VISUALIZE™

Mastering the CxO Discussion

Agenda

This CxO course is one to two days in length (one day assumes the ValueSelling two day course has been completed within the last six months). The workshop will include a session with a 30 year CIO veteran and the teams will be given pre-work to prepare. The pre-work will consist of researching the mock company website and LinkedIn profile. Teams will be told they are meeting with the CIO through a referral and it is up to them to prepare using the tools and techniques they leverage in their day to day activities. When they arrive to the session they will be provided an overview of the one to two day agenda. Immediately following, a sales team will be called at random to conduct the call with the CIO. They will be provided 20 minutes to conduct the call. There will be no additional conversations or preparation. This exercise will allow participants to see how well they have prepared and how well the call is executed. Feedback will be provided, and guidance given immediately after the call. After the CIO exercise is complete, a content review and re-introduction of key elements will take place. Over the course of the workshop the teams will elevate their process, reconnect to leveraging the key elements from ValueSelling in both prep and execution, and see how they have improved.

Content will be focused on two key titles, which the client will select in advance of workshop. The team will build content during the workshop around these two personas. (Choices are CFO, CTO, CIO, COO, CEO)

Agenda framework:

- Tailoring will be based on time and client's current leverage of key artifacts from ValueSelling
- A mock "Administrative Assistant" pulls a team # and this random team is escorted to the CIO in the front of the room, introduced and the sales call is executed "fishbowl" style – 20 minutes
- Initial feedback on first sales call – 10 minutes
- Meet your CIO and CIO's perspectives – 30 minutes
- ValueSelling review – 60 minutes
- Business Issue – C-level top priorities; helping teams understand what they are, and how to research them for the titles they are calling on – 30 minutes
- Conducting research – 30 minutes
    - Workshop pre-work will be to research the company and the personas for the teams to prepared to execute the CIO sales call – this will cover how and what the teams could/should do to prepare with the information that was provided
        - Discuss the company, the individual CxOs, competition, financials, biographies, mission statement, etc.
    - Resulting overview is to determine the CxO's likely Business Issues and what existing real-life credibility introduction with an existing client would likely resonate with the CIO
    - Sharing of best practices on how research can be done and validation of content defined

- Credibility Introductions (CI) – 30 minutes
    - Topic – “We only get one chance to make a strong first impression.”
    - Review we have only one minute to 90 seconds of initial contact with CxO to achieve substantial credibility.
    - We will review the earlier research on the mock company and validation in class of the Business Issue(s).
    - Teams create their “CI story” referencing how they helped a similar level executive’s Business Issue by addressing key problems and the impact they were able to create for one of their clients. This will be refined to be delivered in 90 seconds to create an emotionally compelling CI.
- CIO call preparation – 15 minutes
    - Leveraging the CI created in prior module and the insights uncovered on the likely Business Issues for the CIO, the teams are given 15 minutes to prepare for the CIO sales call
- Skills Practice #2 – 30 minutes
    - “Bingo” selection for next random team to execute call on in room CIO.
    - Fishbowl call in front of room – all teams provided a checklist to follow along
    - Both CIO and team will debrief the room
    - Teams called at random to facilitate feedback based on check list, ensuring active engagement of all teams who are not conducting the practice exercise in the front of the room
    - Differentiation through problem isolation and concurrence with the CIO is missing approximately 90% of the time which is the primary debrief focus setting up the next topic
- Differentiation – 60 minutes/table teams
    - Teams define the top 5 unique capabilities relevant to the CIO to address his Business Issue
    - Teams then define related problems and value examples
    - These elements, problems, solutions, and values are turned into probing questions to be leveraged in the next sales call
- Skills Practice #3 – 40 minutes
    - Execute 20 minute fishbowl sales call on leveraging the differentiation process built in the prior exercise from the ValuePrompter just created, random selection of team
    - Debrief as room – facilitated by random team to lead via the checklist
- Differentiation pre-selected second persona (CTO, CFO, etc.) – 45 minutes
    - Team will build out second CxO pre-call ValuePrompter
    - Leverage content created in previous differentiation exercise where possible
    - Tune problems and Value probes to match newly worded problems
- Skills Practice #4 – 60 minutes - table teams
    - Rest of teams execute same sales call concurrently using participants as CIO
    - Debrief as room – 10 minutes
- Staying Connected to Power – 30 minutes
    - Plan module focus on return ticket
    - Review the ValuePrompter as an artifact to feed the plan letter follow up and the “discovery validation/ value realization deck”
    - Completed ValuePrompter is provided to all teams from the sales call conducted on the CIO (this provides the all teams with the baseline of what could have been uncovered in the sales call)
    - Allowing every team to work from the same content when creating their plan letter follow up email
    - Skills practice as team - create plan letter

- Closing exercise – 20 minutes
    - Create individual next 30 day plan with top 10 accounts identified where C-level discussion will take place
    - Identify any resources needed as part of plan
    - Last action is to schedule 30-minute review with manager & Visualize (format is team opportunity assessment)
- Close workshop – 10 minutes

Post workshop interactions to increase leverage and utilization:

- Harvest electronic copies of all team ValuePrompters, review and tune as needed, provide as deliverable back to client, starting their CxO library
- Credibility Introductions will be captured and collated for the central library
- Visualize to be bcc'd on all Plan letters sent clients after ValuePrompter based sales call for 30 day feedback provided for each plan letter