Tool 2–1

Knowledge Gap Analysis

✔	KNOWLEDGE	1	2	3	4	5	6
	1. I have effective product/service knowledge so I can develop solutions/benefits for my customers.						
	2. I have effective competitor knowledge to offer implications and options to my customers so they can make informed decisions.						
	3. I have effective customer/market knowledge so that I do not waste my customer's time by asking questions for information that is readily available.						
	4. I have effective company knowledge so that I can represent our organization's values/mission and sell products at a profitable level.						

Tool 3–1

Worksheet Example A: Product Knowledge

PRODUCT/SERVICE	FEATURE	WHAT THE FEATURE DOES	PURPOSE OF THE FEATURE	PRICE
What your organization sells to your customers:	Prominent part or characteristic of the product/service:	The intention or outcome of the feature or a technical aspect:	What makes it better for the customer (the potential benefit):	
◆ software	◆ calculates ROI	◆ automatic calculation	◆ faster approval process	◆ Included
◆ accounting services	◆ tax calculation included	◆ provides tax services at no extra fee	◆ no hidden fees	◆ Included
◆ hamburgers	◆ cooked to order	◆ customized cooking	◆ satisfy each customer's taste	◆ $x.xx
◆ hotel rooms	◆ soundproof walls	◆ peaceful sleeping	◆ be rested for the day's activities	◆ $xxx.xx
◆ overnight delivery	◆ delivered before 10 a.m.	◆ timely delivery	◆ no wasted time waiting for letter	◆ $xx.xx
◆ women's sports clothing	◆ carries all sizes, guaranteed	◆ handle all customer sizes	◆ one-stop shopping	◆ N/A
◆ auto insurance	◆ 24-hour settlement	◆ get cars on the road fast	◆ one less hassle in life	◆ Extra
◆ real estate	◆ largest selection in town	◆ provide a wide selection	◆ find your new home faster	◆ N/A
◆ financing	◆ approved on the spot	◆ customer can purchase now	◆ know now if you can buy	◆ N/A
◆ consulting services	◆ guaranteed results	◆ reduces risk	◆ solutions that work	◆ Included

N/A = Not applicable.

Tool 3–2

Worksheet Example B: Product Knowledge

PRODUCT/SERVICE	FEATURE	WHAT THE FEATURE DOES	PURPOSE OF THE FEATURE	PRICE
Spam software	Challenge response	Learns your friends and enemies and adapts to your email characteristics, without complicated rules or settings	Gives the user control over email	$xx.xx
Half-fold envelope	8.5 × 11-inch paper folds once	Allows 8.5 × 11-inch paper or card stock to be used as a greeting card or one-fold brochure	Lets users create their own cards and brochures	$x.xx for x
Customer service	24-hour customer service via a toll-free number	Operators answer all questions regarding the use of our services	Provides fast and effective service for our customers	Included in purchase price
Ergonomic hammer	Slip-resistant handle	Using space technology, the grip resists slippage and does not add extra weight to the hammer	Eliminates the possibility of the hammer slipping out your hand and causing an injury	$xx.xx
Lawn mower	Rear bag	Catches cut grass behind the mower	Enables the mower to cut along the side of fences or objects from either side	Included in purchase price

Tool 3–3

Worksheet Example: Competitor Knowledge

Name of Competitor: *Cheapo Tools* Date: *July 2004*

Headquarters location	Somewhere, USA
Web address	www.cheapotools.com
Public, private, or subsidiary? (If subsidiary, of whom?)	Public
Fiscal or calendar year? (If fiscal year, what is the time period?)	Calendar year
Last year's revenues and profits	Revenue $100 million; profit $15 million
Stock performance over past 12 to 24 months	High: 12.5 one year ago Low: 3.5 last month Latest: 6.4
Dun & Bradstreet rating	3R3
Financial condition	Annual report shows that debt service takes 25 percent of revenues. This is above average for a firm this size according to Dun & Bradstreet
Organizational structure	Chairman*, president/CEO*, vice president of finance*, vice president of operations, vice president of sales and marketing; U.S. broken into three regions with regional managers for each *Sits on board of directors.
Key people	President and vice president of finance
Number of employees	125
Number of locations	one
Key products	Ergonomic tool line
Prices of key products	$xx.xx for hammer, $xx.xx for wrench

continued on next page

Worksheet Example: Competitor Knowledge

Pricing history	No price increases in the past 15 months
Target markets	Neighborhood hardware stores in urban areas and markets where the big stores have not reached
Distribution mechanisms	Direct sales to hardware stores, no e-commerce
Market share	Unable to obtain
Marketing activities	Provides posters for stores, quarterly newsletter called the *Small Hardware Retailer,* no advertising
Short-term strategy	Expand into mountain states and Northwest agricultural areas
Long-term strategy	Continue to be the low-price provider
Topic of any recent articles or news releases (put copies in the file)	No articles; recent news releases were about new appointments (president/CEO and vice president of finance) following the purchase of the firm
Key accounts (name, salesperson, revenue) and those we want	XYZ Hardware stores, John Doe, unable to obtain revenue (however, they cover 85 percent of hardware stores in the Northeast). This is a target account for us. ABC Hardware stores, Jane Doe, annual report shows $1 million. Stores in the Southeast are not a target area for us.
Customer comments (quality, service delivery, problem resolution)	Complaints about quality of tools when used frequently. Customers wanted rebates, not another tool (source: JKL Independent Testing Service). No complaints for service delivery from stores.
Perception of our firm	Had lunch with John Doe and he said that we were not viewed as primary competitor because of our pricing.
Ways to beat this competitor (maximum of five)	(1) Quality; (2) better replacement policy; (3) joint promotions with hardware store owners during spring/summer

Tool 3–4

Worksheet Example: Top Competitors Summary

Competitor	Spam Killer	Cheapo Tools	Biz Office Furniture, Inc.
Product	Spam software	Ergonomic hammer	Office chair
Price	$xx.xx	$xx.xx	$xxx.xx
Distribution	Website only	Neighborhood hardware stores	Up-market stores, Website, Amazon, eBay
Strengths	Fast download from Website; purchased lead position on major search engines	Lowest price	Brand awareness; design awards; Website sales are increasing
Weaknesses	No challenge feature; software does not train itself	Hammer not designed for contractor use; rather, it's for infrequent use by homeowners	Pricing precludes them from more mass distribution through office supply stores such as Staples
Opportunities	As the low-cost provider, Spam Killer can grab market share fast	Become a provider to Wal-Mart	Increase in home-based businesses has increased demand for well-designed and functional chairs
Threats	Lack of features will make it difficult to break into corporate market	Their traditional base of neighborhood stores is becoming concerned about quality and safety	Continued decline in office building rentals reduces the demand for large purchases like those experienced in the 1990s
Other	Product ranked as "average" by *Hi-Tech* magazine	Company has been sold three times during the past 10 years	Stock has been stagnant through recent bull market; good public relations effort with new product

Tool 3–5

Worksheet Example: Individual and Corporate Customer Knowledge

Name of Customer: *Chris Jones, Spam Stopper* Date: *July 2004*

Birth date	August 22, 1966
Hometown	Somewhere, USA
Education	BS (software engineering) from Appalachia State; MBA from University of North Carolina
Family information	Married (John) and two children (Sally, 5, and James, 2)
Special interests	Soccer, children's activities, and local symphony
Sensitive issues	None that I am aware of. Our conversations are primarily business related, and she does not bring up anything of a personal nature.
Career information	Worked for various software firms as a software engineer. At her last position (chief software engineer at XYZ Corp.), she started to become interested in managing a company and obtained her MBA. Current position is manager of new products.
Current boss and peer information	Reports directly to COO, has two peers (operations manager and director of marketing), and has a division of 25 employees (mostly engineers).
Other people in our firm who know this person, and why	Vice president of marketing; Chris's daughter Sally goes to school with VP's son.
Primary job responsibility	Development of new products with emphasis on innovation
Job performance is based on . . . (business objectives)	Number of new products delivered and revenue from these products
Authority levels	Can spend up to $250,000 without approval of chief operating officer.

continued on next page

Worksheet Example: Individual and Corporate Customer Knowledge

Opinions (of you, our firm, our competitors)	When I have asked her if I am providing the service she requires, I get a polite yes, and then she continues the conversation. On three occasions she has stated that she appreciates our customer service, but she always qualifies this with a request for improved quality. She talks about the competition on.ywhen the annual contract comes up for review.
People orientation	Introverted. She likes to hear other opinions to test her own thinking. She is not too worried about what other people think of her.
Thinking style	Analytical (always looking at the numbers), and she always wants to get to the point.
Key problems, concerns, and challenges	Turnover of her staff. Competition has turned out two more successful products in the past two years.
Priorities (customer and get management)	Chris's priority is to reduce turnover and management's is to three or four new products for next calendar year.
Our solutions	Innovation process that engages staff so that they produce more products faster, which motivates them to stay.
Competitors' solutions	Similar, but without the track record we have
Other information	
Public, private, or subsidiary? (If subsidiary, of whom?)	Private
Years in business and nature of business	Five years. Software development to stop spam. They are now looking to get into other fields of software to help improve productivity.
Fiscal or calendar year? (If fiscal year, what is the time period?)	Calendar year

continued on next page

Tool 3–5, continued

Worksheet Example: Individual and Corporate Customer Knowledge

Last year's revenues and profits	No accurate reports because they are privately held; however, Chris said they had broken the $150 million mark last year.
Stock performance over past 12 to 24 months	Not available
Dun & Bradstreet rating	1R3
Financial condition	According to Dun & Bradstreet they are not a credit risk based on their payment history. Unable to get any other information.
Organizational structure	Chairman; president and chief executive officer is the main investor; COO; and then managers of divisions (COO and managers make up executive committee).
Key people	CEO, COO, and finance manager
Number of employees	55
Number of locations	One
Key products	Spam Killer and email sifter software
Target markets	Endusers; moving into corporate sales
Distribution mechanism	Website for endusers; direct sales to corporate markets
Market share	Chris says they have a 35 percent share this year versus 38 percent last year.
Marketing activities	Advertise in trade publications
Short-term strategy	Increase market share of Spam Stopper to 40 percent through price reductions
Long-term strategy	Move out of spam software business and get into office productivity software
Key business issues	Spam segment getting crowded; key competitor Spam Killer was bought by a large conglomerate and has increased its marketing activities by 50 percent.

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Tool 3–5, continued

Worksheet Example: Individual and Corporate Customer Knowledge

Topic of any recent articles or news releases (put copies in the files)	Crowded spam segment; the fight between Spam Stopper and Spam Killer; news releases on appointments and new email sifter program
Key customers	Currently have 10 corporate clients, with XYZ purchasing more software than the other nine combined. ABC Corp. is the largest user of email sifter.

Tool 7–1

Worksheet Example: Where Does My Time Go?

ACTIVITY	IMPORTANT, URGENT	IMPORTANT, NOT URGENT	NOT IMPORTANT, URGENT	NOT IMPORTANT, NOT URGENT	ADDS VALUE
Phone calls to potential customers	X				+
Researching customers		X			+
Handling complaints	X				–
Filling out expense account forms		X			–
Entering information into CRM or SFA		X			+
Filling out reports	X				–
Colleagues visiting my workspace to chat			X		–
PR calls to existing customers		X			=
Following up on proposals/contracts	X				+
Handling service calls from customers	X				–
Eating meals	X				–
Attending sales meetings	X				=
Attending product update meetings		X			+
Answering emails/phone calls from Operations about my customers	X				–

Value key: X means “yes,” + adds value, = neutral, – subtracts value.

continued on next page

Worksheet Example: Where Does My Time Go?

Notes to Facilitator

- **Phone calls to potential customers:** Important urgent and adds value—finding new business helps achieve goals. This activity could also be important not urgent, based on a salesperson's responsibilities.
- **Researching customers:** Important not urgent—this activity adds value by actually speeding up the sales cycle by reducing the amount of time with a customer at the beginning of the sales cycle or qualifying a prospect so that a sales call is not necessary.
- **Handling complaints:** Important urgent—taking care of an upset customer is very important and yet it does not add value to a salesperson's productivity. Why? If a salesperson is handling a complaint it takes away time from speaking to other customers or prospects. It is true that a dissatisfied customer who is turned around into a satisfied customer through a proper service recovery action does become loyal. However, this was existing business that was put at risk. A question for your salespeople is, what is better for overall sales productivity—sales personnel handling complaints or another department handling the call?
- **Filling out expense account forms:** Depending on the salesperson's administration abilities, this could either be important not urgent or important urgent—the activity subtracts value from productivity unless it is done during nonselling hours (when it would become neutral).
- **Entering information into customer relationship management (CRM) or sales force automation (SFA) systems:** Usually treated as important not urgent until a salesperson falls behind; then it becomes important urgent. If the activity is done while it is important urgent it adds value to productivity because it helps with planning for sales calls or developing sales strategies. If the activity is important urgent it could subtract from productivity because the salesperson would be doing this work during selling time.
- **Filling out reports:** For argument's sake consider this important urgent. This designation would make it subtract from productivity. If done outside of selling hours it would become neutral and could even add value.
- **Colleagues visiting my workspace to chat:** Not important urgent—it seems to be urgent to the colleague who stopped to chat and obviously subtracts from productivity. (However, a break every now and then is good!) A suggestion here would be to ask the salespeople how they could protect their prime selling time.
- **PR calls to existing customers** (PR for this comment means that the salesperson is calling to stay in touch and not necessarily talk about business): Important not urgent—this is a neutral activity that can set up business calls for more productivity. This activity could subtract from productivity if it is the primary type of call a salesperson uses.

continued on next page

Worksheet Example: Where Does My Time Go?

- **Following up on proposals/contracts:** It is clear that this is important urgent and adds value.
- **Handling service calls from customers:** This falls into the same category as handling complaints.
- **Eating meals:** This is included to remind everyone that there are some activities that have to be done!
- **Sales meetings:** Many salespeople might view meetings as subtracting value, and if they do, then management ought to look at what these meetings produce. My philosophy is to make sure that at worst the meeting is neutral to productivity.
- **Product update meetings:** Again this is an important not urgent activity if planned for and if the meetings add value. However, if it becomes important urgent because the salesperson procrastinated, attending such meetings could subtract from productivity.
- **Answering emails/phone calls from Operations about customers:** Important urgent because the customer's satisfaction is very important. It subtracts from value because the salesperson could spend the time talking with potential customers. For this situation the salesperson may want to look at the quality of the information about a customer and at how this information gets to the people servicing the customer.

Tool 8–1

Qualification Questions

- Do you purchase products similar to ours?
- How much product/service do you purchase in a year?
- How many suppliers do you use?
- How often do you switch suppliers?
- What are the criteria for switching?
- Who do you like to work with? (helps uncover competitors)
- Have you heard about our company or products?
- What is your opinion of our product/service?
- What led you to contact us?
- How did you learn about our product/service?
- How important is this product/service to your business?
- What information do you have about our product/service?
- What and how much information are you seeking about our product/service?
- What experience have you had with similar products/services?
- Are you considering selecting new suppliers?
- What piques your interest in us?
- How are purchase decisions made at your company?

Tool 8–2

Understanding the Customer Questions

- What are your goals for this year?
- How would you prioritize those goals?
- What has to go right to meet or exceed those goals?
- Are you achieving your goals?
- In your opinion, what obstacles keep you from achieving your goals?
- What key strategies are you responsible for implementing?
- What are your industry's hot buttons?
- How are the industry trends affecting you?
- How do you segment your customers?
- How is your company organized?
- What is working in your current situation?
- What is not working in your current situation?
- What are your criteria for success?
- How do you evaluate vendors/suppliers?
- What causes your company problems on a daily basis? Your department? You?
- How would you describe your responsibilities?
- What are your customers asking of you?
- What is your greatest challenge?
- What new products are you developing?
- What is your typical decision-making process?

Tool 8–3

Conditions of Satisfaction Questions

- What piqued your interest in our product/service?
- What has been your experience with *x* [a competitor]?
- What are some of the ways you would use our product/service?
- What are the key elements in the product/service you are seeking?
- What are the main reasons for using *x*'s product/services?
- What are your expectations of *x*'s product/service?
- What do you like most and least in dealing with suppliers?
- Do you have a list of specifics that you need?
- Do you have technical specifications?
- What are your standards for satisfaction?
- Are you pleased with your current situation? Why?
- Describe your ideal suppler.
- Who are your best suppliers and what do they provide that makes them the best?
- What do you not get from *x* that would make a significant impact if you could get it?
- Outside of price, what other considerations are important?
- What product performance issues are you trying to address?
- If you had your wish, what would be the perfect product/service?
- What frustrates you about *x*'s product/service, and why?
- How do you rate the quality of *x*'s product/service?
- What does *x* do that we do not do?
- What buying criteria are important to you?
- Can you tell me more about your thinking?
- Is there a format that you prefer for . . . [billing, communication, planning]?
- How much time do you have to make this decision?
- Do you like big picture before small picture, or do you prefer to get all the details first?
- How are your procurement efforts evaluated?
- How can we organize our proposal for you so that it is easy for you to compare our offers with other offers you receive?

Tool 8–4

Asking for the Business Questions

- Are there any open issues to review before we present our proposal or contract?
- Have we forgotten anything?
- Is there anything else I need to know for our proposal/contract?
- Does that sound okay to you?
- Is the next step to send a proposal/contract?
- What is the best way to proceed?
- Should I send a draft proposal/contract to you first for review?
- What do we need to provide you so that we can send a proposal/contract?
- What do you think about our offer?
- Does our offer make sense?
- Do we understand your situation well enough to submit a proposal?
- How much time would you like to review our offer and provide feedback so we can finalize a contract?
- What will it take to get your business?
- What is the best way to present our offer to you?
- How many copies of the proposal shall we provide?
- May I submit a proposal to you [tomorrow, next week . . .]?

Tool 9–1

Worksheet Example: Communicating in Person

Preparation

1. What is the intention of the communication?

   Introduce our new product.

2. What is the essence of the message?

   Check and make sure our research is accurate about our new product relative to the client's situation.

3. What offer/value will you deliver in the communication?

   Offer detailed information from our research and compare it to the client's current situation.

4. What is your request, if any?

   To review the research during the sales call and determine if a product trial makes sense.

Draft the Message

1. Personalized opening and closing:

   Opening: *I am pleased to have this opportunity to show you our new product and to thank you for expressing such interest in the product during our phone call last week.*

   Closing: *based on a key point brought up in the meeting.*

2. Big picture to details:

   Big picture: *Research summary.*

   Middle: *How the product has been used within the client's industry.*

   Details: *Particular data that would affect the client specifically.*

3. Present your purpose (value/request, if any):

   Now that I have presented the data in the report, can we review your thoughts about how the product might apply to you? Do you see any direct applications and, if so, what are they? What concerns do you have at this point about the product? What further information might you need to schedule a product trial?

4. Recap key points and identify next step:

   These would be determined from the answers to my questions.

continued on next page

Worksheet Example: Communicating in Person

Check for Unintended Consequences

1. What are the possible consequences?

   I might not be able to go over all the information in a 20-minute meeting.

   The client might feel rushed to make a decision and thus misinterpret my desire to ensure that the product makes sense for the client.

   The information might be boring so that when I get to the questions the client might not pay attention.

2. Are any of them negative to the task, relationship, or your organization?

   The first and third consequences would be negative to the task, and the second consequence probably would not help the relationship.

Refine

1. Does the message reflect your organization's personality? *Yes*

2. Have you used imagery where possible? *Yes, the actual report*

3. Are you in keeping with your organization's tone/manner? *Yes*

4. Were you able to deliver any key messages? *Not sure*

5. Is the communication aligned with the client's style and in keeping with your style? *Not with the client's style because there is too much data; yes as to my style because I like to show lots of proof.*

   Shorten the intro to say thanks for the time and to say that I hope the information I brought lives up to the interest the client expressed on the phone.

   Tell the client that I will show some relevant pieces of the research and then ask a few questions. Let the client know that I have the entire report with me in case of any detail-type questions.

   Make sure the client knows that I want to ensure that the product makes sense in the client's opinion before asking for a product trial.

   Share the data relevant to the client's situation and get right into the questions. Look for an opening to share a key message about the product that marketing has developed.

   Personal note: watch my body language so that the client notices that I am paying close attention to his questions and comments.

   At 15 minutes, ask permission to go over the 20 minutes if the client is asking questions or providing more information. I want to show respect for her time.

Tool 9–2

Worksheet Example: Communicating by Telephone

Preparation

1. What is the intention of the communication?

Get an appointment to present new product line.

2. What is the essence of the message?

I will not waste the client's time, and I believe our new products will be of benefit.

3. What offer/value will you deliver in the communication?

Explain how the new product will save money.

4. What is your request, if any?

Set an appointment (20–30 minutes).

Draft the Message

1. Personalized opening and closing:

Opening: *Mr. or Ms. XXX, thank you for taking my call. The purpose of my call today is to give you a brief overview of our new product line and then, if the products are of interest, to set up an appointment to review the products in more detail. Do you have five minutes for this call?*

Closing: *based on a key point brought up in the call.*

2. Big picture to details

Big picture: *New products designed for the client's work environment.*

Middle: *Products have completed trial runs.*

Details: *Cost savings have ranged from 15 percent to 25 percent.*

3. Present your purpose (value/request, if any):

I believe our new products can save you money. To explain in more detail about how the products work, I would like to have a 20- to 30-minute meeting with you. If you agree with my thinking, when would be a good day and time to meet?

4. Recap key points and identify next step:

These would be determined from the answers to my questions.

continued on next page

Worksheet Example: Communicating by Telephone

Check for Unintended Consequences

1. What are the possible consequences?

   Being too formal with this client might work against me.

   I might run out of time before I explain the new product's benefits.

   If I sound rushed the client might not believe me.

2. Are any of them negative to the task, relationship, or your organization?

   The first consequence would be negative to the task, and the other two consequences would adversely affect the task and the relationship.

Refine

1. Does the message reflect your organization's personality? *Yes*

2. Have you used imagery where possible? *Not applicable*

3. Are you in keeping with your organization's tone/manner? *Yes*

4. Were you able to deliver any key messages? *Yes*

5. Is the communication aligned with the client's style and in keeping with your style? *Not to the client's style because this client is more informal; yes to my style because I like to get to the point.*

   Be more informal with the intro and mention something from the last meeting/phone call to let the client know that I remember topics other than business.

   Tell the client that rather than trying to explain some of the basic benefits of the new product over the phone, a face-to-face meeting would be more effective.

   Focus more on the client and setting up the appointment as opposed to talking about the new product.

Tool 9–3

Worksheet: Communicating in Writing by Email

Preparation

1. What is the intention of the communication?

   To get a response to my previous email messages.

2. What is the essence of the message?

   I want to accommodate the client's wishes.

3. What offer/value will you deliver in the communication?

   Accommodate the client's wishes.

4. What is your request, if any?

   Answer my email messages.

Draft the Message

1. Personalized opening and closing:

   Opening: *Mr. or Ms. XXX, it is our desire to accommodate your wishes. We have responded X times to your request for information, and to date we have not received your reply.*

   Closing: *If you wish to receive further email communication from me, please respond to this message in the next 10 days. Otherwise, I will return your contact information to our corporate marketing department for periodic updates.*

2. Big picture to details:

   Not applicable in this situation

3. Present your purpose (value/request, if any):

   Perhaps your interest has changed, and if this is the case, we again would like to accommodate your wishes by discontinuing (or concluding) email correspondence.

4. Recap key points and identify next step:

   Not applicable in this situation

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Check for Unintended Consequences

1. What are the possible consequences?

   Client might ignore this email as well.

   Client might respond to this email.

   Email could be screened as spam.

2. Are any of them negative to the task, relationship, or your organization?

   The first and third consequences would be negative to the task and relationship.

Refine

1. Does the message reflect your organization's personality? *Yes*
2. Have you used imagery where possible? *Not applicable*
3. Are you in keeping with your organization's tone/manner? *Yes*
4. Were you able to deliver any key messages? *Yes*
5. Is the communication aligned with the client's style and in keeping with your style? *Client's style is not known so it is best to default to polite/formal language.*

   Subject line of the email will be important to make sure the message is not screened as spam. Use the date of the client's original request: Responding to your request for info on XX/XX/XX.

Tool 10–1

Worksheet Example: Presentation

Client: *RAMI Design Group*

Type of presentation: *Oral to the steering committee*

Purpose of presentation: *Get into finals*

Five-sensing—Which, why, and how?

Sight—get their attention and show them that we can produce stunning graphics; when the graphics are presented, darken the room and have spotlights on the graphics.

Sound—use music to anchor their memory even more about our presentation.

Touch—engage the committee physically by having them touch some of the graphics that are embossed; put the graphics into a box with a shroud so the members have to feel the graphic before seeing it.

How can I enhance the relationship with this presentation?

Personalize each presentation packet that we leave behind. Review the bios of each committee member and select a graphic that would appeal to each member; present the graphic as a gift.

How can I animate this presentation?

As the committee enters the room, have a DVD playing the scenes from Cool Hand Luke *(the part about the failure to communicate).*

Employ prepared flipcharts using multicolored markers instead of PowerPoint graphics.

After each graphic is shown, put it on a large banner that we are using to keep track of the meetings proceedings; the banner then becomes the meeting minutes for the client to keep.

Double-check:

1. Is the presentation customized?
2. Is it professional?
3. Is it honest/straightforward?
4. Is positive language used?

Tool 11–1

Worksheet Example: Features, Benefits, and Proof

Feature and Purpose

Feature: 24/7 Service/support via a toll-free number

Purpose: Support customers via telephone 24/7

Benefit: Answers the question, "So what?"

When your employees are working after the information technology (IT) department is closed, they can get support. (This is tied to condition of satisfaction about making sure employees can get support when IT is closed.)

Proof

Service/support fact sheets

Complimentary letters

JD Power survey

Feature and Purpose

Feature: High-speed eight-person ski lift

Purpose: Skiers spend less time in line and take more runs on the mountain

Benefit: Answers the question, "So what?"

You will have at least 15 percent more ski runs in a six-hour period for only 10 percent more in price than XYZ mountain has. (This is tied to condition of satisfaction about number of runs and competitor's pricing.)

Proof

Recent article in Ski *magazine*

Ski lift specifications

Brochure

Tool 13–1

Worksheet Example: Networking

Networking strategies

1. Get more business from current customers
2. Join XYZ club

Tactics . . . first steps

1. *Segment current customers into three groups (used us in past three months; used us in past six months; and more than nine months since they used us); send a customized email to each and set up a trace system to send articles or other value-added communications.*
2. *Find out the cost of joining XYZ club and get budget approval. After joining, select a committee to join, such as membership, and become active in the club.*

The ways I will measure success

1. *Keep track of the responses I get from customers to my communications and keep track of how many customers increase their number of purchases.*
2. *I get accepted to a committee within three months of joining. After six months I have five strong relationships going. Before nine months I have at least three referrals for business and one purchase.*