * or # and you hear "*your input is not valid*" then you're in an Xpressions system. Hit the 0 key during the voicemail, then listen to the prompts, but most of the time hitting * will get you to the dial-by-name directory

4.2.3 Leaving a voicemail

Voicemails are still an important step in the sales cycle - but like email "replies" you know only of the impact of when someone returns your call - not on if they listen. So even though the average reply to voicemails are about 4 - 9%, you should still practice leaving great voicemails.

Why?

Because you are helping create a professional awareness for your name, voice, company and ability to provide value.

Customer's goal: The customer's primary objective is to delete the voicemail and get back to the working day. Before they delete, they are looking for the following three things:

- Who is this?
- What is this about?
- Why should I care?

PRO TIP The role of voicemail is only to draw attention to your email. Think of your voicemail as a hyper-personalized email personally delivered by you, with your passionate personality delivered through your voice.

- JACCO VAN DER KOOIJ

Your goal: NOT to get a call back. People hardly respond to calls these days. Instead, your primary objective is to draw attention to your email, and let them know you are valuable so that they give your email 10% extra attention.

BAD EXAMPLE Voicemail

Hello Mike - This is Jennifer from ACME. We offer a better way to do A B C with our X Y Z solution. We have customers such as APPLE and PEARS who are using us to get 10x return on their investment. I wanted to see if you are interested to chat for 10 minutes. Please call me back at 123-456-7890.

The customer hits DELETE right after "APPLE" right? Here is Why:

- This sounds like a **cold call**.
- All about the vendor: ***WE*** offer, ***WE*** have, ***I*** wanted.
- Then you ask: I want 10 mins of your time

GREAT EXAMPLE Voicemail

Hi Esther - This is Beebee from Freshgrade. First of all, thank you for connecting with me on LinkedIn <pause> I noticed that you have grown to a team of 4, and that you're preparing your annual goals for your district curriculums. I wanted to offer you some insights gained from others similar to you. Please call me back at 123-456-7890. Again this is Beebee from XYZ.

In this case, the customer hits delete right when you leave the phone number. Why this is better:

- Comes in as a **warm call**: Connection on LinkedIn
- All about the customer: ***YOU*** have grown, ***YOU*** launched, ***YOU*** must be busy
- Gives: ***Offers insights*** from your peers

The key is that this must be delivered with high energy and passion in your voice!

GREAT EXAMPLE Voicemail - Reference that you will also email

Hi Esther - This is Beebe from Freshgrade. First of all, thank you for connecting with me on LinkedIn <pause> I noticed that you have grown to a team of 4, and that you're preparing your annual goals for your district curriculums. I wanted 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 Beebee from Freshgrade.*

What makes this call great?

- Use of the first name - draws Esther's full attention
- You then deliver the call to action - Look for my email

EXERCISE Design your voicemail

STEP 1 **Who are you:** ....

STEP 2 **Warm opening:** ....

STEP 3 **What is this about:** ....

STEP 4 **What is their reward:** ....

STEP 5 **Call to action:** [Customer first name], I will follow up with an email, but if your prefer, you can reach me at [your number]

Again, this is .... from ....

4.3 Call and Have a Conversation

Surprise! Sometimes the customer actually picks up the call... be ready to have a conversation that provides value. Show you've done your research and you are a specialist to help them.

4.3.1 Creating Interest in your Opening

The key to a great call is to have a great conversation. You cannot just start pitching. But the customer does want to know what this call is about. You have to be relevant to them. This means your pitch must relate to their particular school/district situation.

The real COLD call is the preparation you did the day before the call, so the call you are making is actually *WARM*.

GREAT EXAMPLE How to turn Cold to Warm ("+" indicates level of engagement)

THE REAL COLD CALL Preparation you did the day before	**YOUR "WARM" CALL** *Follow-up to the cold call*
Visit their profile (+). They visit you back (++)	*Thank you for stopping by on my LinkedIn. I was wondering if...*
View (+), share (++) and/or comment (+++) on their blog post	*Loved the recent post you published on. Have you looked at...*
Pose a question on Quora (+), better yet post a response to their question (++)	*Great question on Quora. I thought would I pick up the phone and give you my answer...*
Send an email	*Based on your background, I shared some insights earlier this week via email, and was wondering if you had time to take a look at it...*

Develop a 30-second script:

- **Research:** Hi David, I noticed on LinkedIn that you are a leader in...
- **Reference:** Several of your peers such as _____ at _________ encouraged me to reach out to you...
- **Reward:** For your convenience, I shot over an article to you earlier that reminded me of our last conversation...
- **Request:** David, can you meet? Let me know when works for you.

Simplified pitch: (Problem) ....

(Solution) ....

Others w/ same: ....

4.3.2 Handling objections

The top four objections that cover 98% of all reasons of rejection are:

1. Not interested!
2. Not now, I am busy!
3. I am the wrong person!
4. We already have/do this!

These objections apply to SDRs during outbound, but also to AEs and CSMs as they navigate through an organization.

In order to increase your success by 50%, you need to:

- **Develop** a proper response to all of these objections
- **Practice** it before you make calls
- **Print** it and hang it on your monitor

The key to objection handling is to give them something more that they do want, to prevent them from moving on with their day and getting you off the phone. This means you have to offer them something.

EXAMPLE Not now

Objection: **Not now** - can you call me back next month?
Initial value: Get you off the phone
Real value: Get themselves out of your system

This is not a good time. Can you call me back next month?

Mike, you don't want me to call you back next month
if I am not relevant to you. I would rather scratch you
you off the list so I don't bother you any longer - make sense?

OK. What is this about?

The reason I am calling is… relevance… relevance… relevance...

Relevance: You must be relevant in a few ways:

- Relevance 1: I know who you are and what you do
- Relevance 2: I suspect you have a problem with this
- Relevance 3: Because I noticed this and this...

EXAMPLE Not me

Objection: **Not me** - I am not the right person
Initial value: Deflect you
Real value: Don't really know if this is relevant - wants to cover their behind

BAD EXAMPLE Most common response that dead-ends:

I am not the right person.

Who is the right person?

Why don't you send me an email - I will forward it on!

GOOD Instead consider this approach:

I am not the right person.

May I ask for a quick favor.
I have been looking around to learn more about your district...
besides your district website, do you know a good place where I can find more info?

Have you tried our newsletter?

Let me look… yes that's exactly what I am looking for.
<First name>, after I complete my research, who should I ask for?

You see how you are leading with knowledge and how this suddenly becomes customer centric?

EXAMPLE Email me

Objection: **Email me your material and I will take a look**
Initial value: I am maybe interested and I want to be polite to you
Real value: Get you off the phone and move on with their life

Consider this approach

… Can you email me more information?

Sure what would you like me to send you?

Send me an outline of __.

Great! I am going to prepare a custom outline for you right now!
May I ask what your current infrastructure is so that I can make it relevant?
… ask question #2..
...ask question #3..

… Thank you so much!

You see how you are leading with knowledge and how this suddenly becomes customer centric?

BEST PRACTICES

- **DO** your research and be relevant to them!
- **DO NOT** say right after they spit out an objection by reflexively saying ***"I understand."*** No, you don't understand. Rather, you did extensive research, and this person has a problem that you can help with.
- **DO NOT** ask a question to which the answer is a negative: ***"Do you have a few moments."***
- **DO NOT** start with negative ***"I am so sorry to bother you, the reason I am calling..."***
- **DO NOT** agree to follow up when they ask. ***"Sure I will get back to you"*** then wait to follow-up 2-3 months without doing anything. You think that you are properly following up at their request. Guess what? Your customers don't set reminders that "Johnny is going to follow up" so they see you as a digital stalker when you call them 2 months later

EXERCISE

- Get a group of 3-5 of you together - this should include AEs, CSMs, marketing, etc.
- Establish the 4 key objections.
- Role-play how each objection would go. Then round-robin that objection until you feel confident you have a plan:

Objection: ....

Response: ....

....

....

Pre-strike/Research: ....

Do this for all key objections!

4.3.3 Asking questions

Selling happens in the talking. Buying happens in the silence.
- Brian Tracy

When you are on the phone with a customer, you cannot start selling straight away, like so many sales professionals feel they have to do. Great sales professionals start by asking questions to diagnose the situation, without mentioning the company they work for or service they sell. Through the art of questioning, you have to determine "where they have pain". Once the pain is identified, you can determine the severity (priority).

For example, imagine that you are an off-duty doctor that sees someone limping. Before you are able to offer advice to have a cast or just pain medication, you must understand what happened and assess their circumstances. If you just start telling them what to do (or worse touching their leg without establishing credibility) they will not be open to the help you are trying to offer them

PRO TIP The fastest way to earn someone's trust is to provide valuable insight and establish yourself as an expert.

- DAN SMITH

Question-based selling is simply the most powerful way to diagnose a customer while building credibility, understanding the customer's real pain/needs/desires, and providing tradeoffs that help the customer be successful in achieving their goals.

Here's how it works.

OPEN vs. CLOSED QUESTIONS

CLOSED QUESTIONS	OPEN QUESTIONS
Usually receives a single word or very short, factual answer. For example, "How many people work for you?" The answer is "6"; "What is your title?" etc. Closed questions often get a short response. They are important to open and close conversations.	Requires longer answers; open questions require the customer to contribute knowledge on the topic, and better yet, an opinion. They usually begin with asking, why do you do this…, how are you doing that..., and what are your plans for...

Best used to:

- Establish the base situation: "How many students?", "Is your student information system on-premise?"
- Get an honest answer at a critical moment: "Are you ready to move forward?"
- Setting up a conversation: "Are you happy with your current provider?"

PRO TIP If you find your customer not very responsive/engaged in the conversation, you probably are asking a lot of closed questions. Try asking a simple open question.

Best used to:

- Start a conversation as the customer gets comfortable: "What are you currently using for..."
- Identifying the impact: "What would happen to your curriculum plans if this isn't launched by Sept 1?"
- Establishing a value proposition: "What would a 5% increase in test scores mean to you and your district?"

PRO TIP As parents know, asking repetitive why/how questions can get boring pretty quickly. You can change this up with more conversational questions, such as "May I ask how..." and "Can you describe..."

QUESTION-BASED SALES TECHNIQUES[1]

There are different kind of questions:

S - Situational
P - Pain/Challenges
V - Value offered by solving the pain or overcome the challenge

[1] Buy and study: SPIN Selling by Neil Rackham, and Question Based Selling by Thomas Freese

Situational Questions: “How many staff on the administrative team do you have?”

Situational questions deal with facts about the customer’s existing circumstance. Because they usually give you simple background information, they are often close-ended. These questions are used to understand 1) if the customer is qualified, 2) their level of understanding of their own problem, and 3) how much knowledge they have about potential solutions. Although asking ten of these in a row sounds like a game of “20 Questions” - or worse, an interrogation - when used properly, they can make you sound like an expert by setting the stage and demonstrating you’ve done your research. Then they infer that you can help them solve real problems.

Aim to ask 3 - 5 great situational questions for every qualification call, or every discovery call to confirm that your research is accurate or if their circumstances have changed since your last conversation. Here is a typical situational question:

BETTER EXAMPLE

How many administrators are there in your district office?
Is your information system on-prem or cloud-based?

PRO TIP Thoughtful situational questions are key! But be careful: the problem with asking too many situational questions in a row will make the customer feel like they are being grilled. Not a good experience. You can avoid this by adding your own insight and turning it more into a conversation, but also eliciting your customer to provide more detailed feedback.

- DAN SMITH

GREAT EXAMPLE Below is a situational question, but more conversational:

I noticed on your district website that there are 6 administrators in the district office, did I get that right?

Pain Questions: “What pains or challenges are you experiencing?”

Pain questions are where you find the pain, the challenges. This should be a solid portion of your calls. If you haven’t built trust through providing value, they will give you a high-level generic answer like “Of course the business needs more revenue.” But if you’ve asked a series of 3-5 strong situational questions, now it’s time to drill into the good stuff. Reference what you have already learned in (S), and make it relevant to your customer.

Do not bring up your product or solution. It's too early to begin "selling".

You have to earn the right to prescribe a solution through proper diagnosis. These questions are about them; both for their business, and to establish personal priorities. If they tell you they just raised a round of funding and are planning to build out the sales team, find out how they will share best practices with the new reps to ramp quickly?

BAD EXAMPLE Too cliche and insincere - avoid questions that are too broad like this one:

> *What keeps you up at night?*

This question has been over-used, and is too general. You customer may respond saying that his newborn is keeping him/her up. So let's make it a little more granular...

> *What are your biggest challenges with the admissions process?*

BETTER EXAMPLE Even more granular…

> *What are your biggest challenges with managing workflow throughout the admissions process?*

GREAT EXAMPLE Make it conversational and add a 3rd party reference:

> *We recently met Mary X at school district Y near you. She expressed that her biggest pain point was the lack of transparency to parents throughout the admissions process. The parents had a very hard time finding out the status of their child's application, which led to a lot of administrative strain on the staff here. Does that match what you see on your team?*

The last question, although more verbose (and best applied by AEs), offers your customer:

- Valuable insight from a peer
- Makes you look like an expert
- Makes you look like you are involved in educational technology
- Establishes a way out. If this does not resonate, you can keep throwing third party sources without you personally getting a "rejection" (e.g., the customer can reject how other customers are making their lives better, without rejecting your product)

PRO TIP Don't press too hard on pain questions, as they might make the customer feel uncomfortable disclosing too much of their "dirty laundry". Better to get to 1 problem… and later on come back and identify another. It's important to note that your customer will not give you the underlying problem and impact until you have build rapport and trust. That is something you have to earn through the conversation.

- DAN SMITH

The next step is to build on the problems they have and the implication that these have on their organization.

Value Questions: Any question that implies the value you offer

Value questions are the meat and potatoes of a great sales conversation. Value questions ask about the value that gets delivered by solving the pain.

This is the critical step where you begin to help the customer visualize the impact their problems are having on their business, using your insight from other customers experiencing similar challenges. The idea is to expand the effects of their pain and challenges. Help your customer realize the implications beyond the symptom of the pain, and then link the problem to other potentially bigger issues they never considered to encourage eagerness to find a solution.

When asked at the right stage of your conversation, they will unlock the door to achieving a positive outcome when leveraging your solution. This will result in more alignment during negotiation, and higher Average Contract Values (ACV).

Example (V) Value Questions:

- *"How has the lack of transparency affected your admissions process?"*
- *"Has the lack of visibility impacted the processing timeline?"*
- *"How have inefficient processes and admin work affected staff morale?"*

Nice lead-in questions:

- *What effect does that have on…*
- *How often does that cause...*
- *Does that ever lead to...*
- *What is the result when...*

PRO TIP Refrain from asking Value questions before you understand the most important problems and the situation the customer is in. This comes off as too aggressive and pushy, and the customer will probably be offended. Value questions are typically done after a few minutes of thoughtful discovery.

- DAN SMITH

EXERCISE Diagnose a customer

Use a real customer call you have had in the last 2 weeks. Summarize S and P questions:

CALL SUMMARY	YOUR NOTES
What is their situation?	S1 : S2 :
What were 2 or 3 of their biggest Problems/Pains?	P :
Summarize this information in 2 sentences for your handoff	**SUMMARIZE**:
What customer use-case could you leverage that best matches their job title, desired outcome or similar industry?	**3rd PARTY REFERENCE/USE-CASE:**

4.3.4 Active listening and mirroring

Active listening is mindfully listening to your customers, building on the response they are giving, and providing cues that show them that you're actually comprehending what they are saying. But what do many salespeople do instead? They use the time that the customers are talking to bask in the moment of having asked a great question, and prepare to score another equally astonishing question.

Active listening can be done in a few specific ways: Verbal, Tone or Visual

MIRROR VERBALLY: Use for particular words that stand out and mirror them:
In response to something you ask, they respond:

That is of no particular interest to me.

What is the word that stands out in this sentence? **Particular**. That means if you follow this up with a question:

*What **in particular** is of interest to you?*

You are mirroring your customer's specific language. This indicates that you are listening.

MIRROR TONE: Use of tone in your voice...use your emotion and have them mirror yours:

- If your customer is in a hurry, you can speak just a touch faster so they know you are responding to their sense of urgency. Then you slow it down so they calm down.
- If it seems like your customer is not paying attention, you can increase the upbeat tone of your voice, and it will increase theirs
- If your customer sounds like they are annoyed, start a short opening, and in 2-3 sentences start sounding excited

MIRROR VISUALLY: Visual cues during a conference call

- Showing them that you are taking notes (screen share your notes)
- Looking into the camera, tilting your head, nodding and other signs you are listening
- Using movements like nodding, hands to create signals, and a pen to raise your hand into view

4.3.5 Wrapping up the call and setting next steps

Here are the key steps to a professional call:

- First ask what they learned today that they did not know
- Then summarize (what you went over today)
- Ask if they agree with the takeaways
- Ask if they are ready to move forward with X or Y

Putting that together will sound something like this:

Let me summarize: today you have **S1** *6 administrators that are* **S2** *working almost full-time on the admissions process during admissions period, and that* **P** *they have time constraints due to lack of transparency for the parents going through the process.*

You want to solve this but you need to confirm availability of budget first. You expect that to happen by Friday next week. You would like to learn more to be prepared for that conversation.

I will set up a call for us to talk on Tuesday with a specialist on our team to help discover if there is a good potential for us to work together.

Did I capture that correctly?

EXERCISE Hand-off after a great call

Use a real customer call you have had in the last 2 weeks. Summarize S and P questions to hand off to the AE. Know a use-case you can share with the customer.

CALL SUMMARY	YOUR ANSWER
What is their situation?	**S1 :** **S2 :**
What were 2 or 3 of their biggest Problems/Pains?	**P :** **P :**
The use-case you provided	**Use-case:**

4.4 Socializing

In the conventional sales world - it was all about the one decision maker. Now, decisions are made as a team. There are several stakeholders at play, so it is important to understand their priorities are in line with the prescription you have helped define.

The reason why 'socializing' in selling can be so important is:

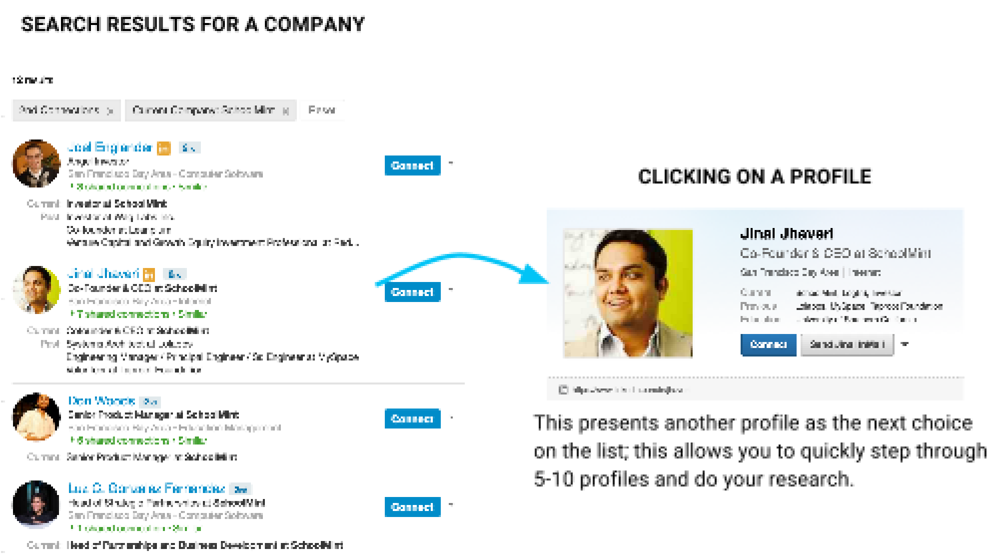
- It takes place from the "O'SH!T" moment all the way through to the "AHA" moment (see below); this is the most complicated part of the entire sales cycle (normally covered with cold calling)
- The efforts scale 24/7
- It is a form of asynchronous selling, where a seller and a buyer operate at a different speed
- Most of it is performed in written/visual communication, allowing for easy preparation/scaling

In many SaaS subscription businesses, the decision makers spend a lot of time on LinkedIn or other social media, and therefore socializing with them on those channels is a great way to start a conversation with them. In Education however, decision makers (administrators) often don't rely on social media as much as other industries. Therefore, it may be more effective to call or email. That said, you should still be familiar with these methods so that you can meet customers wherever they prefer to engage.

4.4.1 Visiting Customers Online

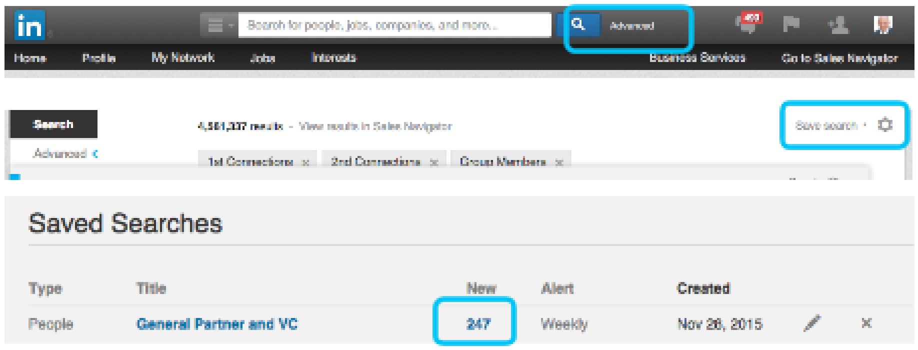
Find the right people at the company. Click through 10+ profiles in your target company, and every day make sure you visit 100+ profiles of prospective customers.

EXAMPLE



BEST PRACTICES **Social Selling Technique**

- Use a saved search list
- Visit all the profiles in the saved list
- View "who's viewed your profile" at least once a day to see who visits you back
- If they visit back, reach out **BUT only if you have your LinkedIn profile prepared**



Screenshot of a Saved Search highlighting 247 New Leads

EXAMPLE Outbound LinkedIn message (no longer an Inmail!)

Thank you for visiting! Were any of the insights I provided of value to you? Your profile says you work on curriculum development - that makes me think [this article] may be of use to you.

4.4.2 Listening to customers online

Start to learn what your market is talking about by listening, understanding how they talk, what industry lingo they use, etc.

STEP 1 Which of your customers are active?

TWITTER ACCOUNTS	TOPICS THEY TALK A LOT ABOUT
@	# ....
@	# ....
@	# ....

STEP 2 Who are the top industry "insiders"? Follow them! Refer to Chapter 2, Key Resources section Create lists by topic, industry, etc. on TweetDeck

TWITTER ACCOUNTS	LINKEDIN INFLUENCERS
@	....
@	....
@	....

STEP 3 What are the industry trends #problem-abc, and the events #events-xyz?

@	# ....
@	# ....
@	# ....

QUORA EXAMPLE Guy Nirpaz, CEO and founder of Totango, listens to this conversation on Quora. The public article allows him to engage, and as he responds he creates NEW content. That content performs as a Lead Generation for months to years.

What are the best examples of online schools or course delivery in K12 education?

Request ▴ Follow 27 Comment Share Downvote •••

6 Answers

Aron Solomon, EDUpreneur
Written Apr 7, 2011

This is an important and rapidly expanding niche in education. It's one that has been done poorly for a long time and is now being done quite well on many fronts.

Florida Virtual School is absolutely a good example. I'd also counsel you to look at K12 (www.k12.com) which is a fairly large online learning company functioning in the K-12 space.

I had the opportunity to spend a day visiting with them in their suburban Washington, DC HQ about a year ago. I was impressed by much of what I saw, particularly the resources they devote to building and refining curriculum. At that point, they had over 130 full-time curriculum developers.

I would also suggest that you look at Open High School in Utah. Here is a shortened URL of a recent piece about them: http://thejournal.com/articles/2...

Open High School was founded in 2009 and is using teacher-generated, open course content. The advantage here is that you know that your course materials are relevant and not dated. You also can effectuate significant cost savings and, done well and broadly, some very cool economies of scale if teachers work collaboratively on this across schools.

- Aron

1.8k Views · View Upvotes

Upvote | 8 Downvote Comment •••

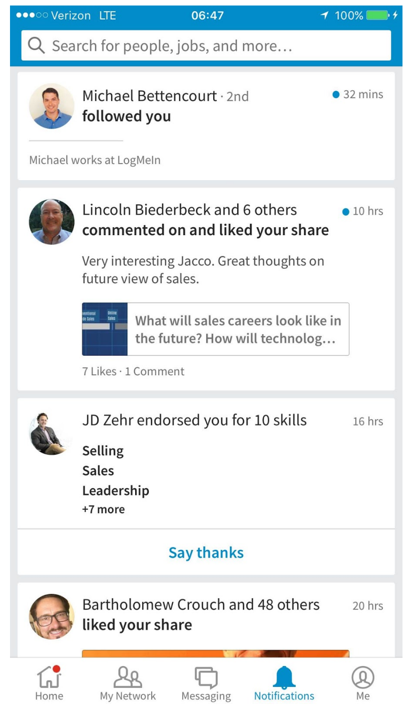
4.4.3 Engaging with customers online

There are two kinds of engagement;

- Passive - Likes, Nudges, etc.
- Active - Directly mentioning, referring or addressing your customer

PASSIVE ENGAGEMENT

In the image on the right, there are four passive engagements. These passive engagements are very non-intrusive and can be considered an outbound “call”. These nudges are a great tool for an AE to expand a network within an existing account, or to re-energize a relationship that has “gone dark”.



LINKEDIN EXAMPLE The non-message touch

- **Following** - You stay up to speed on your customer and what they are doing, while the customer sees you are following them, that you care
- **Commenting** - In case your customer shares a post, your customer will be notified on the comments on that post. If your comments are insightful, this leaves an “expert” impression.
- **Endorsing** - Be careful with this, but a person you have been having meetings with appreciates if you provide a positive engagement
- **Re-sharing** - People love views, re-shares and likes on their articles.
- **Liking** - very gentle nudge, but often seen and appreciated

TWITTER EXAMPLE 140 Characters + Actions

Fewer people are on Twitter these days, but for some customer bases, this still may be very relevant.

- **Follow** - You stay up to speed on your customer and what they are doing, while the customer sees you are following them, that you care
- **Mention** - In case your customer shares a tweet your customer
- **Retweet** - Retweet with a mention of the customer has high visibility
- **Love** - Very gentle nudge, but high visibility and appreciated

ACTIVE ENGAGEMENT

LINKEDIN EXAMPLE Message types

- **Connection Request - Always customize:** In the US, this can happen after a phone outreach, in Europe and Asia this can only happen after you have established a relationship.
- **InMail - Similar to RRRR:** Part of emailing when cold, and part of texting when a connection - be careful about the type of relationship that you have with the person!

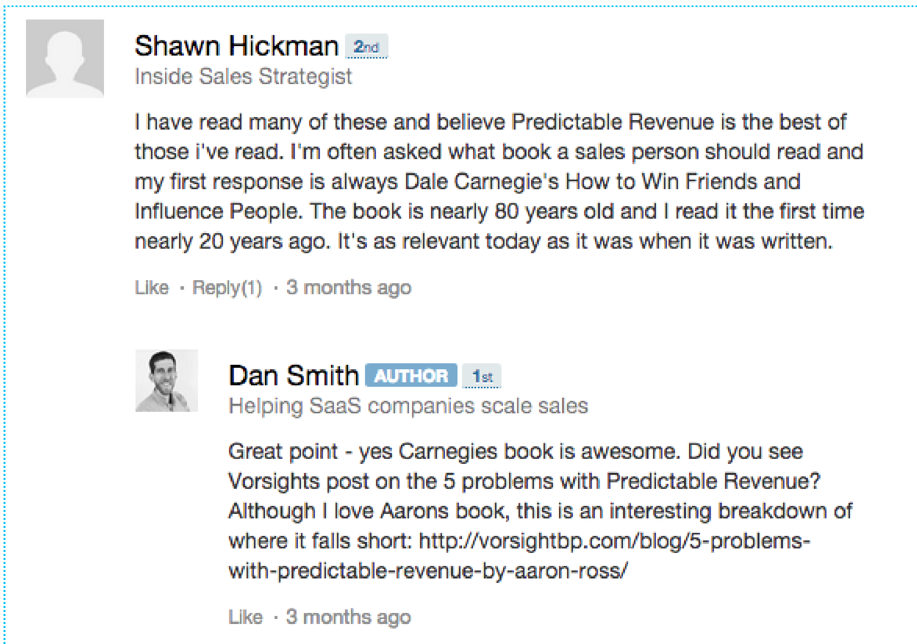
TWITTER EXAMPLE Private

- **Direct Message -** Part of social selling - be careful!

BEST PRACTICES

- **DO** contribute a comment using your personal insights
- **DO** provide real insights to help your customer
- **DO NOT** sell your services in response to any conversation UNLESS specifically asked to do so
- **DO** make comments - relate to how other customers made a decision. Think of PARLA:
    - What ***Problem*** did they experience
    - What ***Action*** did they take
    - What ***Result*** did they get out of this
    - What did they ***Learn*** from it
    - How did they ***Apply*** this moving forward
    - But...**DO NOT** mention your product/service

EXAMPLE Dan Smith shows how it's done...



Shawn Hickman 2nd
Inside Sales Strategist

I have read many of these and believe Predictable Revenue is the best of those i've read. I'm often asked what book a sales person should read and my first response is always Dale Carnegie's How to Win Friends and Influence People. The book is nearly 80 years old and I read it the first time nearly 20 years ago. It's as relevant today as it was when it was written.

Like · Reply(1) · 3 months ago

Dan Smith AUTHOR 1st
Helping SaaS companies scale sales

Great point - yes Carnegies book is awesome. Did you see Vorsights post on the 5 problems with Predictable Revenue? Although I love Aarons book, this is an interesting breakdown of where it falls short: http://vorsightbp.com/blog/5-problems-with-predictable-revenue-by-aaron-ross/

Like · 3 months ago

4.5 Messaging

Messaging is a short form of communication. It has grown in popularity due to its quick back and forth and elimination of lengthy conversations with lots of people involved. Services like SMS and Twitter have long been based on this short form communication, but now services such as Intercom, Slack and Zendesk are using messaging as a way to communicate with customers in a B2B setting. That said, EdTech customers generally only interact using Messaging on LinkedIn, Twitter, or webchat on a website.

Messaging tools relevant in EdTech

LinkedIn	Twitter	LiveChat / webchat

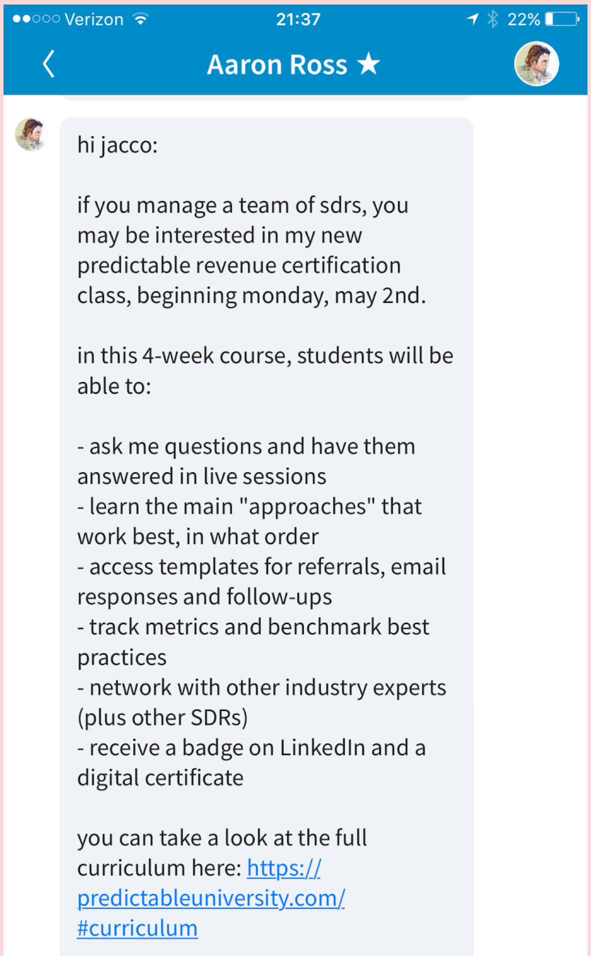
4.5.1 Messaging basics

The latest way customers prefer to buy is through short and to-the-point communication. Long emails are never fully read, and rarely get the desired response. Just remember:

Keep it short!

HOW NOT TO DO IT

⇛ The most common mistake: when people use the same style of short form texting in an email.

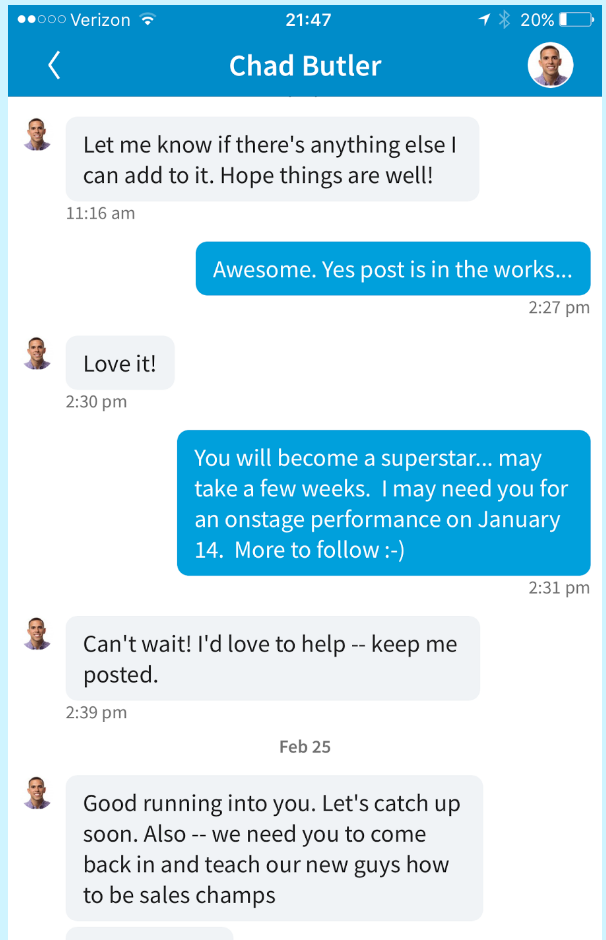


Key areas of improvement:

- ⇛ One-way message rather than conversational
- ⇛ Too long
- ⇛ Not personalized enough
- ⇛ Uses bullets (looks like a marketing email)
- ⇛ All I, Me, Us

HOW TO DO IT

⇛ Used for quick back and forth, thus ultra short and action-driven.



Key areas of improvement:

- ⇛ Took too long for me to respond
- ⇛ Rapid back and forth, but still too slow
- ⇛ Short and to the point, but can be even shorter
- ⇛ Make the action even more specific
- ⇛ Lack of use of emoticons to personalize

BEST PRACTICES

DO set expectation with greetings
- Do they introduce themselves? If so, with a full name or on a first-name basis?
- Do they list additional contact info? A company name or job title?
- An insistence on job titles can be a sign that someone works at a bigger or well established company where communication will be more formal and buying cycles will be longer.

DO use the right lexicon
- You want your response to be understood above all, so it's best to err on the side of clarity when it comes to word choice.
- Visitor dives head-first into technical terms? Match that style.
- Nerds love fellow nerds! Don't be a afraid to be a nerd.

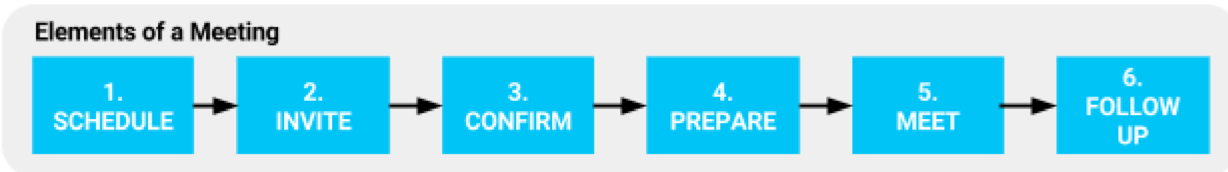
DO mirror the writing style (formal, essay or email)
- This is a good sign that you can go into a bit more detail.
- Time is probably less urgent in these situations.
- It's a good idea to avoid SMS abbreviations, emoji and other chat-speak, as it might not be fully understood.
- Offer proactive information in addition to answering any questions.

DO mirror if the user writes in show burst, abbreviated vocabulary etc.
- These customers might be a bit more inclined to chat-based shorthand, and perhaps more familiar with the messaging format in general.
- Speed and urgency are crucial.

DO it in the right order
- **Answer their question** first - they reached out to ask you something, so make sure you 'give to get!'
- **Introduce yourself** - no one ever was kicked to the curb for having manners
- **Establish rapport**, show that you care! No, seriously - show that you REALLY care!
- **Diagnose** their situation first - do not multitask here, stay focused. Remember prescription before diagnosis is malpractice!
- Then (and this is important) **Provide Value** to them - a link, an online resource, etc. Highlight why you provided that link, and where they can find what.
- Then and only then, **Prescribe** a solution - preferably without mentioning your service too overtly (that's why they contacted you in the first place!)

4.6 Meetings

Every customer facing professional knows that forward progress is made primarily through meetings and calls. These meetings can be for discovery, performing a demo, discussing a proposal, onboarding, training, etc. Every meeting consists of at least 6 elements:



You can't be only good or great at this - you need to EXCEL at conducting meetings - and that means you need to excel at each one of these elements.

4.6.1 Scheduling the Online Meeting

Scheduling of a discovery call/meeting needs to be done quickly; otherwise, the customer loses their interest. If you use a scheduling program, make sure that you word the invitation correctly - for example:

DO NOT DO THIS:

Please click on my schedule to book a date that works for us: <LINK TO ONLINE SCHEDULER>

Although this sounds good, it actually is not as good as you think. Why?

- You are asking the customer to do work that you were suppose to do
- It feels like the customer's schedule is secondary to your schedule

INSTEAD DO THIS:

To find a match on your busy schedule across different time-zones, please book a date that is most convenient for you: <LINK TO ONLINE SCHEDULER>

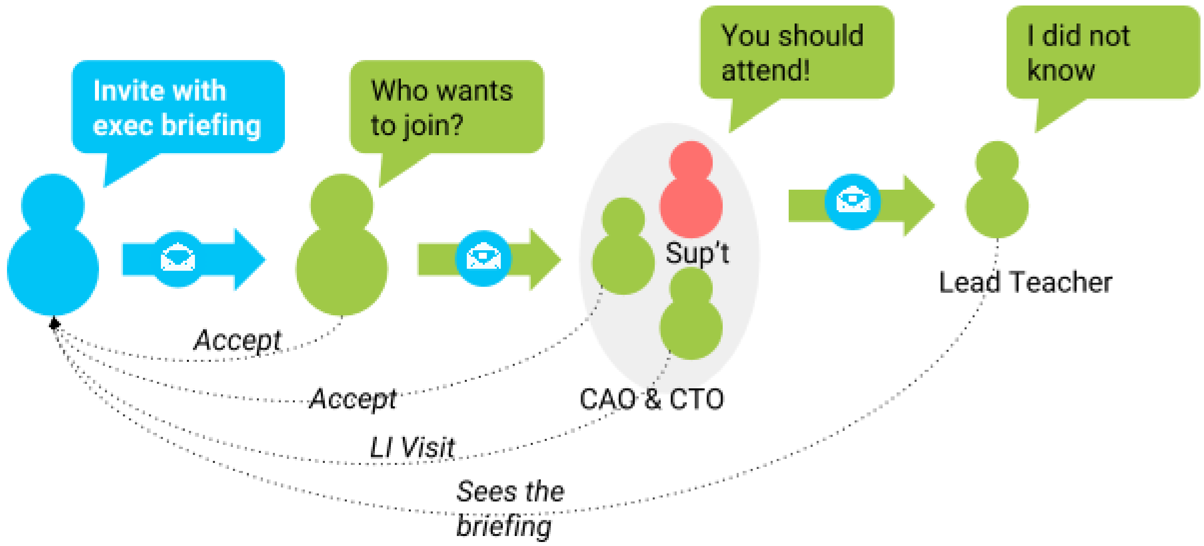
As you can see, customer-centric selling is not just a tagline; it finds its way into everything that you do.

4.6.2 Inviting people to the online meeting

A quality invitation creates brand awareness

To get something accomplished, you have to talk to the right people! A sales professional is able to get the right people in the room at the right time. This means (s)he gets better answers to questions, makes more progress, and earns the business at a higher level.   This does not happen by accident, but is the outcome of a tried and tested system.

EXAMPLE



- You send out a professional invite to the prospect; in the header, you indicate that an executive briefing is included.
- Your customer accepts the invite and forwards it to several team members, inviting them to join.
- Team members accept the invite, giving you insight into who is on the team.
- One of the team members visits your LinkedIn profile, you connect with them and send an inquiry.
- The executive involved scans over the invite, and realizes that a specialist needs to be involved.
- The specialist, invited by the executive, clicks on the research (value) you included.

TAKE-AWAY

Your invite just created awareness, while benefiting your customer (value!).

CHECKLIST

- [ ] Goal of the meeting: Problem/Vision – A description of what you want to get done
- [ ] Value: A link to an article that provides more details, such as your vision
- [ ] Who: Names with hyperlinks to LinkedIn profile – easy for them to click on
- [ ] When: Meeting date, time and time zone
- [ ] How: Make it clear which number to dial
- [ ] Where: Screenshare information (such as join.me)
- [ ] Mobile contact information

Ask yourself... will this really make a difference for every meeting? Yes, it will. Make it count.

BEST PRACTICES

- **DO** state in the title of the invite "Executive briefing included in invite"
- **DO** clearly identify the dial-in number, top of the invite, single click dial capability
- **DO** include your personal direct number they can dial in case of any issues
- **DO NOT** attach any materials – include hyperlinks instead
- **DO NOT** make it a book – it needs to print on one page (one side).

EXAMPLE

Goal: *To do a show and tell on the service and how it meets your requirements, to give your team the real user experience, and to show the integration with your student information system*

Click to join:

408-123=4567,,765432
https://join.me/yournamehere

When: *Tuesday 2pm EST (local time)*

Invited:

John D (Link to LinkedIn profile)
Mary Smith (Link to LinkedIn profile)

Agenda:

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

Learn more:

- *Link to an article with insights*
- *Link to a video with insights (District X implementation and lessons learned)*

In case of questions, feel free to call me at 123-456-7890

4.6.3 Preparing for the online meeting

Similar to preparing an email...If you know more about the customer, the impact and consequences of the imminent decision – and you have the right solution – you will win! This power is earned by thorough online research, which signals to your customer that you care about them. And the information you desperately seek is often laying around in plain sight.

As you prepare for the meeting, identify your ideal outcome of the call.

If you're looking to determine a understanding for how they would bring on your solution, write down the questions you will ask to get that understanding?

Write down the name of everyone who will be attending the meeting, and do 2-3 minutes of research of each attendee before the call.

CHECKLIST

MARKET-SPECIFIC

- [ ] Partner
- [ ] School
- [ ] District
- [ ] EdWeek - website
- [ ] EdSurge - website
- [ ] Thought leaders such as [Tom Vander Ark]
- [ ] Industry / association events
- [ ] ....
- [ ] ....

TARGET-SPECIFIC

- [ ] greatschools.org
- [ ] NCES National Center for Education Statistics at https://nces.ed.gov/globallocator/
- [ ] District website
- [ ] District needs assessment (if they receive at least $30K in federal funding)
- [ ] State / county department of education website
- [ ] State teachers' union website

PROBLEM-SPECIFIC

- [ ] State department of education website
- [ ] Subscribe to their newsletter (if applicable)
- [ ] Submit a request for info (if applicable)
- [ ] ....
- [ ] ....
- [ ] ....

PERSON-SPECIFIC

- [ ] Twitter, Facebook, other social media
- [ ] LinkedIn profiles
- [ ] Teacher / administrator profiles on district websites
- [ ] ....
- [ ] ....

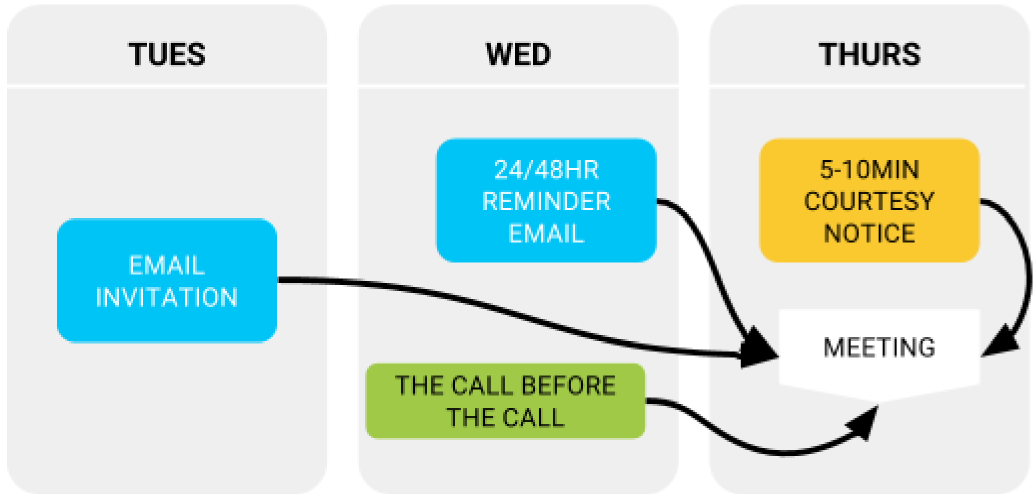
A modern sales professional, armed with an iPad and WiFi connectivity, will be able to track digital footprints and get a basic understanding of what is going on with the account/opportunity.

4.6.4 Confirming the online meeting

CONFIRMATION #1 The call before the call
If there are multiple people on the call, the Development Rep (SDR) MUST inform the Account Exec/Sales Manager (AE) so that the AE can place a separate phone call BEFORE the online meeting takes place.

This call takes place with your inside coach. In this call, the AE has to ask for the inside coach's guidance on the meeting, any insights you need to know, and the roles and goals of the other attendees. Your outbound email to request this call can be short and to the point, something like:

Mike, Looking forward to our meeting scheduled for Friday. I noticed several people are attending. Can we talk today between 3-5pm? I want to make sure we accomplish your goals.



CONFIRMATION #2 24/48 hour reminder
24 hours before the meeting, you need to send a helpful/kind reminder to the attendee:

We are very much looking forward to seeing you this Thursday at 10am PST. Please find below a recently published article that outlines very similar issues that you are encountering, and what actions the company took.

http://link to article - with expert advice from a respectable source

If anything comes up, please do not hesitate to reach out to me. I am here to help!

BEST PRACTICES

- **DO** include a copy of the invite/agenda in the confirmation email below the body of your message. The key of this reminder is to make sure they attend. BUT this also this gives them the opportunity to forward the meeting and invite more people.
- **DO** include links to relevant article. By including a relevant article for them to read, you once again create value-add in the sales process. You can open the call by asking who read the article, and asking them their take on it. This gives you an opportunity to let them “sell” your points based on the article you provided them (a customer use-case?).

CONFIRMATION #3 5-minute courtesy email
5-10 minutes before the call, the Development Rep or AE needs to send out a courtesy message:

Include commas to automatically add in meeting ID

For example: Instead of having them "dial (415) 123-4567, then enter meeting ID: 999-888-777 followed by #" - Instead include one-click dial in from your phone: 4151234567,,9998887777

Courtesy message for all attendees:

Single click dial-in: xxx.xxx.xxxx,,123456789

Link: www.personalized.com/heretohelpyou

If anything comes up do not hesitate to reach out on my cell at 123.456.7890

4.6.5 Opening and Running the online meeting

STEP 1 T-10 mins: **Preparation** of the meeting

☐ Send out courtesy email	*Whenever you're ready … here is the dial-in*
☐ Set up your browser tabs	Close apps, turn off notifications and status updates
☐ Check the technology	Dial-in, setup your screen share, test that it all works
☐ Did you get briefed? Research?	Obtain the **SP3V** from SDR? Perform last min research

STEP 2 T-0: **Start** of the conversation

☐ Start with an introduction	Write down their names (if you haven't already)
☐ Ask for approval to record	Since Jack can't join the meeting, do you mind if…

STEP 3 T+2 mins: Perform an **AxNOT**

☐ **A**ppreciate	***Appreciate*** *you joining our call today*
☐ **x** Check the end time	*We are* ***scheduled until*** *the bottom of the hour, does that still work for everyone? (check silent ones) Mike you too?*
☐ **N**aturally	***Naturally*** *you will have some questions for me….*
☐ **O**bviously	*and* ***Obviously*** *I have some questions for you...*
☐ **T**ypically	***Typically*** *this call concludes with {X or Y}. Does that sound like a good use of our time today?*
☐ 1st call? Give them the right of refusal	*Folks if this does* ***not feel like a good fit for you*** *anytime in our conversation - please interrupt and let me know.*

STEP 4 T+3 mins: Set the **Agenda** of the call

☐ Inquire/present the agenda	*What* ***would you*** *like to achieve in this call?*
☐ Call everyone out	***Michael*** *what would you like to get out of today's call?*
☐ Take notes, and let them know that	***Jennifer can you*** *spell that for me?*
☐ Summarize	*So if I got that right* ***you want to accomplish X, Y, Z***
☐ Clarify	*Is there* ***anything else****?*
☐ Prioritize	*In an effort to fit it in the allotted time… what is the priority - what* ***would you like*** *to cover first?*

STEP 5 T+5 mins: Diagnose the situation: Ask **SP3V** questions

☐ **S** - 2 situational Qs	*How many people do you have on the curriculum team*
☐ **P** - 1 Problem Q	*What is the challenge you face with...*
☐ **Sum** - Summarize	*So if I get it right… you have* **S1** *and* **S2** *resulting in* **P**.
☐ **3** - Customer Reference	*You are not alone. We hear this a lot. Others such as ….*
☐ **V** - Value	*If you'd have a solution like this how would this impact…*
☐ Repeat SP3V sequence 2-3 times	

STEP 6 T+15 mins: Prescribe based on their situation

☐ Prescribe in their context	*Based on **your** situation I advise you do this and this...*
☐ Provide 3rd party reference	***You are not the first**… others such as… solved it by...*
☐ Ask if this is relevant	*Does this sound familiar? Is this relevant **for you**?*
☐ Demo/Present	*Here is an example how this would work in **your situation***
☐ Summarize the demo	*Do **you see yourself** using this in a similar way?*
☐ Link back to their need	*To **your point**…<problem>... how do **you see** this impact…*
☐ Summarize the prescription	*What we showed today was how to solve X, Y and Z*

STEP 7 T+20 mins: Qualify with CIPD

☐ Critical event for the customer	*What happens if **you miss** that date?*
☐ Impact on the customer's org	*Do you **see yourself** using this? What is the impact?*
☐ Priority for the customer established	*What is the priority of this project on **your list of things**?*
☐ Decision Process identified	*Have **you been involved** in a purchase like this* before?

STEP 8 T+25 mins: Wrap up the call

☐ Verify that goals were met	*At the start of the call we said… did we meet your goals?*
☐ Summarize	*Here are the takeaways from this meeting*
☐ Ask for the "business"	*Based on this are you ready to move forward with demo?*
☐ Agree to next steps	*As the next steps I will…<date>... <invite people>... <goal>*
☐ Close the call AND screen sharing	*Thank you all… looking forward to speak to you next week*

STEP 9 T+35 mins: Follow up

☐ Follow up immediately	*Within 60 minutes of ending the call, send thank you / with a short summary email with **1** action item (invite)*

The next page will give you an example of how to run through a proper call - EVERY time!

GREAT EXAMPLE Transcript of a call

<ding> Michael joining

Good morning Michael - this is Erica speaking

<Michael> Good morning Erica
<ding>

Hello who just joined?

<Jennifer> This is Jennifer

Hello Jennifer - this is Erica

<Jennifer> Hello Erica

How are you folks doing today?

<Michael> Doing well

Is there anyone else we are expecting?

<Jennifer> Chris is joining too let me ping him

Michael do you mind if I record the call to share the recording with Chris if he can't join?

<Michael> Sounds good

[Recording Started]

Good morning, everyone.
May I ask what are the goals you like to accomplish today?

<Michael> We want to see if this solves our problem

[silence - you taking notes]

Great, and Jennifer?

<Jennifer> We want to see if this solves our problem

[silence - you taking notes]

Chris, what do you like to get out of this?

<Chris> Same as Jennifer and Mike said

*Got it. Well I **appreciate** you taking the time to talk this morning. I have us **scheduled till the bottom of the hour;** does that still work for everyone?*

<Jennifer> We have to jump out 5 mins early to attend a department meeting in another building.

*No problem, I will keep us on schedule. **Naturally,** you will have some questions for me to address your goals… and **obviously** I will have some questions for you. **Typically** we end this call with me having addressed your goals and we agree on this being a mutual fit and moving forward or not. Does that sound fair?*

<Michael> Fair enough, Erica

Well let's get started …

4.6.6 Presenting in real time (TAB-based presenting)

Customers are expecting a great sales experience and are frustrated with the standard way of sharing features. One of the best way to stay engaging is kind of like sharing the journey you will be going on on through showing them each chapter of the demo.

Below is a picture of real-time selling, (AKA tab-based selling). A browser pre-loaded with content is used to guide a customer through the discovery call.

CHECKLIST

- [ ] Make sure the technology works
- [ ] Pre-load the tabs with what you want in them
- [ ] Open a shared document and pre-populate it with minutes of the meeting (who, what, when, etc)

BEST PRACTICES

- **DO** practice!
- **DO NOT** wing it! It will not work. Leverage the “Executive briefing included in invite”
- **DO** set up your tabs 15 minutes ahead of time
- **DO NOT** exceed 10 tabs/window, you want to be able to read the headers. If you need more, use a different browser window altogether
- **DO** close all other apps
  - Disable popup notifications
  - If you have a second display to your PC, either take it off, or switch into mirroring mode.
  - Use a whiteboard, it works wonders!
- **DO** record the session to share with others.

- **DO** run your product/service demo in its own browser in case it crashes
- **DO** pre-load a series of tabs in the right order, so the customer can expect what he will see
- **DO** "surf" to examples your customer is bringing up; this further enhances the real-time experience, increasing the value - and with it, your credibility

Some conferencing tools

TOOL	GREAT FOR...
Zoom.us	Great tool for online presenting, white boarding, and internal meetings. In-browser app makes it seamless for anyone joining.
Join.me	Great for desktop sharing with a customer, and conference calling. Easy to understand, offers dial-in by phone (local). Minor downside that people only see your "face in a bubble" minimizing your ability to draw something on a white board. Allows recording.
Google Hangouts	Great for very distributed teams at startups doing internal meetings. Not the best for customer presentations. Great feature is that they show their link in the invite (need to disable this is if it is not the right one). Hard to record the session.
GoToMeeting	Great for desktop sharing with a customer, and conference calling. Easy to understand, offers dial-in by phone (local). Allows recording.

4.6.7 Follow up to the meeting

Following up to the meeting is critically important, as it secures the progress you just made. You write the summary, not aimed AT your coach, but FOR your coach. When you create a proper summary, and do it shortly after the call, your customer will likely copy and paste a large part of your summary into the internal briefing. Customer-centric superstars see and use this as an opportunity.

CHECKLIST

- [ ] Outline the key observations/accomplishments
- [ ] Outline the action items/next steps

BEST PRACTICES

- **DO** contact your coach and verify! Right after the meeting (seconds to minutes), call your coach and ask him/her if (s)he is happy with what was accomplished. Verify your takeaways!
- **DO** block 30 minutes post-meeting to do your follow-up
- **DO** make your follow-up short and to the point
- **DO** separate your follow-up into two parts (but in 1 email)
- **DO** write meeting minutes, with the intent to brief others who were NOT on the call; better yet, share your notes you took in the shared doc. Quick/fast!
- **DO** effectively use the subject line – consider it as your 60 character result summary/follow-up
- **DO** write it in such a way that it can easily be shared
- **DO NOT** use attachments; only use links

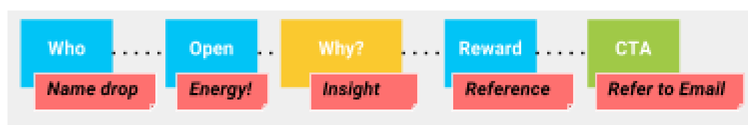
Summary Chapter IV

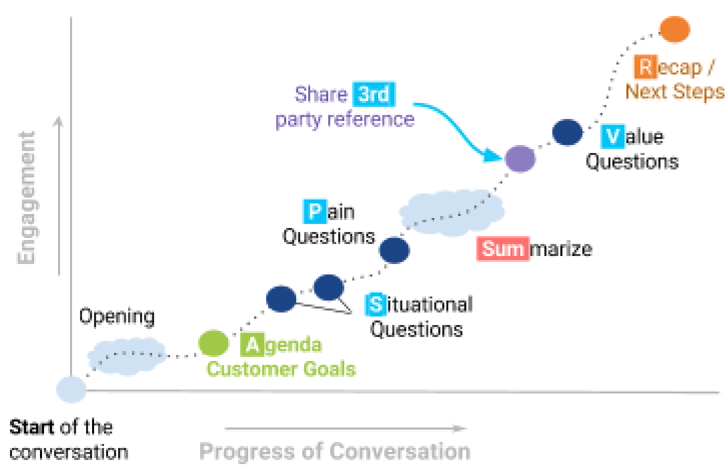
<table>
<tr><th>PROCESS</th><th>PLAYS</th><th>PREPARE</th></tr>
<tr><td>Email</td><td>Select Insights
RRRR</td><td>R Research — An opening that shows you have done your homework, and it’s about them

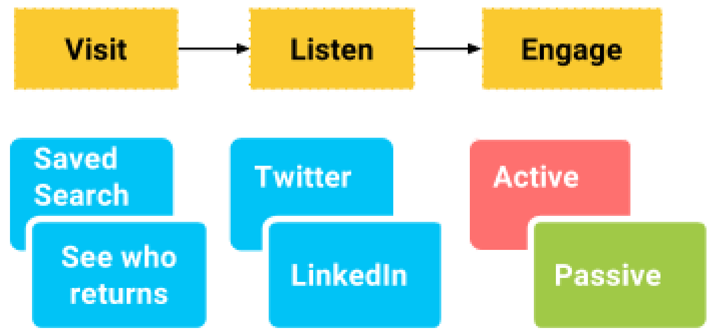
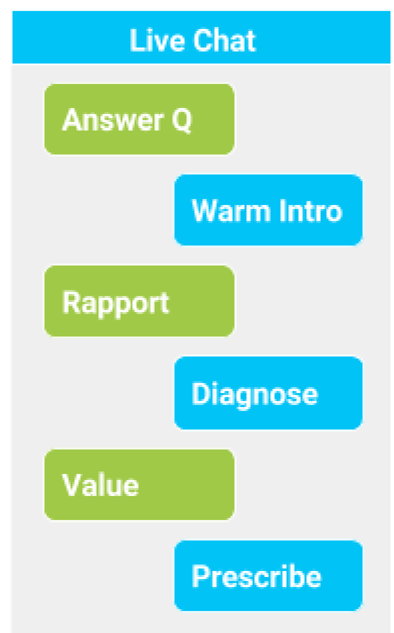
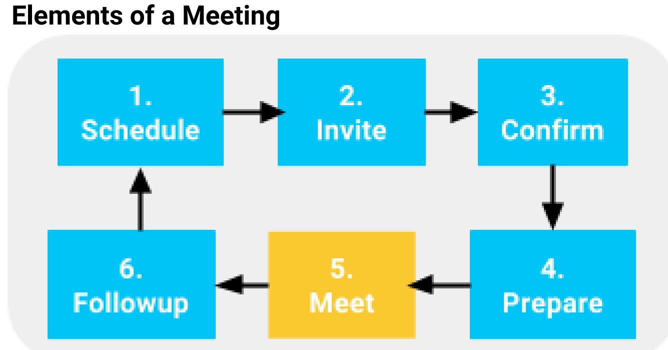
R Reference — Refer to other customers who have had a similar experience and what they did

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

R Request — Offer to share more insights, and ask for a meeting.</td></tr>
<tr><td>Voicemail</td><td>Never Generic
Give Value
Personalize</td><td>Think of voicemails like hyper-personalized emails. Prepare by understanding why the customer should be interested in your call, and deliver with energy!


</td></tr>
<tr><td>Call</td><td>Diagnose</td><td>• Ask to S ituational questions
• Identify P ain
• Summarize S S P
• Ask “Did I get that right?”
• Share a customer story that is relevant
• Ask a value question
• Recap and define next steps


</td></tr>
</table>

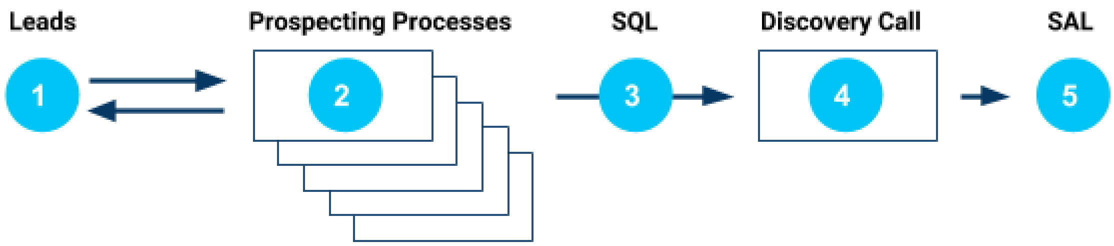
<table>
<tr><th>PROCESS</th><th>PLAYS</th><th>PREPARE</th></tr>
<tr><td>Social Networks</td><td>Visiting
Listening
Engaging Passive vs. Active</td><td>Social Networks provide customers with content available 24/7. It allows for asynchronous communication. Set up searches, use tools to push content to you, and connect through sharing insight.

</td></tr>
<tr><td>Messaging</td><td>Keep it Short
Match style</td><td>Show the customer you heard them
Show you are human
Show you can help by building rapport
Ask thoughtful questions
Provide them resources to solve their problem
Let them know what to do

</td></tr>
<tr><td>Meeting</td><td>Scheduling
Executive Briefing
Confirm
Checklist
Tab-Based Sales</td><td>Elements of a Meeting

</td></tr>
</table>

CHAPTER V. PROSPECTING

V. PROSPECTING

The Goal:

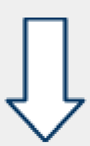
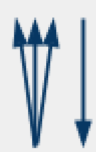
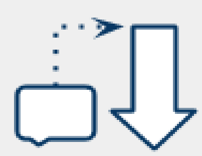
- To set up calls with leads that will turn into customers and who will use our service
- To disqualify leads that can result in a financial loss for the company
- To make a professional impression while doing this



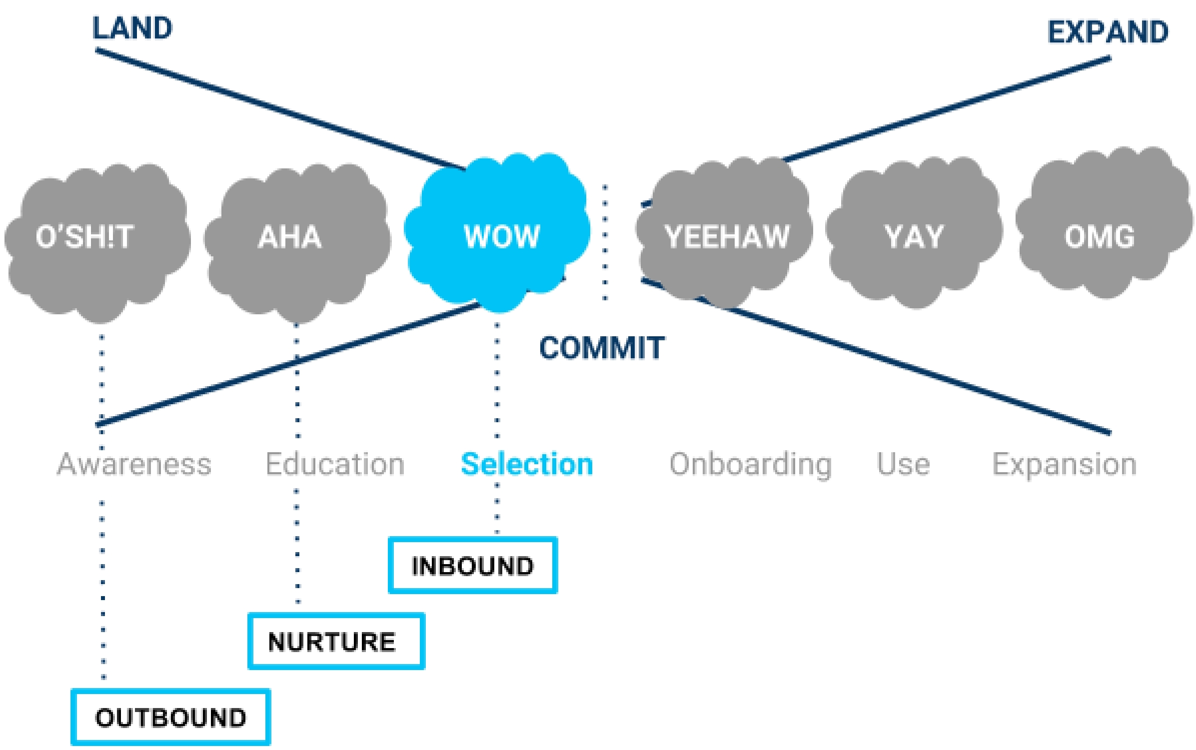
STEP 1 Lead Type Definitions

LEADS	DEFINITION
Contact (the phone book)	A person with a name, a phone number, and/or email address
Suspect	A Contact who, based on their profile, should be interested
Prospect	A Suspect who expresses interest in our product based on an action
Marketing Qualified Lead (MQL)	A Prospect that meets our minimum qualification criteria
Sales Qualified Lead (SQL)	A Prospect/MQL interested to go through the discovery process
Sales Accepted Lead (SAL)	An SQL who, after a discovery call with an AE, enters the sales process
Opportunity	A person/company who is interested in buying the solution

STEP 2 Definition of the Five Processes

INBOUND	EVENT	OUTBOUND	TARGET/ABM	SOCIAL
				
Follow up on an inbound	Generating inbound using an event as a give-to-get	Volume-based outbound through sequences of personalized outreach	Targeting a specific account with a variety of outbound techniques	Generating Inbound through social selling, such as writing a blog post.

The key difference between Inbound and Outbound processes (1-1, 1-Few, Event and ABM) is that Inbound leads have identified a problem. Visualized on the buyer's journey it looks like this:



INBOUND Follows a call to action such as a demo request. Customers have educated themselves and are ready to talk to sales to assist the selection process. This type of process can start the call with the question "How can I help?"

NURTURE This is the most misunderstood and it refers to action such as downloading a white paper, an eBook etc. These are not to be considered inbound (e.g. selection) but this indicates a client is in education. If you ask someone in this stage "How can I help?" they will often respond with confusion, not knowing anything about your company or angry that you called them when all they wanted was to read an article.

Key to note is that you cannot pursue this kind of client with an "inbound approach" but rather an outbound approach.

Events fall into this category. There are a high density of buyers, and competitors, so approaching these prospects requires an understanding on how educated they are about their problem and potential solution.

OUTBOUND Using research, you identify clients that are most likely to benefit from your service. There are a few different ways of outbound:

- 1-1 Outbound: Target a specific person
- 1-Few Outbound: Target a group of people (<50 at a time)
- Target/ABM: Target different people inside a company
- Social: Generating online content that helps people realize there is a problem/solution

STEP 3 Lead Qualification Criteria

CRITERIA	SUSPECT/ PROSPECT	MQL	SQL	SAL
Target Market/Vertical	YES	YES	YES	YES
Target Company (size)	YES	YES	YES	YES
Target Persona	YES	YES	YES	YES
Meets minimum requirements (MQL)		YES	YES	YES
Wants to speak to sales (SQL)			YES	YES
Sales professional agrees that the customer is a good fit to go through sales process (SAL)				YES

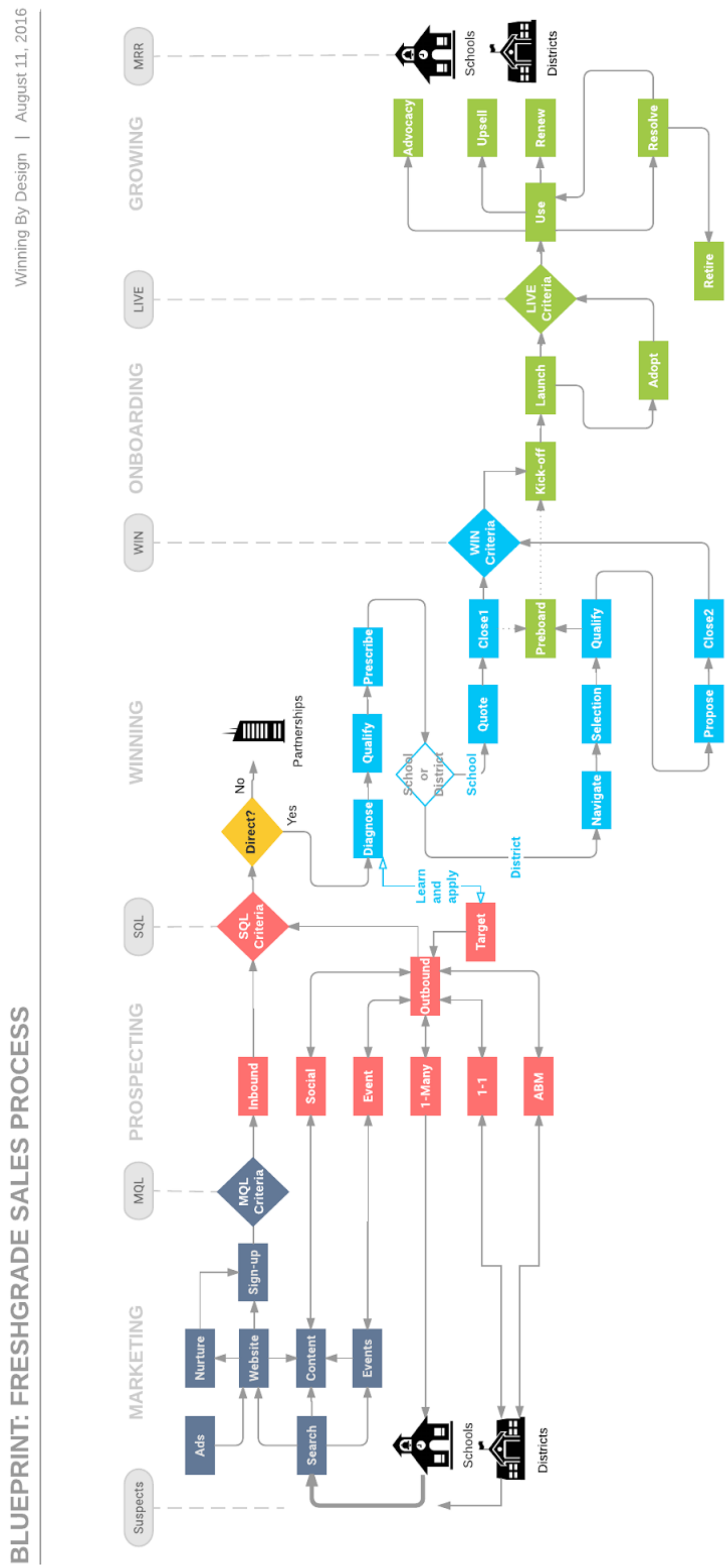
STEP 4 Discovery Call

PROCESS	DEFINITION
Set up the Meeting	The sales professional provides necessary handoff information to both customer and internal teammate. The meeting is set up with Executive Briefing Attached to drive more attendees.
Run the Meeting	The sales professionals runs through Diagnosis, Prescription and Qualification to address customer needs and identify opportunity.
Sales Process	A customer who is qualified and ready to move forward in the sales process becomes SAL. If not, they are nurtured or disqualified.

STEP 5 Sales Accepted Lead or Opportunity

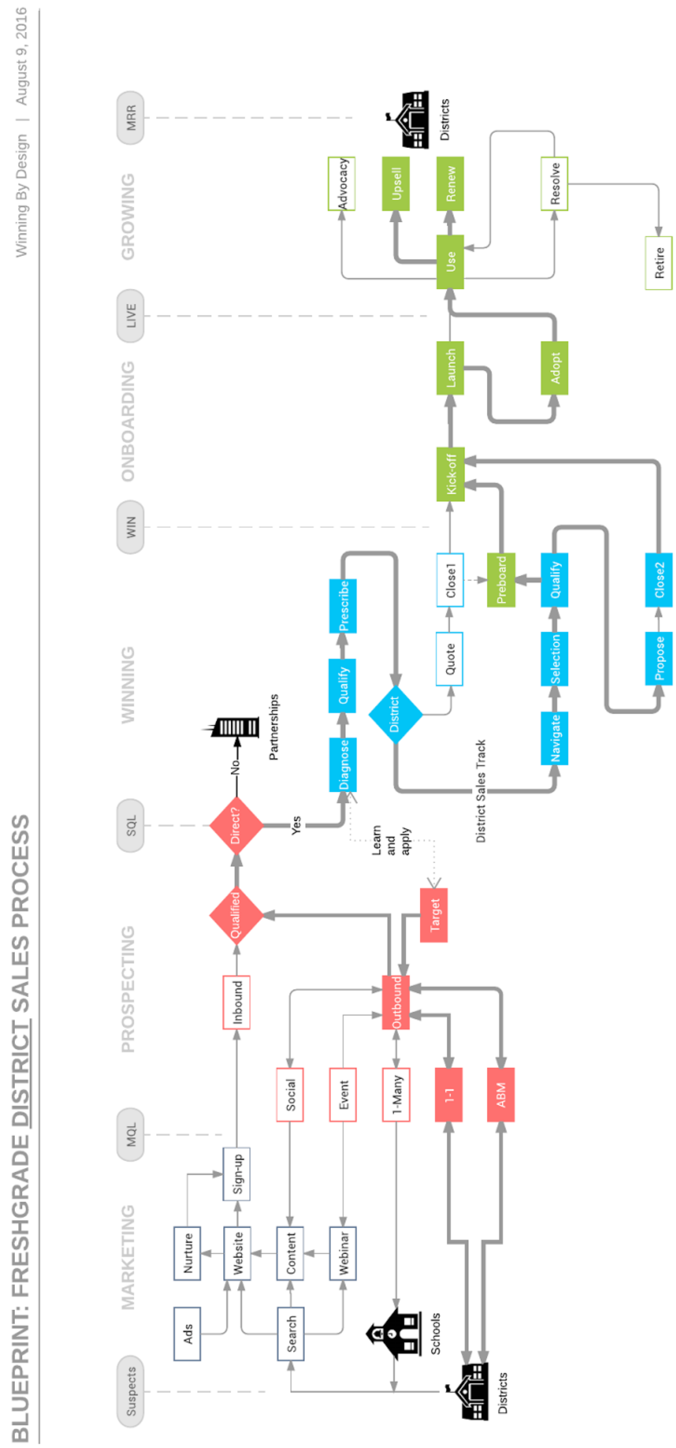
Process	DEFINITION
Assist in Selection and Purchase	An SQL who, after a discovery call with an AE, enters the sales process
Pre-Boarding, Negotiation	During the selection phase, pre-boarding may begin before contract is actually signed to ensure a seamless transition, and mutual success criteria established to drive to first value.

EXAMPLE An example of what the full sales process looks like for Freshgrade is below. You will need to map out your own specific sales process after going through this chapter.



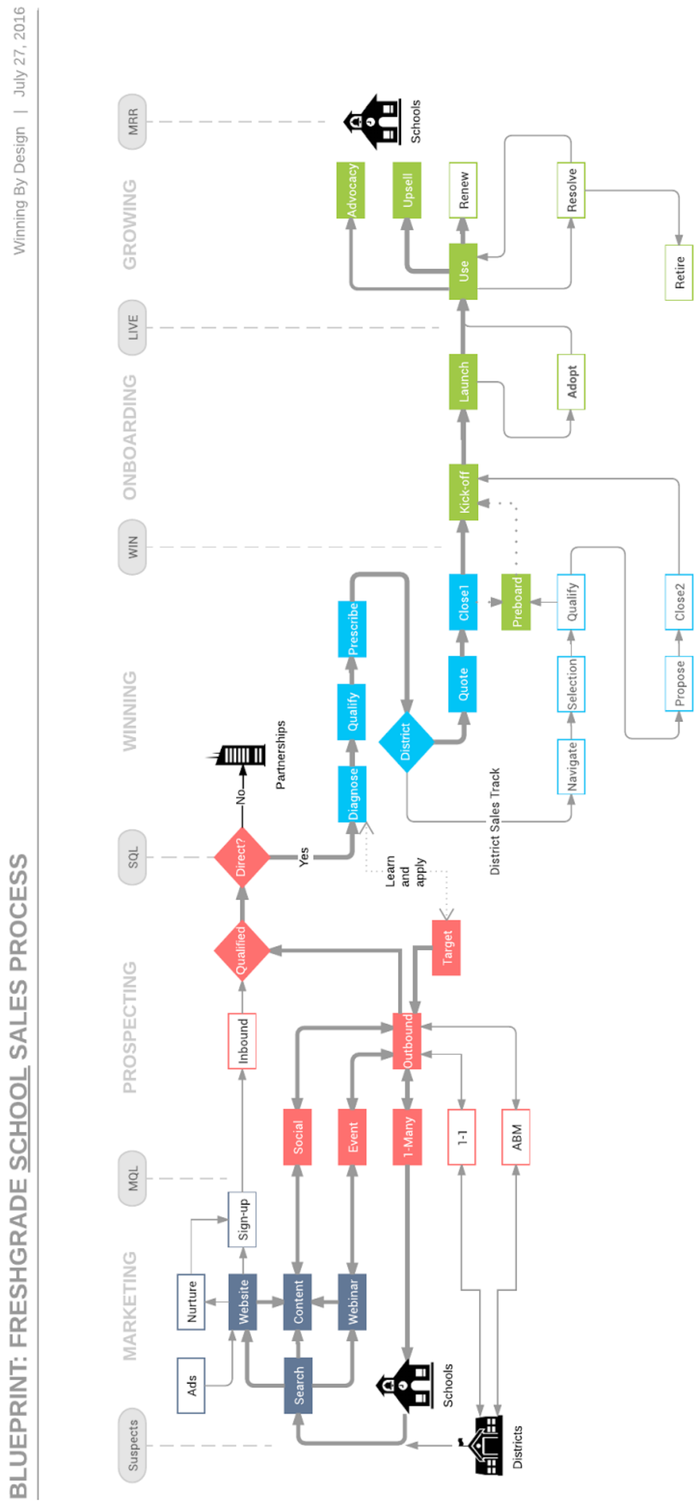
District Sales Process

EXAMPLE An example of what the sales process looks like for selling to districts for Freshgrade is below. You will need to map out your own specific sales process after going through this chapter.



School Sales Process

EXAMPLE An example of what the sales process looks like for selling to individual schools for Freshgrade is below. You will need to map out your own specific sales process after going through this chapter.

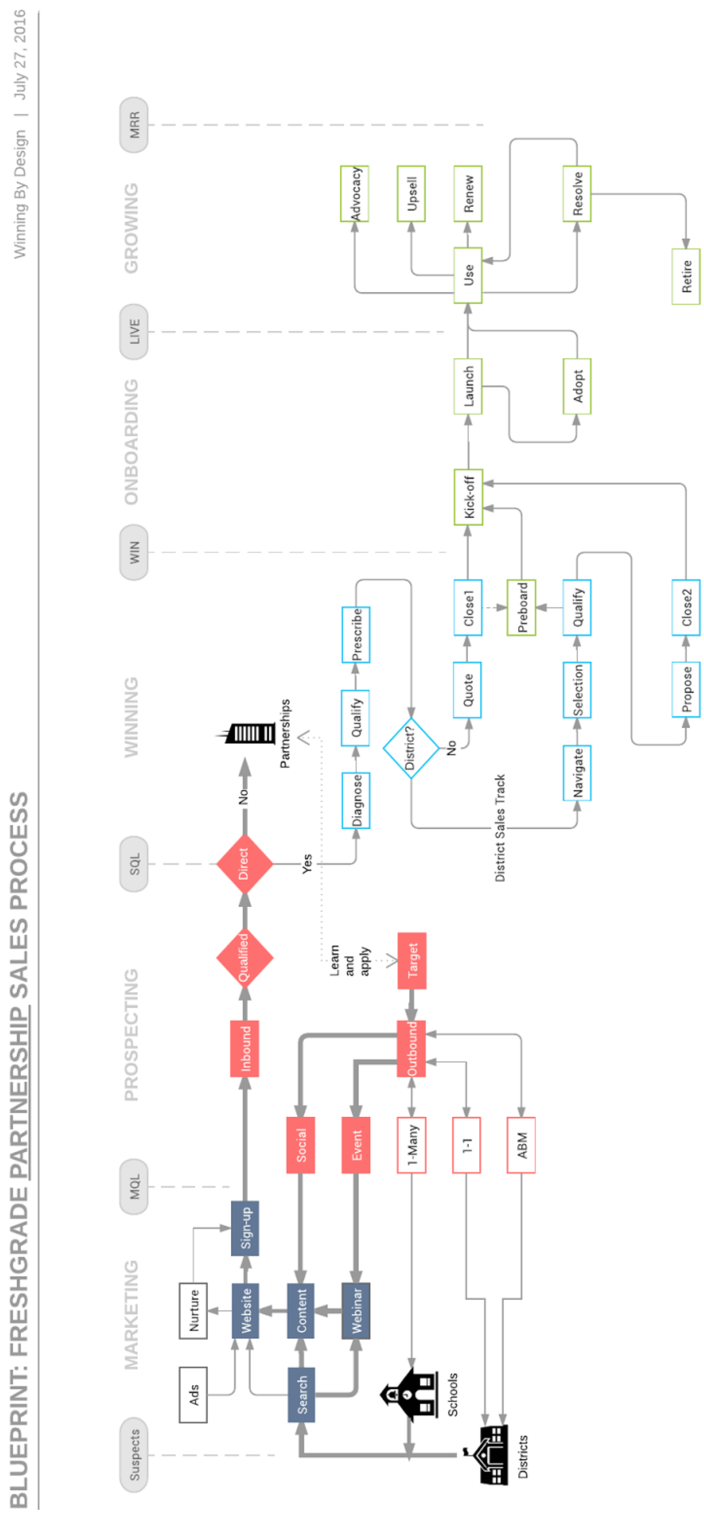


Schools / District Sales Stage Description

	SALES PROCESS BY STAGE									
Stage #	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Stage 6	Stage 7	Stage 8	Stage 9	Stage 10
Stage Name	**Diagnose**	**Research and Qualification**	**Prescribe**	**Navigate**	**Select**	**Propose**	**Negotiate**	**Secure**	**Delay**	**Loss**
Metric	*Meetings Held*	*Content Engagement*	*Demos Performed*	*Number of people per account*	*Trade-off*	*Proposal submitted*	*Discounts Surrendered*	*Deals Won, ACV, Velocity, Win Ratio*	*Gone Dark*	*Lost*
	AE is assigned and performs a discovery call (online). AE decides it's worth it to invest time & resources. If not qualified, either disqualify -or- to Nurture	AE performs research on the client, its situation, identities reference cases and creates a table of valuable insights.	AE prescribes what we can do to impact client's needs. We are able to technically meet requirements. A critical event is identified.	AE navigates through the organization to identify others involved in the decision.	CIDP is fully met. Project is prioritized. Prospect will DO something to solve problem. AE has identified the key elements of a value prop.	Client requests a proposal. AE is creating the proposal and sending it to client via certified email (click view). Schedule a pre-boarding meeting to anticipate critical event date.	Client reviewed proposal and starts negotiating on specific needs, terms and price. This may involve multiple reviews with different stakeholders	Received verbal; must execute contract immediately. Including NDA, SLA, etc.	No response to email, social, and phone calls. Something happened. Most likely client is securing budget and/or resources.	Scheduled debrief with the client. Send out written thank you note. Share feedback with product team, and initiates ReWin process. Inform ONB.
	CIDP (!) Outline of a critical event (+) We can make an Impact on a relevant pain point	CIDP (+) Critical event	CIDP (+) Critical event (+) Impact	CIDP (+) Critical event (+) Impact (+) Decision Process	CIDP (+) Critical event (+) Impact (+) Decision Process (+) Priority	CIDP (+) Quote/ Proposal	CIDP (+) Verbal on final 2	CIPD (+) Signed contract	(+) Re-engaged Revisit CIDP (?) Critical event (?) Impact (?) Priority (?) Process (?) Proposal	(+) Re-engage Revisit CIDP (?) Critical event (?) Impact (?) Priority (?) Process

Partnership Sales Process

EXAMPLE An example of what the sales process looks like for selling to partners for Freshgrade is below. You will need to map out your own specific sales process after going through this chapter.



Partnership Sales Qualification

Qualification Criteria	Description
C ritical Event	A technology partner, such as Schoology, may have its own own product but it is unable to meet the demand of the schools/districts. As such, their clients are picking a competitive solution with a better "grade book".
I mpact on the organization	Loss of deals this can cost them millions of dollars per year
D ecision Process	• **INITIATOR**: ... • **INFLUENCER**: .... • **DECIDER**: ....
P riority	The priority commonly ranks in the MUST have (over nice to have and want to have). The priority surges to a must have when a big deal is lost.

5.1 Inbound

Only MQLs are considered inbound leads!

During the inbound lead development, the following happens:

1. **MQL Triggered:** A trigger on the website (most commonly: contact us, request demo, and call sales) generates an inbound lead. **The development rep** needs to follow up promptly and schedule a discovery call.
2. **MQL Nurtured:** Suspects from the contact database are nurtured, and when they achieve a certain "nurture value" or "lead score", it generates an inbound lead. This process is heavily skewed to a download of a white paper or sign-up to a webinar.
3. **Word of mouth:** A new customer heard from us via word-of-mouth. The hottest leads!

5.1.1 Organize leads

STEP 1 Identify inbound lead providers (MQL)

You need to know who is responsible for handing off MQLs to you:

- MQL List (often a marketing person): .... (e.g., Jennifer)
- MQL Nurtured (often a marketing system): .... (e.g., Marketo, Hubspot)
- MQL Triggered (often a lead system) .... (e.g., Infer, Everstring)

STEP 2 Identify inbound lead sources (MQL)

Next, you should know what the triggers and lead sources are. Why? Because this will give you more information about what customers are looking for and why they were interested in us in the first place.

Sources are (from the website):

- .... (e.g., "Call for Sales")
- .... (e.g., "Schedule a demo")
- .... (e.g., "Contact Us" popup)

Off-site sign-ups (webinar, BrightTALK video, download white paper, etc.)

- ....
- ....

STEP 3 Check your CRM

Data quality is very important. You know the phrase "garbage in, garbage out"? Well, if your data quality in your CRM is garbage, you're going to get bad reporting and even worse insights on your deals and your performance. Your Sales Operations team is looking out for you by making sure everything runs smoothly - make sure that you do your part to keep the data clean - both you and Sales Ops will be much better off that way!

STEP 4 **Make sure the data is complete**

- [ ] First name/last name
- [ ] School district name
- [ ] Email address
- [ ] Number of students
- [ ] ....
- [ ] ....
- [ ] ....

NOTE: It is best to set up your CRM with the NCES ID as a unique identifier for each district and school. You can find those data sets here: http://nces.ed.gov/ccd/pubagency.asp

STEP 5 **OPTIONAL:** If off-shore resources are available:

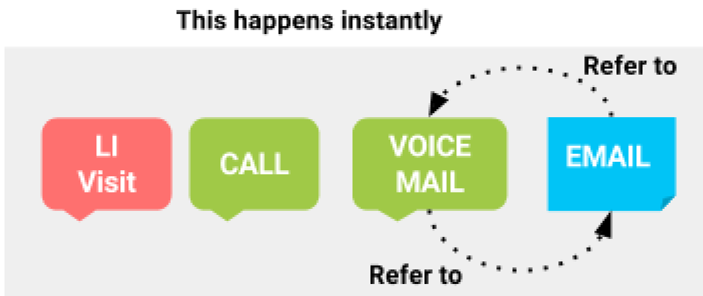
- If data is not complete - mark "append"
- Weekly/monthly send all contacts that are marked "Append" to offshore team for appending

5.1.2 Research and Prioritize MQLs

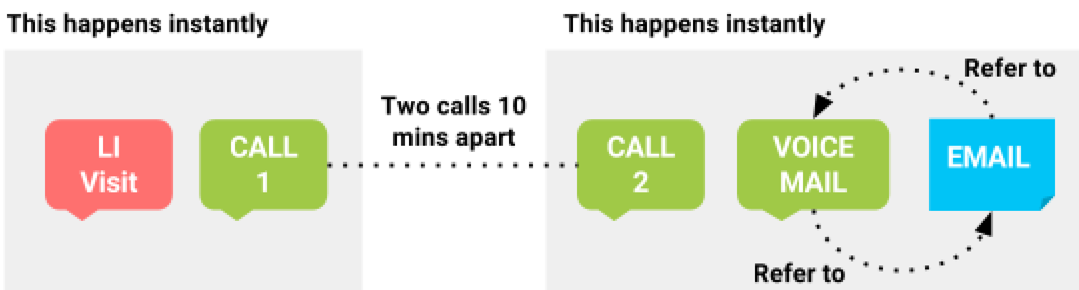
- Check on specific websites:
  - .... (e.g., greatschools.org, NCES)
  - .... (Google alerts)
  - ....
- Go to the district's website:
  - .... (key district info)
  - .... (key initiatives they are running)
  - ....
- Check on LinkedIn:
  - .... (info on their profile)
  - .... (info on their posts)
  - .... (info about their LinkedIn Groups)
- Google search:
  - .... (straight Google search)
  - .... (recent news)
  - ....

5.1.3 Inbound Engagement Plays

INBOUND PLAY 1 Winning By Design SingleTap™ Inbound Engagement Play



INBOUND PLAY 2 Winning By Design DoubleTap™ Inbound Engagement Play



STEP 1 **LINKEDIN VISIT**

- Visit the person's LinkedIn profile (yes I can say more - but that's pretty much it :-)

STEP 2 **CALL**

- Place call #1 at 10-15 minutes before the top of the hour (most people have meetings that start at the top of the hour).
- Place call #2 a few minutes after call #1; this indicates that you are trying to get a hold of them. Make the calls at least 4-5 minutes apart (1-2 minutes apart often indicates an emergency from a partner, family member, etc.)

Good morning {{first name}}, how are you doing? This is _____ from ____. We received your inquiry for _____ on _______ and I would love to help.

STEP 3 **VOICEMAIL -** If still not answered, leave a voicemail (and refer to the email):

Hello Mary,

This is Mike from XYZ.

I am responding to your inquiry for more information.

Mary, I will send you an email but in case you prefer to reach out via phone my number is 123-456-7890.

Again, this is Mike from XYZ, and my phone number is 123-456-7890.

Looking forward to hear from you Mary!

STEP 4 **EMAIL -** Follow the voicemail instantly with an email (which refers to the voicemail):

Hello Mary - Just left you a voicemail in response to your request for help. I'd love to learn more! Call me back at 123-456-7890, or reply to this email and let me know how I can help you.
Best - John
{{Email signature with company name, links to blog posts, phone number, etc.}}

5.1.4 Diagnose and Prioritize

Criteria to consider when prioritizing leads are:

- Size of district, number of students, key demographics
- District's strategic plan
- District's funding

EXAMPLE Lead Prioritization from Freshgrade

Qualification Criteria for a District

CRITERIA	SUSPECT	PROSPECT	MQL	SQL
USA / CANADA	YES	YES	YES	YES
> 3,000 STUDENTS	YES	YES	YES	YES
Solution aligns with District Strategic Plan (through research)		YES	YES	YES
Marketing target responded to call to action		YES	YES	YES
District leader expressed interest in learning more about our solution			YES	YES
Admin confirms alignment to our solution				YES
Wants to schedule a demo				YES

EXERCISE Lead Prioritization

Now create your own lead prioritization for inbound leads.

CRITERIA	SUSPECT	PROSPECT	MQL	SQL
C1	....	....	....	....
C2	....	....	....	....
C3	....	....	....	....
C4	....	....	....	....
C5	....	....	....	....

Enterprise velocity sales using an SAL process
In many organizations, the SQL goes through a stage of SAL (Sales Accepted Lead). This in general involves larger opportunities with multiple decision makers. In this process, the SQL is developed by a SDR or MDR, who hands it over quickly to the AE. The steps are as follows:

- MDR/SDR develops a lead into a SQL by setting up a discovery call
- The AE runs a discovery call, and through the process of asking questions determines if this opportunity is qualified, and what kind of resources need to be assigned to the customer
- The AE accepts the lead, and marks it as SAL

High velocity selling? Skip the SQL process, go straight to Opportunity, SDR closes.
When selling to VSB/SMB (very small business/small business), the opposite may happen. While on the phone with the customer, the SDR may opt to run the discovery process right then, and may include a brief demonstration using a screen share. At the end of the call, the SDR can convert this lead directly into an opportunity, and work closely with the AE to transfer the knowledge he gained on the call so that they can help the customer identify the right solution.

5.1.5 Hand-off SQLs

What is the process for handing off an SQL to an AE?

STEP 1: ....

STEP 2: ....

STEP 3: ....

What is the process for handing off a HOT HOT HOT lead?

STEP 1: ....

STEP 2: ....

STEP 3: ....

What is the process for a DISQUALIFIED lead?

STEP 1: ....

STEP 2: ....

STEP 3: ....

SAMPLE LETTER DISQUALIFICATION

If a customer is disqualified, the average sales person may simply click Disqualify in their CRM. However, there is an opportunity to leverage the investment you made with the intent to use the DQ'd customer as a marketer.

Hi Jack,

Thank you for your inquiry. I greatly appreciate spending time with you.

Although naturally disappointed that it did not work out this time, I did want to send you a brief note in case you have a need later on, or come across someone who can benefit from our service.

Jack, have a great year, and do not hesitate to let me know if my network is ever of use to you.

Thank you,
Sarah

Attachment: Video link to what we do
Attachment B: Use case of a relevant client

5.2 Outbound (1-1)

There is something very important that you need to keep in mind with respect to edtech when it comes to outbound. Remember in Chapter 2 how we talked about the surge of new EdTech products and platforms (check out the Edsurge Index)? Well, because the market is simply exploding with so many new solutions out there, this means that more and more of them are starting to do outreach. Which means that your target schools and districts are likely getting several emails and phone calls each week.

And this means . . . that timing is key. Know the market (chapter 2) and prepare wisely (chapter 3) so that you know what initiatives each of your targets are working on, what is relevant to them RIGHT NOW - before you start reaching out. Your chances of connecting with them are far greater if you can reach out at the right time with a type of solution that fits an existing strategic initiative or program.

5.2.1 Identify your ICP

We need to identify the right contacts - your **ideal customer profile** - inside of a targeted company.

STEP 1 What are the sample titles of your target audience?
(e.g., Chief Academic Officer, CTO, Administrator, Teacher, etc.)

.... [Title]

.... [Title]

.... [Title]

.... [Title]

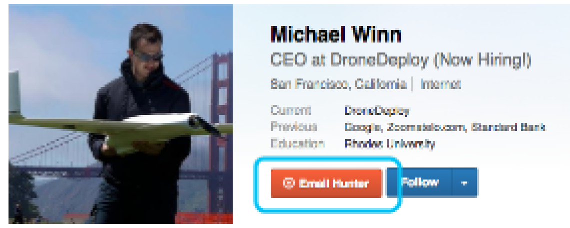
.... [Title]

STEP 2 Develop an understanding of the person
Create a description of the persona by researching their LinkedIn profile in detail:

- Who are they (hobbies, personality, family status, etc.)
- What content do they like (video, white paper, books, etc.)
- Where do they get their information (LinkedIn, Quora, newsletters, LinkedIn groups, Twitter, etc.)

EXAMPLE	**NOW YOUR TURN** *(go to their LinkedIn profile)*
Jody J @ Pleasanton School District	Name: ....
• Chief Academic Officer	• ....
• Female mid 40's	• ....
• On LinkedIn and Twitter	• ....
• Loves video content and Infographics	• ....
• Part of LinkedIn groups xyz	• ....
• Video on youtube: xxxxx	• ....
• Blog posts on topics: yyyyyy	• ....

STEP 3 Obtain contact information
Obtaining contact data is not as hard as it seems. Google Chrome extensions like [Email Hunter] provide you with a customer's email address by checking the database of email syntaxes. Also check [www.mailtester.com] to double check or find others.



Many sales prospecting tools integrate this type of functionality.

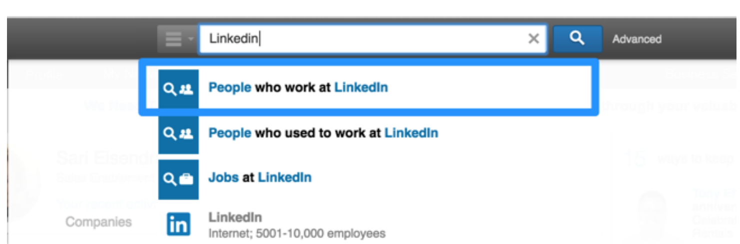
5.2.2 Research your ICP

If you know more about the customer, the impact and consequences of the imminent decision – and you have the right solution – you will win! This power is earned by thorough online research, which signals to your customer that you care about them.

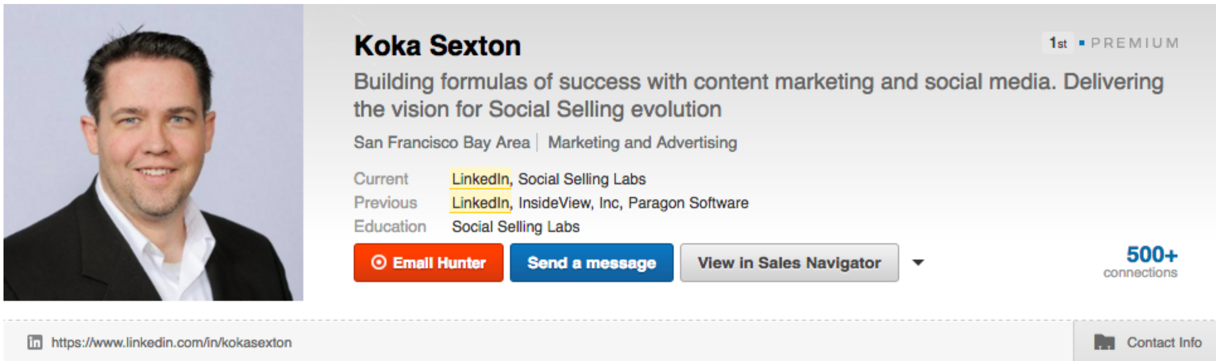
CHECKLIST

MARKET-SPECIFIC	TARGET-SPECIFIC
☐ Partner ☐ School ☐ District ☐ EdWeek - website ☐ EdSurge - website ☐ Thought leaders such as [Tom Vander Ark] ☐ Industry / association events ☐ .... ☐	☐ greatschools.org ☐ NCES National Center for Education Statistics at [https://nces.ed.gov/globallocator/] ☐ District website ☐ District needs assessment (if they receive at least $30K in federal funding) ☐ State / county department of education website ☐ State teachers' union website
PROBLEM-SPECIFIC	**PERSON-SPECIFIC**
☐ State department of education website ☐ Subscribe to their newsletter (if applicable) ☐ Submit a request for info (if applicable) ☐ .... ☐ .... ☐	☐ Twitter, Facebook, other social media ☐ LinkedIn profiles ☐ Teacher / administrator profiles on district websites ☐ .... ☐ ....

LINKEDIN AS AN OUTBOUND TOOL
In this case, I'll use LinkedIn as an example target company. On LinkedIn, go to the search box and click on "People who work at LinkedIn"

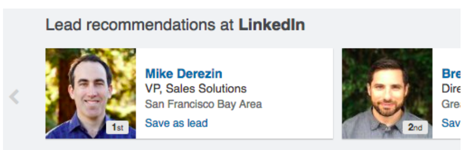


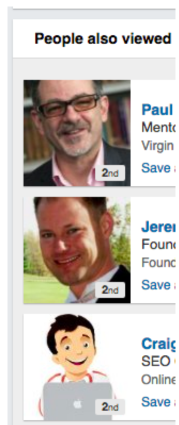
And I get my friend Koka Sexton in the results:



LinkedIn's Sales Navigator product goes even deeper and provides two critical pieces of info:

RECOMMENDATION	PEOPLE ALSO VIEWED





Both of the above can be used for identifying:

- Reporting structure
- Influencers
- Decision makers
- Etcetera

NOTE A modern sales professional, armed with an iPad and wifi connectivity, will be able to track digital footprints and get a basic understanding of what is going on with the account/opportunity.

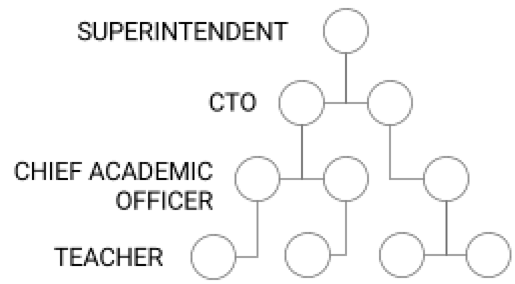
BEST PRACTICES

- **DO** create a checklist
- **DO** prepare: if you do not prepare, you will fail - this is your company's HOT LIST!
- **DO NOT** do this only once but repeatedly
- **DO** set triggers on relevant sites such as LinkedIn, Google, etc.

5.2.3 Develop a value proposition per ICP

You need to learn how your personas across the organization discover content. Why? Because you want to reach people with information in ways that they like to consume it. If that's how they like to absorb information, then chances are greater that they will engage.

Similarly, value prop differs for each hierarchical layer in a target company. You need to understand the different value props as they relate to your service.



ICP/ROLE	PERSONA-BASED VALUE PROPOSITION	WHERE THEY GET THEIR INFO
SUPERINT-ENDENT	*Fill in:*	• ... • ...
CTO	*Fill in:*	• ... • ...
CAO	*Fill in:*	• ... • ...
TEACHER	*Fill in:*	• ... • ...
OTHER	*Fill in:*	• ... • ...

5.2.4 ICP Outbound Engagement plays

As you approach an account, you need a blueprint - a plan that outlines what to do. In this section, we outline a variety of plays to use for engaging with an account.

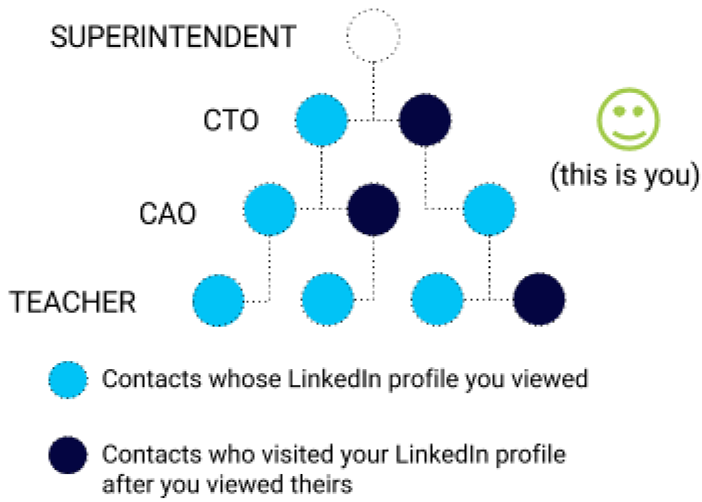
There are six ways to engage with an Ideal Customer Profile (ICP).

ICP PLAY 1 Awareness - Visit all relevant LinkedIn profiles

Great for these situations:
- First touch
- Right before a call
- Establishing awareness in a key account

Pros:
- Easy to do
- Automate using tools
- Non-intrusive

Cons:
- Need a level of insight/intelligence



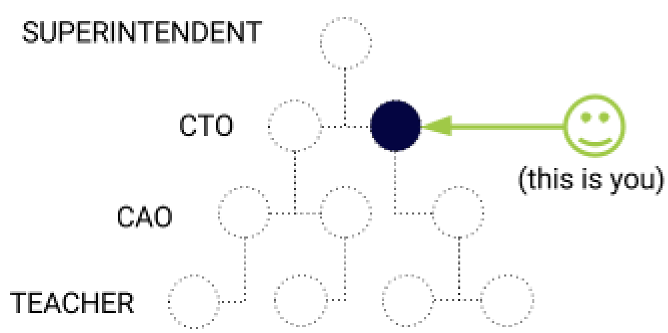
Visit the LinkedIn profiles of each target person at the account. By visiting these profiles, you are establishing brand awareness as they visit their "Who viewed me" page (but before you do this, make sure you have set up your LinkedIn profile to be customer-centric! Refer to the *Preparation* chapter). In the figure above, you see that you visited all profiles and that four people visited you back. Those people can be addressed with an outbound email: In this case you can send a message to the VP *"Dear _____, Thank you for visiting my profile, hope the insights were of use…"*

ICP PLAY 2 Go Direct - Reach out to a senior person directly - Use RRRR

Great for these situations:
- When you found the right person
- Right before a call/email
- Right after a call/email
- After play 1

Pros:
- Effective when done right

Cons:
- Requires research
- Can be intrusive when not done right



In this approach, you target a senior executive directly following extensive research (read Heather Morgan's blog post: 3 Tips to write a cold email that gets a response).

> *Subject: Per your superintendent*
>
> *Andy - Your superintendent {{full name}} stated that he has aggressive goals to meet Common Core standards for next year. Your peer {{full name}} at {{company name}} had the exact same challenge. Let me know if I can send you his insights on how he did it!*
>
> *Best,*
> *Cam*

ICP PLAY 3 Vertical Approach - Group target, using exec statement to light a fire

Great for these situation:

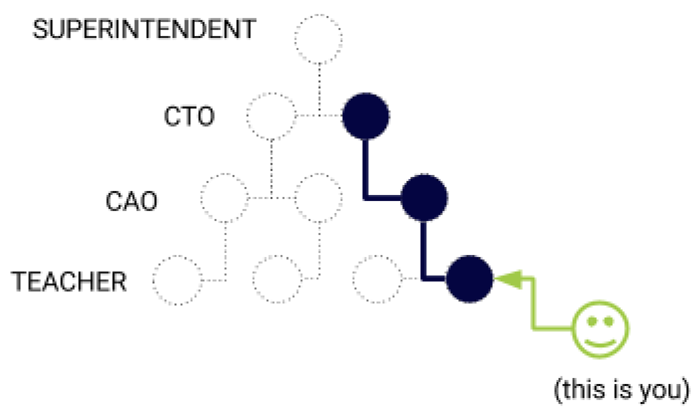
- Individuals are not responding to you
- Unclear to you who is doing what?
- Event invites
- After play 1 and play 2

Pros:

- Effective when done right
- Get a quick response

Cons:

- Can be very intrusive when not done right
- Difficult to automate



In this approach, you use a single outreach to target the entire decision chain, and this can even include the most senior executive in certain situations. Note that when you address multiple people you cc: the most senior person. What will happen is that the person responsible will respond to you.

To: Jennifer (CAO), Alan (CTO)
Cc: Alan (Assistant Super)

Subject: Per your superintendent

Hello Jennifer, Alan, and Linda -

You are all involved in the ________ process. Your superintendent Mike stated in his annual goals that he wants to improve efficiency of the student admissions process by 20%.

{{District ABC}} had similar goals like yours and accomplished this by {{value 1}} and {{value 2}}.

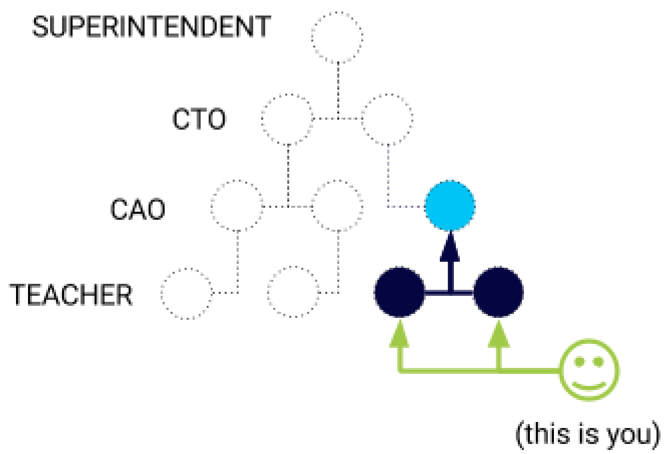
Let me know if any of you are interested to learn about the details of this story and how it can impact you.

ICP PLAY 4 Bottoms up approach - Using actual users as influencers

Great for these situation:
- When you offer a user driven service and want to gain foothold

Pros:
- Fault tolerant - e.g., you have lots of users to practice on

Cons:
- Takes a long time to get to a decision maker



In this approach, you target the actual users of your target company's product. You can target them directly (via the RRRR method) or indirectly:
- Comment on a blog post/tweet, like, share etc.
- Publish your own blog post - then share it with them (can ask a mutual connection to forward)

ICP PLAY 5 Top-down approach - Using a reference

Great for these situation:

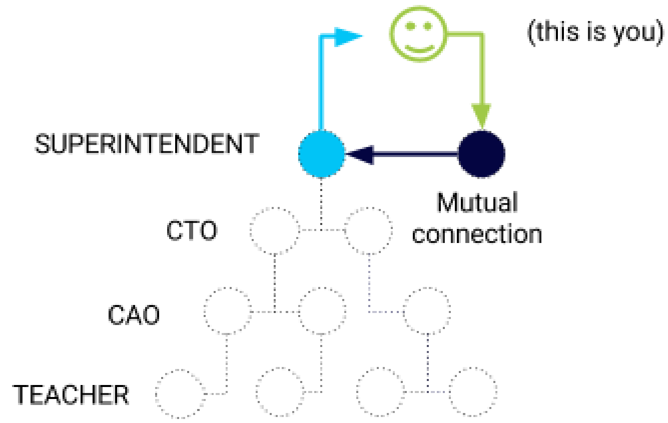
- Platform sale
- Exec level outreach
- When it's unclear who owns

Pros:

- Obtain a quick Yes/No
- Often an internal referral

Cons:

- Requires deep research
- Time consuming
- May feel resistance upon further entry into the account



In this approach, you are using a common connection to reach out to the decision maker. For example, your own CEO may know their superintendent. This means that you have to write a message for your own CEO to forward to the their superintendent - who forwards it to the decision maker.

Although this goes through many steps, it often goes extremely fast - executives tend to forward these message promptly. But this requires that you perform proper research, put that into an email for your CEO so that it's really simple for him to send along.

ICP PLAY 6 Contact Superintendent - No one listened, but we can really help you (BEWARE!!!)

Great for these situations:

- When nothing else worked
- When key people left the company

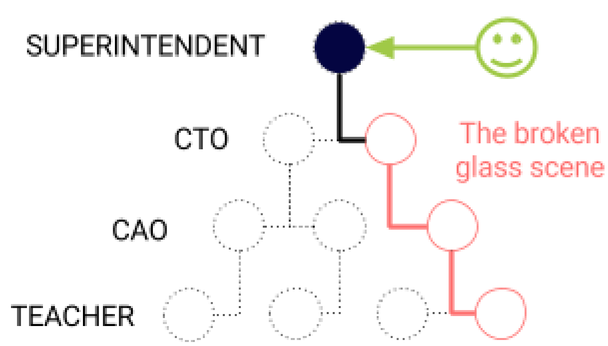
Pros:

- Extremely effective, high response rate

Cons:

- Is very intrusive regardless

NOTE: This is a last ditch effort that will break glass. Seek approval from a manager. Do not use in ABM.



In this play, you have tried a few times throughout the organization, but no dice. It's possible that the target organization doesn't completely understand the impact of your service. Or they're not willing to. Or they are simply too busy. In this approach, you reach out directly to the superintendent using your previous attempts as the source of "research", and the work you have done with the competitor as a reference. It looks something like this:

Subject: Surprised to find you not interested

Dear {{Superintendent first name}} -

Over the past few weeks I have reached out to Jennifer, Alan, and Mike in the administrative office to share some key insights. Unfortunately, they expressed no interest.

The reason why I am so persistent in my outreach is because I have been working closely with others in your space, such as {{Competitor name}} and {{Competitor name}} and was able to achieve meaningful results.

{{First name}}, will you let me know if I've overstepped? However, if this is something of interest that got lost in the shuffle, it would be my pleasure to share the valuable insights with your team.

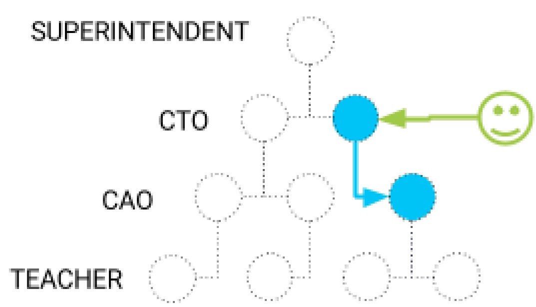
Sincerely,
Mary

Beware that you may receive some backlash from the team because you called them out, so only use this approach sparingly, and for the right kind of company. Please note that the above already reflects a proper email structure (RRRR), something you can learn more about in the Outbound Emailing chapter.

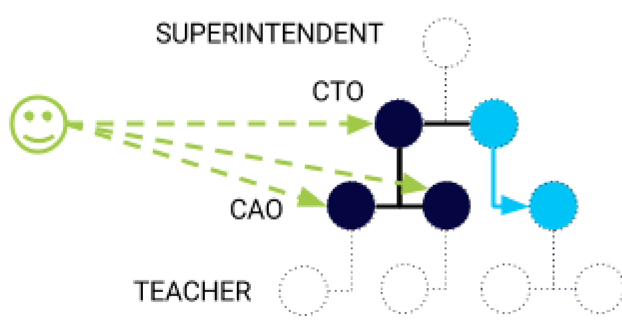
5.2.5 Multithreading: Creating a broader platform

Within larger schools or districts, often multiple people are responsible for the same area. You have to create a broader platform inside an account that goes beyond just one person, one group or one division. You can do this by contacting those from other groups and involve them in the meeting.

STEP 1 Secure the meeting



STEP 2 Invite others to the meeting



Five ways to invite others to the meeting:

1. Ask your sponsor: *"Danny, who else can benefit from attending the meeting on Friday?"*
2. Mention others you think can benefit: *"I think Mary and John could benefit from this meeting. Danny, do you think you can invite them?"*
3. Just straight up invite Mary and John: *"Mary/John - We are meeting next week with Danny at department Y. I thought you could benefit from this meeting. Would you like to attend?"*
4. Share with Danny what others have done: *"Danny, other companies I've worked with have found that inviting others in these kind of roles benefited greatly. I notice that Mary and John are in* these *positions. Do you think you can invite them?"*
5. Call John and Mary by phone and invite them personally - have a conversation!

STEP 3 Send out the invitations

If your meeting does not result in a deal, you at least have created alternative paths. We recommend that when you invite other departments, you mention who you are working with, so they can contact them.

PRO TIP Over the years, we have heard far too often that people restrict themselves from expanding their footprint without guidance from their inside coach, because once in the past, it backfired. However, it is SO rare that it backfires. Reach out - there's very little risk, and you won't know until you try!

5.3 Outbound (1-Few)

Outbound is an important skill to practice with a customer centric frame of mind. Replace the “spray and pray” mentality with personalization at scale - be a valuable resource for your customer.

How to generate qualified leads in volume:

1. We do the same but more: Instead of hyper-personalized emails, we personalize our outbound mailing and calling ***in groups***. The outreach may include a social interaction such as a like, retweet, LinkedIn connection, etc.
2. In return, we will gain interest from a group of people (as opposed to an individual)
3. We secure online meetings with qualified prospects (who behave as cohorts)

A key principle of an Outbound Cadence is that you must treat the batch in small groups. We have seen the best results when you consider the plan per “vertical” -- also known as “sprints”. In each sprint, we focus on just one vertical market, allowing us to optimize on the use-case knowledge, as well as get educated on the particulars of that vertical market (specific competitors, partners, etc.)

1:Few vs. 1:Many

When sending out emails to more than 1 person at a time, it is important to make sure you’re not treating your prospects as just a number’s game. 1:Few (one-to-few) is typically about 10-25 similar people by persona and industry.

For example, group together 10 CTOs at large single-school districts with between 1000-5000 students. You are able to send them a similar email because you know they probably will resonate with a similar value prop to each other based on your research and knowledge of their potential use case. 1:many is a different ball game - typically with 25-200 people per batch. This could be following up with a cohort who attended an event.

Rarely should sales people send out batch emails to greater than 200+ people at a time - leave this for your marketing team.

PRO TIP The difference between cold email and SPAM is the effort you put into personalizing the email with relevant and thoughtful content.

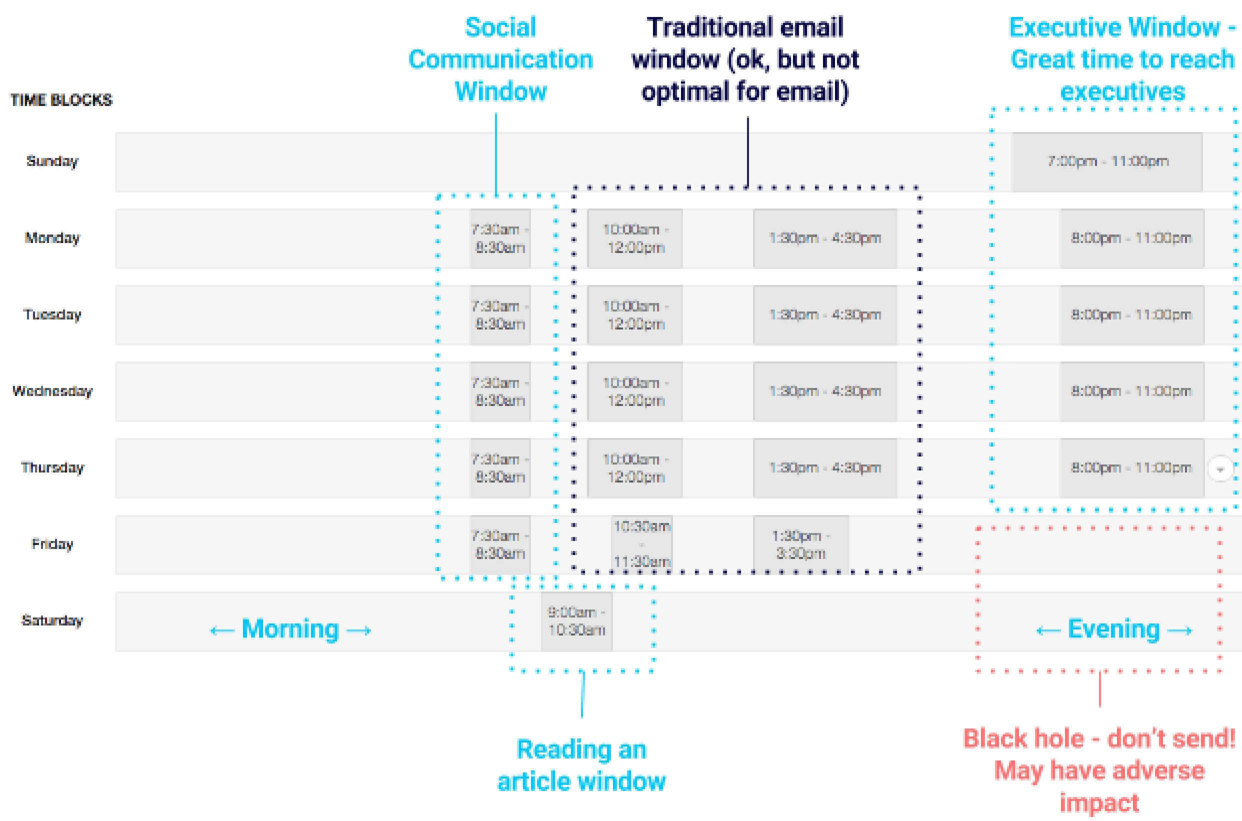
- DAN SMITH

The variables of cadences:
As a consultative inside sales professional, the key to a great cadence is to provide a set of rolling insights that are so valuable to your lead that they want to read your emails.

- Ideal Customer Profile: Different person, different value prop
- Day/Time Window: Response rates can vary significantly based on the day and the time
- Contents: Subject line, opening, and structure of the email will impact response to an email

1-Dimensional	2-Dimensional	3-Dimensional
X	X * Y	X * Y * Z
X is the amount of touches	Y is the amount of days	Z is the amount of roles
Example: A double touch play on an inbound inquiry	Example: A (7x21) 7 touches across 21 days	Example: A 7 touches across 35 days addressing 3 role: (7x35x3).
Common Use-case: **Inbound** **Outbound 1-1**	Common Use-case: **Outbound 1: Few** **Event**	Common Use-case: **Account Based Marketing**

Principles of Windowing



BEST PRACTICES

- **DO** use Friday afternoon for preparation for Sunday window
- **DO NOT** use Friday afternoon window for follow-up; it won't work.
- **DO** use Sunday eve window for reaching executives
- **DO** use evening windows BUT you must be able to respond immediately (otherwise it goes dark)
- **DO** use Saturday morning windows to share a "non critical" article to read over coffee
- **DO NOT** count on the traditional email window - you must read your data (A/B test), and expect the response rate to fluctuate significantly per persona.
- **DO** use tools to amplify the positive aspects of selling to have conversations - not to harass your prospects.
- **DO** use tools to help you with this - you cannot do this manually at scale. Some options include Outreach.io, Salesloft and Yesware.

5.3.1 One-to-Few Plays

The key to great cadence structure that results in SQLs is knowing your audience, and how they expect to interact with you. Whether or not your prospect ends up buying from you, you can earn their respect and trust by providing value. Here's proven sequencing that drives meetings - but it is always evolving. Try one of these, and then test a new flow to see if it works better for your ICPs.

1-FEW PLAY 1 **5x5 Hard Hitter Play (Email heavy)**

Who this is optimized for: Those who are already familiar with your solution
What: 5 emails and 5 other touches over 2 weeks
Breakdown:

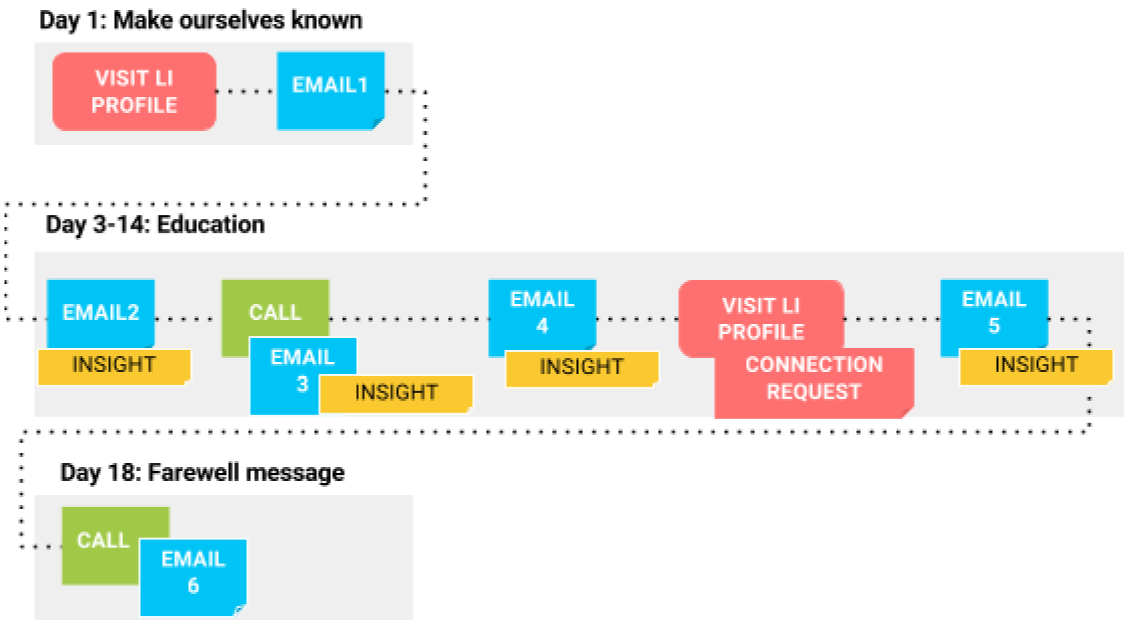
- Day 1: Introduction email - who you are, why you are reaching out now, 1 phone call
- Day 2: Add value email - provide content to help them do their job better (or get promoted)
- Day 4: Social touch via Twitter (retweet) or LinkedIn (like one of their posts or updates)
- Day 5: Offer help by email and phone call
- Day 8: Connect on LinkedIn with a personalized note
- Day 9: Email with the ask - connect to help them solve a problem
- Day 10: Just busy or not interested?
- Day 13: Phone call and social touch
- Day 14: Break up email - put them on slow drip (once per month)

1-FEW PLAY 2 **3-5-3-1 Fomo Play (Mixed media)**

Who this is optimized for: Raising Awareness using an education cycle
What: 5 emails, several calls, 2 voicemails, 1 LinkedIn message, 1 LinkedIn request
Breakdown:

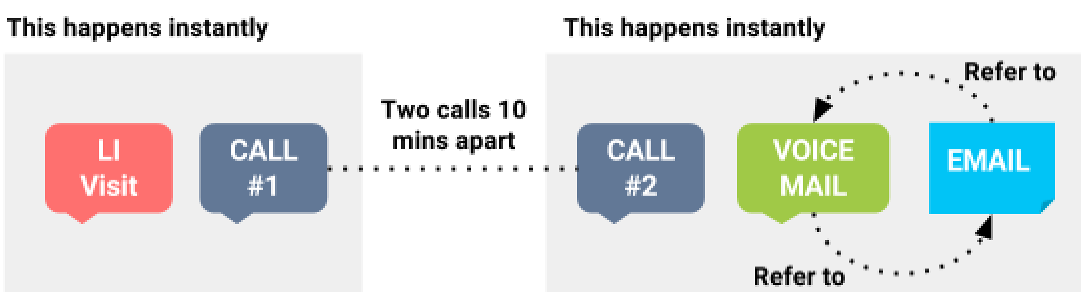
- Day 1: Call first, leave a voicemail, email, then call a second time later that day (no voicemail)
- Day 3: Send email and share insight 1; e.g., a research paper
- Day 6: Send email and share insight 2: e.g., a whiteboard video
- Day 11: Share insight 3 via LinkedIn: e.g., a customer use-case
- Day 15: Send email and share insight 4: e.g., a customer win
- Day 17: Share insight 5 via LinkedIn/Request connection: e.g., another customer win
- Day 22: Invite to a shared insight session such as a "webinar" - call first, leave a voicemail, email the invitation referring to the voicemail, then call a second time later that day (no voicemail)
- Day 23: If no sign of interest, move to slow drip

1-FEW PLAY 5 **Mixed Media Play 11 x 18**



5.3.2 Code the plays

EXAMPLE **1-Dimensional cadence:** Double Tap Call (commonly used for inbound)



We can now code the plays:

VOICEMAIL: Its primary focus is to ask them to read your email

Hello Mary -
This is Mike from XYZ, I am trying to get a hold of you to see if you are able to join the ABC event next week.

Mary, I've also sent you an email in case you prefer to communicate via email. Again this is Mike from XYZ, and my phone number is 123-456-7890; again, that's 123-456-7890. Bye.

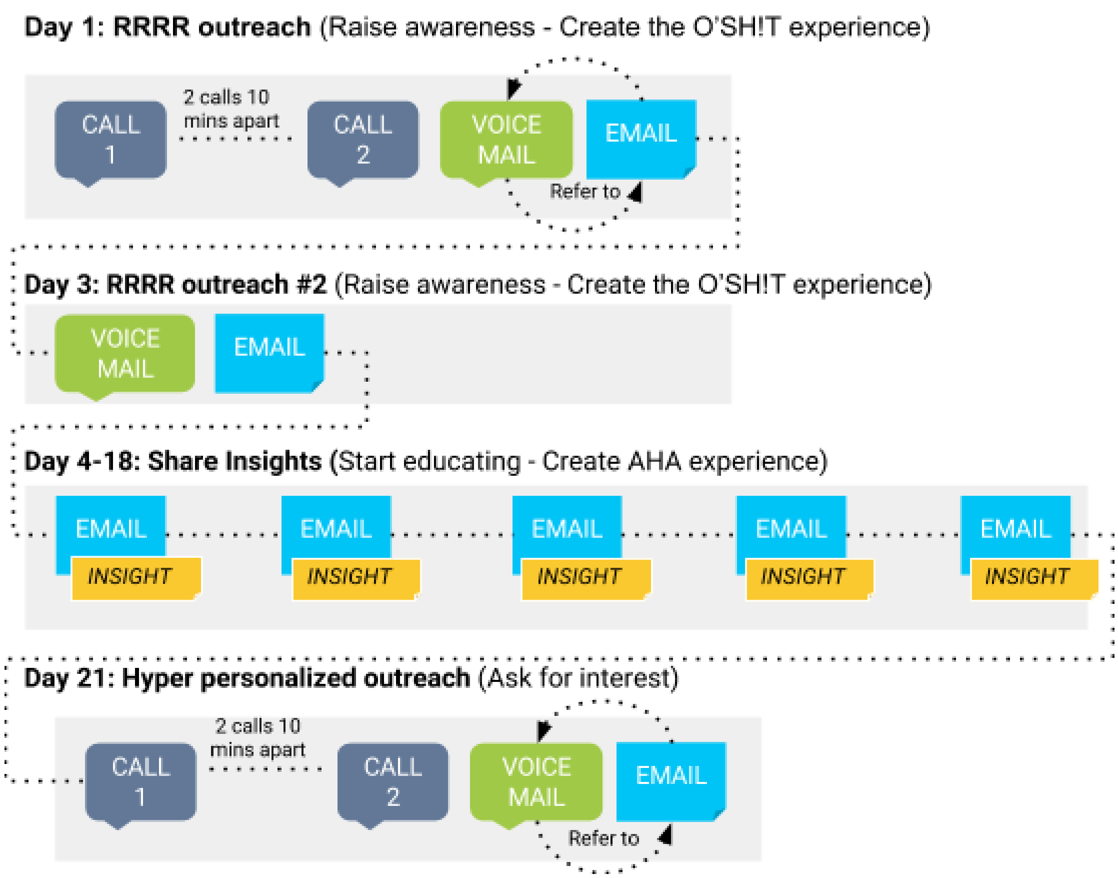
EMAIL REFERRING TO THE VOICEMAIL: No longer a cold email

Hello Mary - I just left you a voicemail.

You recently asked us to keep you appraised. As it happens we are organizing a get together of your peers this week to talk about XYZ. I am trying to get a hold of you to see if you are able to join us.

Best,
John

EXAMPLE **2-dimensional 12 x 21** Email/Call Cadence (commonly used for outbound)



Email Day One

Subject: Congrats on your new role / improving student outcomes

Hi Jill,

Congrats on your recent move into the Superintendent role at Pleasanton School District. I was prompted to reach out as I work with others like you such as {{nearby district A}} and {{nearby district B}} to help them improve student outcomes.

HBR recently published an article on this topic (LINK), and I thought you would especially like this quote as it seems to relate: {{quote}}

Let me know if this is relevant and I will send you more insights on this topic!
Meghan

Email Day Three

Subject: In follow-up to my voicemail

Hi Jill,

Because you are likely focusing on student outcomes in your new Superintendent role, here's an article that provides {{insight insight insight}} on how districts are using educational technology to do just that.

The article describes how to help teachers focus on the problem areas where they can make the most impact, for improvement in outcomes of up to 35%.

Hope this is helpful,
Meghan

P.S. If you'd like to learn more insights, please connect with me on LinkedIn where I share my favorite articles on best practices.

Email Day Eighteen

Subject: Your focus on student outcomes

Hi Jill,

I often see superintendents, much like yourself, having trouble quickly achieving results; [example 1, example 2, etc.]. The lack of ability to customize and accelerate learning is holding them back. We work with them to help overcome these challenges.

{{Nearby district}}, for example, was able to use our individualized and self-paced curriculum tools to engage every student and track their progress on detailed dashboards. They were able to close their achievement gap, helping their students achieve 1.5x their expected yearly growth.

Jill, do you think this could have value at your district?

Cheers,
Meghan

Email Day Twenty One

Subject: Just not interested or busy?

Hi Jill,

Please excuse my polite persistence. With your new role, there must be many priorities you're juggling. If you are just busy, I'm happy to reach out when the timing is better - please let me know.

Jill, is there anyone on your team that would benefit from learning more from some of the insights I've shared with you?

Cheers,
Meghan

CALL TO ACTION: If anyone opens your email within 5 minutes, do the following:

STEP 1 45-60 second research + keep researching while dialing

- Visit their profile
- Look for their 3 most recent jobs
- Read what they like (references they received)
- Check interests and publications
- Check recent blog posts and social media activity

STEP 2 **Place a call (remember they're thinking: "Who are you, why are you calling, what's in it for me?)**

Hello Mary - this is Mike, how are you?

Doing alright…Who is this?

My name is Mike from XYZ I am calling you because you are the the CAO at Pleasanton District, right?

***Yes** what is this about?*

Based on your …[reference your relevant research…I sent you a link to a use-case... And I was wondering if you had an opportunity to take a look at it?

***Yes** I am looking at it right now!*

Would you like me to save you some time of reading it all and give you the cliff notes?

***Yes** why not...*

BEST PRACTICES

- **DO** provide customer centric messaging - write about them, not about "I"
- **DO** personalize, and if possible HYPER personalize - NO ONE wants to read SPAM
- **DO** keep it short and sweet - as Dan Adams of Trust Triangle says: half as long, twice as powerful.
- **DO** consider how it appears on a mobile device (65% of emails are read on mobile)
- **DO** develop different cadences for different personas (a Superintendent cares about different things than a CTO, a CAO, etc.)
- **DO** be creative, and use your personality to your advantage
- **DO NOT** abuse GIF files of cool cats. This fad has passed.
- **DO** use A/B testing to see what works and what doesn't
- **DO** switch up your cadences - for example, you should use a different cadence for an INBOUND vs. a COLD OUTBOUND. If they come inbound, they are warm and interested in information, so you can reach out more frequently.
- **DO** use finesse. Based on your target persona's specific buying preference, you may need more phone calls, or fewer. Here's some guidelines to get started:
    1. **Introduction**: Send a couple lines to your prospect to introduce yourself and how she will benefit from what your company does. Remember, customers buy benefits, not features.
    2. **Provide Value**: Share a piece of content that educates your customer and makes her better at her job.
    3. **Offer Help**: Because you know her persona, ask the prospect what her goals are in relation to the top 3 benefits you've helped people like her accomplish. Share 1 more piece of valuable content.
    4. **Engage for Feedback** - ask about the content you sent over - was it helpful? You've now established yourself with some credibility.
    5. **The Ask**: You've earned it after providing a bit of value. Do you have 15 minutes for a call next Tuesday afternoon?
    6. **Just busy, or not interested?** This is an extremely effective subject line. In sales, it's all about getting to yes or no. If you've been politely persistent, let them know you are moving on soon.

- DO NOT pursue a person hard with email/call as they will NOT accept your LinkedIn request
- DO adhere to local culture. In Europe, it is common to not accept a LinkedIn request until you meet the person or build a strong relationship.
- DO visit someone's profile - this is considered an outbound touch
- DO NOT pursue a person on multiple social channels (FB!) - this is considered stalking. Just don't

5.2.3 Measuring engagement

By monitoring our engagement, we are able to make data-driven decisions. Let's first establish what your target open rate looks like for a decent outbound campaign:

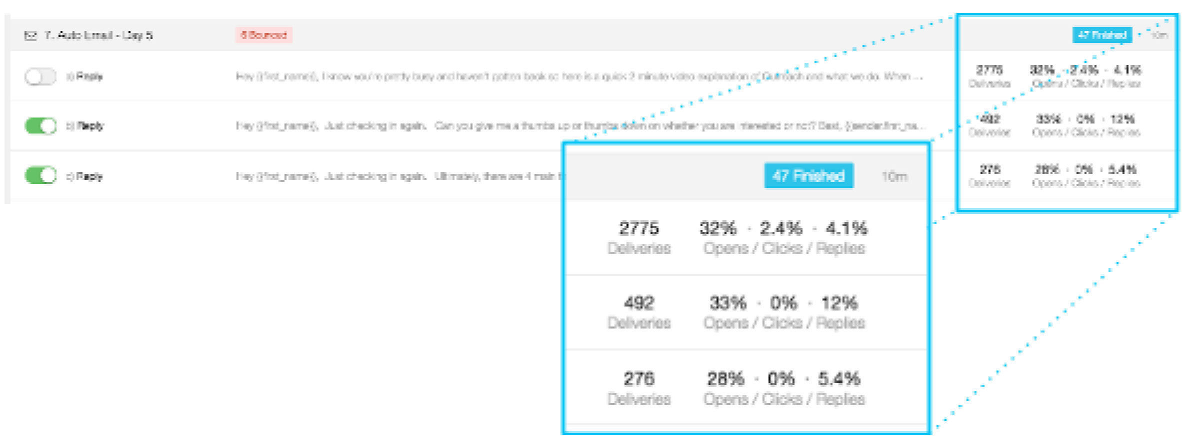
OPEN RATE	REPLY RATE
40%	10%

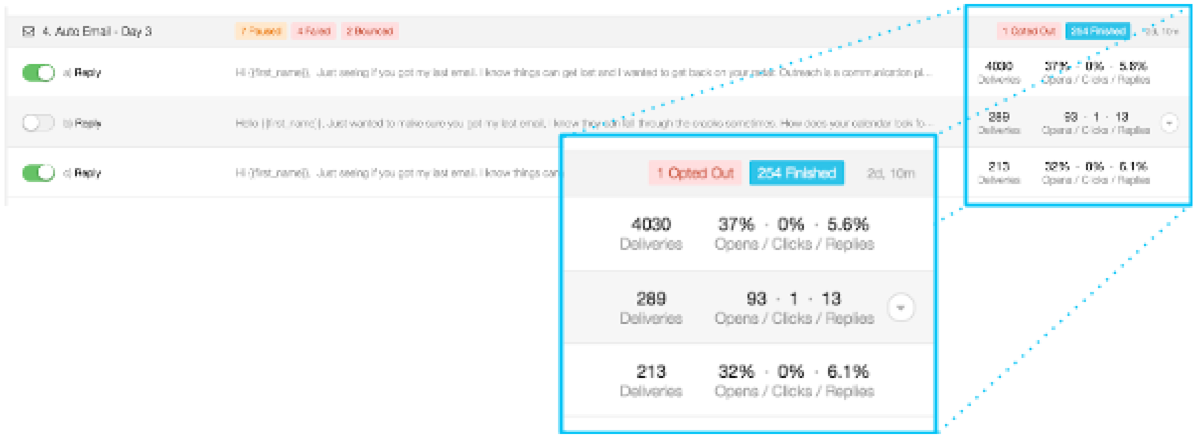
In order to achieve this, you need to A/B test.

A/B Testing

A/B testing means that you compare two similar emails - they are exactly the same, except for only 1 item in the email. Most commonly, one of the following:

- The subject
- The opening of the body
- The call to action




4. Auto Email - Day 3
a) Reply
b) Reply
c) Reply
1 Opted Out
254 Finished
2d, 10m
4030
Deliveries
37% · 0% · 5.6%
Opens / Clicks / Replies
289
Deliveries
93 · 1 · 13
Opens / Clicks / Replies
213
Deliveries
32% · 0% · 6.1%
Opens / Clicks / Replies

5.4 Events Generate Leads

Winning By Design Event Process™

REGISTRATION Open a registration page, create a welcoming landing page, easily communicated through social media.

INVITATION A list of identified prospects, customers or customers are invited

a. If it is a smaller event, hyper-personalized emails and phone calls are used to invite
b. If it is a larger audience, social media can be used

CONFIRMATION Qualified attendees are developed before, during, and after the event

THE EVENT Prospects attend the event

FOLLOW-UP Following attendance we follow-up with everyone (attendants, no shows, etcetera)

5.4.1 Different kind of events

ACTIVITY	SMALL SOCIAL EVENT (up to ~20 attendees)	ONLINE WEBINAR (up to ~1,000 signups)	REGIONAL EVENT (up to ~300 attendees)
Online Registration	Via a blog post ~10 days before the event	Via a blog post two business days before the event	Via a dedicated landing page >30 days before the event
Invitations	Bulk of people sign up on Sunday before. Needs to be hyper personalized and use email/phone to invite.	Bulk of people sign up 24 hours before event. Use of “influencers” via social media.	Bulk of people sign up 1-2 weeks before event. Mass emailing, and hyper personalization of influencers and speakers
Confirmation	As they sign up + 48 hours before + the morning of	At sign-up + 15 minutes before	At sign-up + 1 week before event + 1 day before event
The Event	Expect 50-60% to show up	Expect 20-30% to attend (most people want the recording)	Expect 50-60% if it is free; if it is paid, expect 80-90% attendance.

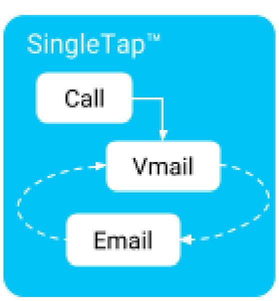
Continued on the next page

ACTIVITY	SMALL SOCIAL EVENT (up to ~20 attendees)	ONLINE WEBINAR (up to ~1,000 signups)	REGIONAL EVENT (up to ~300 attendees)
Follow-up: Thank You for attending	If the event is on Thursday, follow up on Sunday. Follow-up should include key takeaways from the event.	Within 2-3 hours following the event, send the recording of the webinar.	Do not follow up immediately, as people need to catch up on their email while they were out of the office, etc. Give it a few days.
Follow-up: Sorry you missed it	As soon as the event is done (hours)	As soon as the event is done (hours)	As soon as the event is done (hours)
Follow Up: BLOG for those who did not attend	Update blog post within hours; resocialize.	Within hours	Within hours
Social Media	Not as much as you think, as you generally get the wrong attendees for small events (e.g., job seekers). Primarily a blog post and personalized LinkedIn invitations.	Go all-out on social media: - Blog post on LinkedIn - Twitter invitations - Facebook invitations - Status updates	Go all-out on social media.

5.4.2 Invitation process

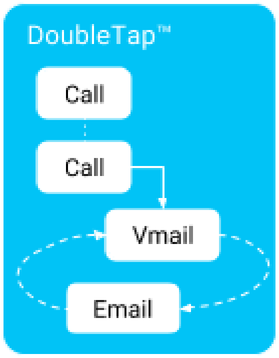
There are different ways of registering attendees to consider:

- **BLOG** We highly recommend to use a blog post to start the conversation. At the top, middle and bottom, invite customers to join the conversation at the event.
- **EVENTBRITE** Best to use Eventbrite for events with larger sign-ups, and/or if a fee is charged.
- **MEETUP** Best for informal get-togethers, NOT good for paid professional events
- **LANDING PAGE** Best for events with a 1-2 day agenda, speakers details, etc.; may embed an Eventbrite invite
- **EMAIL/CALENDAR INVITE** Send out email invitations, followed by a calendar invite. The use of the calendar invite has proven to drive up attendance significantly.



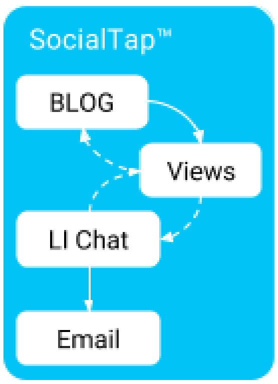
INVITATION PLAY 1 SingleTap™

- Place a call
- Leave a voicemail referring to the email
- Email referring to the voice mail that provides value



INVITATION PLAY 2 DoubleTap™

- Place a call
- Wait 10 minutes
- Place another call
- Leave a voicemail referring to the email
- Email referring to the voice mail that provides value



INVITATION PLAY 3 SocialTap™

- Write a blog post on the event
- Monitor views/shares/likes and comments
- Send a LinkedIn message
- Move to Email

Send the Invitation

The invitation to the event needs to be something that appears on their calendars. Most people believe if they signed up via Eventbrite, Meetup or other that they will get notified automatically. These invites often do require them to opt-in to get it on their calendar. Why take the risk? Instead, send anyone that signed up a separate ***Calendar Invite.***

The invite needs to contain valuable info, such as location, parking, etc. The goal of the invitation is to:

- Secure attendance
- Act as a "briefing" in case the invite is forwarded inside the company
- Provide practical details about the value of the event

EXAMPLE A sample invitation is below:

HELPING TEACHERS MANAGE THEIR CURRICULUMS
Breakfast Briefing @ Stanford
October 13 - 7:30AM - 9:30AM

PARKING: RESERVED PARKING PROVIDED - Tresidor Lot (L-39), just in front of the Stanford Faculty Club. Posted spaces will be numbers 92 – 134

Keynote: [NAME], [Company]
Description

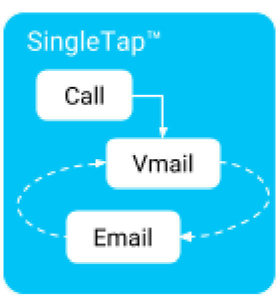
Session: [NAME], [Company]
Description

In this session, you will learn new solutions that teachers are using to manage their curriculums, how they stay in touch with parents, and how they use these solutions to track progress and report on outcomes.

Practicals:
- Breakfast provided at 7.30am
- Dress code is business casual
- In case of issues please call Michelle at 123 456-7890

Forward invite: If you know of anyone else that can benefit from attending, please feel free to forward: Link to invite

5.4.3 Confirm attendance



CONFIRMATION EVENT PLAY 1 SingleTap™
The confirmation is low profile to make sure you do not overwhelm
- Place a call
- Leave a voicemail referring to the email
- Email referring to the voice mail that provides value

There are three kinds of confirmation that each give a different opportunity/advantage.

EXAMPLE EMAIL #1 Upon registration ask them to have their peers join:

Subject: Your Confirmation / Invite a friend

Hello Mary,

Congratulations we secured you a seat. You can find the confirmation details below. Do let us know if you know of anyone else you think that can benefit from these kind of insights?

Looking forward to see you!
Mike

EXAMPLE EMAIL #2 Start the conversation before the event starts

Subject: See you on Thu / Great article that makes the point!

Hello Mary,

Thought you'd appreciate this article that talks about "Inside Sales Organizations are Growing by 300%". In particular that they see them move to new markets such as Dallas. <LINK>

Suzanne from ACME corp will join us and share her experience.

See you on Thursday, call me if anything comes up 123-456-7890
Mike

The extra asset provides increased engagement, and shows which customers are more interested, even if they miss the session at the last moment.

EXAMPLE EMAIL #3 Right before the event provide a helping hand

Subject: Single Click Dial in for your convenience

Hello Mary,

If you are anything like me you probably looking for the dial-in numbers, so you may find this single click to join helpful:

Click: 123 456-7890,,98766542*

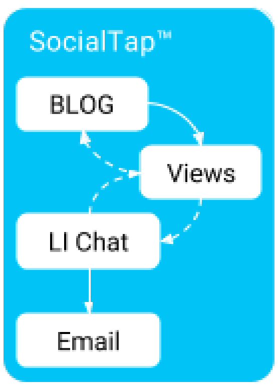
Cheers,
Mike

PRO TIP Notice the 2 commas between the dial-in number and the login code - that creates a single click to dial-in if they're calling in from your smartphone. This removes a huge common frustration and will be greatly appreciated by your customers.

5.4.4 During the event

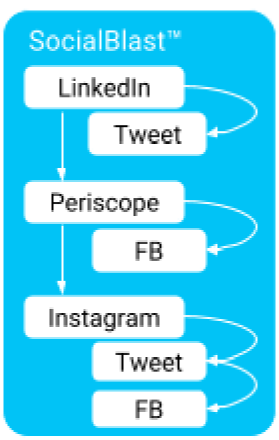
Use your social media:

- **Set up your tweets** (following Social Selling certification)
- **Take pictures of the event** that show the educational nature of the event; you can later tweet these pictures, or post them social media. DO NOT make references to "you missing out".
- **Take detailed notes, and write a follow-up post** with key takeaways on behalf of your customers



DURING EVENT PLAY 1 SocialTap™

- Write a blog post on the event
- Monitor views/shares/likes and comments
- Send a LinkedIn message
- Move to Email



DURING EVENT PLAY 2 SocialBlast™

- Build an audience on LinkedIn and Share on LinkedIn
- Build a following a twitter and Tweet using a #

- Share on FB

- Take a share pictures during the event
- Tweet the pictures
- Facebook the pictures

5.4.5 Following up on the event

EVENT FOLLOW-UP BLOG Post Force Multiplier Play

Following up on the event is where the rubber meets the road; there are three key activities here:

STEP 1 Write a blog post

A blog post that summarizes your takeaways allows you to make the event last forever. It can also help create a series of new leads. As you can see in the image here, there are 1,199 views on this post. More importantly, there are 210 likes. These are people you can now "qualify" and reach out to.

No longer is your outbound a cold call! Now you have used an event, which generated a lot of insight, that you turned into a blog post - and that in turn, generates leads 24/7.

You see the impact?

STEP 2 Follow up directly

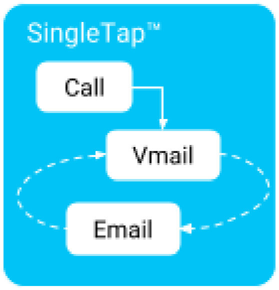
When you follow up, you need to be timely. Sometimes, this means you have to do it right away (e.g., online webinar), and sometimes early the following week. Best practice shows that follow-up on a Friday afternoon/Saturday is a waste of effort. Sunday night and Tuesday mornings show better engagement in the follow-up. The follow-up should be HYPER PERSONALIZED for the smaller event (up to 300 attendees). Meaning - every person should get a personal "thank you" note for attending - even better, give them something of additional value for their effort!

STEP 3 Follow up with those who missed it

Those who missed it are often the ones who are of most interest, because they were too busy to attend. You can qualify who signed up but missed the event, and is a real lead, and create a personalized note:

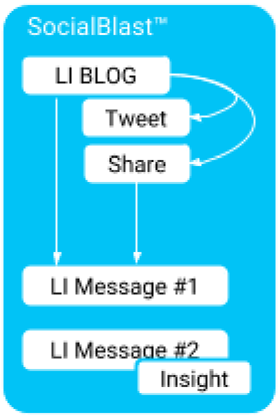
> *Subject: Do a 1-1 session instead?*
>
> *Hello Jennifer - Since you could not make it last Thursday, but did sign up, do you want me to schedule a 1-1 session instead? Here is a link that shares the key takeaways from the session - Jane.*

Do you notice how we got to the point? We are "mirroring" the behavior of the customer - so busy that they could not make it. Hence, we keep the message short and sweet.



FOLLOW-UP EVENT PLAY 1 SingleTap™

- Place a call
- Leave a voicemail referring to the email
- Email referring to the voice mail that provides value



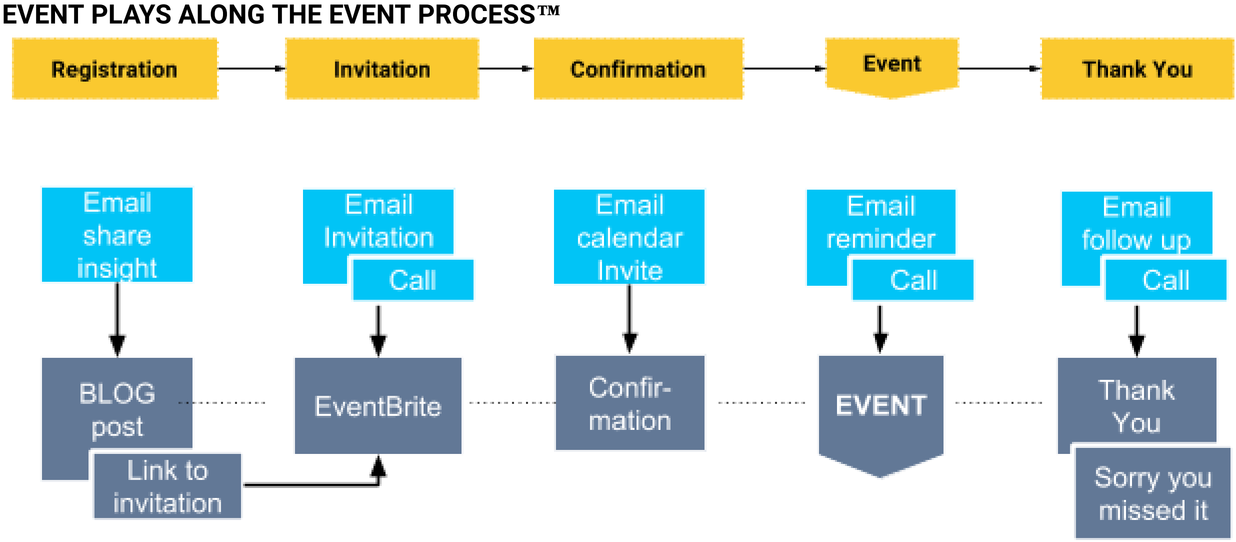
FOLLOW-UP EVENT PLAY 2 BLOGTap™

- Write a BLOG Post
- Share with:
    - Attendees
    - No shows
    - Anyone
- See who shares the BLOG
- Qualify and reach out with LI Message
    - Those who shared the post
    - Those who the post was shared with
    - Those who liked/viewed etc.
- Follow-up with LI Message with additional insights

The execution of these sequence are the responsibility of the Development Representative. Time, effort, intent and approach all heavily influence the attendance:

- **TIME:** Different events have different timelines. Sometimes you have to rush and respond instantly, while at other times you have to hurry up and wait.
- **INTENT:** Your attendees can sense your intent. If it is to sell them something, you will not have high attendance. Your intent must be to educate, inform, advise and provide insight.
- **APPROACH:** How are you going to go about it - a mass email to get broader awareness, or a hyper-personalized message? Each of these has pros and cons to consider depending on the event.
- **EFFORT:** Of all the things that we do not control, it must be mentioned that we have seen many cases where the outcome is directly related to the effort put into it. Hard work delivers results.

EVENT PLAYS ALONG THE EVENT PROCESS™



Organizing an event is a great way to generate leads for your business. The principle behind this is that you are GIVING/SHARING information during the event; this attracts the right audience who wishes to invest their time in LEARNING. The importance is to have people become aware of the event and the valuable insights being shared. Here is a proven sequence to make sure the event is a success.

5.5 Social Selling

5.5.1 Curating content

CONTENT CURATION PLAY **Curating Content**

When you curate, you engage with content and share it with your network. Since the people in your network trust your judgement, they value the article. This once again emphasizes the impact of your presence online and why you should be so careful with maintaining it.

Curating content has two important impacts:

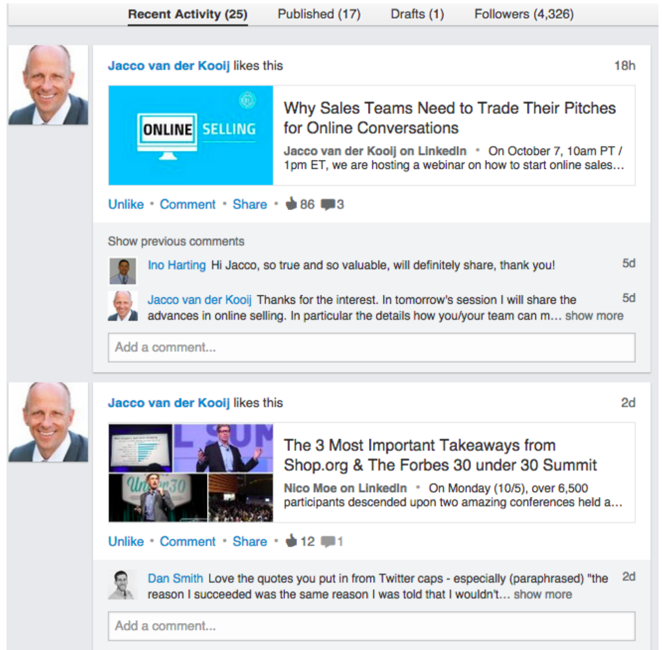
- You contribute your own insights to your network: This increases your value as you become a thought leader on a specific topic
- You can curate content that your prospect has written: This is a very powerful approach, as your prospect is nudged in the most friendly way about your presence

	CLICK CURATION	CLICK+WRITE CURATION	PROVING INSIGHT CURATION
Methods of Curating	● Like ● Retweet ● Follow ● Upvote ● Share (others content) ● .... ● .... ● .... ●	● Share (your content) ● Forward ● .... ● .... ● .... ●	● Comment (LinkedIn) ● Comment (BLOG) ● Answer (Quora) ● Congrats (LinkedIn) ● .... ● .... ● .... ● ....
Action	View/Understand/Click	Summarize a key takeaway relevant for your audience; try to avoid just "snipping" a headline.	Requires in-depth reading of the article and full understanding of the content, but in return it is most impactful on your lead generation.
Network Impact	Update evaporates quickly (mins to hrs)	Evaporates quickly (mins to hrs)	Does not evaporate, may stay for years. Will be subject to prioritization (likes, views, time, etc.)
Prospect Impact	He receives a friendly nudge in the form of an update, builds name recognition.	He receives an immediate update.	Your prospect receives an immediate update, provides you with high visibility, and often requires the person to respond to you.

STEP 1 **Measure what works**

As you start to share insights you have gathered from credible sources, you must measure performance:

- Which articles get shared the most and why?
- Which articles generate the best quality of leads?
- Who is always involved (re-tweets you, etc.)?



STEP 2 **Do more of what works**

and stop doing what doesn't work

STEP 3 **Write a lot of thank you's**

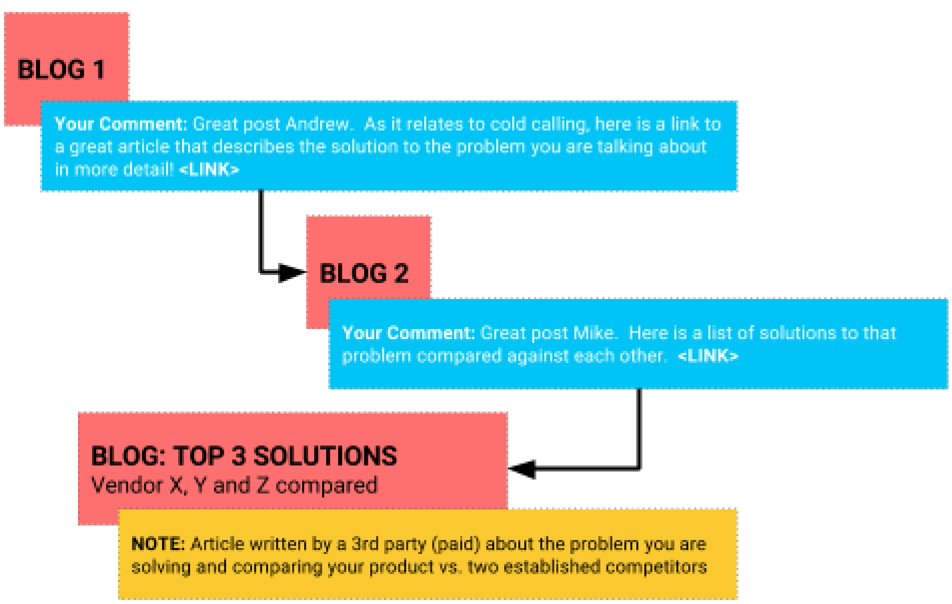
- Thank you for sharing
- Thank you for liking
- Thank you for your comments
- Who are my top shares this week
- Thank you for following me
- Thank you, thank you, thank you!

STEP 4 **Team up with a peer**

It's called "social" fora reason! Learn to recognize who has great articles that you can trust as great content when you hit like.

STEP 5 **The Ultimate: Creating multi-touch**

So you want to create the Ultimate. You can do this by linking comments to multiple blog posts, thus creating the impression that "you are everywhere". Here's how it works:



5.5.2 Create Content as Outbound

CONTENT CREATION PLAY By now, you know where your customers are conversing, and what they are talking about. You know how to engage them and at what time. Once you have mastered these first 5 steps, you are ready to become a Social Seller.

Social selling takes place in the educational part of the customer's journey, and therefore **at no point in time can you "sell"**. You educate, you share. The goal is to engage a customer in an online conversation, very similar to how you'd approach a customer at a coffee shop or at a conference. And in the world of online, your insights are the conversation starter.

STEP 6: Create Content (only upon approval by your VP)
Summarize your week's experiences; what are the problems your customers frequently talk about?

PROBLEM 1: ....

USE-CASE STORY: ....

PROBLEM 2: ....

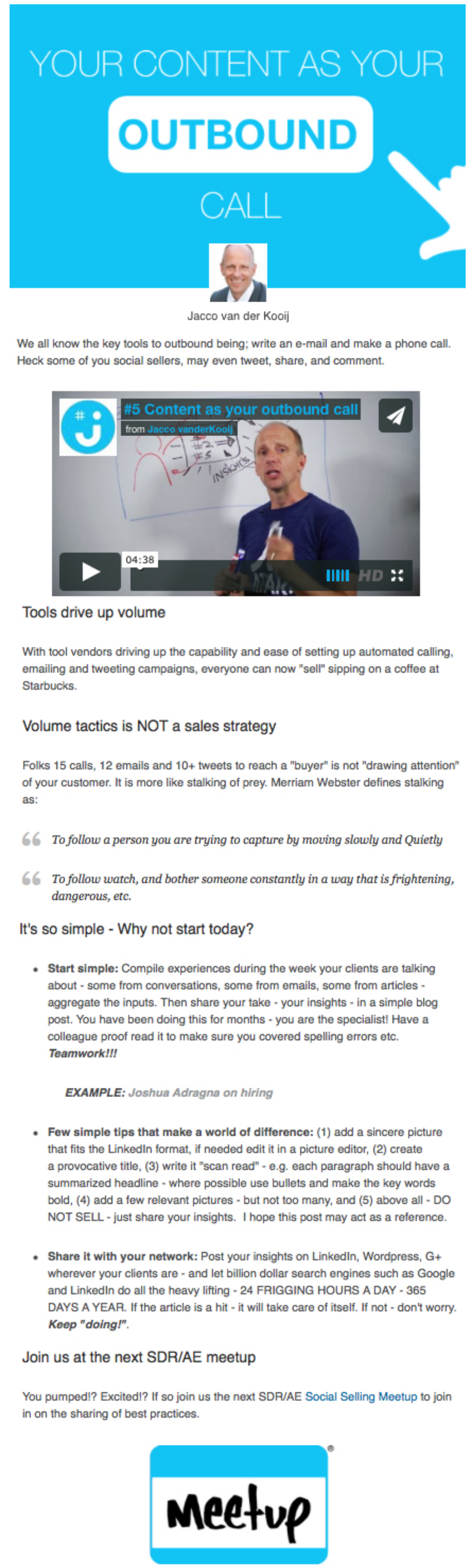
USE-CASE STORY: ....

PROBLEM 3: ....

USE-CASE STORY: ....

BEST PRACTICES

- **DO** provide VALUE
- **DO** make your content easy to scan through
- **DO** add a visual that tells the story
- **DO NOT** use stock photography
- **DO** create content yourself - if needed, take a picture of your scribbles on whiteboard
- **DO** add a few relevant quotes - this makes it easy for people to tweet
- **DO NOT** sell: "To solve this problem - contact me at xyz and I will gladly attack you"
- **DO** advise "I recommend that you follow these people x,y,z; they often talk about interesting solutions"
- **DO** comment on articles written by x,y,z --- this will create multi-touch!


YOUR CONTENT AS YOUR OUTBOUND CALL

Jacco van der Kooij

We all know the key tools to outbound being; write an e-mail and make a phone call. Heck some of you social sellers, may even tweet, share, and comment.

#5 Content as your outbound call
from Jacco vanderKooij

Tools drive up volume

With tool vendors driving up the capability and ease of setting up automated calling, emailing and tweeting campaigns, everyone can now "sell" sipping on a coffee at Starbucks.

Volume tactics is NOT a sales strategy

Folks 15 calls, 12 emails and 10+ tweets to reach a "buyer" is not "drawing attention" of your customer. It is more like stalking of prey. Merriam Webster defines stalking as:

> *To follow a person you are trying to capture by moving slowly and Quietly*

> *To follow watch, and bother someone constantly in a way that is frightening, dangerous, etc.*

It's so simple - Why not start today?

- **Start simple:** Compile experiences during the week your clients are talking about - some from conversations, some from emails, some from articles - aggregate the inputs. Then share your take - your insights - in a simple blog post. You have been doing this for months - you are the specialist! Have a colleague proof read it to make sure you covered spelling errors etc. ***Teamwork!!!***

  EXAMPLE: *Joshua Adragna on hiring*

- **Few simple tips that make a world of difference:** (1) add a sincere picture that fits the LinkedIn format, if needed edit it in a picture editor, (2) create a provocative title, (3) write it "scan read" - e.g. each paragraph should have a summarized headline - where possible use bullets and make the key words bold, (4) add a few relevant pictures - but not too many, and (5) above all - DO NOT SELL - just share your insights. I hope this post may act as a reference.
- **Share it with your network:** Post your insights on LinkedIn, Wordpress, G+ wherever your clients are - and let billion dollar search engines such as Google and LinkedIn do all the heavy lifting - 24 FRIGGING HOURS A DAY - 365 DAYS A YEAR. If the article is a hit - it will take care of itself. If not - don't worry. ***Keep "doing!"***.

Join us at the next SDR/AE meetup

You pumped!? Excited!? If so join us the next SDR/AE Social Selling Meetup to join in on the sharing of best practices.

5.6 Target Account Selling (also known as ABM)

Target Account Selling (TAS) and Account Based Marketing (ABM) go hand in hand. They are both of the same philosophy, but approach it from two different disciplines. TAS is the approach from the Sales discipline, and ABM from the Marketing discipline.

This approach is typically for enterprise-level sales teams. It was first introduced in the mid 1990s to trend away from Lead Based Marketing, or mass marketing, focused on driving a high volume of leads.

Just like you learned earlier in this chapter about outbound sequencing from 1:1 vs. 1:many, the goal of TAS and ABM is to sell as much as possible to 1 customer (1:1), instead of selling to as many new customers as possible. Based on the level of sophistication of tools, content and skills, this process is only profitable for high ACV deals.

What are ABM and TAS?

What makes TAS and ABM different is instead of going after a single lead at thousands of companies, you target a small group of decision makers at specific organizations.

In edtech when you are selling to schools and districts, in an ideal world where you are selling using a top-down approach - every deal that you work is effectively using target account selling.

By taking into account engagement across groups of people, instead of just one lead at a time, you'll be able to focus on companies who are actively showing interest. For example, instead of working with 1,000 inbound leads, in an Account Based Approach, you go after 4-5 key people in your top 50 schools/districts = 200 targeted people.

Key principles:

- **Target the best accounts** and prioritize the accounts you wish to go after
- **Identify 5-10 personas per account** even if you don't know them yet
- **Research** thoroughly - make sure you understand their goals and plans
- **Engage with focused content** - you may be able to very easily target an organization with an accurate value prop, use-case, market research, etc. Remember how important references from nearby/similar districts are!
- **Create mindshare** by orchestrating the account approach for what is relevant to them, and perform actions that align to the key account's goal

How does it work?

During target account-based lead development, the following happens:

1. The development rep receives a target list from the account manager, sales leader or executive in charge or defining the prioritized companies to reach out to.
2. A target list of contacts are established: name, title, email, phone, etc.
3. Accounts are targeted as a group within the contact base using email, phone calls, social and customized marketing campaigns.
4. Those who express interest through engaging with any of the outreach are considered prospects.
5. Each type of engagement has a different type of engagement score - and instead of calculating engagement on individuals, you are now calculating the sum across all individuals within that account.
6. Prospects are qualified. Discovery calls are set up with the sales team for qualified prospects.

Target Account Selling is the basis for many of the most effective outreach campaigns.

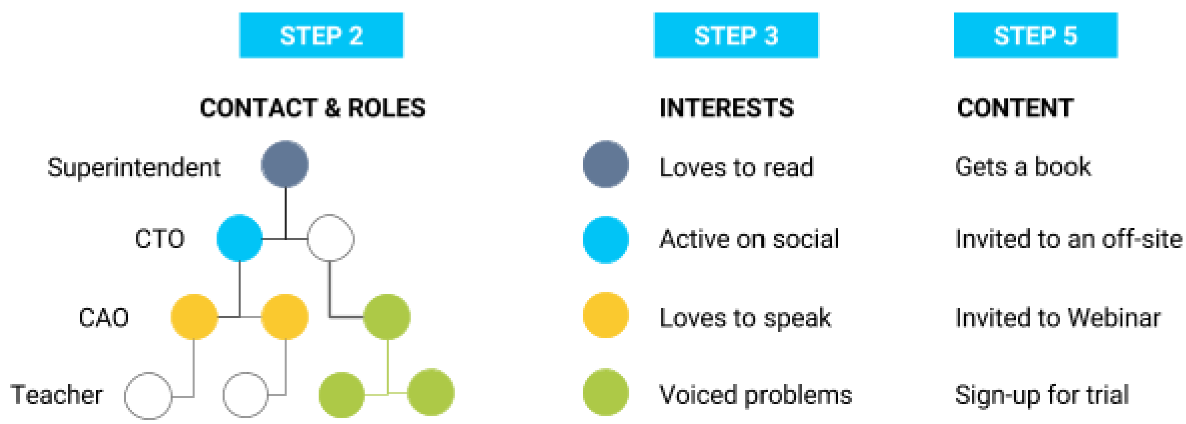
Next we will describe the individual actions you need to take to excel in Target Account Selling, including six different strategies you can use to connect within your targeted audience.

The Key Steps of Account Based Marketing are:

STEP 1 Pick your key target accounts. These are schools/districts that are likely to be a great fit for your solution based on size, use case, and organizational need.

STEP 2 Identify the roles - focus on the teams that would likely evaluate the solution together across the 4 major hierarchies (i.e. Superintendent to Teacher)

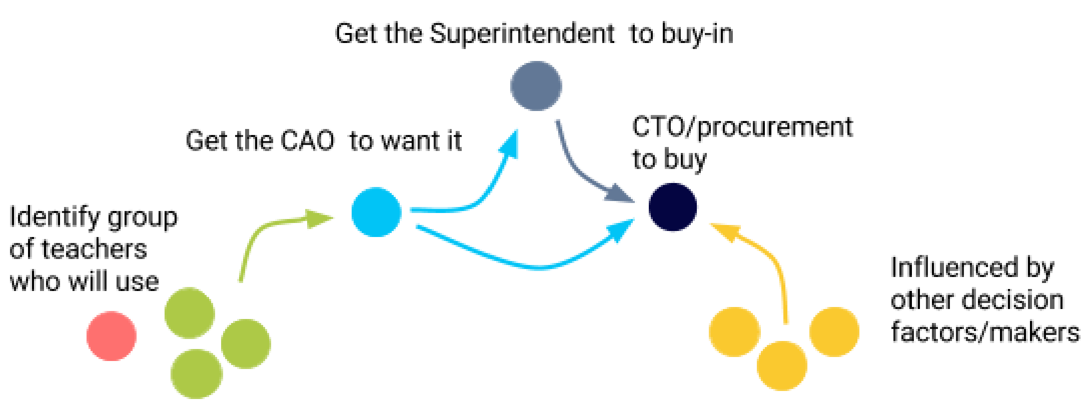
STEP 3 Research (in depth!) and obtain contact data. Find trigger events, executive priorities, and individuals who have published content on a relevant subject within the organization.



STEP 4 Create a persona-based value proposition. Typically, the more senior the title, the more strategic their role is. Find value props that match their day-to-day priorities in order to attract their attention and provide value.

STEP 5 Create a content map. Show them you know about them by sharing content that aligns with what you have researched in Step 3, understand by role in Step 4.

STEP 6 Determine your account engagement play mapping roles to content over time



STEP 7 Engage with people inside the account

5.6.1 Target key accounts

TIER 1 ACCOUNTS (Tens)	TIER 2 ACCOUNTS (Hundreds)
These are the top accounts and will be pursued by hyper-personalized messaging to the individual, the account and the problem. This should be a short list of schools//districts to whom you should dedicate time on a daily basis. You should NOT practice any new methodology/tools/skills on these accounts.	This is your next tier of accounts. You can pursue them with a personalized approach, but generic to title/problem, etc. You can try out certain tools/skills/methodology, such as emails/phone calls, etc. This is a way for you to become comfortable with your outreach before you contact a Tier 1 account.
Target Market:	**Target Market:**
Example Account/Use-case:	**Example Account/Use-case:**
1. ………………………………………………	1. ………………………………………………
2. ………………………………………………	2. ………………………………………………
3. ………………………………………………	3. ………………………………………………
4. ………………………………………………	4. ………………………………………………
5. ………………………………………………	5. ………………………………………………
6. ………………………………………………	6. ………………………………………………
7. ………………………………………………	7. ………………………………………………
8. ………………………………………………	8. ………………………………………………
9. ………………………………………………	9. ………………………………………………
10. ………………………………………………	10. ………………………………………………

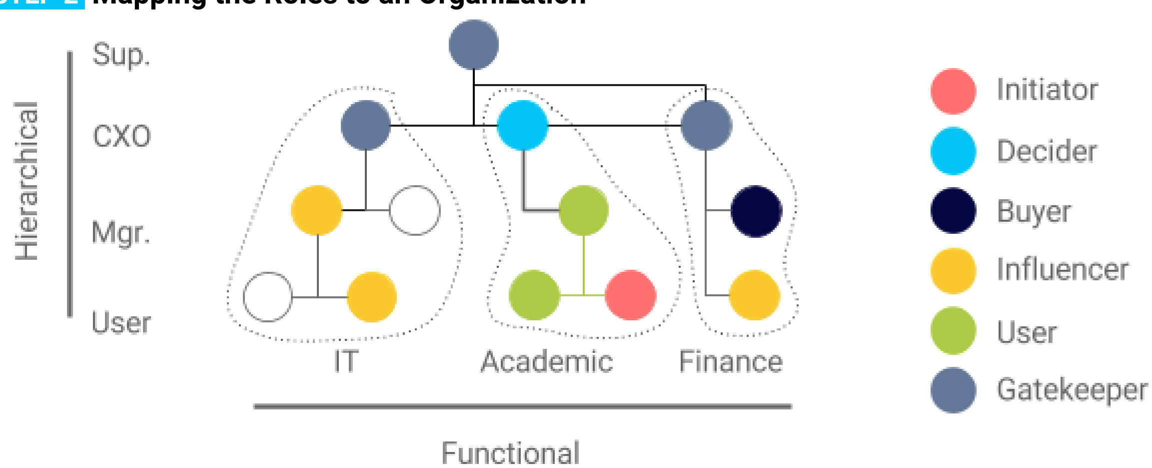
5.6.2 Identify roles

A buying center brings together all members of an organization who are involved in the buying process for your product or service. It is ideally suited for Enterprise Deals that often require navigation through an account.

STEP 1 Roles in a buying decision

ROLE	DESCRIPTION
Initiator	Make a request to purchase a product or service or recognizes the problem, with this action they start the decision-making process. e.g., maintenance manager
Decider	Makes the actual purchase decision. Typically, they don't have or need formal authority but have sufficient weight within the buying team to decide if a service/product will be purchased.
Buyer	Selects the suppliers and manages the buying process such that the necessary products are acquired. Also called purchasing manager.
Influencer	Contributes to the formulation and determination of the specifications of the product or service. The influencer evaluates and recommends which potential supplier satisfies the specific needs of the organization.
User	People that actually use the product or service. They are not always involved in the buying process, but have a critical role in the feedback and evaluation process of the performance of the good that has been purchased.
Gatekeeper	Controls the flow of information in and out of the company and buying center and teams.

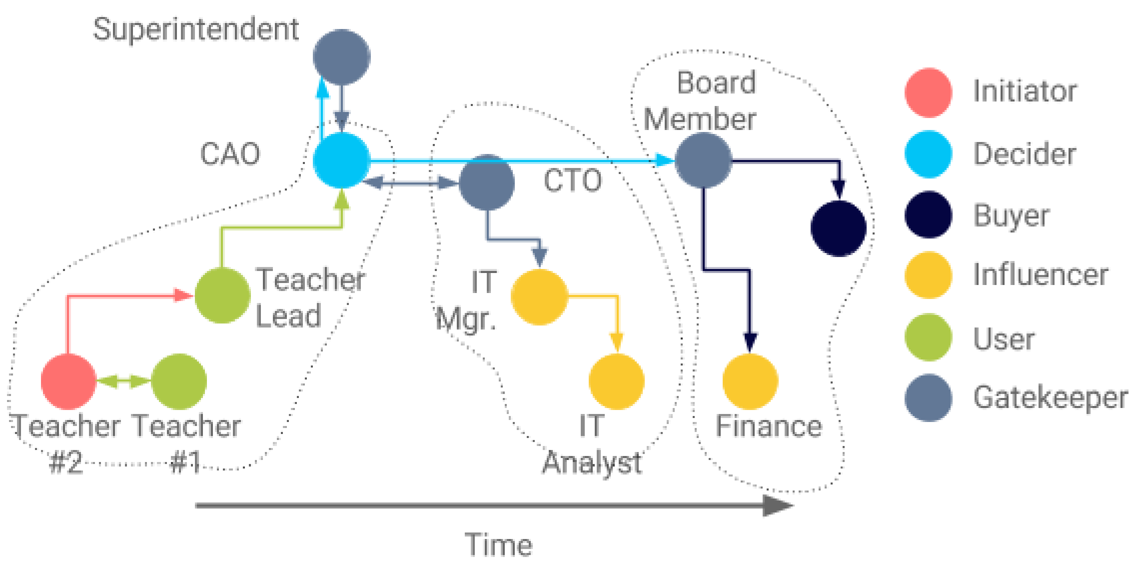
STEP 2 Mapping the Roles to an Organization



This diagram demonstrates the functional groups vs. hierarchy; this is useful to target each of these groups with content over time. For example, the User group in this case is the "academic" team. They may be targeted well before "IT" team.

STEP 3 Mapping the Decision Tree

As we map this over time, you see how the decision evolves and roams through the organization up and down decision trees of different functional groups.



CASE-IN POINT **Step by step through the Decision Tree**

1. *Enthusiastic teacher #1 runs into a problem and finds a solution.*
2. *She runs it by a fellow teacher #2 who loves it too.*
3. *They get the Teacher Leader to participate in the trial.*
4. *Teacher Lead sees the benefits from the reports she is getting and she runs it up to the CAO.*
5. *The CAO sees the benefits.*
6. *He runs a snapshot value prop by the Superintendent with the impact it could have on the school.*
7. *The Superintendent says to check with the CTO, and to check with Finance.*
8. *CAO asks CTO to check it.*
9. *CTO delegates it to the IT Manager.*
10. *IT Manager delegates it to the IT Analyst. Who runs the analysis to make sure it runs on the "stack" and it obeys "security regulation", and then gives the thumbs up to IT Manager, who in turns gives the thumbs up to the CTO.*
11. *CTO lets CAO know.*
12. *At the same time, the CAO asked the Finance team how the budget is tracking.*
13. *Finance Analyst runs the numbers and says it fits.*
14. *CAO tasks the buyer to "buy".*
15. *Buyer googles and finds 2 competitors asks the Teacher Lead to run a trial and obtain pricing from all three vendors. To start the sales process...*

5.6.3 Research

We need to identify the right contacts inside a targeted school or district.

STEP 1 What are the sample titles of your key contacts within a customer?
(e.g., Chief Customer Officer, Creative Talent Manager, Inside Sales Manager, etc.)

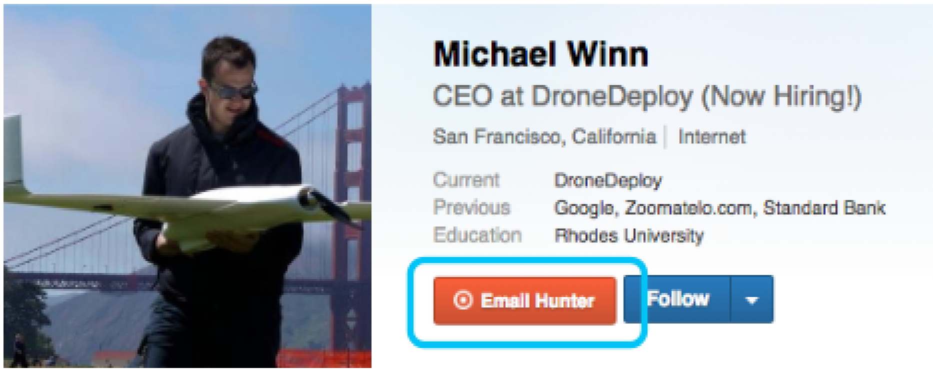
- .... [Title]
- .... [Title]
- .... [Title]
- .... [Title]
- .... [Title]

STEP 2 Develop an understanding of each of the roles identified
Create a description of the persona by researching their LinkedIn profile in detail:

- Who are they (hobbies, personality, family status, etc.)
- What content do they like (video, white paper, books, etc.)
- Where do they get their information (LinkedIn, Quora, newsletters, LinkedIn groups, Twitter, etc.)

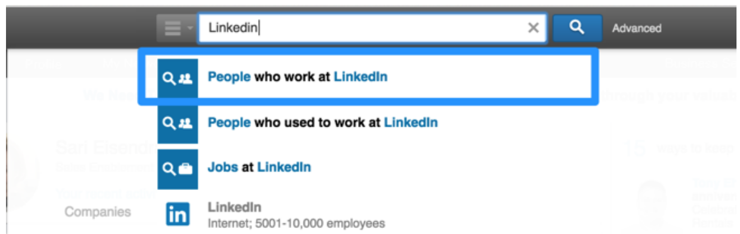
EXAMPLE	NOW YOUR TURN (go to their LinkedIn profile)
Jody J @ ACME **Decider**	Name: ....
• VP Marketing	• ....
• Female mid 40's	• ....
• On LinkedIn and Twitter	• ....
• Loves video content and Infographics	• ....
• Tweets about 4-5/week	• ....
• Part of LinkedIn group x, y and z	• ....
• Video on youtube: xxxxx	• ....
• Blog posts on topics: yyyyyy	• ....

STEP 3 Obtain contact information
Obtaining contact data is not as hard as it seems. Google Chrome extensions like Email Hunter provide you with a customer's email address by checking the database of email syntaxes. Also check www.mailtester.com to double check or find others.

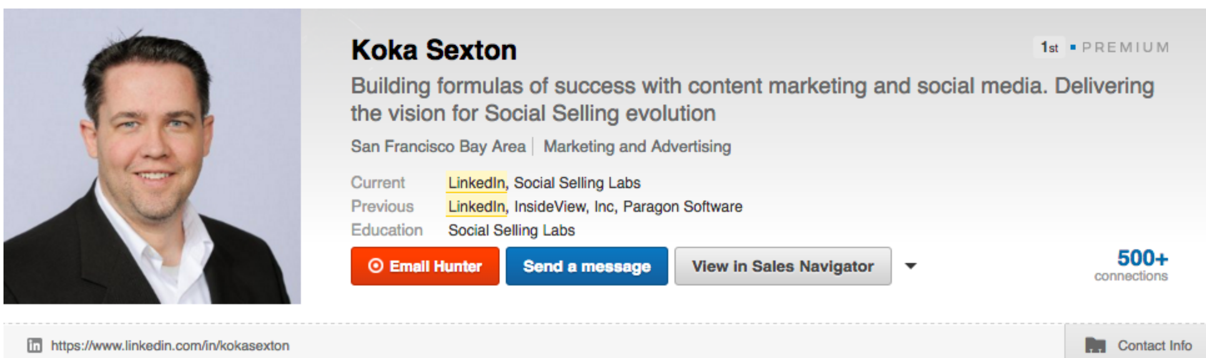


Many sales prospecting tools integrate this type of functionality.

LINKEDIN AS A TAS/ABM TOOL
In this case, I'll use LinkedIn as an example target company. On LinkedIn, go to the search box and click on "People who work at LinkedIn"

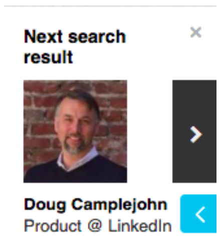


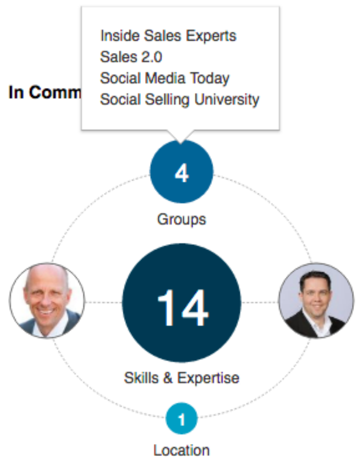
And I get my friend Koka Sexton in the results:

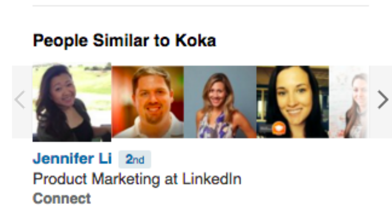


Even more .. LinkedIn offers a series of TAS/ABM tools out of the box:

NEXT SEARCH RESULT	COMMON INTERESTS	PEOPLE SIMILAR TO







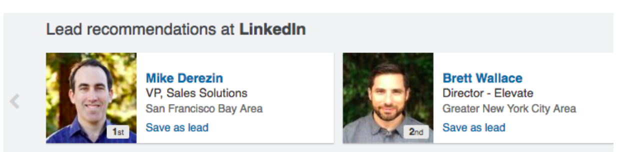
Can be used for identifying:
- Reporting structure
- Influencers
- Decision makers

Can be used for:
- Shared interests
- Best distribution channel
- Content for opening email

Can be used for:
- Cross-functional selling
- Identifying new decision makers

LinkedIn's Sales Navigator product goes even deeper and provides two critical pieces of info:

RECOMMENDATION	PEOPLE ALSO VIEWED



Both of the above can be used for identifying:
- Reporting structure
- Influencers
- Decision makers

NOTE A modern sales professional, armed with an iPad and wifi connectivity, will be able to track digital footprints and get a basic understanding of what is going on with the account/opportunity.

5.6.4 Develop Content Map

Next we need to develop content valuable, this can be separated in "Account specific content" that is valuable across all the company, and "Role specific content".

Account-Specific Content Map

Based on your research, identify the top 3 problems and create 2-3 assets per problem that you can share with the account.

	WHAT IS THE PROBLEM?	CONTENT RELATED TO THIS PROBLEM
Ex	Struggle with ways to showcase student learning in the classroom	(White paper, use-case, blog post, tweet, picture etc.) White paper x, recent news release, blog posts from, competitors, video on youtube, and book on the topic
1		
2		

Role-specific content map

Based on the role, create a specific content map that applies to each role/person within the account, such as the CMO/Director of Marketing etc.

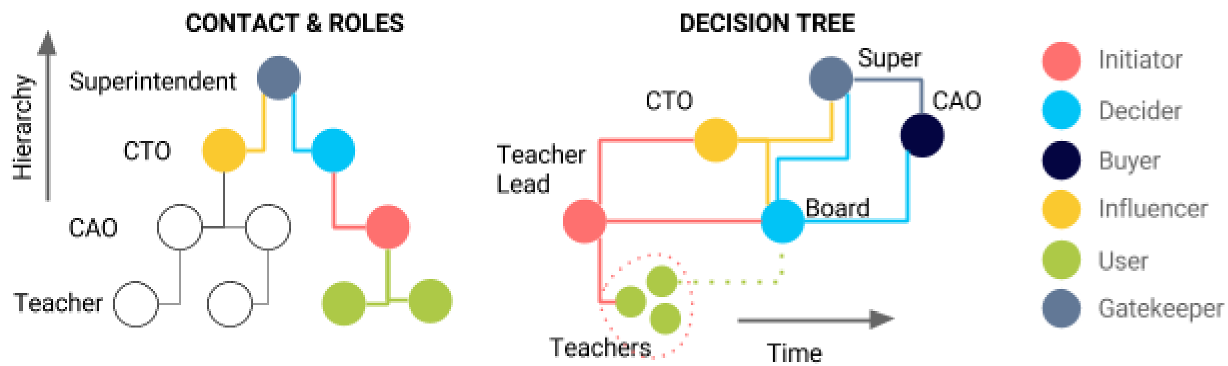
ROLE	WHAT THEY CARE ABOUT	CONTENT FOR THEM
Superintendent	Improving student outcomes	HBR article

5.6.5 Account Engagement Plays

ABM PLAY #1 Start-up Play

Goal: In this play we know that districts that receive new funding may be looking to spend their money on new technology solutions. This impacts everyone:

- The superintendent who wants to see improved test scores
- The Chief Academic Officer who needs to grow her academic administration team
- The CTO who is looking to upgrade their infrastructure
- Teachers who want better tools for the classroom



EXERCISE

ABM PLAY #2 ....

STEP 1 Pick your key account ....

STEP 2 Identify the roles

ROLE	NAME(S)	RESEARCH
Initiator	....	....
Decider	....	....
Buyer	....	....
Influencer	....	....
User	....	....
Gatekeeper	....	....

STEP 3 Research (in depth!) and obtain contact data

STEP 4 Create a person-based value proposition

ROLE	PAINPOINTS	SIMPLE VALUE PROP
Initiator	....	....
Decider	....	....
Buyer	....	....
Influencer	....	....
User	....	....
Gatekeeper	....	....

STEP 5 Create a content map

ROLE	MEDIUM	CONTENT
Initiator	....	....
Decider	....	....
Buyer	....	....
Influencer	....	....
User	....	....
Gatekeeper	....	....

STEP 6 Determine your account engagement play mapping roles to content over time

ROLE	FIRST DO THIS	THEN THIS	THEN THIS	FINALLY THIS
Initiator				
Decider				
Buyer				
Influencer				
User				
Gatekeeper				

STEP 7 Engage with people inside the account

5.6.6 Engagement actions, a few tips to remember

Engaging with people inside the account means that you provide your insight in a friendly way (not SPAMMING) through a variety of methods, outlined below:

WAYS TO ENGAGE	DESCRIPTION
Outbound call/email	Reach out via a direct email and/or phone call (described further below): this is the most common way to reach out. You have the following to consider: ● Reach out to **individuals within an account** (Jenn the VP of Marketing) ● Reach out to a **group within an account** (marketing team) ● Reach out to a group across accounts (CMOs) As you reach out, you can use either: ● Hyper-personalized 1-1 ● Group personalized 1-few And you can choose with method: ● 1-Dimensional: Reach out multiple times to an individual in one day ● 2-Dimensional: Reach out to group of people with one value prop across multiple days ● 3-Dimensional: Reach out to different groups of people with different value props across multiple days
Social engagement	Visiting their LinkedIn profile, commenting on their post, sharing an article, inviting them to connect, etc.
Invite them to an event	Think of a webinar, a social gathering, an industry event, etc. You can organize events in various ways: ● **Account-Specific:** Gather people from within the account; very useful to expand reach within an account ● **Industry-Specific**: Gather specialists across key accounts to discuss industry topics. Very useful mixing prospects with customers. ● **Title-Specific:** Bring a specific role (CMOs) together to discuss issues they care about at their level. Very useful to gain executive coverage within your account portfolio. ● **Problem-Specific:** Discussing an issue (such as “Safe Harbor”); very useful to break open an account Reaching out to your audience with the request to join an event is a great way to start a meaningful relationship.
Mail	Mailing a relevant book, a personal invite, a handwritten note, a Starbucks giftcard to grab a coffee, etc. Very effective, especially in combination with an event. Note: increasingly, companies are not allowed to receive gifts and/or cannot exceed $50 cumulative over a year (including coffee/lunch). *My personal favorite for an SDR performing account based development is to send a personal handwritten note on a simple white stock card.*
Your idea	What is your personal experience that has shown to work well?

5.7 Trigger Based Selling

Trigger based selling helps you prospect and qualify by leveraging tools to do a lot of the work for you. In this section, you will learn the best practices for prospecting systems, and the type of information you can use in your daily routine to find the right people at the right time.

Here's a quick overview of Trigger Based Lead Generation:

1. A target account list is received.
2. The Development Rep identifies the key events, and sets triggers on various websites, such as a saved search for new hires on LinkedIn, or notifications for new questions asked on Quora.
3. The Development Rep receives notifications as the triggers go off.
4. The Development Rep takes action and performs an outbound call, email or social interaction - but with a hyper-personalized approach
5. Prospects express interest to learn more
6. Following qualification, the Development Rep sets up a meeting with Sales

Next we describe the individual plays you can use for Trigger Based Sales.

The principles of Trigger Based lead generation

Trigger based selling relates to customers who do NOT seek us out. We simply are looking for customers that are taking an action that is visible on the internet. By responding to a trigger action, we're avoiding a "cold outbound".

- Trigger actions often require timely response; depending on the trigger, this can be from minutes (respond to a question on Quora) ol days (congratulations on a job promotion on LinkedIn).
- Responses to triggers need to be hyper-personalized
- This is an ideal way to use advanced tools.
- Triggers must have a high signal-to-noise ratio. For example, someone's anniversary is a noisy signal, but a new Ideal Customer Profile (ICP) joining your target account is a high signal.

5.7.1 Identifying triggers

Identify the triggers for your business. The types of triggers you set up are used to start conversations to make your cold calls turn warm.

Effective triggers

- Raised a new round of funding (charter school)
- New Executive or Board Member hired
- Revision of strategic plan
- Common Core released
- Hiring more teachers
- Key demographic changes

Trigger tools used

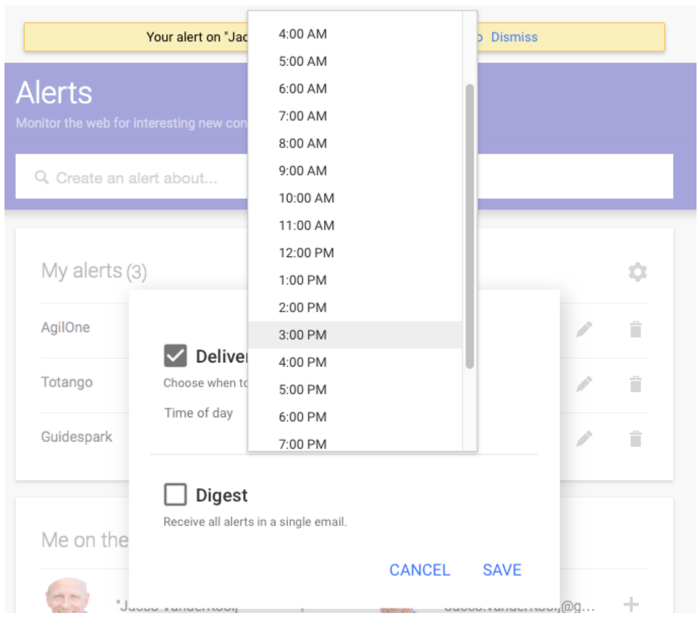
- Google Alerts - School/district name, Person name
- IFTTT - in case of alert do this (like add link to article to a Google Sheet)
- **LinkedIn** Saved Searches (Company hiring/job openings)
- **Twitter** generated Alert (i.e. TweetDeck)

5.7.2 Trigger engagement plays

Next, a few examples of how to practically use Triggers.

TRIGGER PLAY #1 GOOGLE ALERTS

Set a Google Alert for accounts you are targeting, industries you are involved in, etc. You can set the delivery time of the alerts to the day and time that matches up with your "social media" time blocks on your schedule - this way, your alerts become the automatic "timer" for you to stop calling and get started on your Trigger work.

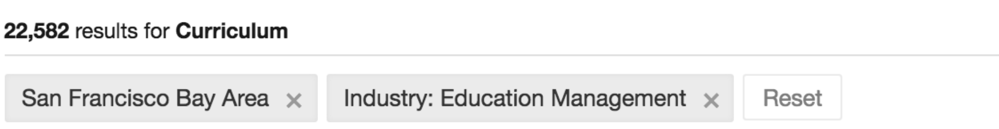


EXERCISE Write down the alerts you want to set:

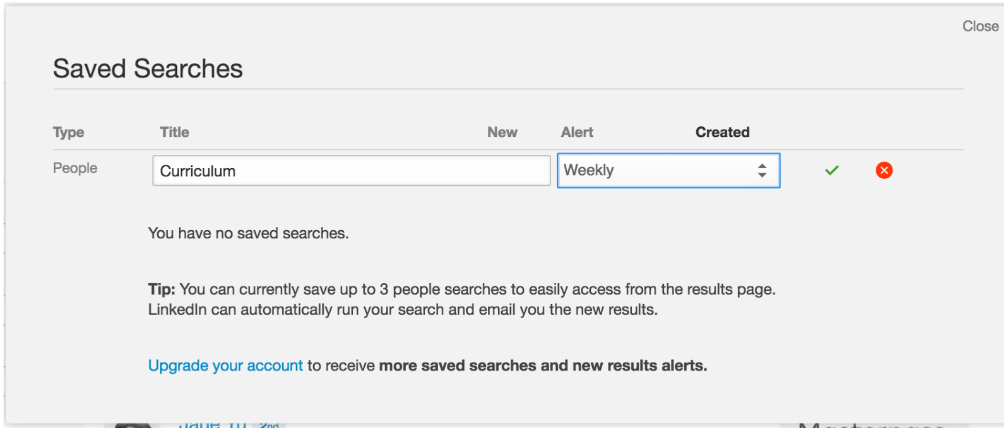
SCHOOL/DISTRICT	INDUSTRY	TECHNOLOGY

TRIGGER PLAY #2 LINKEDIN SAVED SEARCHES

A very useful service of LinkedIn is to set a saved search. When you perform a manual search in LinkedIn, you will notice the ability to save that search in the right upper corner.



By saving that search, you can receive results at various time intervals on that query:



This can be used in a variety of ways:

- If you are working on a target account, you can create a search for a specific function
- You can create a search for when anyone that within that region changes their role/title to become one of your target personas (e.g., becomes a new VP of Lead Gen)
- If you are working on a function, you can set a trigger on anyone that you have not contact before

You will now receive regular updates on leads within that query. You can specify leads from within your network (1st degree), your social network (GROUP), and your extended network (2nd).

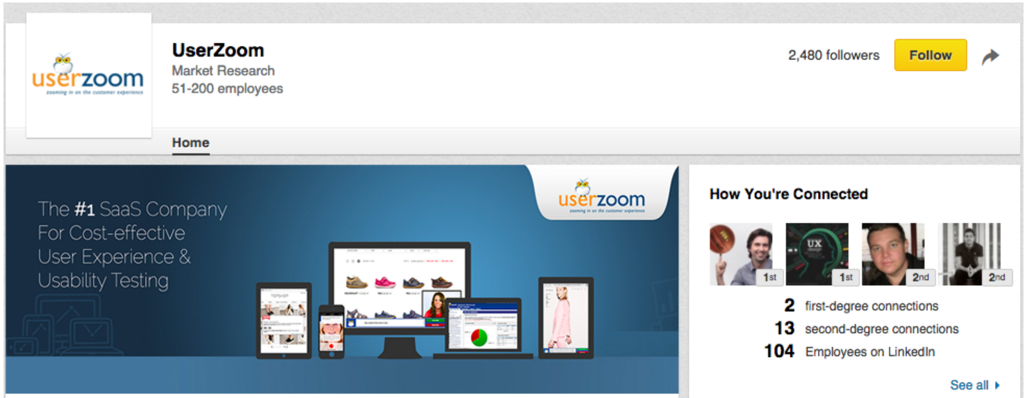
EXERCISE Saved Searches: Create 4 saved searches

	CRITERIA 1 (TITLE)	CRITERIA 2 (LOCATION)
1	CAO, Director of Curriculum	SF Bay Area
2		
3		
4		

TRIGGER PLAY #3 LINKEDIN PULSE NOTIFICATIONS

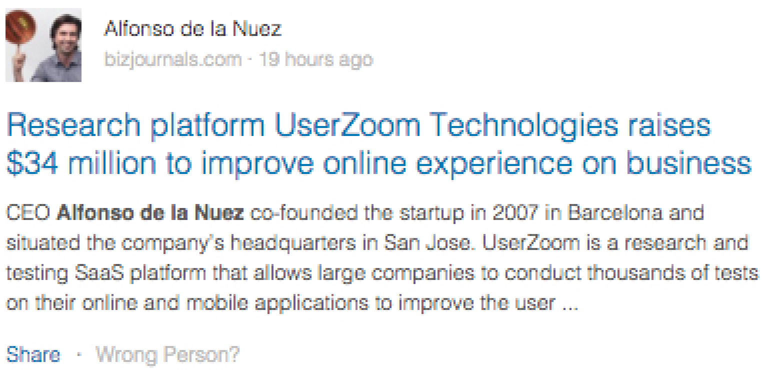
If you have set up LinkedIn properly (see the Preparation chapter), and you are sharing content and building your network, then it's time to switch on LinkedIn Pulse. It provides daily updates about what is going on in your network. The key for this to occur is to:

- Connect with your prospects, and customers on LinkedIn
- Follow the companies on LinkedIn (see below)



- Minimize following people who create a lot of noise (some people create so many updates each week that your customer news is overwhelmed with only their updates).

Once you set up these alerts, you will receive daily/weekly updates like the below...



Summary Chapter V

PROCESS	PLAYS	PREPARE
Inbound	SingleTap DoubleTap	*Orchestrate the best way to communicate with your customer to provide value. DoubleTap includes visiting LinkedIn, calling twice 10 mins apart, leaving a voicemail on the second call that references your email.*
Outbound 1:1	Awareness Direct Vertical Bottoms up Top down Superintendent	*6 strategies for connecting with prospects within a company. Before disqualifying, make sure you implement several strategies. Vertical approach drives value across the decision chain.*
Outbound 1: Few	Hardhitter FOMO Countdown Mixed Media Socialite	*Identify your personas typical communication preferences. Choose a sequence that has more touches in the first few days for inbound, or build*
Events	*Invite Peers* *Conversation starter* *Helping Hand* *SocialTap* *SocialBlast*	● *Before: Drive prospects to the event by sharing value, who else will be attending* ● *During: Leverage social tools to drive conversations between attendees and social channels* ● *After the event: Segment your communication to be relevant.*
Social Selling	Curation vs. Creation	*Listen to your customers on different channels - have conversations where they like to - comment on posts, messaging, calls or emails. Avoid stalking on personal sites like Facebook, instead drive business conversations through LinkedIn, Quora, Medium etc.*
TAS / ABM	Enterprise sales Multi-channel campaigns	*Work work marketing teams, advertising campaigns and all parts of the sales team (SDR, AE, CSM, AM) to drive conversations that are hyper-personalized.*
Trigger Based Sales	Google Alerts LinkedIn Search News, Pulse	*Be able to answer “Why you? Why you now?” - customers care about themselves, and solving their problems. Have alerts set up to deliver you relevant industry and customer news.*

CHAPTER VI. WINNING

VI. WINNING

6.1 Diagnose

Prescription before diagnosis
is malpractice

- Unknown

When you are on the phone with a customer for the first time, you cannot start selling straight away. Many sales professionals feel that they have to show the customer their product, and hope the customer will see how it can solve their problems through a demo. This is prescribing a solution before diagnosing.

Great sales professionals start by asking questions to diagnose the situation, without mentioning the company they work for or service they sell.

There is no doubt asking questions is fundamental to the selling process.

But you must listen to the response - and **this is where many salespeople fail**. If you're too focused on what you're going to ask next, you aren't having a conversation, you're running through a checklist.

To deliver an excellent buying experience you must first identify the nature of the customer's circumstances. Some customers want the latest and greatest technology and are looking for solutions to help them get there. However, there is something that is 2.5x more powerful as a driving force. Most people are motivated by fear of making a horrible choice.

When you first meet a potential customer, you have to build trust and provide value before they will be honest about what their real problems and desired solutions are. The best performing salespeople work hard to research the customer, listen to what they say, and help them uniquely. Mediocre salespeople try to bucket everyone into the same value proposition.

You learned earlier how to have great conversations with your customers through question based selling. There are two books we strongly recommend that you study:

- SPIN Selling by Neil Rackham
- Question Based Selling by Thomas Freese

But before you start asking questions, you first must set the stage.

6.1.1 Set the stage

Have you ever had a great discovery call, but right as you were about to set up next steps, the customer has to abruptly leave the meeting? Then you're left chasing them down, or the deal completely fades and eventually is lost. Or even worse, you get on a call and halfway through, you realize the customer wanted a full-on technical demo but you were only prepared to discuss how to set up a pilot. Yikes!

The beginning of the call should be conversational, but also set the stage for the structure of the call. Structure your opening using **AxNOT** - this shows the customer that:

1. You're prepared, thoughtful and professional
2. This is a 2-way conversation, not a 1 sided demo
3. You want to make it relevant and efficient for both parties

When you're ready to kick off your demo, start with **AxNOT**:

A - Appreciate	***Appreciate*** *you joining our call today*
x - time (confirm)	*We are* ***scheduled until*** *the bottom of the hour, still work?*
N - Naturally	***Naturally*** *you will have some questions for me….*
O - Obviously	***Obviously*** *I have some questions for you...*
T - Typically	***Typically*** *this call concludes with {X or Y}. Does that sound like a good use of our time today?*

This should take no more than 45-60 seconds, and make sure you ask and confirm their timing for the meeting. If they only have 5 minutes, maybe you should reschedule. For the first 20 times you start a scheduled call, use these exact words - then once you're comfortable, you can change them to something more natural for you.

The magic of **AxNOT** is that you set yourself up for success:

- Confirmed the end-time
- Set a goal for the end of the meeting

6.1.2 Ask questions

Now it's time to diagnose your customer, using three different kind of questions. Contrary to what you learned in school, some questions are bad in sales situations when asked at the wrong time.

Build on your previous questions and remember to listen to their answers so you know where to take the conversation next.

Before we get into the types of questions, here are a few crucial points that you should understand as you being the discovery process.

Tips to inform Discovery within Ed Tech

DISTRICTS

- Every district will be a bit different, but something to keep in mind is that every district will have some price threshold that will trigger sending a purchase through a formal bid process, which can expand the sales cycle. Some districts are more rigorous about this than others.
- A typical bid process (RFP) can take 6-9 months.
- Thresholds that trigger an RFP can be anywhere between $25K - $50K (note that this range may vary a bit by state) - especially if the purchase is servicing more than just one school.

SCHOOLS AND TEACHERS

- Typically, school-level purchases kept under $10K will not require district involvement. But this depends on whether the district allows schools to operate with some level of autonomy. This is not the case in every district. ***It will be important for the sales person to establish that understanding early on in the process.***
- If product operates with a freemium model, it will always be advised to run a top-down and bottoms-up strategy (e.g., rallying teachers to help create a bridge to decision makers).
- Administrators often struggle to get teachers to adopt a tool solution when it is pushed top-down. Therefore, preexisting buy-in from a base of teachers is always helpful to aid the decision.

Situational "How many students are there in your district?"

Situational questions are close-ended that result in "yes" or "no" or fact type answers like "we use Excel instead of Google Sheets". These questions are used to understand 1) if the customer is qualified, 2) their level of understanding of their own problem, and 3) how much knowledge they already have about potential solutions. Although asking ten of these in a row sounds like a game of "20 Questions" - or worse, an interrogation - when used properly, they can make you sound like an expert that can help them solve real problems.

Aim to ask a few great situational questions for every qualification call, or for every discovery call to confirm if your research is accurate or if the situation has changed since your last conversation. Here is a situational question that also demonstrates your expertise: "Doing some research I learned you have about 200 teachers and 5,000 students in this school. Did I get that right?"

Pain: "What kind of issues are you experiencing with the current student enrollment process?"

Reference what you have already learned in (S), and make it relevant to your customer. Do not bring up your product. These questions are about them; both for their business, and to establish personal priorities. If they tell you they just raised a round of funding and are planning to build out the sales team, find out, for example, how they will share best practices with the new reps to ramp quickly.

Pain questions are where you find the acute pain, the lower-level challenges. This should be a solid portion of your calls. If you haven't built trust through providing value, they will give you generic answers like "Of course we're always constrained by resources." But if you've asked a series of 3-5 strong situational questions, now it's time to show them you listened to build trust and make your diagnosis specific to them.

Repeat this cycle a few times if necessary in order to uncover their biggest pain. Then summarize:

GREAT EXAMPLE Summarize before moving on

To make sure I understand what you've just shared, you currently have 3,000 students in your district. The biggest challenge you have is streamlining your enrollment process for these existing students each year, as well as having a smooth enrollment for incoming students. Did I get that right?

The next step is to build on the problems they have and the implication that these have on their business.

Value: “How does this impact your organization?”

Value questions are the meat and potatoes of a great sales conversation. They hit on deeper organizational and personal priorities. They uncover how impactful solving this problem would be, and highlight how different parts of the customer’s school/district would benefit.

This is the critical step where you begin to help the customer visualize the impact their problems are having on their business, using your insight from other customers experiencing similar challenges. The idea is to extend and expand the effects of the problem, and then link the problem to other potential problems to make the buyer eager to find a solution.

Good salespeople are comfortable with Situational and Pain questions - but great salespeople are comfortable with transitioning to Value questions. It takes practice.

GREAT EXAMPLE Value questions

What effect does that have on…
How often does that cause…
Does that ever lead to…
What is the result when…

GREAT EXAMPLE Questions referencing what you diagnosed in S and P

How has the chaotic waitlist management affected your enrollment?
Has the lack of information affected your ability to answer questions from families?
How have inefficient enrollment processes affected registrations?

Refrain from asking Value questions before you understand the most important problems and the situation the customer is in. This comes off as too aggressive and pushy, and the customer will probably be offended. Value questions are typically done following a thoughtful discovery (5+ minutes).

Recap and Transition to Next Steps

The value proposition focuses on the value and importance or usefulness of the solution. When used effectively, they result in positive emotions around constructive and relevant solutions. These questions are most powerful after you’ve explored the full impact that your solution could have on their school. If you can show a high ROI, or strong value based on their core executive priorities, this will impact how much they are willing to pay for your solution.

They move the conversation towards action and commitment, and reduce objections.

GREAT EXAMPLE Recap questions for transition to next steps

If you could streamline the application and waitlist process, how would that impact registration numbers?

Would it be useful to have more reliable data on family communications, events and RSVPs?

How much time would it save your administration if you could consolidate all enrollment and waitlist processes by using one tool instead of 4?

PRO TIP Practice mirroring when summarizing - this lets the customer know you were listening and builds trust as you complete your diagnosis.

- DAN SMITH

6.1.3 Active listening

Active listening is mindfully listening to your customers, building on the response they are giving, and providing cues that show them that you're actually comprehending what they are saying.

But what do many salespeople do instead?

They use the time that the customers are talking to bask in the moment of having asked a great question, and prepare to score another equally astonishing question.

Active listening can be done in a few specific ways:

GREAT EXAMPLE **Mirror verbally: Use uncommon words that stand out**

In response to something you ask, they may respond:

That is of no particular interest to me

What is the word that stands out in this sentence? **Particular**. That means if you follow this up with a question:

That is of no particular interest to me

*What in **particular** is of interest to you?*

PRO TIP You are mirroring your customer's verbiage. This indicates that you are listening and care about what they are saying.

- Jacco van der Kooij

Mirror Tone: Use of tone in your voice… use your emotion and have them mirror yours:

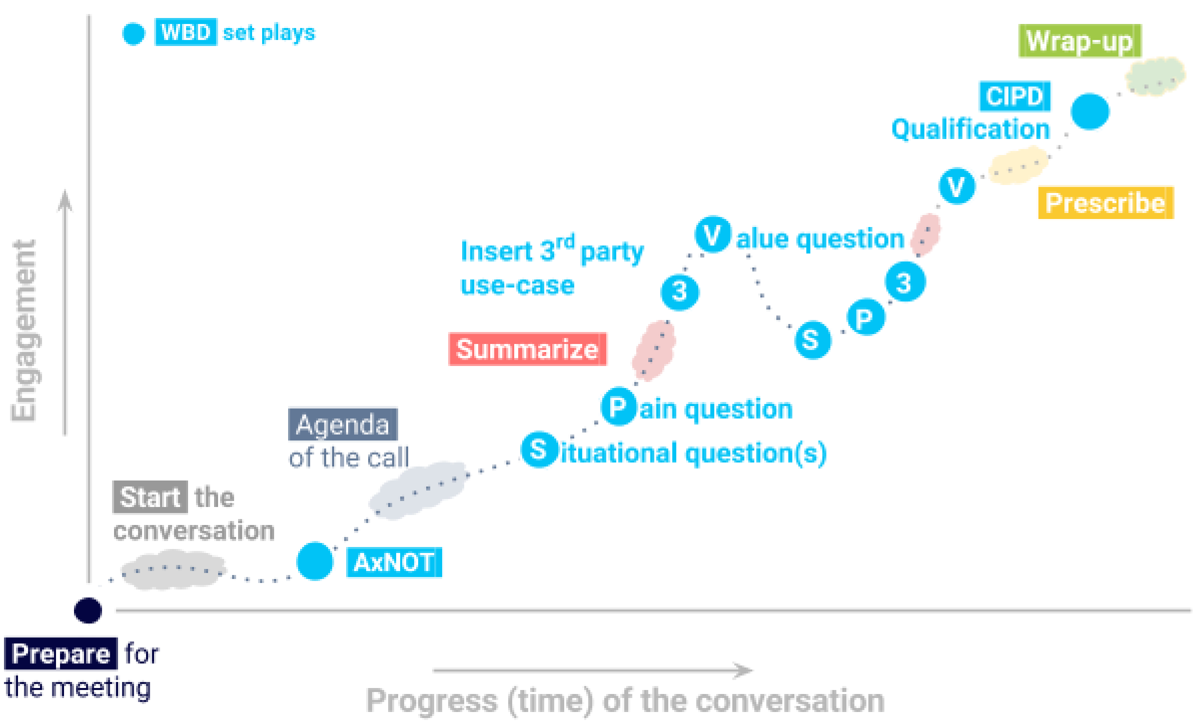
- If your customer is in a hurry, you can speak just a touch faster so they know you are responding to their sense of urgency. Then you slow it down so they calm down.
- If it seems like your customer is not paying attention, you can increase the upbeat tone of your voice, and it will increase theirs
- If your customer sounds like they are annoyed, start a short opening, and in 2-3 sentences start sounding excited

Mirror Visuals: Visual cues during a conference call

- Showing them that you are taking notes (screen share your notes)
- Looking into the camera, tilting your head, nodding and other signs you are listening
- Using movements like nodding, hands to create signals, and a pen to raise your hand into view

6.1.4 The Winning By Design SP3V™ Diagnose sequence

Sequencing questions allows for the proper diagnosis of a customer's problems - by establishing their situation, the problems they encounter, the impact of the problem and the value proposition of the solution. The principle of this technique requires you to increase engagement through a series of questions.



STEP 1 : Prepare for the meeting

Goal: Don't get rushed into the call, take your time, be ready

Send out courtesy email with the details, set up your browser tabs, make sure the technology works! Perform your last minute research, and be on the call 1-2 minutes before the call starts.

STEP 2 : Start the conversation

Goal: Set yourself up as a friendly professional.

Inquire what is going on in their world. Ask who will be joining the call, This is also a good time to mention (ask for approval) that you will be recording the call. What you should NOT do is start political, sports debates or worse how great the weather is in California. Keep it short!

STEP 3: Perform an AxNOT

Goal: Structure the meeting

Appreciate you joining the call. We have you on the schedule until 11:30 today, does that still work for you?

I have a hard stop 5 minutes early.

I will make sure we end early. Naturally I have some questions for you to learn more about you, and obviously you will have some questions for me. Typically this call ends with us deciding this could be a good fit for us to move forward - but if you realize this won't work, will you interrupt and let me know?

Sounds great!

STEP 4 : Set the Agenda of the call

Next you need to confirm the agenda, by asking each person on the call what they are looking to get out of today's meeting. Make sure you write it down, and make sure that you address each and everyone on the call.

Goal: Establish what they like to discuss today

May I ask: what do you like to accomplish on this call?

I want to learn about how your product works and get an idea if it can help me solve my enrollment problem

Okay. So you want to learn about how to address your problem and how our product works. Anything else?

Yes and get an idea of your price.

Yes we can tackle that too. Anything else?

I'd love to learn more about your support levels.

Got it!

Obtain a first glimpse into the decision criteria

Goal: Establish the decision criteria

That's a lot to talk about in the allotted time.
May I ask what is the most pressing issue?

How the product works and how it can help me solve for enrollment

Okay - why don't we start with those two topics
And address the others at the end?

Sounds like a plan.

STEP 5 : Diagnose the situation

Goal: Diagnosis of the situation using the SP3V questions

S1 *How many students go through the enrollment process each year?*

3,000 students.

S2 *How are you currently managing the waitlist process?*

We use Excel spreadsheets.

P1 *Do you have challenges knowing the status of enrollment?*

We often have to do a lot of manual work in spreadsheets just to know the enrollment status of each student as we go through the process.

P2 *How does that impact other parts of your business?*

*The team gets overwhelmed, and then we have to catch up on all of our regular monthly administrative tasks when enrollment is finally over, causing lots of **frustration**.*

Summarize the conversation

Goal: Establish that you heard your client, and understand the situation and the pain(s) it is causing

*So let me know if I've got this right: You have 3,000 students going through the enrollment process each year. Your team gets swamped using Excel spreadsheets that might be inaccurate, and doing a lot of manual work just to get through to the end of enrollment. And after that, the team needs to get back to their regular work and are already behind at the start of the school year, resulting in the team working overtime and getting **frustrated**. Did I get that right?*

Yup, you got it.

PRO TIP Did you see how you mirrored the emotional word ***frustration*** this develops a mutual trust with your customers as you demonstrate that you are listening closely to them. More on this active listening strategy below.

- JACCO VAN DER KOOIJ

Provide a 3rd party reference

Goal: Show empathy, provide a use-case, establish yourself as an expert

That definitely sounds like a challenging situation. You're not alone in feeling frustrated: Michelle from ________, who is also a CTO of a large school district like you, felt the same way. She found that consolidating the enrollment and waitlist management into a strong digital platform helped reduce manual work, unnecessary process and eliminate a lot of frustration.

Does that resonate with you?

Of course! How did she solve it?

This was an executive priority for the district, and they were able to complete the implementation in just two weeks.

That's exactly what we're looking to do.

Show the Value of the solution

Goal: Begin to transition from emotional to rational decision making and quantify the value of your solution.

In this case, we can conclude that the situation happens in every enrollment period 2x a year, learn how many employees work overtime, estimate the amount paid for overtime per employee, and then estimate the annual dollars spent on working on overtime and compare that against your solution.

In order to help you get the best solution, I'd like to clarify. Since this sounds like something that happens twice a year, how many employees have to work overtime and for how many hours each?

There are 8 employees that work 20 hours each.

So with the administrative team each making about $80k/year, which breaks down to an overtime cost of about $60/hr, and there is about 20 hours of overtime per employee, twice a year - so this is costing you almost $20k per year just in overtime costs alone. Not to mention a poor experience for students, parents and other stakeholders. Does that sound about right?

Yes - that sounds about right.

Let's get you something better. Based on what you've described it sounds like our solution can definitely help. And good news, it will pay for itself in just one enrollment period.

SP3V EXERCISE Work backwards to build your Diagnosis questions

When preparing your questions, work backwards from the value proposition THAT you expect to have the biggest impact, based on your persona.

BREAKDOWN	YOUR ANSWERS
Who is the Persona? What is their title?	**PERSONA:** **JOB TITLE:**
What is their biggest value proposition or value driver to your solution?	**VALUE PROP:**
What is a customer you know of that benefited greatly from this in the past	3rd Party Reference:
What is a Value question that you could ask that would lead to the value proposition answer above?	V :
What are some pain or problems that result if their main value proposition is not solved?	P1 : P2 :
What is their situation that would help create this pain? (different tools used in each school, using manual spreadsheets, etc.)	S1 : S2 : S3 :

6.1.5 Recap and setup next steps

Here are the key steps to summarize:

- **SUMMARIZE** what you went over today
- Understood the **ACTION** needed to make this happen
- Highlight the **DATE**
- Clearly mention the **NEXT STEP**

Putting that together will sound something like this:

GREAT EXAMPLE **Recap and Next Steps**

Let me summarize - Today we learned that you have an issue with **SUMMARIZE**.

For us to help you solve this together, you need **ACTION** *to happen.*

You expect that to happen by Friday next week.

I will set up a call for us to talk on **DATE** *to demonstrate how we can make that happen.*
You will invite **DECISION MAKER** *on your side.*

Did I capture that correctly?

Now if you do all of those steps, you will get results like this (an actual email sent to a rep at Schoolzilla!):

Hi Beth,

I truly appreciate the time you took today to ask questions about our needs in relation to an assessment data warehouse. What a refreshing change from the usual sales promotion phone call. You are one in a million. Truly!!!!!!

Lacey Jones
K-8 Curriculum Coordinator

6.2 Qualify

Because time is your most important asset, don't waste it on customer's who are not worthy. Qualification is about deciding if what you uncovered in your diagnosis warrants continuing to explore a potential partnership. In order to make sure you know how mature an opportunity is, identify if it by stage:

Qualifying the Opportunity

QUALIFICATION/OPPORTUNITY STAGES	STAGE 1 Diagnose	STAGE+1 Prescribe	STAGE+1 Navigate	STAGE+1 Navigate
C Critical event for the customer	Yes	Yes	Yes	Yes
I Impact on the customer organization		Yes	Yes	Yes
D Customer Decision Process identified			Yes	Yes
P Priority for the customer established				Yes

6.2.1 C - Establish a critical event (Teacher, School and District)

Critical Event

The key to EVERY deal is to understanding what is in it for the customer. We call this the CRITICAL EVENT. This is an important project or solution that must be completed or something severe could happen to the business or the person you are speaking with.

Note we make a difference between a Compelling Event and a Critical Event: A critical event is an event that carries consequences if the deadline is not met.

COMPELLING EVENT	CRITICAL EVENT
What time do you need this by?	*What time do you need this by?*
I need X done by Y date	*I need X done by Y date*
What happens if you miss that date?	*What happens if you miss that date?*
It probably moves to next month	***I am going to get fired!***

It is hard for you to establish what a critical event is, however you should always have a list of top 5-10 common critical events that you run into. If your manager asks "what is the critical event" you cannot answer "I don't know". What you can answer is " I am still trying to establish that, however I found out it is not ____ nor ____ or _____". E.g. you are checking of what are NOT the critical events against those you always run into.

Critical Event Date

A critical event date is a date at which the event takes place or a deadline has been set to have a solution. Sometimes you will find the critical event but due to local culture, the deadline is still flexible.

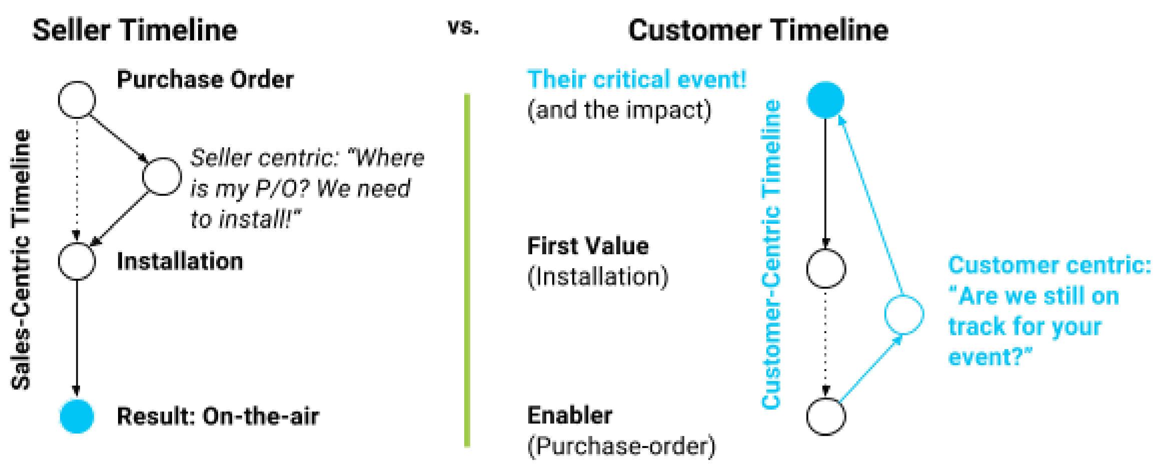
A critical event is like the end result of a delicious recipe when cooking a meal. In order to achieve your desired outcome, the recipe tells you what to do in what order. And following the identification of a critical event, you must uncover all the steps that need to happen.

PRO TIP The key question that differentiates between a critical and compelling event: **"What happens if you miss that date?"**

- JACCO VAN DER KOOIJ

Critical Event Timeline

The challenge described here is not unique to just SaaS. Rather, this is a common mistake sales professionals make all the time. In SaaS sales, we are often interested in "When do you need to have this by…" or "What is the go-live date for this service..." from which we establish a timeline. However, the timeline is actually in reverse.



Situation Explained:

Instead of determining when you need the P/O from the customer, you need to start with the customer needs in mind...when does the customer need the desired IMPACT? Then work your way back. For example, if the customer starts their school year in September, they may want to implement your solution before school is in session. This means they need to start implementation by August 1, and therefore have your quote submitted to legal by July 1 for execution on July 15. If you do not receive the P/O on July 15, you don't call them up and say "Jennifer where is my P/O? We've got to start the implementation...""... but instead you ask "Jennifer, I am giving you a call to make sure we are still on track for launching in time for the start of the school year". The critical event is not you getting a P/O - it is the customer going live with the solution at the right time (solve their problem!).

PRO TIP The critical event is not about you getting a PO/contract before the month is over, but it is about the customer using your solution successfully to solve their problem!

- JACCO VAN DER KOOIJ

What to do:
The key is for an SDR - early on - to establish what the critical event is. The key question to ask is "When do you need this service to be live by?" THEN followed by "...and what happens if you miss that date?" This simple question will let you know if the event is "compelling" or "critical". As the customer is transferred from the SDR to the AE, she can now provide the customer with the summary: "My colleague tells me you have to have this live by {{date}} to get this {{impact}} or otherwise you {{consequence}} … how can we help you avoid that?" You can now work your way back from the date and start peeling the onion.

EXERCISE Uncover the Critical Event

Use a real customer call you have had in the last 2 weeks.

KEY INFORMATION	YOUR NOTES
What is their critical event? (E.g., the next school year or semester starting)	
Date	
Consequence: What happens if they miss this date?	
What needs to happen to hit that date?	

GREAT EXAMPLE Critical Event: Sales Kickoff

KEY INFORMATION	EXAMPLE CRITICAL EVENT
What is their critical event?	The start of the next school year
Date	Sept 1
Consequence: What happens if you miss the launch of this tool by the sales meeting?	*Weak (rational):* We do not have the tool in place - cannot benefit - impact $$ *Strong (emotional):* Look bad in front of team *Very Strong (emotional):* Salespeople have no new tools to work with
What needs to happen to hit that date? • What comes before this: • What comes before this: • What comes before this: • What comes before this: • What comes before this:	• Need the team trained <takes 1 week> • Tools needs to be integrated <takes 1 hour> • Web Developer available <takes 1 month> • Processes order <takes about 1 week> • Legal agrees to terms <takes about 2 weeks> • Quote/Proposal tuned <takes about 1 week>

Natural Consequence: To have us hit your July 15 date, we need to get the proposal memorialized in an order by May 5th.

GREAT EXAMPLE Critical Event Follow Up Email

Subject: Start of the school year Sept 1 / PO July 30 / Decision July 8

Dear Mary,

Thank you for taking the time today to talk. To have the solution ready for the start of teacher training on August 15, we need to get the proposal memorialized in an order by July 30. Based on your purchasing process, I put the following timeline together to hit that date:

***Sept 1** - Start of a new school year with excited and enabled staff*
Aug 15 - Staff & Teacher training
***Aug 1** - Request for Web Developer*
***July 30** - Process Purchase Order to hit monthly cycle*
***July 15** - Legal Review of SLA Agreement*
***July 8** - The project team concludes <our company> offers the right solution*

Did I capture this correctly?

With kind regards,
Mark

As a sales professional, you need to absolutely be aware of any potential critical events of your customer. Some happen annually or quarterly, such as teacher training or parent/teacher meetings. Others can be business dependent.

EXERCISE Identify Critical Events Based On Past Customers

CUSTOMER NAME	THEIR CRITICAL EVENT	QUESTIONS TO UNCOVER
Example: School district	*Example:* August teacher training	*Example:* When do you start teacher training this year? How are you preparing your teachers for X and Y changes this year?
....	....	....
....	....	....
....	....	....

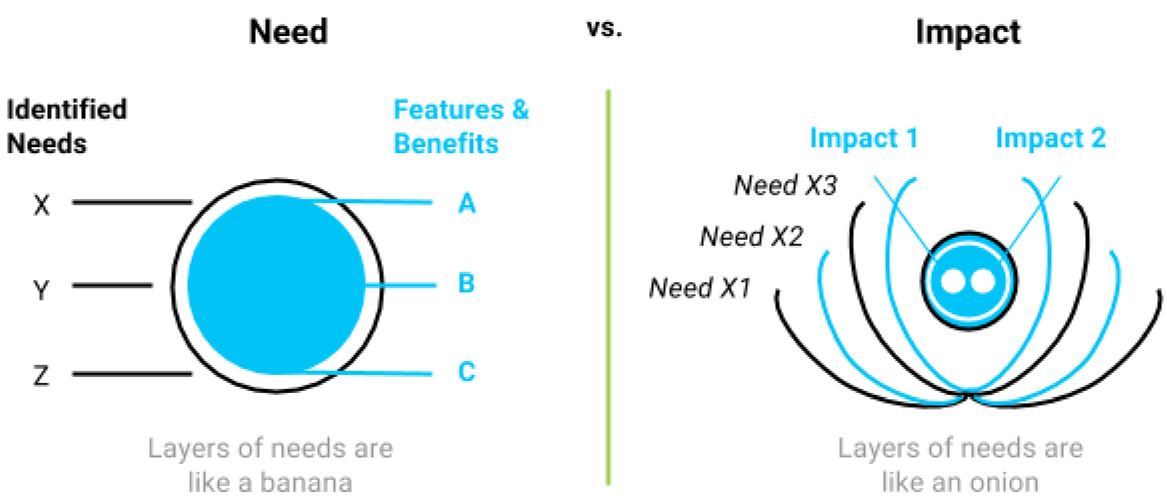
6.2.2 I - Impact vs. need (School and District)

The ABC of SaaS sales. Always Be Curious.

Definition of Need: Require something because it is essential or very important.

Definition of Impact: Have a strong effect on someone or something.

The Situation: SaaS has become extremely competitive, as almost every service sits on the same cloud infrastructure, uses a very similar color scheme (e.g., blue for social, green for predictive), so competing can quickly become feature-to-feature combat. This is not to the benefit of the customer, as they are often bamboozled into paying for features they're never going to need. As a sales professional you can play a key role in helping to avoid this early on by identifying the impact.



Concept Explained: In the picture above you notice on the left a traditional focus on the customer's need translating their requirements into features and benefits. On the right you see that the customer's need is actually more like an onion with endless layers that through the art of asking questions has to be peeled… to the core. Often 6-7 layers deep (6-7 questions deep!) you can find the underlying impact of the need. This impact determines the difference between nice-to-have vs. must-have and understanding this concept is what separates a good AE from a GREAT AE.

What to do as a sales professional: The impact of a service is best found by talking to a customer. So organize a customer/sales get-together. Ask your SDR/AE teams to come up with a list of meaningful questions to ask on the impact of the service. IMPORTANT! As an SDR, you cannot unpeel the entire onion on the first call - the customer does not trust you yet! But you may be able to unpeel one more layer by asking 1-2 more questions; "May I ask what is the impact of this service beyond giving you better dashboards?"... This will give your AE an incredible advantage, as he's able to better diagnose the customer's true needs: "My SDR briefed me on you needing this service to impact … did we capture that correctly? May I ask.."

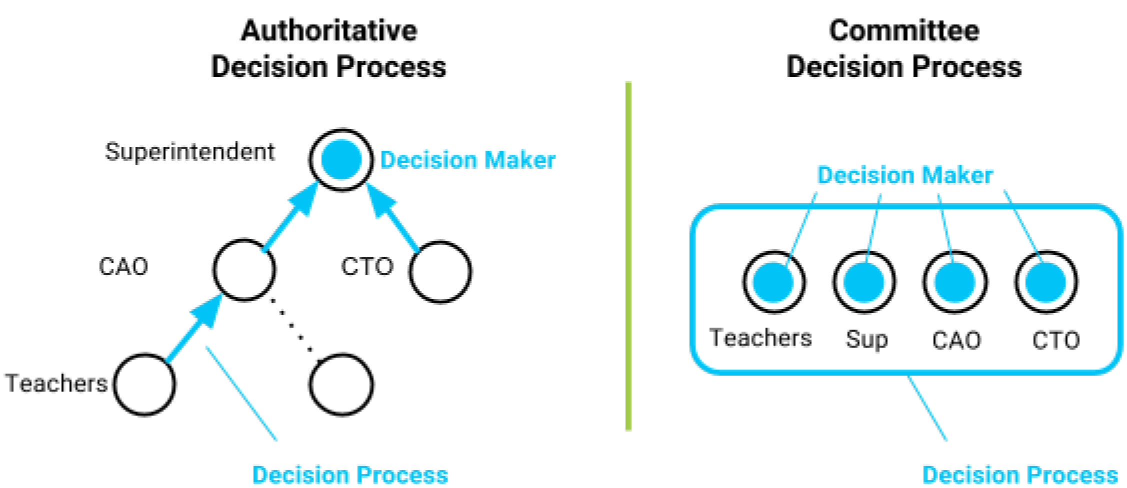
6.2.3 D - Decision process NOT authority (District only)

Stop the pitching. Start asking questions.

Definition of Authority: The power or right to give orders, make decisions, and enforce obedience.

The SaaS Situation: With SaaS (and increasingly so in any sales) we see a move away from the hierarchical (top-down) decision making. In many cases a single user can report back that the service does not work as advertised, changing the course of action. Many companies today build a team that has to come to a consensus. The team can consist of 1-2 users, a manager, someone from financing, etc.

Concept Explained: In the next picture you see on the left a traditional "decision tree". Users roll up into managers, who in turn roll up toward an executive who gathers the info and makes the decision. However, many SaaS services are actually "user experience driven". This is one of the many reasons why UI/UX has become so important in recent years. On the right you see that what you thought was a decision tree actually was a committee. In many cases in committees, the executive is not the person who will decide (they give the final decision their blessing), but rather a user who has to work with it every day. The user will be guided in the decision process by the manager (with her own needs) and the executive (making sure a proper decision process was followed).



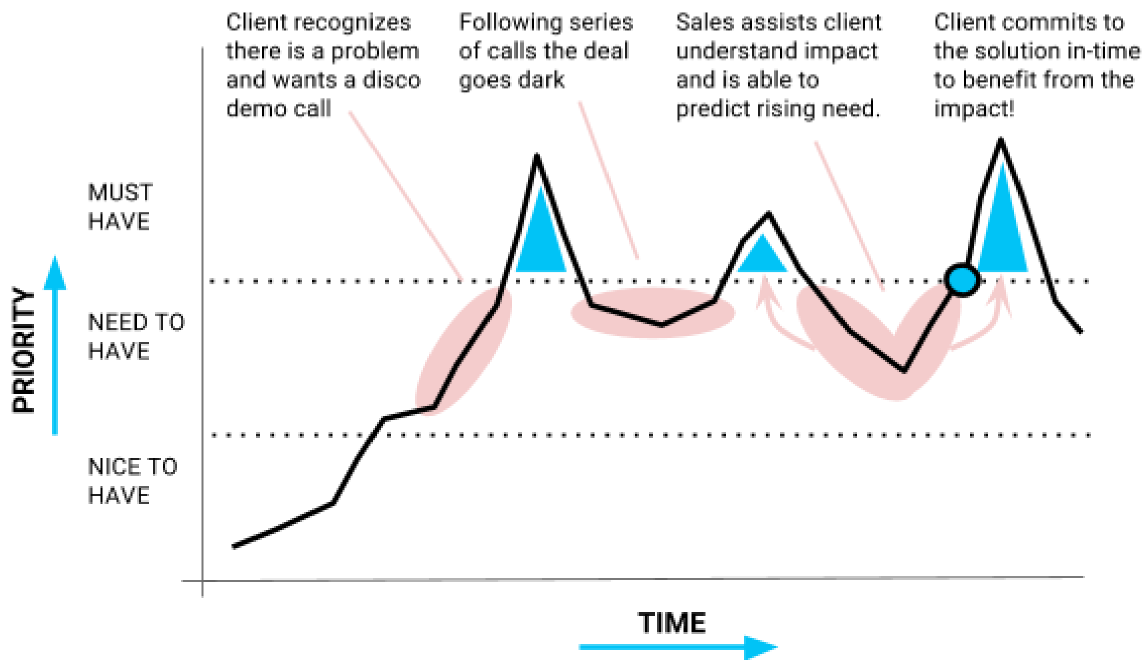
What to do as a sales professional: Your first priority is not to determine who is the decision maker but rather what kind of decision process is being followed. You can find out by asking questions such as "Who else is involved in this project that can benefit from this <insert article with insights>?" and "Who else can I invite to the next meeting…?". Another great question to ask is "Have you been involved in other recent purchases in this area such as <x> and <y>?"

6.2.4 P - Establish priority (District Only)

Finding the priority of your solution in a strategic sale can be quite time sensitive.

Definition of Budget: An estimate of income and expenditure for a set period of time.

The Situation: Most SaaS services are priced at a fraction of their perpetual license/hardware counterparts. A $500-$5,000 per month fee should be no problem for a school/district that has a real problem. This can extend to as much as $40,000/month without a hitch for large districts. Meaning there is ALWAYS budget. It never was about the budget, it has always been about it being a priority. A priority that fluctuates over time.



Concept Explained: In the above picture you notice that over time the priority increases from nice-to- have, to need-to-have and at one point even reaches must-have. It is critical to determine where you are in this picture. As the priority drops, a customer may go dark, leading you to believe that the "budget is spent", not realizing the conditions may change in your favor in which the priority will increase again. Even better… understanding their situation, you may outline the full impact of your service and how it can solve other challenges the customer may experience and with it you will be able to increase the priority!

What to do as a sales professional: Early on in the sales process your customer is still in discovery mode, this is an ideal time to ask: "Is this one of the top initiatives at your school/district?" And "Where does this rank?" And "Do you see this priority changing over time?" Ask, "Is this a Nice-to-have, a Need-to-have, or a Must-have?"

How this works in EdTech: EdTech is slightly different than many other industries, because the budget for public schools is determined by the federal and state government, as well as the timing of that budget availability. However, the general concept of needing to establish priority is the same - we must help the district/school understand that our solution should be a priority and that they should consider that when they are allocating their budget. Be sure to refer back to Chapter 2 for details on budget sources, and additional options such as competitive grants.

EXERCISE What stage are your deals

Use a real opportunities and identify what stage they are in:

QUALIFICATION STAGES	STAGE 1	STAGE 2	STAGE 3	STAGE 4
C Critical event for the customer known	Yes	Yes	Yes	Yes
I Impact on the customer organization known		Yes	Yes	Yes
D Customer Decision Process identified			Yes	Yes
P Priority for the customer established				Yes

YOUR OPPORTUNITY NAME	C	I	D	P
....				
....				
....				
....				

6.2.5 Detrimental impact of BANT™ on your forecast

The basic qualification we have used for decades is BANT™ . Although this was a good framework for enterprise sales, it is not enough for today's high velocity SaaS/Cloud services, as the price and timeline of a decision are radically different. BANT was conceived by IBM as a way to identify an opportunity. The IBM website tells us the following:

BANT: Opportunity Identification Criteria
Opportunities are identified by speaking to prospects or clients to determine their business and solution needs. The IBM guidance for opportunity identification is to use a standard approach called BANT. According to the guidance, an opportunity is considered validated if the prospect meets three of four of the BANT items.

As a team, the ISR and sales representative may decide on an either a tighter or looser form of BANT.

Budget - What is the prospect's budget?
Authority - Does the prospect have the decision-making authority, or is she an influencer
Need - What is the prospect's business need?
Time-frame - In what time frame will the prospect be implementing a solution?

Challenges with BANT applied to SaaS Sales

- **Budget** - Today, SaaS is a subscription model that draws from OpEx budgets whereas traditionally, purchases came out of a CapEx budget… does this change anything?
- **Authority** - Do organizations today still make purchase decisions on a single senior authoritative voice enforcing the decision?
- **Need** - What is a Need vs. a Must and a Want? Does SaaS really address a Need or are most of the services just a "Nice-to-have"?
- **Time-frame** - Is the concept of timeframe different for a SaaS deal with a sales cycle measured in days and an implementation of a single "click"?

Most of all, do we still live in a sales-centric world where we look for customers with Budget who can be sold on a solution, or have things changed to where we now live in a more customer-centric world where we assist a customer in identifying, diagnosing and resolving a problem? If so, what changes? And in light of this shift, how do I qualify a SaaS deal?

What we have found is that when we apply BANT to traditional SaaS Sales, there are a few challenges:

- Problem for SDRs: When SDRs are given BANT to qualify a deal, it backfires as they essentially are starting to sell while a customer is still in "education" mode.
- Problem for AEs: When AEs are executing BANT to qualify a deal, they are getting affirmative answers yet the deal is still not qualified.

As an example, let's take a look at a typical conversation along traditional BANT, but dramatized for effect:

BAD EXAMPLE Traditional BANT can lead to improper Qualification in SaaS

Mike SaaS Salester | ***Jennifer the CAO***

Jennifer, so if I summarize your challenges you need to solve problem X and problem Y. Did I get that right?

Yes that is right!

It sounds like this is a big need for you folks.

It absolutely is! We've been talking about doing something about this for a long time.

Awesome. Well it sounds like you secured budget for this project?

Yes we have.

Great.
May I ask who is the decision-maker?

I am the decision-maker,
And Director of Curriculum Development will get involved as well.

Sounds good. And when do you need to have a solution in place?

In the next 8 weeks,
but no later than September 1st!

Mike just qualified according to traditional BANT and reports back to his boss Nicole:

> *Nicole, I just got off a call with Jennifer. You may remember her, she is the CAO in the XYZ school district looking for a solution for enrollment and waitlisting. She confirmed she is the decision-maker on this "Improvement" project. Jennifer needs a solution in place by September 1, and confirmed that she has budget to spend.*

This results in low quality SQLs, or worse, low quality deals in the qualified sales pipeline with a commit to close in the next 8 weeks. And although this is a severely oversimplified the example, in most cases this is pretty much how this weak "deal" enters the funnel as a qualified deal.

6.3 Prescribe

Following the diagnosis it is time for you to demonstrate how you can help your customer. There are two very different scenarios:

SHARE your story

Often used in first engagement with a customer when they ask *"what do you do?"*

SHOW whatcha got

Often used in follow-up engagements when a customer asks *"I want to see how it works?"*

6.3.1 Share story - Storytelling

Every song, movie, poem, and book has a structure. So too has a professional sales story.

- Why – Start of with what is happening in the "market", sharing your market insights – example of a customer with a problem!
- How – How to tackle this problem, the approach, a better service etc. – how would it look and feel? Do this without mentioning your company!
- What – What we are doing to realize the company's vision?
- Proof – Benefit other customers have experienced using your service
- Next steps – What actions to take/mutual

EXERCISE **Start with Why**

Watch this video

https://goo.gl/2YDHGA

Simon Sinek
How great leaders inspire action
22M views • May 2010

ACTION

Why does your company do what they do?

How does your company do what you do?

What does your company do?

STORY STAGE	DESCRIPTION
Introduction	Start with an introduction slide - show your logo with the customer's logo
Problem Statement	Grab their attention with an interesting story about the big picture problem in the industry. "Start with Why"
Solution	How to tackle the school's/district's challenges. What is the approach and how it would look and feel. Don't mention your company - stay high level.
Proof	Leverage a ***relevant*** use-case by a similar school/district/partner trying to solve the same thing. For this to be effective, it must be relevant.
Show and Share	It will be tempting to go on autopilot and show feature after feature. Instead, each screen you show should demonstrate a relevant use-case. Make sure you are only showing the solutions that are relevant to what the customer is looking to solve.
Next Steps	Will this solution fit their needs?

BEST PRACTICES

- **DO** follow this mantra: Prepare. Practice. Reflect. Refine.
- **DO** make your opening catchy – you've got 5-15 seconds!
- **DO** be passionate, reading from a script will reduce passion
- **DO** Make it feel like it is personalized, talk to a human, in real language
- **DO** be concise about what you do, short and to the point, as if you talk to a 6 year old
- **DO** integrate your customer into your story:
  - **DO NOT** put just the logo on the opening slide
  - **DO** Include pictures of their App/Service
  - **DO** Include their people and highlight statements they made. Make this a critical part of your "discovery"
    Example: "The lack of x, y and z made it impossible for him to meet deadlines"
- **DO** engage your audience meaningfully
  Instead of: *"Questions?"*
  Try (closed): *"Does this resonate with you?", "____, do you experience something similar?"*
  Better yet (open): *"Mike can you share me an example of …"*
- **DO** connect the slides through story
- **DO** talk from a customer perspective
  Instead of: *"We are really strong at this and this… that's why customers buy us all the time"*
  Try: *"Customers similar to you… experienced exactly the same… and here is what they did."*
- **DO** use video/visuals to make the point, but make the point! Prezify your powerpoint
- **DO** record your own presentation (just the audio by itself is already good). Listen, learn, and improve it, then do it again. I realize you find it awkward to listen to yourself, no worries that will be gone by the 26th time. Quicktime is a simple way to do this.

EXERCISE **Share Your Story:** Identify your key elements in your story in a high level outline:

DRAW KEY MOMENTS OF YOUR DEMO	SPEAKING POINTS
	Slide Title: Introduction *How to speak to this slide:*
	Slide 2: Problem Statement *How to speak this slide*
	Slide 3: Solution *How to speak this slide*
	Slide 4: Show and Share (Demo) *How to speak this slide*
	Slide 5: End and Next Steps How to speak this slide

6.3.2 Show - Demonstrate your Product

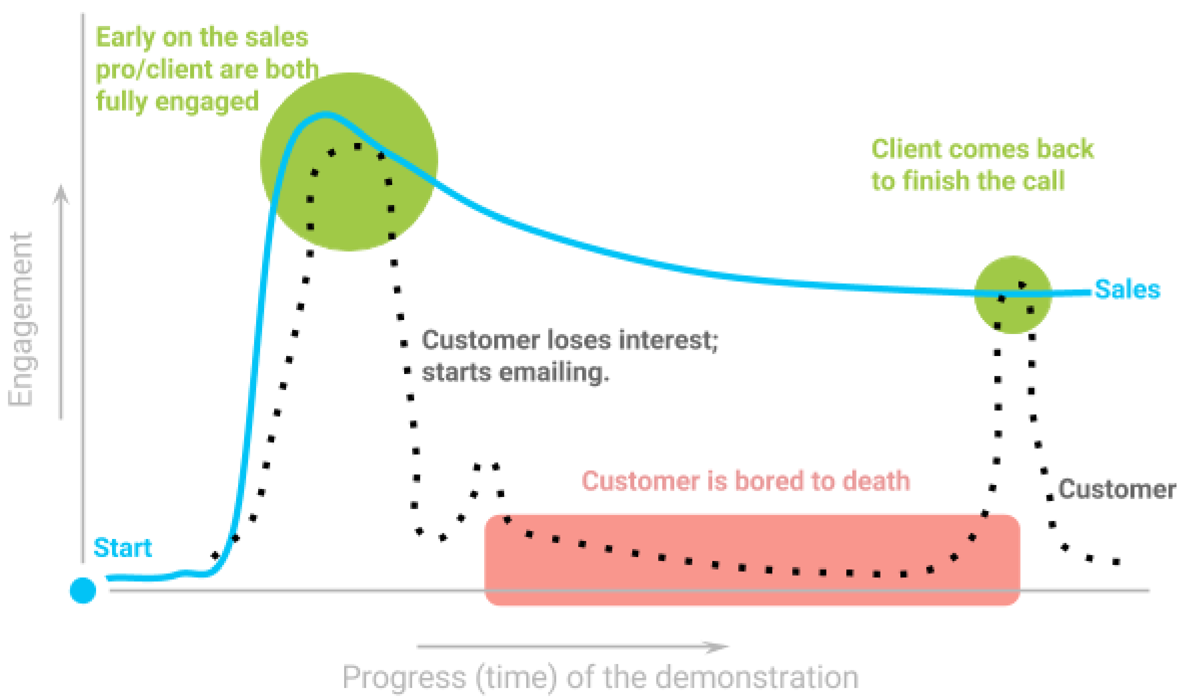
Part 1: How to demonstrate your product

Following the diagnosis, you identified 3 key value points (A), (B), and (C). You have prescribed your customer a solution to their problem - for example, "it needs to be Cloud based, be accessible by both teachers and parents, and provide an easy to read dashboard."

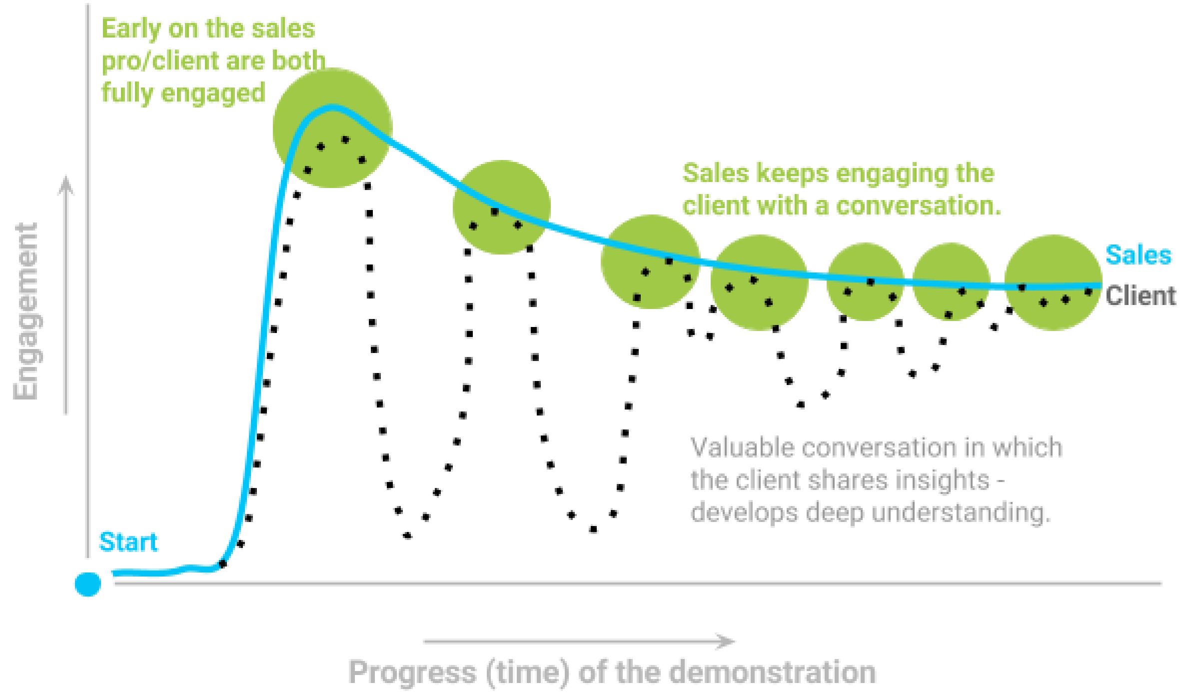
The client is eager to see all this in action – and so the time has come for you to perform a demonstration of your platform.

By far the number one challenge for sales professionals is that this turns into a monologue that can last anywhere from 10-40 minutes and is lovingly known by sales professionals as the "sh!t show".

The problem is that you will overwhelm the client – fatiguing the client with an onslaught of your pitch. You are doing this for the 4th time that day. This is their first. And so they lose interest when there is too much information that they can relate back to their circumstance. And with that you miss understanding some of their key challenges. The figure below shows the experience.



Instead what you are suppose to do is "re-engage" the client by asking a questions that are related to the specific things you learned during the diagnosis.



How do you engage a client? In each "green bubble" perform the following:

STEP 1 Demonstrate your product in their context

Before we get started, I'd like to confirm that your top challenges is {challenge 1, and challenge 2}, and you're looking for {their desired solution}. Did I get that right?

Always try to phrase it in their words and context. Pick up on how they speak about their customers and products.

STEP 2 Describe the layout of the screen

What you see on this screen are 4 different panes each with a different use-case, we are not going to worry about [X] , [Y] and [Z],

Feel free to point out what they should NOT be focused on as well.

STEP 3 Always discuss why you are showing a particular page, dashboard or feature

Your customer will likely need to sell this internally to their team. Make sure your story relates to them with anecdotes that will be easier to share. You want your customer after the call to say something like: "They have something that will let us gain visibility into this process that ultimately helps solve "Challenge 1".

STEP 4 **Summarize your previous diagnosis and key customer pain**

Then briefly familiarize your customer with the layout on the screen – Let them know what the different panes mean without going into detail. You've got 5-10 seconds max to do this.

Based on our previous conversations with your team, your top priority is to solve [Challenge 1] and are also interested in [2]. Did I get that right?

Yes, exactly. We also care about [3]

Ok, thank you. Based on your priorities, I would like to cover only the relevant parts of our solution that will help you.

STEP 5 **Then, in <u>context</u> of the customer, demonstrate how your product solves their problem.**

Avoid the temptation to show them every feature and potential solution of your solution.

The top performing sales organizations only show their solution after discovery, then customizing what they show just to the client's top challenges.

Buyers don't care about your solution. They care about removing the roadblocks to accomplishing their objectives and to be more successful.

Because you are looking to solve [1], this particular dashboard shows the insight your management team will use to make decisions and meet your school's goals.

STEP 6 **Ask if what you showed was relevant, or helpful**

Can you see yourself using this service?

What stands out most to you on this page that would help your team?

STEP 7 **Upon their response, immediately diagnose the situation**

Can you see yourself using this service?

Yes - this is exactly what we are looking for.

What would the impact be if you had this today?

Keep engaging the customer asking for feedback

Involve the customer. It's easy when discussing something you're passionate about to barely take time to take a breath. Make sure to pepper your conversation with questions to make sure it is relevant to the customer.

Does that resonate with you?

What part of what I've just showed you seems like it would be the best help?

STEP 8 Hand over controls. Let them test drive!

Customers love to feel in control. Let them be the judge, and once you've given them the fundamental high-level overview of your customized solution, ask them to give it a spin.

Based on what you see on my screen, is there anything you'd like to click on or dive more deeply into?

STEP 9 Summarize and move to the next point.

Before I move on to the next point; Is there anything else we have forgotten that is important to address?

So in summary... you have this problem... and as you can see this would help you solve [ABC]

Resulting in [this] impact on your business.

Now let's talk about the next point…

STEP 10 Rinse and repeat

Rinse and repeat for other points. Throughout the demo, make sure you continue to refine your understanding of the customer's situation, problem and desired outcomes.

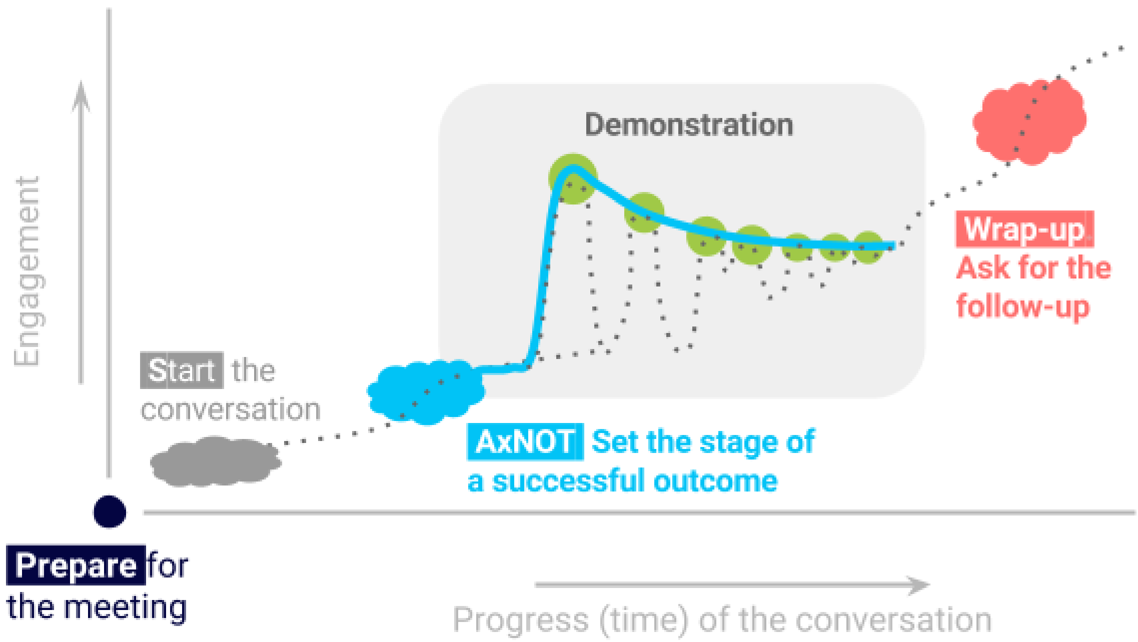
Customers are often shown every little thing your company can do, or are told about this cool new feature coming out soon. Focus just on what's on the truck today, and what is most relevant for your customer. Keep doing this for every part (tab-page) of the demonstration.

PRO TIP Turn on your video camera to "put a face to the voice" and ask your customer to do the same. Because they are on camera, they are more likely to stay engaged which maximizes both of your time, and maybe even lets the call end early.

- JACCO VAN DER KOOIJ

Part 2: Integrate the demonstration into the call

We now need to integrate this world class demo into an overall structure. This can be seen below.



Prepare for the meeting

Goal: Review the key points of the diagnosis and match to your demonstration

Before even getting on the call, you have set up the meeting as a professional: executive briefing, reminders, technology check and a clear understanding of your desired outcome of the call.

Start the conversation

Goal: Set yourself up as a friendly professional, and exchange warm business friendly pleasantries as you get started.

Show that you've done your research as people join the call - ask about a relevant news article or key milestone that could be important to the individual (work anniversary, school milestone, recent funding, etc.).

Mike, in our first call you said you experienced problems with _____ , _____ and _____ - did I get that right?

Yes that's right.

Well today, I'd like to demonstrate step by step how this can be solved.

NOTE: If there are 2-4 people on the call let them briefly introduce themselves. If there are lots of people on the call, run it through your coach.

AxNOT Run your AxNOT

A - Appreciate	***Appreciate*** *you joining our call today*
x - time (check)	*We* ***scheduled this demo til*** *the bottom of the hour,* *Does that still work? Great. And for you Michael?*
N - Naturally	***Naturally*** *you'll want to see how our service can meet your needs*
O - Obviously	***Obviously*** *I'd like to learn from you in this demo what resonates*
T - Typically	***Typically*** *this call concludes with you seeing that our product can meet your needs - AND that we are moving forward with ___* *Does that sound like a good use of our time today?*

Agenda Confirm your Agenda

I have planned to cover [Agenda written in invite]. Mrs. Decision Maker, what would you like to get out of our call today?

Sure I'd like to see …and …

Yes, I will make sure we have time to cover this in the demonstration.

Demonstration as detailed above

Wrap-up for the follow-up

During the AxNOT, you set the stage for the outcome of a successful demo. During the demo you earned their follow-up. Now this is the time to ask for it!

At the beginning of the call we discussed that a successful demo today would lead to next steps. Are you pleased with what has been demonstrated today?

Yes. This was a great demo!

Thank you! We worked hard on it.

May I ask if you are ready to move forward with a proposal?

6.3.3 Handling objections: competitors

Across customers there are a few common objections. A customer raising an objection is them expressing the interest to buy. And guess what? 95% of the objections are all alike. That means we can practice them. Your ability to address these objections in a fluent way makes all the difference. There is a customer centric way that you need to develop into your "muscle memory".

Experts say the source of the mentioned objection often is 4-5 layers deep. This requires a deep understanding of question-based techniques to uncover the real objection - in particular, the "Value style" questions.

There are a variety of objections

Not every objection is the same - here are the most common categories:

TYPE OF OBJECTION	WHAT THEY SAY	WHAT IT TELLS YOU
Not understanding the value	*"We don't need that"*	Establish value by asking questions on the impact on their organization. Keep asking.
Raising a concern	*"Your product is too complicated"*	Show that this is not the case. I literally mean SHOW them, and let them DO IT.
Wrong perception	*"That does not pass our security profile"*	Need to provide proof how others overcame that issue
Lack of priority	*"That feature you offer is not a priority"*	Establish impact of that feature, and present it back to them … e.g., this feature means less training.
Budget concerns	*"This would eat up almost one quarter of our curriculum budget"*	You need to sell at a higher level. Use organizational selling to get the district office involved,, and be their advisor to help identify new sources of funds.
Secret agenda	The CTO worked with your competitor at a previous district and appears to want to use them again	Research beforehand. Need to flush this out in the disco call and ask "what did you not like working with..." You need to learn if this is a (+) or (-) impact. If (-) you need to apply organizational selling.

Objection Handling - How it works

Step 1	Prepare BEFORE you get on the call	
Step 2	Ask and perform Active Listening	
Step 3	Summarize and appreciate	*"Did I understand correctly that…* *"Thank you for raising the concern."*
Step 4	Empathize	*"We hear this a lot"*
Step 5	Get the whole picture (tipping the bucket)	*"Is there anything else?"*
Step 6	Summarize and appreciate	*"If I may summarize… did I get that right?"*
Step 7	Ask questions to uncover the real needs	
Step 8	Counter offer based on what is important to them	

You may have noticed that Step 3 and Step 6 are similar. This is because you must listen intently and confirm you understand exactly what they are objecting to or asking for. The risk for assuming their objection is similar to your last customer is too high - and will often cause you to try and compromise on the wrong trigger.

Understand / Peer Reference / Solution they found

- Confirm you listened — *"I **understand** you are experiencing…"*
- Show empathy — *"Your **peers** experienced exactly the same thing"*
- Make a 3rd party reference — *"The **solution** they found was…"*

EXERCISE Objection Handling

STEP 1 Identify the most common objections (in this stage)

- ....
- ....

STEP 2 Pick an objection

- ....

STEP 3 Ask diagnostic questions

- ....
- ....
- ....

STEP 4 Identify others who had the same objection

- ....
- ....
- ....

STEP 5 Offer stats/proof that you learned from existing customers

- ....
- ....
- ....

STEP 6 **Address concerns**

- *I understand how you feel about that* ....
- *Others such as* .... *and* .... *felt the same way*......................................
- *What they found was that* .... *and as a result* ....

6.3.4 Sharing use-cases

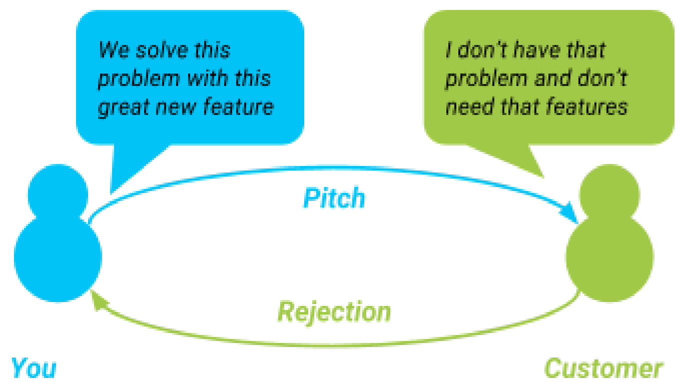
The price you pay for not being knowledgeable is called discount.

- Michael Virardi

The use of use-cases as a third party reference drastically helps your storytelling. In the example below, you notice the hard pitch - followed by the rejection. This can put a quick stop to a conversation. Do this 2-3 times and you'll see that your pitch is rendered pretty much useless.

How direct pitching can causes issues:
Using a 3rd party reference through storytelling can make all the difference:

- Does not fatigue as fast (e.g., you can run multiple examples)
- Provides value with your statement (e.g., how others do this)
- Makes you come across as an expert (e.g., you know people, understand their situation)



How a 3rd party reference can have an impact:
When you use a 3rd party reference, you talk through: who experienced the problem (person), what was the problem they experienced (in context), what action did they take, what was the result they got from it, what did they learn from it, and how they applied it.

In EdTech, it's especially powerful to reference nearby schools and districts. If you can talk educator-to-educator, you will be trusted. If you can link educators to other educators and help them learn from each other, you will be trusted and appreciated!

EXAMPLE FROM Freshgrade: PLEASANTON SCHOOL DISTRICT

Mark is a new CTO at the Pleasanton School District, and he recently did a review of the IT infrastructure for the district. His goal is to streamline the instructional technology that is used across the district. But Mark's problem is that several schools were using different tools to accomplish the same thing, and each were using different databases on the backend, making the infrastructure very difficult to maintain. He needed a solution that would solve those issues, get all schools working off of the same data, and save costs at the same time. So, he did some research and contacted Freshgrade because they seemed like a potential solution.

After the board approved the decision to go with Freshgrade and the platform was implemented across two schools in the district, Mark noticed several improvements: the database was easier and took less time to maintain, schools were able to easily share data when necessary, teachers reported higher morale, and parents seemed more satisfied because they were more in touch with their children's learning paths.

He realized that this will work for not just the two high schools in the district, but for the middle and elementary school as well. So Mark made the recommendation to roll Freshgrade out to the remaining schools.

COMPANY	PERSON	'PARLA'
Pleasanton School District	Mark, the new CTO	*Description:* Recently did a review of the district's IT infrastructure and realized the need to streamline *Problem:* Difficult to maintain, poor experience and high cost *Action:* Bring in a platform that offered: ● Effective in the classroom ● Easy to access for parents and teachers ● Ability to put all schools on the same platform ● Shared database *Result:* Improvements across the board ● Less time and money to maintain ● Shared data ● Higher teacher morale ● More satisfied parents *Learnings:* The other schools in the district can benefit from this as well *Applied:* Made the recommendation to roll out the platform to the remaining schools in the district

EXERCISE Compile your use-cases

COMPANY	PERSON	'PARLA'
	....	*Description:* ....
....	....	*Problem:* ....
	....	*Action:* ....
		Result: ....
		Learnings: ....
		Applied: ....
	....	*Description:* ....
....	....	*Problem:* ....
	....	*Action:* ....
		Result: ....
		Learnings: ....
		Applied: ....
	....	*Description:* ....
....	....	*Problem:* ....
	....	*Action:* ....
		Result: ....
		Learnings: ....
		Applied: ....

6.4 Navigate the Organization (Big schools and Districts)

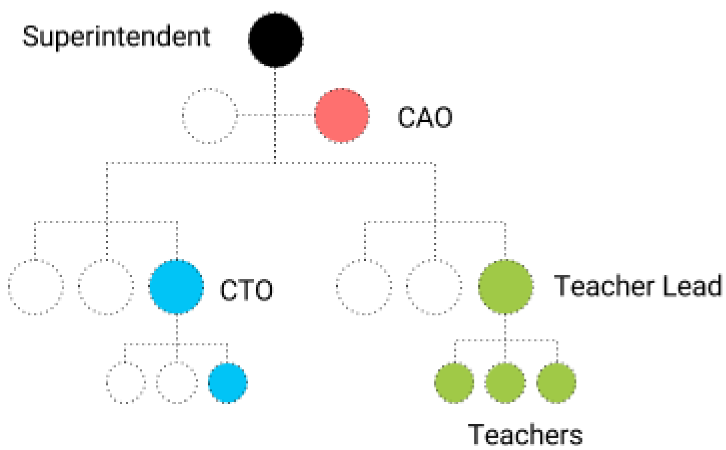
Organizational selling is best applied in organizations that have a decentralized decision process involving multiple decision makers. This is most commonly found when selling to large Enterprise Organizations (500-250,000 employees) as compared to VSB and SMBs that often have only a few stakeholders.

SUMMARY OF ORGANIZATIONAL SELLING:

STEP 1 Establish who is involved
STEP 2 Establish the decision process
STEP 3 Establish needs per user/group/department
STEP 4 Hierarchical Selling
STEP 5 Organizational Pricing

6.4.1 Establish who is involved

Traditional selling involves you selling to the Users and the Manager. For example (see below), three salespeople and the sales director.



It is your job to identify stakeholders EVEN if your sponsor does NOT. Many sponsors may not have the depth to understand that IT, Legal, Support, etc. needs to be involved. Do not wait for your deal to delay by not adding all of the decision makers until the end of the deal cycle.

BEST PRACTICES

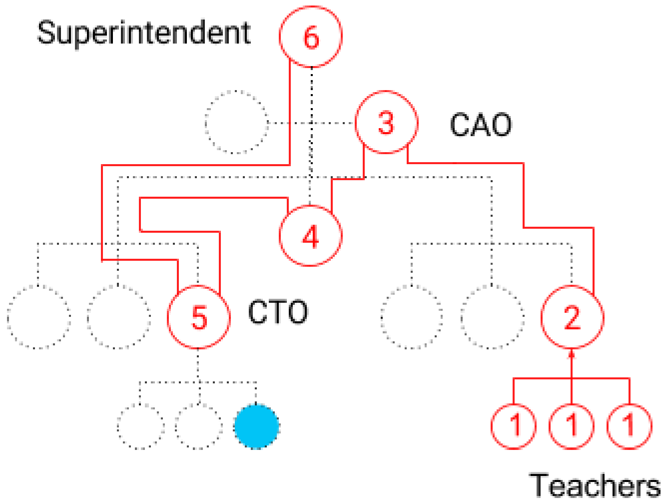
- **DO** have your SDRs keep finding new information, set triggers (trigger based selling) and provide information to users to gain mindshare
- **DO** keep identifying new decision makers based on previous experiences

6.4.2 Establish decision process

The traditional decision process was based on purchasing authority against seniority. This authoritative process aligned along brackets of PO size (e.g., $10K, $50K, $100K, $500K, $1M).

Today, however, we see more team decisions being made, as SaaS software can impact many different groups:

- Curriculum Development
- CTO
- Teachers



In this case, the process works as follows:

1. Teachers have signed up and love using the product for their curriculum
2. The teacher lead sees multiple people use and benefit from the service
3. The teacher lead wants to order for the entire school, but the CAO has other budget priorities that may conflict. You address the issue.
4. Curriculum Director agrees that this is a priority
5. CTO signs off on the security requirements
6. The Superintendent signs-off on the purchase and brings it next board meeting for approval.

This requires you to manage the district's resources. For example, instead of you addressing all of these people, consider:

- Introducing your own CTO to their CTO to tackle any security issues
- Introducing your own CFO to their board to discuss payment plans
- Introducing your own CEO to their Superintendent to develop a joint strategy for the entire district

BEST PRACTICES

For the AE:

- DO NOT try to "know everything about everything".
- DO make sure that you manage the decision process, and bring in specialists along the way.
- DO brief each specialist before the call, give them an objective to achieve and debrief with them after the call.

For the SDR:

- DO NOT come unprepared to a call
- DO develop an org chart so that you know who all of the possible stakeholders are

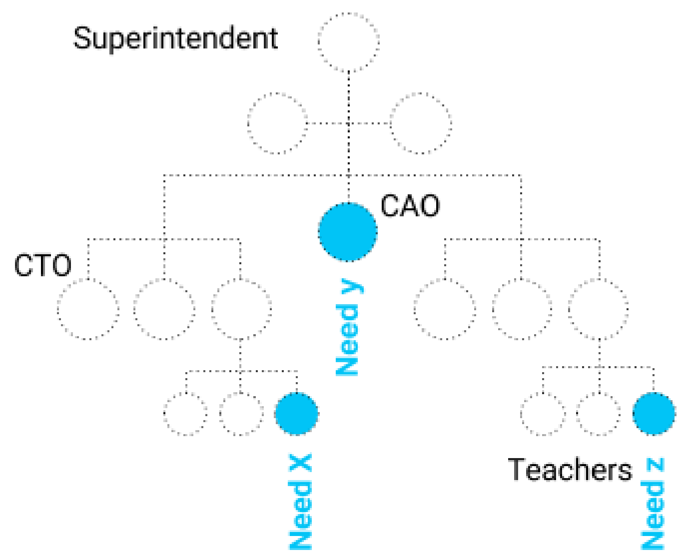
6.4.3 Establish Impact per users/group/department

AEs must identify and track a list of needs/desires that results in a certain impact per department. In this example, different departments, such as IT and Inside Sales, may have contradictory needs with different impacts. It is NOT your responsibility to resolve these. It is your responsibility to provide clarity. A best practice for doing this is to open a shared doc in which you highlight the needs per person or department.

It is key that you do as follows:

- Ask for the criteria
- Repeat and clarify if you got it right
- Ask "Is there anything else"
- Write it down
- Share with their team
- Send in more information

By managing this process on behalf of your customer, you are controlling the process.

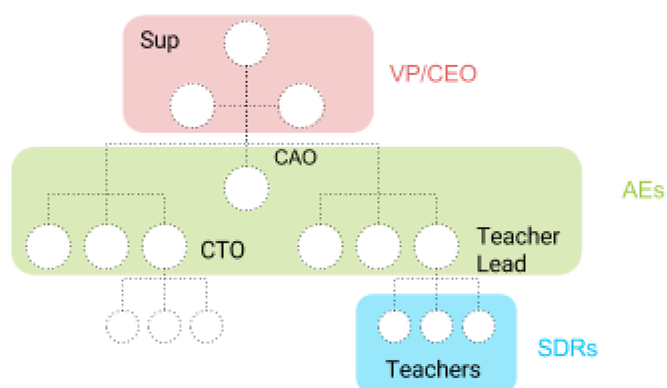


BEST PRACTICES

- **DO** have an SDR identify new stakeholders inside an organization
- **DO** have the AE create an overview of all the needs per stakeholder (pros/cons)

6.4.4 Hierarchical selling - Align seniority

It is the job of the AE to align resources to the point that executives line up. As opposed to smaller deals, where we use all resources as quickly as possible (referred to as provocative sales), in larger organizations we often have to (unfortunately) play the title game.



This means that as an AE, you need to achieve coverage to at least the Director level, and if possible at the executive level. The higher you go, the better. This way you can bring in your VP to meet with their executive to discuss the outlines of the deal. Your VP in turn will bring in your CEO to meet with their Superintendent to discuss the partnership...and so on.

If you bring in your VP to a manager meeting, it is often frowned upon for the VP to then go over the head of the manager and talk to his/her boss. So make sure that you're staying aware of the reporting structure and not seeming that you're going over anyone's head.

KEY FOR THE SDR/AE TEAM:

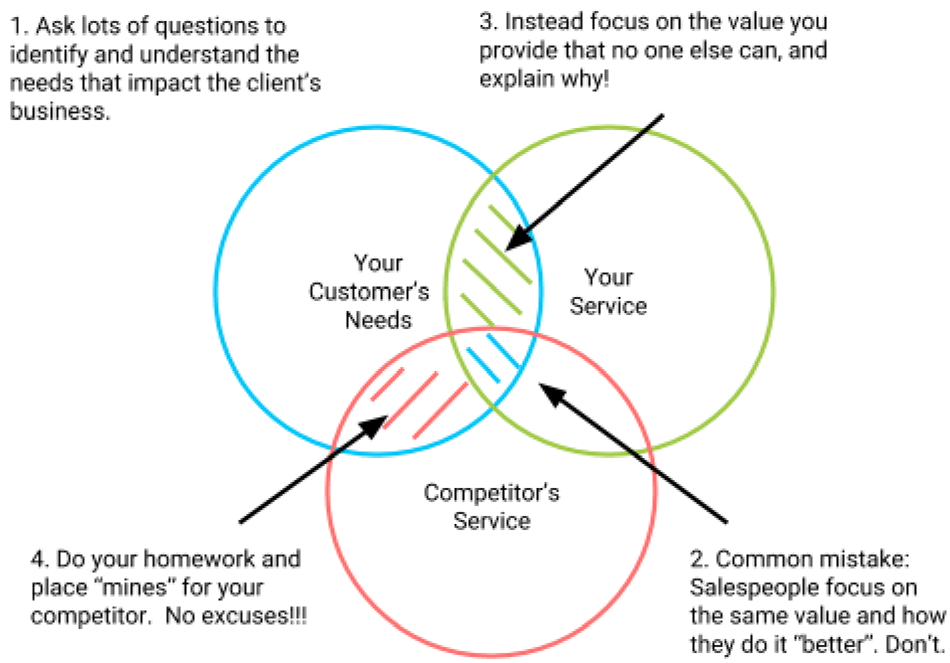
- SDR should build an org structure
- AE should get as high as possible
- AE should involve Executives as needed to expand exposure within the customer

6.5 Strategize (Schools and Districts Only)

Used car salespeople have a bad wrap. The bad ones are known for the hustle, pressure and manipulative strategies that result in buyer's remorse. That's not what will turn customers into long-term partners.

Of course, most products don't have 100% market share, so competitive pressures can make it seem that price is the only thing that matters. That's why you have focused your early conversations on diagnosis. Now, it's time to assist the customer with tradeoffs, because you know what they care about.

The basics of effective competing with competitors during the selection process



The basics of competing, explained:

1. Your primary focus must be on uncovering the customer's needs and identify the ways your offering can help them with real and measurable impact on their business. So keep on asking the right questions and you will learn more and more. That knowledge will lead you in the right direction. NOT addressing customer's needs will make the customer feel you are not knowledgeable, coy, or simply incapable.

2. Traditionally, salespeople were very focused on competing with a competitor. They focused on what they had in common - and it ended up in a "we do this better then them" conversation. **Don't.** The customer will quickly come to the conclusion that "You all look alike" and it turns into a price discussion. Hence, the importance of focusing on the value this offers for the customer (see #1 above).

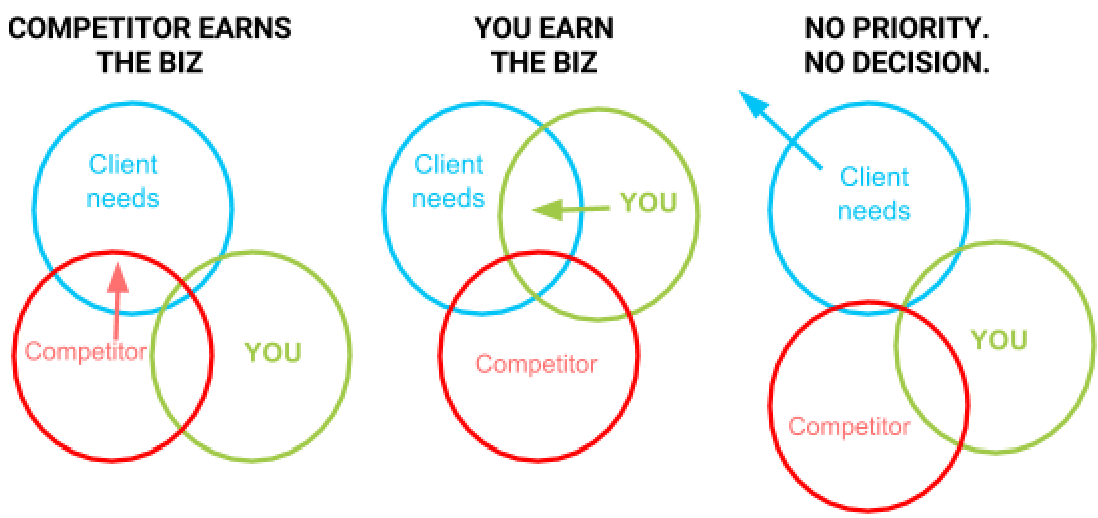
3. In your positioning, focus on the area of needs that you can help impact!

4. Back in the day, we recommended not to talk about your competitors, because we relied on the lack of information a customer had. No need to give them a name of a competitor they did not know, right? But today, a customer can simply type in "competitor to [your product]" he gets a nice tidy a list of competitors to go check out. So instead, you need to focus on "placing mines"

by anticipating how the competitor will position themselves. Place a mine by making this a non-important decision criteria.

AE RESPONSIBILITY #1 Knowledge

1. You must have an intimate understanding of your customer's needs/decision criteria.
2. You must understand how your product can meet that demand, today and in the future.
3. You must learn and understand your competitors strengths and their approach.



AE RESPONSIBILITY #2 Assist the selection process

1. Establish the client needs/decision criteria from the first interaction with a customer, and along the entire journey.
2. Write these decision criteria down, repeat them to the customer, and make sure you capture the exact words they use.
3. Ask the customer to prioritize these criteria (it's effective to do this visually on a screen share), and capture the implied need of each of the criteria.
4. Change the decision criteria, based on what the customer's needs are, but in favor or our service, by:
    - Moving the decision criteria that favor you up in priority
    - Moving the decision criteria that favor your competitor down in priority
    - Add decision criteria that favor you, by
        - Changing the decision process
        - Changing the decision makers
        - Changing the sense of urgency
    - Improve your rank (such as creating a 3-year ROI vs. 1-year pricing)

AE RESPONSIBILITY #3 Trade-off

- Create a trade-off matrix (next paragraphs)

BEST PRACTICES

- **DO** determine the customer needs (decision criteria)
- **DO** determine the impact of those needs on their organization
- **DO** determine the impact of that on your coach and the people you work with
- **DO** determine who the competitors are
- **DO** have a conversation on the details of this competitor, ask "Are you looking at others?"

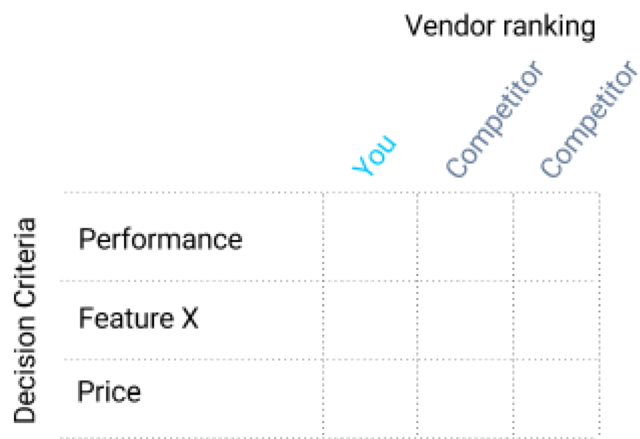
- **DO** use the words "substitutes" when identifying other ways to spend their budget, and alternatives; minimize the use of the words competitors
- **DO NOT** introduce a competitor if you do not know the above 3 points about that competitor
- **DO:** Bringing up a known competitor early in the conversation allows you to place "mines". (see the green in the first chart of this section). These are areas where you educate the customer on questions to ask your competitor about - questions that you know will impact the decision in your favor.
- **DO NOT:** The most common mistake of salespeople is to focus on the overlap (see red + white overlap area in first chart in this section) - this turns it into a feature war.
- **DO** Instead, the key is to focus on the area where you have identified a customer's key needs that the competitor can't meet, and stay focused on this area with value propositions and use-case examples (third party validation).
- In case the competitor is an incumbent:
  - **DO** focus on what the customer was promised (red in the first chart above), and what they did not deliver on (for example, stability of the service). Provide third party proof that we can provide that.
  - **DO** combine this with teasing them new functionality that meets their needs today/future (blue area).
  - **DO** ask great questions such as:
    - *"What made you fall in love with [your existing provider]?"*
    - Followed by *"How is that working out for you?"*
    - *"If there is one thing that is causing you issues with [your existing provider], what is it?"*
- **DO** be:
  - Consultative. Don't tell, but ask, refer and provide info.
  - Knowledgeable. Knowledge wins every time.
  - Non-emotional (emotion = loss of composure)
  - A sincere trusted insider (and don't fake it --- truly be one!)

6.5.1 Obtain and prioritize the customer's decision criteria

The decision criteria are like the four center squares of a chess board. Control them, and your chances of winning the game radically increase. This is why it is so important to get engaged with a customer early on in the sales process. With early involvement, you are able to set the stage and control the decision criteria.

STEP 1 Use a basic matrix like depicted to establish the customer's key decision criteria.

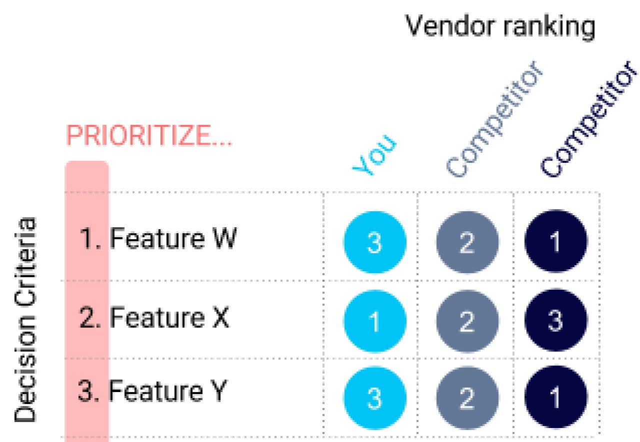
- SDRs: During the first call/engagement, it is key for you to inquire about the customer's decision criteria, and inform your AE during the transfer.
- AEs: In the opening call, verify these decision criteria with your customer. In the process, try to identify the competitors they are looking at.



STEP 2 **Figure out "where we are" in the deal**

Now the AE verifies with the customer the decision criteria and asks *"is this the right priority?"*. This way, we can figure out what is most important. Next, using a variety of exchanges, it is up to the AE to establish where we are in the deal on each of these criteria. How do we stack up - are we first, second or third?

NOTE: *I realize this is not easy to do, but this is a key task for the sales team to figure out. You can use* ***SP3V*** *questions to derive this from your conversations with your customers. In the case above, we are most likely ranked 3rd.*



6.5.2 Reprioritize decision criteria (along customer needs)

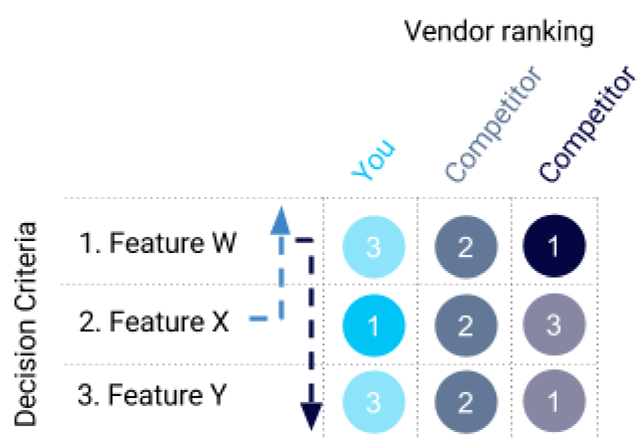
Now you need to increase the priority of what is important to the customer and what you are good at. And at the same time, you need to decrease the importance of what we are not good at.

In this example, we are ranked #1 on FEATURE X.

It now is the task of the AE to reprioritize where we are strong at and make it the #1 decision criteria, AND de-prioritize Performance as the top criteria. This can be accomplished by adding depth to the item.

Similarly, we need to devalue what our customer is strong at. This requires a lot of skills and techniques explained throughout the playbook, such as:

- SP3V Question Based Selling
- Critical Event Timeline
- Decision Process

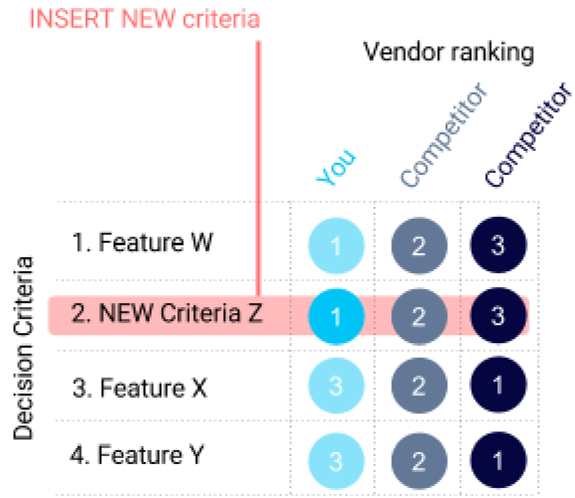


6.5.3 Add decision criteria (important to the customer)

Obviously, we do not have to stay within the box that was drawn for us. We can add criteria important to the customer. Perhaps a feature that only we offer - say, “simple to use”.

In this example, the AE must provide the customer insights that if it is not simple to use, that the adoption of the service will falter, and waste the entire investment. The AE can provide use-cases, do demonstrations, and even set up references on this single item to make sure this gets to be THE MOST important priority.

NOTE: *Doing this successfully will allow you to help the customer implement the right solution AND provide you with a deal.*

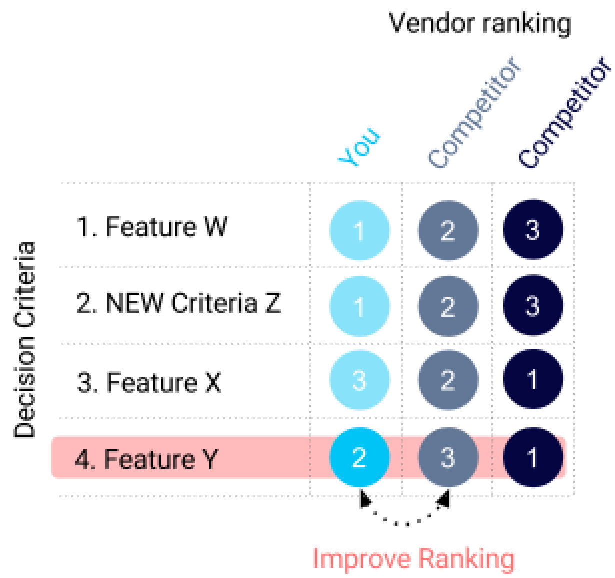


6.5.4 Improve ranking against known decision criteria

In this example, while price remains the #4 priority, it is the AE’s responsibility to move his solution from a #3 ranking to a #2 ranking.

How? This can be achieved by offering the customer deeper insights, statistics, demonstrations, use-cases, reference calls with other users, etc. The outcome of this process is that the customer has a better understanding of what the right solution looks like.

NOTE: *It is key to be persistent on this matter. Too often, an AE will think too lightly about his own solution, and think that the competitor’s is perfect. All too often, all vendors are in a similar boat, and the confidence and persistence of the AE becomes the key differentiator.*



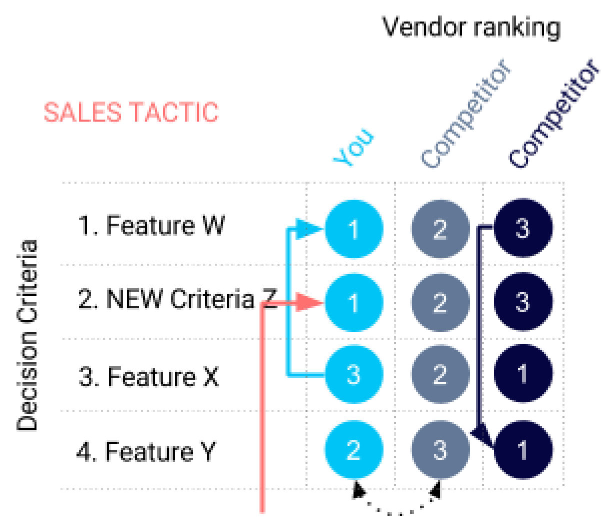
6.5.5 Sales tactics

For each account, the AE must identify and establish the following key elements to achieve success:

- Understand if there is (or else create) a **critical event timeline**
- Understand in detail the **decision criteria**
- Identify the **decision makers** - per the decision criteria
- Determine the **decision process**

Based on these elements, an accomplished AE can determine the appropriate sales tactic to use:

- Make performance the most important criteria
- Make FEATURE X the least important
- Add a new criteria that outperforms the competitor



- Try to win on every criteria *(this is primarily where most sales professionals focus on)*

PRO TIP Setting a sales tactic is not something that happens once. It is a fluid process that can change with each twist and turn a deal makes (and your competitor is often doing the same thing).

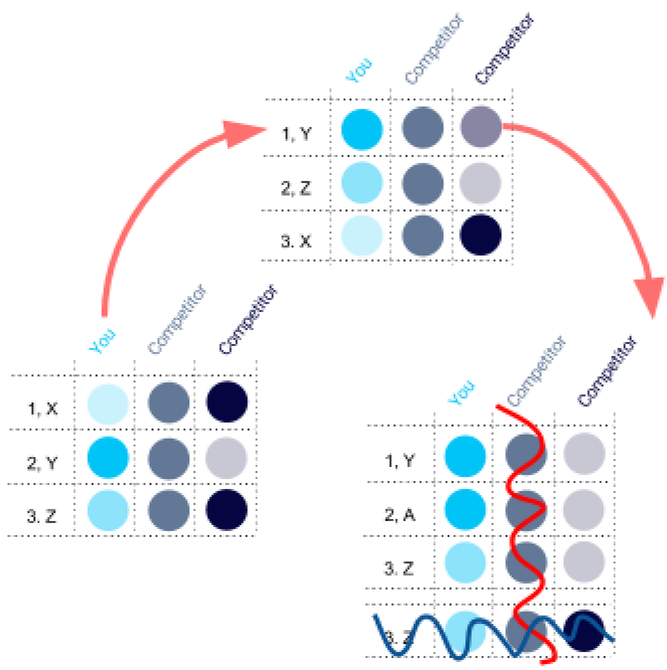
- DAN SMITH

6.5.6 Sales strategy

Strategy without tactics is the slowest route to victory.
Tactics without strategy is the noise before defeat

- Sun Tzu

The AE needs to keep close track over time how the decision matrix evolves.



In this example, we see the following three evolutions:

1. We start with a 3-criteria and 3-competitor matrix. We fill in the positioning.
2. Re-prioritize the decision criteria.
    a. Add a new criteria (A), as a result eliminate a competitor, AND
    b. eliminate Z as a key decision criteria
3. Take another look at the decision criteria matrix… who's on top now?

That is how a major deal is won!

EXERCISE Decision Criteria

Pick a real customer scenario, in which you are currently experiencing competition, and one in which you have reasonable insights.

CUSTOMER'S DECISION CRITERIA *in Priority Order*	YOUR COMPANY	COMPETITOR #1	COMPETITOR #2
Criteria 1:			
Criteria 2:			
Criteria 3:			

STEP 1 Add/increase priority of existing decision criteria that are in our favor:

Criteria: ....

Determine implied need: ....

Determine value of implied need: ....

STEP 2 Remove/decrease priority of existing decision criteria:

Criteria: ....

Determine implied need: ....

Determine value of implied need: ....

STEP 3 Add a new criteria: ....

What is the value to the customer: ....

Who is the specialist (e.g. the CFO): ....

How can you involve this person in the decision process? ....

....

Show the customer the trade-offs, and help them visualize their evaluation. Build it with them on a screen share. You become a trusted consultant to help them solve their business need, while simultaneously avoiding being a pushy salesperson.

6.6 Propose

6.6.1 Propose Pricing

Important note specific to EdTech:
Pricing is less often negotiated in EdTech than it is for other industries. This is due to something called the [Most Favored Nation (or Most Favored Customer) clause](). This as a contractual clause that guarantees the customer the best price that you give to any other customer.

This doesn't mean that pricing shouldn't be discussed, but it shouldn't be a major area of negotiation in EdTech as it might be in other industries where you may have had experience in the past.

6.6.2 Create a Quote (Teachers and Schools)

Every quote should be standardized. You cannot make your own quote. Below an outline on the minimum information that needs to be on your quote.

EXAMPLE

1 Every quote must have an expiration date.

2 Reference is needed for invoices later on.

3 Include terms. At a minimum payment terms and the conditions of sale (ownership).

QUOTATION OF SERVICES

Quote for:	Company Addressee Email	1	**Expiration Date:** **Phone number**
Quote References:	BCD051216	2	
Prepared by:	Name of Sales person Title/Region Email		**Date Submitted:** **Phone number**

Product Line	Description	Unit Price	Quantity	Sub-total
				Per year
XYZ-001	**Product XYZ descrioption. What is included and what is not included**	$ xxx	yy	$xxx * yy
XYZ-001	**Product XYZ descrioption. What is included and what is not included**	$ xxx	yy	$xxx * yy
XYZ-001	**Product XYZ descrioption. What is included and what is not included**	$ xxx	yy	$xxx * yy
Pro Services	**Service ABC description. What is included and what is not included**	$ xxx	yy	$xxx * yy

Note: Provide the conditions of price adjustment

Sub-total	$$$
Price Adjustment	$$$
Taxes	$$$
TOTAL UPFRONT YEAR 1	**$$$**
BUDGETTED FOR YEAR 2	**$$$**

3

Terms and conditions of sale:
Vis eu prima praesent principes, natum maluisset rationibus id ius. Ei sit viderer denique. Ex mea numquam placerat periculis, sit no adhuc illud. Has id sonet diceret adolescens, nibh detraxit aliquando ne sit, cilla mucius alienum id eum. Harum accusamus eu pro, graecis definiebas id usu. Cu principes scribentur nam. Elit idque maiestatis ad duo, quo adhuc movet cu.

6.6.4 Creating a Proposal (Large schools and districts)

A solid proposal makes ALL the difference. For smaller deals that may be a professional looking quote and for larger deals it will be a multi-page value proposal. The proposal helps outline the work you have done till date and represents the client's needs/challenges and your plan to help them with it.

Minimum Contents	Quote	Proposal	Value Proposal
Price	Yes	Yes	Yes
Terms	Yes	Yes	Yes
Expiration	Yes	Yes	Yes
Needs outlined		Yes	Yes
Competitor Overview		Yes	Yes
Next steps		Yes	Yes
Annex with meeting notes		Yes	Yes
Impact on the school/district		Sometimes	Yes
Impact per role/department			Yes
RoI Calculation			Yes

In the case of a proposal you open a google shared doc and start capturing each point they are bringing up. To give an idea (Minimal requirements):

- **Quote: ACV ~ $5,000** deal can have about 1-2 pages describing what, when and who is going to do what. Followed by a 1 page quote. We strongly recommend that you included a "competitor" comparison. In case your client is likely to take no action we would also recommend including "no action"

- **Proposal: ACV ~ $12,000** deal has become a 5-20 page proposal, clearly outlining the full program, including lots of examples (screenshots) of how you are looking to address their needs.

  EXAMPLE OUTLINE
    - Executive summary
        - Problem you are solving and how
        - Basic outline of the offer
        - Competitor matrix
        - Next steps
    - Solution to your problem - Overview of your solution (graphics and diagrams help)
    - Your product requirements - specific needs described and how you address them
    - Your service requirements
    - Your timeline - reverse chronological timeline that starts with client deliverable
    - Pricing - price, expiration date, terms, reference number, etc.
    - Why us? Ten reasons why you should partner with ___
    - Next steps - outline of the 3-4 next steps that need to be taken

  Annex: Meeting minutes, diagrams, slides, case studies etc.

- **Value Proposal (Start) ACV = $24,000+** deal has become a 20 page proposal, outlining how you are looking to address their needs of the school or small district. This is now turning into a value proposal and includes an RoI calculation for the CFO/board.

- **Value Proposal (Major) ACV = $60,000+** deal has become a 50 page proposal, outlining how you are looking to address their needs of each school in a large district. This is now turning into a value proposal and may include an ROI calculation for each school.

6.7 Close

You've earned their business.

After diagnosing the customer, helping them understand tradeoffs and showing them a solution that solves their pain on time and within budget it's time to seal the deal.

6.7.1 Objection handling - Price

Two major questions when confronted with *"We don't have budget for that"*

QUESTION 1 Ask, *"What are you directing your budget toward?"* or *"Can you explain what sources of funding you are currently utilizing?"* Asking your customer to elaborate to better understand the objection is essential to address that objection. You need to explain to your customer why your solution is worth more than the alternatives she is considering, and help them understand if they can apply a different budget to your solution that they may not have thought of.

QUESTION 2 *"Is budget the only remaining issue?"* Many times, customers "forget" to reveal to you that there are some major outstanding issues. They will tell you that the budget is the only remaining issue, only to later unveil payment terms, delivery, roll-out timing, or other key issues. This is handled with a powerful closing question: *"To confirm, you have no outstanding concerns on any other issues, correct?"*

You will then use a confirming summary close to insure that you have a full understanding of exactly where she stands and what you need to do to earn her business: *"So let me review: you indicated that you want to finalize your investment decision tomorrow, you are 110% convinced that we are the right solution for you and the only thing standing between us doing business is X, correct?"*

6.8 Incurring Delay

6.8.1 Follow up

The most common reason for losing a deal is extended delay. In order to assist a customer during the delay, you need to do three specific things:

- **DO NOT** harass them, this can often lead to the customer feeling guilty or getting annoyed, and either one is usually a huge turn-off for them.
- **DO** make sure your proposal, presentations, videos, and emails are all enabled with tracking. In case the customer reengages with your proposal – you will know when it happens and can take immediate action.
- **DO** make sure you continue to assist by providing valuable insights in a slow-drip campaign – with a focus on customer use-cases. You want to keep educating the customer with what others are doing, and the benefits they are getting.
- **DO** agree with the customer, for example:
    - Mike is the buyer he has asked Ellie for a proposal. Mike shares with Ellie that it will take about a week before the quarterly board meeting happens, where he will put forth the proposal, and then he will go out of country for another week, so it will be at least a month before he can get back to her. What do you do?

STEP 1 Confirm with Mike on the phone and/or in email what you are doing

{{First name}},

Please find attached a link to the proposal. As agreed, it is for 5 seats/2 months at $6,000.

Mike, if questions arise, I am available at 123-456-7890. If I don't hear back from you by {{date}}, I will reach out on {{date}}. In the meantime, I will send along some relevant info.

Have a great trip to London!

Best,
{{Your name}}

STEP 2 Make sure the email with your proposal has tracking enabled

STEP 3 Add Mike to your sales nurturing drip campaign

STEP 4 Remove Mike from the marketing nurture drip campaign

STEP 5 Set up the actions for what you are going to do, based on what Mike does

For example:

- If Mike opens the proposal, then you will...
- If Mike forwards the proposal, then you will...
- If Mike opens the use-cases, then you will...
- If Mike forwards the use-cases, then you will...

6.8.2 Keep educating (FOMO)

Set up a series of articles in a queue that goes out to customers that are in decision mode. Hand pick articles that match your customer's situation – the more customized the message, the stronger the bond it creates. It essentially creates the Fear Of Missing Out (FOMO).

Just as you nurture prospects, it is important to nurture people who have delayed their decision. The best way to do this is to categorize your personas and find articles that fit the biggest pain points they are looking to solve.

Hi Maureen,

Here's an article that made me think of you based on our past conversations about solving {Value Prop 1}; I think that Section 2 is especially interesting.

Maureen, would it be valuable to share how other districts we work with like yours are solving this?

Cheers,
Brandon

PRO TIP Focus on providing insights that are relevant - this includes 3rd party articles (like HBR), but also a sprinkle of relevant use cases. Always point out the specific part in the use case - don't just send the PDF.

- DAN SMITH

Customers make decisions emotionally first, then justify rationally. Part of what you are achieving with the FOMO approach is realizing that many people are motivated by avoiding mistakes instead of finding the absolute best solution.

- **DO NOT** "sell" them - focus on what's in it for them, and speaking about relevant 3rd party experiences.
- **DO** make sure your FOMO is centered around the individual customer - help them get promoted with the insights you are sending them
- **DO NOT** Only share content branded with your company logo
- **DO** point out the particular paragraph or insight you think is most relevant.

6.8.3 Set Triggers

A particular way to keep tabs on your lost customer is to set triggers. The point of triggers is that you stay in touch with them over the months to come. The types of triggers you set up depend per market. For example for a hyper growth start-up we would set the following triggers

Effective triggers

- Raised a new round of funding (charter school)
- New Executive or Board Member hired
- Revision of strategic plan

- Common Core released
- Hiring more teachers
- Key demographic changes

Trigger tools used

- Google Alerts - School/district name, Person name
- IFTTT - in case of alert do this (like add link to article to a Google Sheet)
- **LinkedIn** Saved Searches (Company hiring/job openings)
- **Twitter** generated Alert (i.e. TweetDeck)

6.9 Win

Congrats! You have helped your customer move to the next stage of finding a solution. They chose you to partner with, and now it's time to help transition them into becoming an onboarded customer.

6.9.1 Process the deal

When you receive a verbal commit, the deal isn't done. There could easily still be a competitor in the running. Thus it is of utmost importance that you take the following actions:

CHECKLIST

- [ ] Deal processing: Expedite any paperwork: set up immediate meetings with the purchasing team
- [ ] Deal confirmation letter: Sent out a deal confirmation letter
- [ ] Set up a debrief call: Secure the pros and cons of your solution
- [ ] Schedule the onboarding/training with a transfer call
- [ ] Executive involvement: get one of the execs to write a welcome note to the customer district office.
- [ ] ....
- [ ] ....
- [ ] ....
- [ ] ....

6.9.2 Confirm a win

Subject: Summary of the agreement
To: Denise, cc: Matt, Paul

Hi Denise -
This is a follow-up to our discussion regarding ______ project.
{{Your company name}} agrees to a price of $____/mo for an {{xx}} month contract.

- *Purchase order to be received on or before February 27.*
- *A 12 month agreement with a monthly commit of $_____*

Thank you for working with us. We are excited about the opportunity and greatly appreciate your business.

With kind regards,
Scott

6.9.3 Thank You and DeBrief

The moment a client has committed to you and your company they have a vested interest to provide a lot more insight into the situation. This requires that you schedule a 1-1 debrief - a great way to schedule this is through the Thank You Note.

STEP 1 Thank you note

Andy,

Thank you for choosing to go with [my company]. In an effort to help you <achieve goal> on set date I was hoping if we could briefly catch-up by phone later today? Is there a time convenient for you?

Best,
Nico

STEP 2 Call

- During the call,
    - Thank them for the business
    - You can ask "What the trade-off was between your service and the others"

- Inquire on the following:
    - What are the things you need to know to make this project a success
    - How to make this project a success
    - What help your customer needs from you to make this a success

6.9.4 Ask for a Referral

Every customer is a peer to your next prospect

The request for referral is the easiest way, and after you have earned it provides an incredible opportunity.

WHEN ANYTIME - Asking for a referral can be done ANYTIME during the process. However most people feel comfortable just after the close. Do not mistake that any positive interaction with a client is a GREAT moment for asking for a referral.

WHO ANYONE - Not just execs and your SPONSOR can be asked for a referral. Anyone.

WHAT TWO KINDS -

- Asking a referral for yourself (LinkedIn Recommendation)
- Asking for intro into another deal (Anyone else interested?)

HOW A FEW SIMPLE SENTENCES

Do you know of anyone else that can benefit from this solution?

If they provide you a referral … FIRST AND FOREMOST

THANK YOU!

They just provided a referral … that is extremely gracious of them! And Congratulations - because that is the ultimate compliment you can get as a sales professional!

Do you mind if I mention your name and that you encouraged me to reach out?

NEXT Thank you Note and SWAG!

- Send a handwritten postcard to thank them
- If you have access to company swag, send it to them to thank them

6.10 Loss: Start the ReWin

6.10.1 Debriefing the customer

When a customer informs you that their decision is “no’, what should you do?

- **STEP 1** Schedule a 5-minute debrief
- **STEP 2** Send a thank you note
- **STEP 3** Update your records processes – e.g., does the customer still wish to receive your product updates

When they inform you of the loss, be sure to reply expressing gratitude for getting back to you, and for the opportunity. Ask if you can have 5 minutes of their time to get their feedback. Customers are likely going to give you information that is not necessarily correct, and this can lead to you setting your company up for failure. For example, they can say the price was too high – and now you are dropping price across the entire business?

NO! Instead simply focus the entire call on; “What was the trade-off that you made?”

BEST PRACTICES

- **DO** focus on obtaining the key points where your competitor was strong and weak; try to identify why your strong points were not valued over the competitor’s weak points
- **DO NOT** battle the customer
- **DO NOT** state “oh but we do that too” even If they completely missed your value prop – it will not work at this time. Rather take the info back revise the offer and come back within an hour!
- **DO** take solid notes, and record the call
- **DO** prepare questions and listen carefully
- **DO** agree with the customer the next steps, even if there are none – but perhaps – check in 30 days from now. Most likely your competitor is going to mess up the onboarding, or the superintendent may resign, the competitor’s AE might botch the deal, etc. You never know!
- **DO** find out the length of the contract they are signing – so you can set a reminder to approach them again a few months before it’s time to renew

6.10.2 Confirming a loss

You’ve made it this far in the playbook, so you know how valuable your personal brand is. You’ve invested a ton of time in helping to educate the customer, guiding them through the process and leveraging best practices. Then the worst happens - they say no.

Stay in it for the long haul. You never know if the other solution they went with was over-sold.

The best way to stand out: write a handwritten card. This will make you stand head and shoulders above the competition. The objective of the loss note is to leave a very memorable professional impression.

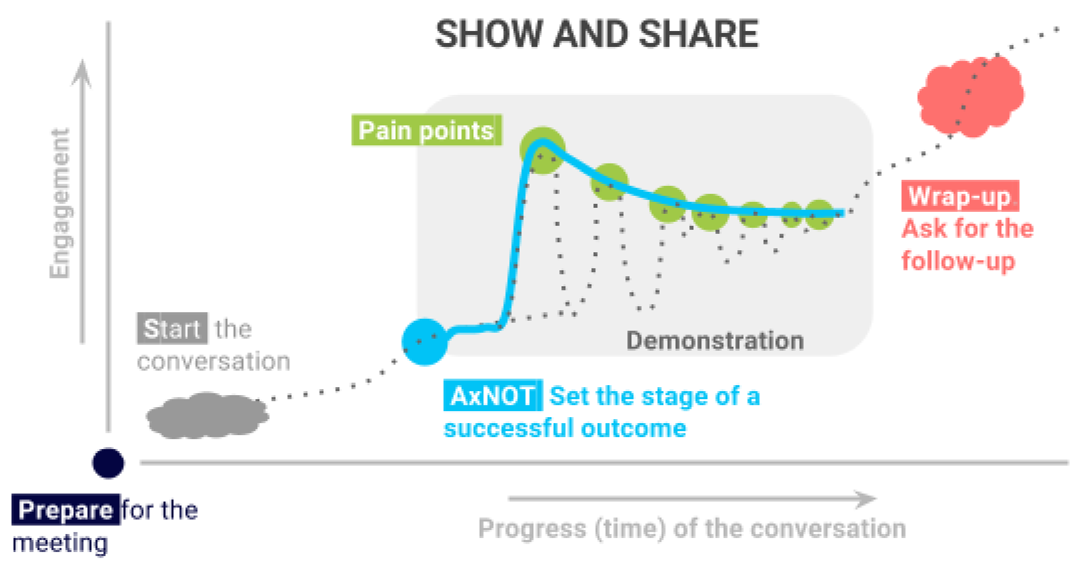
Ryan,

Thank you for spending time with me over the past few weeks. I thoroughly enjoyed the interaction with you. Although I am naturally disappointed that we won't be working together, I do look forward to staying in touch. I will occasionally check back in to make sure you are doing well. Either way, here is my phone number: ________ and email address in case anything comes up.

Best,
Michelle

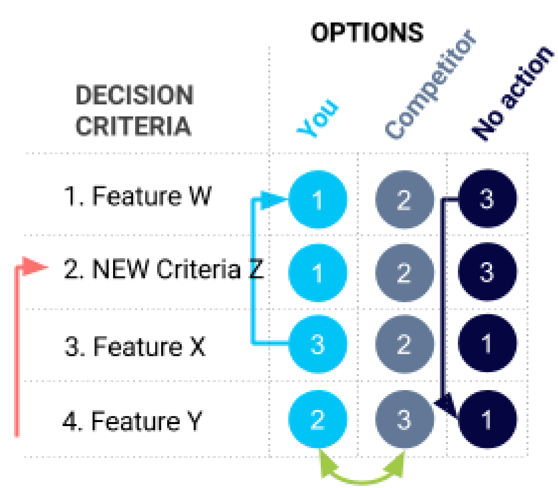
Summary Chapter VI

	OUTLINE OF A DISCOVERY CALL	PREPARE
AxNOT Opening	• **A ppreciate** you taking the time • **X -time**, are we still good till ... • **N aturally**, you have q's for me • **O bviously**, I have q's for you • **T ypically**, we agree to...	*Determine what you want the outcome of the meeting to be!*
Agenda	• Confirm the agenda you sent in calendar invite • Ask customer for their goals • Make sure you involve everyone • Summarize goals, ask "is there anything else?" • Set priorities to hit end time	*Research everyone on the meeting (2-3 mins/person)*
SP3V Diagnose	• Ask to **S ituational** questions • Identify **P ain** • Summarize S S P • **Ask** "Did I get that right?" • **Empathize** "I hear this a lot" • **Mention** a 3 rd party • What is the **V alue** of a solution?	*Prepare a list of questions, and structure them into* SP3V *including reference case-studies*
Prescribe	Make a recommendation following what "others in the same situation" have done. Be specific what happened. • **Why** – Sharing your market insights • **How** – the approach, how would it look & feel? • **What** – What we are specifics we do • **Proof** – Benefits customers have experienced	*Know use-case stories relevant to the customer*
CIDP Qualify	• C ritical Event "what happens if … miss" • I mpact on the org ($$$, cost, UX/UI) • D ecision Process • P riority of the project against others	*Prepare a list of critical events that may apply.*



SHOW & SHARE	OUTLINE OF A DEMONSTRATION	PREPARE
Demonstration	• Set the stage with what you will demo • Address each pain point one at a time PER PAIN POINT • Orient them / Describe the screen • Demo / Share use-cases • Ask "Can you see … using the service" • Ask "What impact … would it have" • LISTEN and follow the conversation **SUMMARIZE** if the points were addressed/anything else.	*Have a script to address their pain points* *Set up your tabs in a browser*
Wrap-Up	**AxNOT** You earned the right to ask for the business **First** "Did we address your questions in full?" **Then** "At the beginning of the call we said… " **Ask** "May I ask are you ready to… {{move forward}} "	*What to ask for!*

SELECTION	OUTLINE OF DECISION CRITERIA
Assist Selection	**Step 1** Determine Decision Criteria **Step 2** Prioritize **Step 3** Determine options **Step 4** Determine our position
Assist Buying	**Reprioritize** (**up**/**down**) **Insert new criteria** **Improve ranking** (involve a new DM)



6.10 Customer Success: After the deal closes

As explained in the methodology, being successful in sales requires you to excel all the time throughout the sales process.

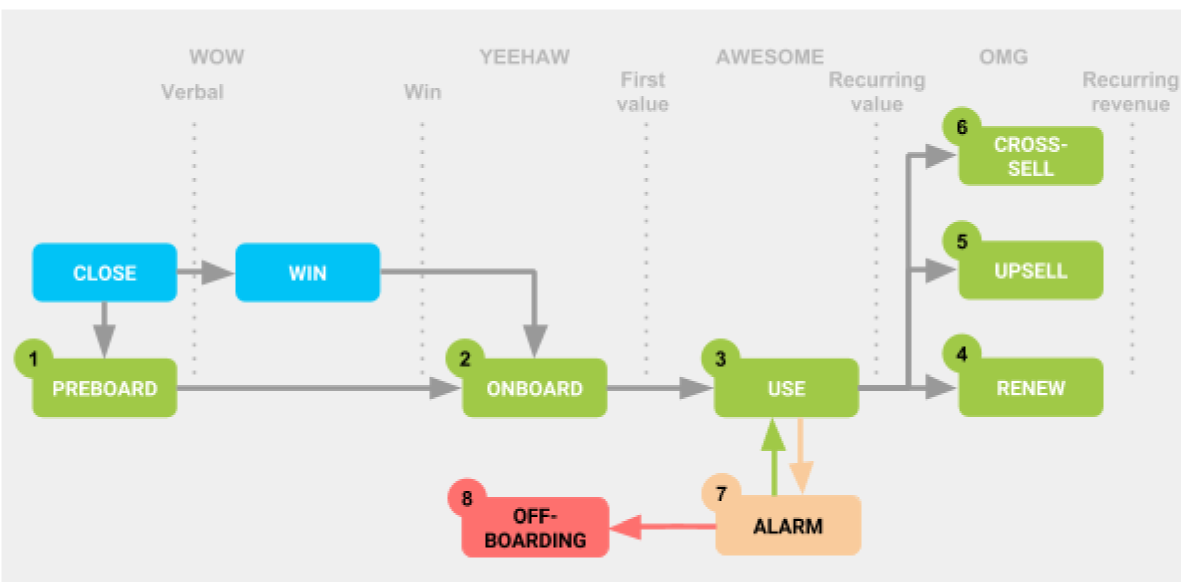
- **O'Shit** - I have a problem
- **Aha** - There is a solution
- **Wow** - They really helped me get the right solution for me

But then, the most important part starts: making your customer successful:

- **Yeehaw** - Delivered as promised, on-time and within budget
- **Awesome** - It helps me day-in and day-out
- **OMG** - Why did I not get this sooner!

Your job is NOT actually done after the deal closes. It is incredibly important to provide ongoing support, beyond the initial sale, so that the implementation takes root, becomes 'sticky', and increases the likelihood of renewal, upsell and cross-sell. And this is especially important in ed tech, where schools and districts generally don't have Program Managers who are responsible for the success of new initiatives. Therefore, it is on the shoulders of the providers (your company, and you!) to build support into the deal after it's been won, and to ensure their ongoing future success.

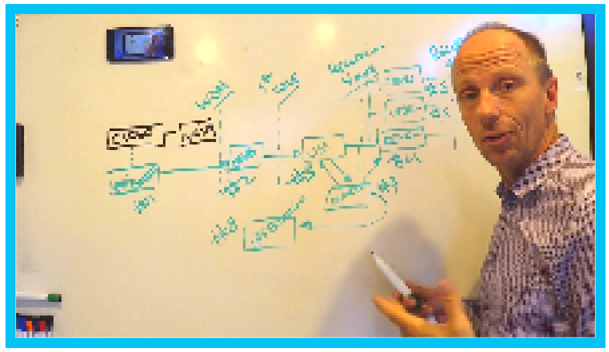
Eight Customer Success Processes



PROCESS	WHO	ACTIVITY	DELIVERABLE
1 Pre-boarding	**CSM/SE**	*Discusses practical examples/use-cases with the prospective school/district.*	High level roll-out plan and system integration plan (SIS, etc.)
2 Onboarding	**CSM/SE**	*Sets up kick-off call, establishes communication plan, orchestrates the next steps.*	Client able to obtain first value
3 Use	**CSM/AM**	*Creates campaigns to grow use within accounts. Shares best practices, events, etc.*	Client able to obtain recurring value
4 Renew	**CSM/AM**	*Executes renewal agreement before it is due.*	PO for same services from the same decision maker
5 Upsell	**AM**	***Identifies** new opportunities and executes on it.*	PO for new services from the same decision maker
6 Cross Sell	**AM**	***Develops** new opportunities*	PO for new services from different decision makers
7 Alarm	**CSM**	*With extreme time sensitivity executes a correction plan for the account, involves execs.*	Alarm is recovered OR mutually agreed to part ways
8 Offboarding	**CSM**	*Executes an exit plan, including data retrieval, NDA termination, logo removal, etc.*	Exit plan

PROCESS	Teacher	School	District
1 Pre-boarding	N/A	Maybe	SE Assisted
2 Onboarding	Self Service	Assisted	SE Assisted
3 Use	User Generated	Email Campaign	CSM / Webinars
4 Renew	Automatic	CSM	AM
5 Upsell	Email Campaign	CSM	AM
6 Cross Sell	Social Media	CSM	AM
7 Alarm	CSM	CSM	CSM
8 Offboarding	Self Service/CSM	CSM	CSM

Below is a video that explains the key elements of the process after the deal closes. A separate playbook on Customer Success will dive into these elements in detail, but this should help to get you started.

JACCO's ADVICE	WHAT HAPPENS AFTER THE DEAL CLOSES?
In this short video Jacco talks about the different processes and how it will impact your businesses.	 Link: https://vimeo.com/184945728

CHAPTER VII. SALES LEADERSHIP

VII. SALES LEADERSHIP

You can probably tell by now that there is a method to our madness. We use process, tools and timing to our advantage to help salespeople be effective. As a sales leader, you should also be applying a set of processes, tools and timing to building and growing your sales team, sales strategy and go-to-market plan.

So here we offer you the blueprint, drawn from years spent with sales leaders helping them design and scale their sales teams for growth, for how to build your own customer-centric team. We created four videos for explaining these concepts, which are summarized below. Be sure to watch the videos (links below) to get deeper into the material.

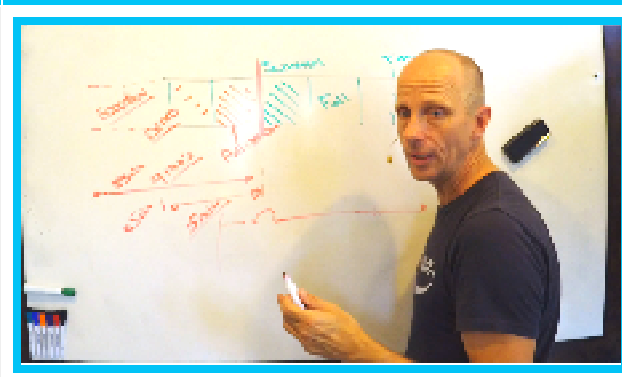
7.1 Funnel Management

The basics of the funnel are pretty straightforward - but the difficult part of managing a funnel is making the right decisions when your metrics start to change and fluctuate as the business progresses.

First, let's take a look at which metrics you should be actively monitoring. You have your key inbound metrics of MQL, SQL and wins. Similarly, you have your key outbound metrics of SQLs/week or SQLs/month, number of activities (e.g., emails or calls), win ratio, ACV and sales cycle. As you watch the video below, you will learn about some typical ranges for each of these metrics (e.g., a common range of win ratio is around 30-35%), and how to think about them as you start to see changes in your metrics. For instance, you should know how to evaluate when your volume of SQLs starts to decrease, or if your win ratio starts to change over time.

You also need to consider this in the unique sales cycle of the EdTech space, which revolves around the school calendar. As you start to determine how long your average sales cycles are, you can map out where to focus your efforts given that key there are three key buying periods throughout the year (July-August is the primary buying period, as well as October-November and April-May). See Chapter 2, section 2.1.5 for more detail.

As you think about your funnel, you also need to be thinking about the sources from which leads come into the funnel. For an overview of each of those sources for inbound and outbound, refer to the first section of [Chapter 5 on Prospecting](#).

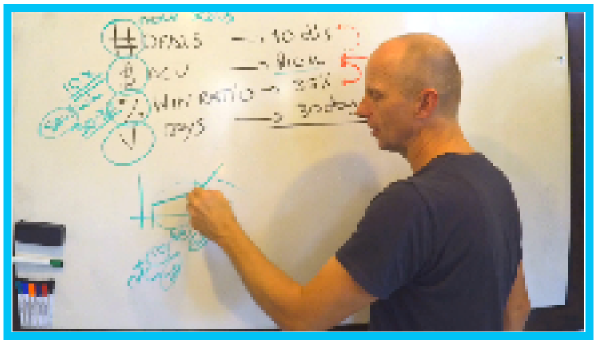
KEY POINTS	VIDEO
Key inbound metrics: • MQL • SQL • Wins Key outbound metrics: • SQLs/week • Number of activities • Win ratio • ACV • Sales cycle	 Link: https://vimeo.com/186036798

7.2 Funnel Metrics

Here we look at each of your core metrics and discuss how you can optimize each one. The four core metrics are:

- # of deals
- Annual Contract Value (ACV)
- % win ratio (conversion from SQL to win)
- Velocity (# of days in sales cycle)

As an example, let's take the metric of **number of deals**. If you want to optimize the number of deals, then you will need to determine how to drive more SQLs into your sales team. To do this, you can either choose to invest in more marketing (to generate more inbound leads), or invest in more SDRs (to conduct more outbound activities). Based on the needs and timing of your business, you will have to determine which one makes the most sense - for instance, the ramp time for a new SDR can often be 2-3 months (before he starts bringing you new leads), while the results from setting up marketing automation and a marketing manager to run a marketing campaign can take anywhere from 3-9 months. And of course, each decision requires a different type of management and investment.

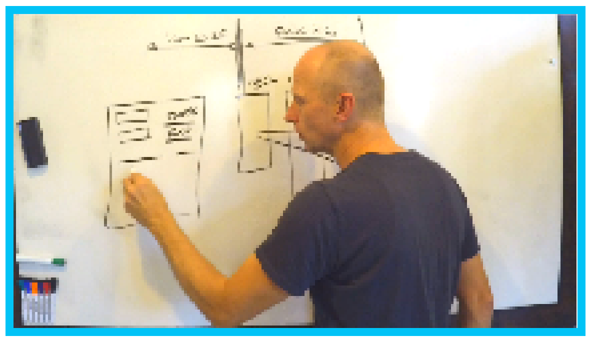
KEY POINTS	VIDEO
Always think about how to optimize your core funnel metrics: • # of deals • Annual Contract Value (ACV) • % win ratio • Velocity (# of days in sales cycle)	 Link: https://vimeo.com/186037951

7.3 Pricing Your Service in the EdTech Space

Pricing is tough, and it's going to evolve over time. You will have to experiment a bit with pricing as you go - your market will mature, it may start to become more competitive, and your product will mature along the way and drive even more value for your customers. But you need to start somewhere.

Once you get past your first 10-20 deals, a good rule of thumb is to price at 1/10th of the amount of money that you save your customer. For instance, if using your product will save your customer about $25,000 a year, then pricing at $2,500/yr for your product or service would be a fair price.

Also keep in mind that you should not be discounting, especially in EdTech. As we mentioned earlier in Chapter 6 (section 6.6.1), you must abide by the "Most Favored Nation" clause when you are selling in this industry - you cannot offer a better deal to one school over another. Work with your sales manager to determine what is appropriate for each deal - for instance, it may be appropriate to structure your deal with an MDF (market development fund) credit to their account. Learn more about this in the video below.

KEY POINTS	VIDEO
• Start high, and over time lower the price if you need • First ~10 deals: do whatever it takes to make it work. Experiment and find out. • Next deals 10-20: Price at 1/10th the amount that value you create for the customer	 Link: https://vimeo.com/186036160

7.4 Sales Compensation

In the beginning, there was you. You (as the founder/sales leader) are probably handling all of the sales calls, and you're burning at both ends. When you decide that you need to start building the sales team, you should do this in a steady progression, adding new team members as the business grows, and starting to make each role more specialized as your team becomes more sophisticated.

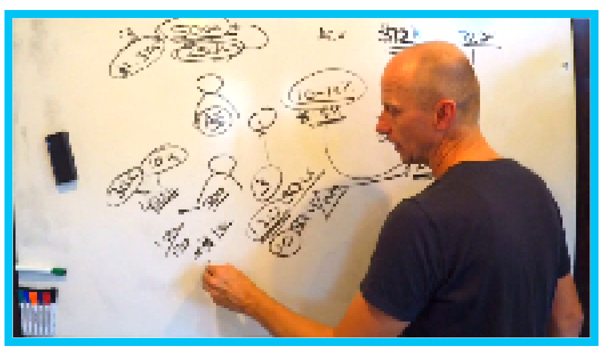
Your first 6-12 months should include the following progressions:

- You handle all sales
- Hire your first SDR to handle outbound and inbound lead qualification, and he passes you the leads to close them as wins
- Next, promote the SDR after 2-3 months to an AE role, and backfill the SDR role. As a new AE, he will handle all standard deals, while the bigger, strategic deals you will continue to handle yourself.

You will scale this and continue to create "pods" of SDRs and AEs that each work territories together. Refer to the video in Chapter 1, entitled ["How to Set Up a Pod Saas Sales Structure"]

Now for compensation - some general rules:

- Your ACV will determine the ranges that you use for compensation
- You should be compensating your AE team at no more than 50=55% of the revenue that they bring in; generally their OTE (On Target Earnings, or total compensation) should be around $100K
- Compensate SDRs with a split between base and commission, with the commission calculated based on the number of SQLs that they bring in. Generally their OTE should be $40-60K
- As your sales funnel becomes more concrete and predictable, you may want to change the balance by increasing the amount of variable pay and decreasing the amount of base

KEY POINTS	VIDEO
• Start with one SDR who can feed you leads • Bring in SDRs who have some market knowledge, or prove that they can quickly learn it	 Link: https://vimeo.com/186036003

ANNEX. ADDITIONAL INFORMATION

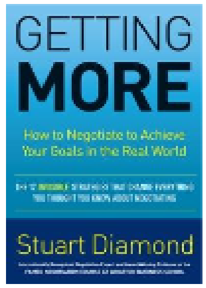
Annex A: Day in the Life of ADR/SDR - Ned & Nicole

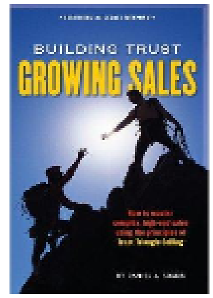
TIME	ACTIVITY	DESCRIPTION
5:30am	Wake Up O'clock	Whether you snooze nine times, or set four different alarms, days start earlier for sales professionals with customers across timezones. Some get inspired by 8 things to do before 8am. Did you know that many SDRs start their day as early as 6am?
7:00am	Commute to Work	Taking the bus provides a few hours a week to read, listen to podcasts or scan social media for the latest news that could be interesting to your team or customers. 8:00am – Arrive at the Office
7:30am	Important/Urgent	When Ned from GuideSpark arrives at the office he starts off first by checking email, scanning for priority messages, then grabbing a coffee and granola bar from the kitchen. Over coffee, he checks social outlets and uses Buffer to share great articles and insight throughout the day on Twitter and LinkedIn. If it will take him less than two minutes to respond to an email, he gets it done right away. Then he prioritizes questions that need a researched answer to handle later. ⇛ Pitfall to avoid: Don't spend too much time on email or social media. Some things can wait.
8:15am	Standup Meeting with the Team	Ned is partnered with an AE in New York. They collaborate as a team and establish 1-3 key priorities. After agreeing what can wait, they share what worked or what didn't yesterday, and focus on something they're going to improve today.
8:30am	Research and Respond	Ned is not "spraying and praying". Through research, he finds the most relevant insights based on personas, and based on what he has found resonated with similar people in the past. He checks his LinkedIn profile views for any customers that may have visited his profile. He does some quick research to find uncommon commonalities or interesting aspects of their profile, responds to comments on his posts, and sends thank you's or personalized LinkedIn requests.
9:00am	Prioritize Your Top Customers	The coffee Ned had earlier has now kicked in, it's time to get on the phone. He uses this time block to call based on tasks scheduled in Salesforce. **PRO TIP** Avoid getting distracted by constantly checking your email during this time slot – this can be a big time sink.
9:45am	Take a break	To maximize productivity, Ned divides up his day with scheduled breaks. Get to know your coworkers if they are also taking a break, take a walk, or perfect your coffee making skills.

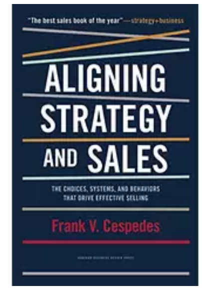
10:00am	Go Hard	In the next 75 mins, Ned gets after it. He remembers he is NOT selling. He is helping educate customers to solve their problems. He's their "doctor" that did the research for them. **PRO TIP** Do not prescribe your solution before a diagnosis. ● Emails: Half as long, twice as powerful; provide value. ● Phone calls: Personable and to the point, provoke thought. ● Social media: Help through providing customized/relevant insights
11:15am	Follow-up Calls with Emails	Ned won't let it linger. He shares insights, includes a valuable article in all of his emails to be truly helpful to customers. He then schedules follow up emails using an email scheduling tool to send them the next day in his defined sequence.
11:45am	Break for Lunch	Nicole and Ned grab lunch. Now it's time to do something fun with the team or get a quick workout or run 3.5 miles. On the way back, eat that burrito you earned. ⇛ Pitfall to avoid: Do not eat at your desk!
12:45pm	Check-in with your manager	Nicole doesn't do this every day, but doing this every now and then makes a huge difference. She sees if there are any pressing issues that need to be dealt with and if so, she asks how she can help. She then does more research about her customers to be strategic with her time to focus on the right people.
1:30pm	Check on your Social Channels and Emails	Nicole scans her LinkedIn and email. Same as Ned, she deals with urgent issues right away, deletes spam and marks what needs to be done later based on research. She then pops a Diet Coke (or Diet Dr. Pepper…. or Red Bull) in preparation of the 2pm AWESOMENESS she is about to deliver. Practices her pitch, objection management and it's game time.
2:00pm	AWESOME Hours	The next batch of qualification calls is happening, she is fueled, ready and excited. Each call is based on research. She has the customer's LinkedIn profile up, knows which value props will potentially resonate based on their persona, and she is handling common objections like a boss in a customer centric way. **PRO TIP** Have real conversations. Keep going, don't look back… you are in the zone.
3:45pm	Take a Break	The weather is gorgeous. Celebrate a success with your coworkers.
4:00pm	Wrap-up/Prepare	Nicole recognizes knowledge is power – and research is the name of the game. Nicole schedules targeted emails in small batches, targeting similar customers using tools as a force multiplier to scale her thoughtful outreach. Nicole only focuses on prospects she identified that could benefit from her solution. She schedules them using her email scheduling tool to go out tomorrow morning about 30 minutes before she

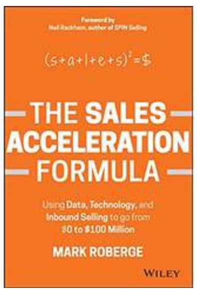
		arrives at work, so she can prioritized her outreach based on who opened/clicked and seems most interested. ⇛ Pitfall to Avoid: Do not write emails to "check-in" if they got your last email – or worse a "mass personalized check-in" email.
5:00pm	Another Day, Another Happy Customer	Exercise, have a social life. Read books and become an expert in your industry and in sales. Attend events to share best practices and make connections. Wait … the day is NOT done yet… as an SDR there is another important window…
8:30pm	Executive Communication Window	While on the couch binging through your favorite Netflix series, keep that phone handy. If you have earned it, several of the executives you are working with, are now getting into their email window. They now are responding to your emails! You don't want to let it wait until next morning as you will now just be one of hundreds the y .
Unique	Special Considerations	**Friday afternoon** No follow-up emails, any action can be "delay-sent" over the weekend. Unless it is urgent, you're better off waiting until the Sunday night window. Friday afternoon phone calls for executives is quite effective as the rest of the office heads into happy hour **Monday** Skip all social activities on Monday afternoon, check-in calls etc. Just don't bother. Monday is 100% business day, to GSD. **Sunday evening** Great email productivity window on Sunday eve to get through to executives. You may want to do some prep work for the week. One hour should do it.

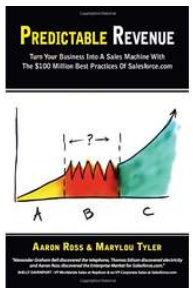
Annex B - Recommended Books

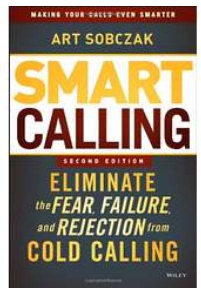


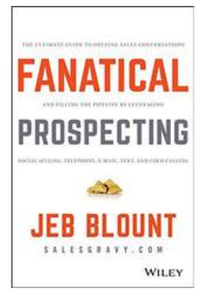


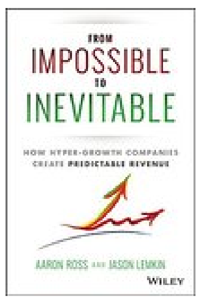


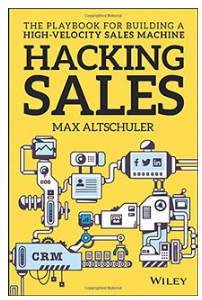


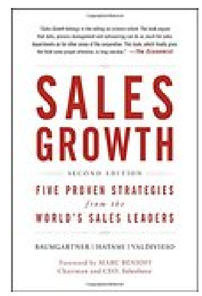


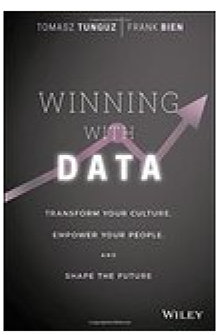


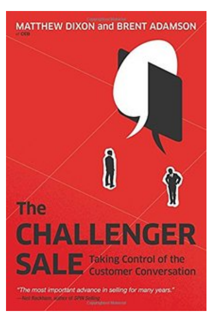


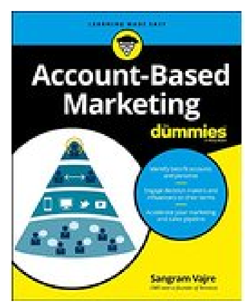


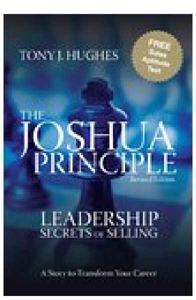


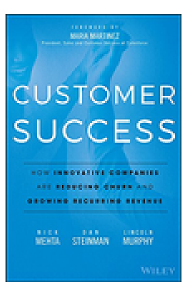


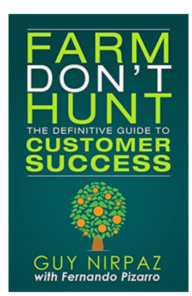


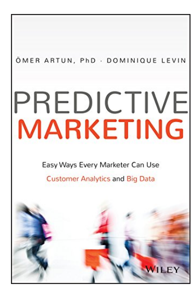












Annex C - Glossary

Customer Centric Selling

O'SHIT The moment when a client realizes they have a problem that needs to be fixed. This stage is also called "Awareness"

AHA The moment when a client realizes there is a solution to their problem. This stage is also called "Education".

WOW The experience when a client is impressed by the expertise of your sales team in helping them with the selection/trade-off process of finding the right solution for them. This stage is also called "Selection"

YEEHAW The feeling a customer experiences when they get to first value typically within 30 days of becoming customers. This stage is also called "Onboarding".

AWESOME/YAY The feeling a customer experiences when they get recurring value, achieving their desired outcome. This stage is also called "Usage"

OMG The experience a customer has when the overall selection/deployment experience was so great that they want to share it with others creating word of mouth. This stage is also called Cross-sell / Upsell.

Orchestration There are two orchestration points:

- Sales Orchestration point (also known as the value creation point): This point occurs in the overlap between O'SHIT and AHA. If this moment is facilitated by a sales professional, it allows them to orchestrate the entire sales process. Those who help a client at this stage are most likely to win the deal.
- Customer Success Orchestration point: This happens right after the client signs and is willing to confide everything in you to achieve success. This is your moment to set the stage for the renewal/upsell and cross sell.

Size of Business (in order of size)

Freemium Individual non-paying user often addressed through self service

User Individual paying user often addressed through self service

Pro-User Paying user that buys a premium package often addressed through web sales

VSB Very Small Business (often <20 employees), often called on by AE1s

SMB Small Business (10-250 employees), often called on by AE1s

MidMarket Businesses with 100-1000 employees, often called on by AE2s

Enterprise Businesses with 1000+ employees, often called on by AE3s/FAEs

F100/F500 Fortune 100/500 accounts, often called on by a dedicated Account Executive

Lead Definitions (In order of development)

Suspect	A name, phone number, email address of a person.
Prospect	A name, phone number, email address of a person who matches our customer profile
MQL	Marketing Qualified Lead: A prospect who meets the minimum requirements of being a potential customer. They have typically taken a non-personal action, such as provided their email to download a white paper, clicked around on the web pages (pricing, product etc.), or clicked on “contact us”. The most common form is “Requested Demo”. An MQL needs to be reviewed by a real person (usually the MDR) to determine if it falls within the set criteria.
Target	Target is pre-qualified based on research. Often these are premium contacts from the database. However, a Target still must confirm they are willing to have a meeting to qualify as an SQL.
SQL	Sales Qualified Lead. A real “lead” verified by an SDR that match our profile and who is willing to talk to a sales expert. This can be for a qualification or discovery call.
SAL	Sales Accepted Lead. Following the diagnose call, the AE/AM/SM confirms the lead by converting it to an SAL. This means that the SDR/BDR can be paid.
LeadGen	Process of generating MQLs. Stands for Lead Generation and is typically part of the marketing team.
LeadDev	Process of converting MQLs or referrals into SQLs

Titles, Roles and Responsibilities

ADR	Account Development Rep: Often used to describe an SDR who prospects into existing customers to drive cross-sells and upsells. Entirely focused on supporting the AM with existing customers. ADRs help with Renewals, Upsell and Cross Sell, the same way that SDRs work on Acquisition sales.
AE	Account Executive: Typically a sales rep responsible for closing business. Commonly operates in an inside sales role. There are three kinds of seniority: ● AE1: Calls on VSB/SMB ● AE2: Calls on MidMarket ● AE3: Calls on Enterprise The next level is: ● FAE: A role dedicated to 1-2 accounts (think FAE on AT&T)
AM	Account Manager: A person working on post-sales, responsible for revenue generation from existing accounts. Most common: Renewals, Upsell and Cross Sell

BDR Business Development Rep: Often used to describe an SDR. But this should be a person with SDR-like responsibilities, though entirely focused on developing leads with partners such as Salesforce.

CXO Someone in the "C-suite" or Chief [something] Officer - such as Chief Customer Officer, Chief Executive Officer, or Chief Financial Officer

CRO Chief Revenue Officer: Oversees Acquisition and Renewal sales

CSM Customer Success Manager: This role is varied and often used to describe a series of very different roles that should be split into 4 different roles - in order of development:

- ONB - Onboarder, focused on achieving first value
- CSM - Customer Success Manager, focused on achieving recurring value
- AM - Account Manager, focused on capturing renewals, up/cross sell
- EVANGELIST - Responsible for community and advocacy

CFO Chief Financial Officer

FAE Field Account Executive: The most senior form of AE. Differs from an AE in that the role is located in the field, and they are expected to be self-motivated and able to work relatively unassisted.

MDR Market Development Rep: The most junior role of the SDR. Differs in that they only respond to "inbound" and therefore do not have to diagnose, prescribe or handle objections.

PM Project Manager: A person on the buyer's side responsible for deploying the purchased solution smoothly and on time.

SDR Sales Development Representative: The most common name describing a person responsible for developing leads. The SDR role has 5 levels of seniority:

- MDR: Market Development Rep - only performs inbounds LeadDev
- SDR1: Performs Outbound 1-1/Event based LeadGen
- SDR2: Performs Outbound 1-Few/1-Many for LeadGen
- SDR3: Social Seller that generates and uses content for LeadGen
- ADR and BDR:
  - ADR: Develops upsell/cross sell opportunities in a key account
  - BDR: Develops SQLs in volume through a partner

SE Sales Engineer: Similar role as a CSM except with in-depth technical expertise, often used as an onboarding specialist on services that require deep integration, security protocols or desktop integration.

VPM VP of Marketing: Responsible for Lead Generation and Lead Development (also branding, advertising, and search, but this is outside of our context).

VPS VP of Sales: Often oversees Acquisition Sales. If they also oversee Renewal sales, their title often is CRO.

SaaS Business Terms

ABM	Account Based Marketing: Calling on accounts versus individuals
ACV	Annual Contract Value, 12 months of MRR + Installation/Services
ACRC	Costs associated with renewals only
APAC	Asia Pacific
ARR	Annual Recurring Revenue: Similar to ACV, but ARR only covers the recurring revenue of the deal (i.e. not Set Up Fee or 1-time service charges). This is calculated by MRR x 12
B2B	Business to Business, such as selling software to a company (e.g., Salesforce)
B2C	Business to Consumer, such as selling to an individual consumer (e.g., a dad)
CAC	Client Acquisition Cost: Cost of acquiring a customer. Often estimated by adding the previous month of marketing and sales costs divided by the number of clients won.
CR	Conversion Ratio: Can be applied to lots of metrics - specifically, sales funnel metrics.
CRC	Client Retention Cost: Cost associated with keeping the customer. This is the total cost of the CS organization, including headcount of ONBs and CSMs. In many cases, it does not include AMs and/or EVANGELISTs.
CRM	Customer Relationship Management: Often refers to the software that you use for managing your customer information (e.g., Salesforce).
Cross Sell	This is an opportunity to sell within an existing customer account to a different team that holds a different budget. This is bringing a new deal, but not a “new logo” or “new business”
LTV	Lifetime Value of a Customer is an estimate of the average revenue that a customer will generate before they churn. In SaaS sales, this is often calculated by ACV for year one + 2 x ARR to cover approximately 3 years of revenue.
MAS	Marketing Automation System: Tool used for LeadGen and LeadDev (nurturing) often used by MDRs and marketing teams. Common examples are Marketo, Eloqua, Pardot and Hubspot.
MRR	Monthly Recurring Revenue: The sum of the monthly fee paid by each of the subscribers in your customer base.
RoI	Return on Investment. Expresses profitability, or the efficiency of an investment.If you generate more revenue than your costs, you have a positive RoI. Most SaaS services must offer a client a 10x RoI (e.g., for every $1 they spend on your service, your service must directly contribute $10 to their top line, or save on the bottom line).

SaaS	Software as a Service - If you have to look it up … this book is not for you.
Upsell	Upsell is a deal that adds more value to an existing customer contract. This is by adding more licenses, increasing the price year over year. This is a distinct sales process from Cross Sell (different team or budget).